How to Use this Download

- Having a set of yearly goals for each employee (we limit to 3-5) allows for proactive performance management.

- While we do yearly performance reviews for legal and human resource-related issues, I share that if there’s a surprise at a review, the manager and employee have failed.

- For the 3-5 goals, they should be SMART (specific, measurable, actionable, realistic, and time-focused).

- At Intertech, the #1 goal is the main way the individual contributes to the firm. For a sales person, this is sales. For a consultant, this is chargeable hours. For a marketing person, this is inbound leads.

- Also at Intertech, the last goal is a learning goal. Learning goals could include attending a course or conference, taking a certification, or performing some self-study or self-guided project.

- While we use the Dale Carnegie Key Result Area approach, other approaches that prioritize and limit goals, have a focus on learning, and are SMART would work just fine.
[Year] Key Results Area (KRA)

Name: __________________________________________________________________________

Date: ___________________________ Revised: ___________________________

Instructions:

KRA Chart

a. Your #1 KRA should be the top focus of your job. For example, for salespeople, this would be an annual sales goal.

b. Additional KRA areas can include special projects, assistance on sales proposals, etc. When in doubt, talk with your leader.

c. Finally, the last KRA should be your learning goals for the year.

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<thead>
<tr>
<th>#</th>
<th>KRA</th>
<th>Goal</th>
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<tbody>
<tr>
<td>1</td>
<td>Top Focus of Job</td>
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<tr>
<td>2...</td>
<td>Special Projects, Certification, etc.</td>
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<tr>
<td>N</td>
<td>Learning</td>
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KRA Page

a. At the top of each page, put the KRA # and name

b. In “Duties/Activities” include a break down of the steps and include dates

c. In “Performance Standards” make it brief and SMART—Specific Measurable Achievable, and Timely.

d. In “Skills/Knowledge” list any resources or help required to help you reach your goal.
KRA Summary Post

Cut-and-Paste-and-Post. In one to three words, summarize your KRAs below. Print this page, cut summary, and post in a place you will see daily.

Key Results Areas

1.
2.
3.
4.
5.

Along with your KRA, please let us know if you are interested in:

- A mentor or coach: Someone who could be an informal guide to our company. This person would meet with you a few times a year to stay in touch and be an internal resource.

- Additional projects: From time-to-time we have projects that are eligible for a bonus.
Key Results Area #1:

What are the activities that I must do to accomplish the Key Result Areas?

• ________________________________

Performance Standards

My job in this Key Result Area will have been satisfactorily completed when: (Make sure this is SMART—Specific, Measurable, Achievable, Results-oriented, and Tied to a date):

Skills/Knowledge

What must I know, or know how to do, in order to reach these results?

• ________________________________

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(Use this for Q2, Q3, and Q4 updates)
Key Results Area #2:

Duties/Activities

What are the activities that I must do to accomplish the Key Result Areas?

• ____________________________________________

Performance Standards

My job in this Key Result Area will have been satisfactorily completed when: (Make sure this is SMART—Specific, Measurable, Achievable, Results-oriented, and Tied to a date):

• ____________________________________________

Skills/Knowledge

What must I know, or know how to do, in order to reach these results?

• ____________________________________________

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(Use this for Q2, Q3, and Q4 updates)
Key Results Area #N: Learning

Continue professional development and other learning. One week of training per year counts as billable time. If you believe you need more, please let your manager know.

Duties/Activities

What are the activities that I must do to accomplish the Key Result Areas?

• ________________________________

Performance Standards

My job in this Key Result Area will have been satisfactorily completed when: (Make sure this is SMART—Specific, Measurable, Achievable, Results-oriented, and Tied to a date):

• ________________________________

Skills/Knowledge

What must I know, or know how to do, in order to reach these results?

• ________________________________

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