

# The 5A's test to set effective objectives



All Objectives should be Assessable, Aspirational, Aligned, Accountable and Agile. Use this '5As' Test as a guideline for setting high quality objectives

## Aligned

means the objective aligns with, and drives, wider team and organizational goals

- Does the objective align to your team's, department's and company's wider objectives?
- Will success drive the organization to deliver its strategic goals?
- Is the objective relevant to you and your role?

## Agile

means that the objective is near-term, and it is reviewed at a cadence that keeps it relevant and meaningful

- Does the objective have a motivational, realistic, near-term timeframe for delivery (for example, is it achievable within the next 1-4 months)?
- Can the entire objective be achieved within a near-term timeframe (if not, consider setting interim milestones to maintain focus and track progress)?
- When will you review (and if appropriate amend) the objective to ensure it stays relevant and meaningful?

## Assessable

means that your objective can be clearly measured so that you'll know when you've achieved it

- Is it clear what you are expected to achieve and what success would look like?
- If the objective cannot be measured in quantitative terms, how will success be measured in qualitative terms?
- Is it clear what measures and targets will be used to track progress against the objective?

## Accountable

means the objective is within your control, and you are clear where there is shared ownership

- Is the objective directly owned by you and within your control?
- Is it clear, transparent and documented where you share ownership for success with collaborators?
- Do these collaborators also have this objective in their set of agreed objectives?

## Aspirational

means that your objective is stretching, yet achievable, and delivery would drive high performance

- Is the objective stretching and challenging whilst still achievable?
- Would successful achievement of the objective drive high performance at an individual and team level?
- Are the challenges or obstacles understood and manageable?

# 3 step guide to set effective objectives



Objectives should be established and agreed through open and honest dialogue between the individual and their manager

## How to set effective objectives

### STEP 1: PREPARE (Individual and Manager)

- Prepare for an effective objective setting conversation by drafting
  - Performance Objectives
  - Personal Development Objectives

### STEP 2: MEET AND DISCUSS (Individual and Manager)

- Meet to discuss and agree the Performance and Personal Development Objectives and measures together
- Allow sufficient time for a thorough and open discussion
- The manager should explain the business context, i.e. the direction of the business and the overall business goals and priorities, where appropriate
- Focus on setting near-term objectives for the period ahead (1-4 month time frame)
- Focus on a few high quality objectives (which meet the '5As' test) which clarify the individual's key priorities for the forthcoming period. It is better to have a few critical objectives than a huge 'wish list'
- Discuss an appropriate plan and milestones to achieve each objective
- Discuss the individual's thoughts about how they plan to deliver the objectives
- Think about the factors affecting the individual's performance, for example the operating environment and any support required for success
- The individual should feel ownership for their objectives and be confident and motivated to achieve them

### STEP 3: SET OBJECTIVES IN CLEAR REVIEW (Individual or Manager)

- Either during, or immediately after the objective setting conversation, either the individual or their manager should record the agreed Performance Objectives and Personal Development Objectives in Clear Review
- They should also agree a date for the first Check-In meeting where they will check in on progress against the objectives together (usually in the next 1-3 months)



# Top 10 traps to avoid when setting objectives

It is vital that all individuals have clear objectives that define expectations and priorities for their performance. Having objectives which meet the 5As test (Assessable, Aspirational, Aligned, Accountable and Agile) helps:

- Ensure alignment with business and team goals and priorities
- Motivate and guide individuals to achieve higher levels of performance
- Form the basis for managers to monitor and assess an individual's performance throughout the year

This checklist is designed to help you better understand and avoid the common traps when setting objectives.

Compare the draft objectives with the criteria to avoid below. If your objective falls into any of the traps below, please revise the objective accordingly.

## COMMON TRAPS TO AVOID

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|---|--|----|---|
| 1 | The objective or the measure is unclear, ambiguous or vague  | 6  | The objective time frame is lengthy so it does not motivate the individual or guide day-to-day performance (most objectives should be set with a 1-4 month timeframe, not 12-months)  |
| 2 | The objective is not aligned to the individual's role and the team or business objectives  | 7  | There are significant barriers which could make it difficult for the individual to achieve the expected level of performance (e.g. resource or budget challenges, a lack of control over the objective) and there has been no discussion about what can be done to mitigate these risks |
| 3 | The objective has not been set in partnership between the individual and their manager – is it not fully agreed, understood or 'owned' by the individual         | 8  | It is not clear what action the individual needs to take to ensure they achieve the objective – there isn't an appropriate plan to achieve each objective   |
| 4 | The objectives are a list of what the individual must do (a task list or a repeat of the Job Description) rather than what they should achieve (results focused) | 9  | The objective is overly 'safe' – it does not demand an appropriate degree of calculated risk, creativity and personal stretch from the individual   |
| 5 | The objective is not engaging or motivating (a target set too high or too low can be de-motivating and produce poor results)                                     | 10 | The objectives do not become 'live' – they are filed away after the discussion until the next performance conversation and do not guide day to day activity   |