



THE DOWNLOAD

A Monthly Resource from the NCEO

Understanding different types of goals helps you clarify your intentions, measure progress, and stay motivated. Use this guide to set goals that are specific, actionable, and aligned with your personal or professional growth.

GOAL BY TYPE

Type	Definition	Example
OKRs	Objectives and Key Results – Define a big goal (objective) with measurable outcomes (key results).	Objective: Improve team productivity. KR: Complete 90% of projects on time.
KPIs	Key Performance Indicators – Quantitative metrics used to track performance over time.	Sales increase of 10% in Q4.
SMART	Specific, Measurable, Achievable, Relevant, Time-Bound – A popular framework for goal-setting.	"Walk 10,000 steps a day for 30 days."

GOAL BY TIMEFRAME

Type	Definition	Example
SHORT-TERM GOALS	Goals achievable in days to months.	Complete a client proposal this week.
LONG-TERM GOALS	Goals that require sustained effort over months or years.	Earn a master's degree.
LIFETIME GOALS	Aspirational goals that reflect your broader vision and values.	Learn a new language to retire and travel overseas.

GOAL BY FOCUS AREA

Type	Definition	Example
PROCESS	Focus on habits and behaviors within your control.	Practice piano 20 minutes daily.
PERFORMANCE	Focus on reaching a personal standard of performance.	Deadlift twice my body weight.
OUTCOME	Focus on on the result or end achievement.	Get promoted to a management role.

GOAL BY AREA OF LIFE

Type	Example
CAREER	Lead a cross-functional project this quarter.
FINANCE	Build a \$1,000 emergency fund in 3 months.
PERSONAL DEVELOPMENT	Journal every day.
EDUCATION	Complete 10 hours of professional development CE this quarter.
HEALTH & WELLNESS	Run a 5k this summer.

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Pro tip: You can combine multiple types!
Example: A SMART, short-term, process goal in the health/wellness area of your life:
"Go to the gym three times per week for the next 8 weeks."

EMPLOYEE OWNERSHIP GOALS

Putting It All Together: Using these frameworks, how can you apply goal setting to employee ownership? How can you think and act like an owner more often?

Type	Example
SELF	Complete an eligibility worksheet to understand when I will enter into the ESOP.
DEPARTMENT	Suggest and implement a cost-savings idea for my department that will increase our company bottom line.
COMPANY	Review the company financials (if available) and ask one question to better understand the numbers.
EDUCATION	Attend one employee ownership webinar each quarter.
