

CLEAR REVIEW

# Organisational Goals

Administrator guide for organisational goals

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# 1. What are Organisational Goals?

Organisational goals are typically higher level, strategic business goals that are at either the company, functional or departmental level. These goals are intended to foster strategic alignment, and when used, ensure that employees can align their individual performance objectives to a higher-level strategic goal that supports either the wider business or departmental objectives.

A lot of organisations update these on a regular cycle once or twice a year, which you can also do within Clear Review to ensure ongoing strategic alignment. You can also run reports within Clear Review to track the types of performance objectives that are being worked on relating to any of the key business initiatives you wish to measure.

## 2. Strategic Goals vs Business Functional or Department Goals

There are some key similarities between strategic goals and business specific goals. They are both important for driving organisational success and are essential for ensuring all teams and individuals are working towards a common goal.

Strategic goals typically focus on long-term growth or performance and have a broader and more aspirational focus. Strategic goals encourage you to take a comprehensive approach to achieve organisational success.

Business goals are more immediate targets you must hit to to achieve bigger objectives. They tend to be specific and quantitative with a focus on improving performance in individual business units or departments.

### Considering your approach within Advanced Clear Review:

The organisational goals feature is optional and can be toggled on / off via the Admin area. The functionality includes the ability to limit the visibility of various goals to certain org units i.e. departments depending on what makes the most sense for your organization and what data sets you currently incorporate into Clear Review.

Some examples might be to have a few higher-level strategic goals such as:

- Human Resources: become the employer of choice in our industry and improve our talent attraction and retention metrics by xx%
- Sales: generate new sales of xx% this year and build pipeline by xx% for next year
- Technology: identify opportunities across our data infrastructure and increase usage by xx% It is also possible to expand on these and add multiple strategic goals per function or department.

Examples of these more granular departmental strategic goals would be as follows:

- HR Team - HR project management of key initiatives
- HR Team - Continuous Improvement
- HR Team - Headcount Management

The system itself is flexible and can support either approach. Consider your needs and mechanism to convey strategic priorities to your employee base. Ultimately, the strategic organisational goals that you utilise will be linked to the individual goals your employees later create and you can then report on this information to review alignment and progress related to achieving these priorities.

### 3. How to enable Organisational Goals

To use organisational goals, navigate to **Admin > Organizational Goals > Change Organisational Goals**

#### Organizational Goals

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Business Development - align services across sales, marketing and product to increase offerings and drive revenue


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Client Experience - deliver exceptional service and resources to enhance overall client experience

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Operational Excellence - breakdown silos and foster enhanced collaboration across business functions

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Change organizational goals

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Use organizational goals

Yes

No

From there, you can start to add in the goals you would like employees to select from when creating their own individual performance objectives.

If you would like to make them visible to everyone, leave the org unit column blank. However, if you would like to limit the visibility so specific departments or functions, you may do so by selecting the corresponding org unit as shown below:

The screenshot shows a form titled 'Organizational Goal'. On the left, there is a text input field containing the goal description: 'Business Development - align services across sales, marketing and product to increase offerings and drive revenue'. On the right, there is a section titled 'Visible to the following org units (or leave blank for all)'. This section contains a dropdown menu currently set to 'Sales', a search input field with the placeholder text 'Type to search', and a trash icon.

Once you are happy, click 'save'. Then, ensure you have the option toggled to 'yes' via **Admin > Organizational Goals > Use Organisational Goals**. This will make the organizational goals visible to everyone when creating a new Performance Objective

## 4. How to update Organisational Goals

Organisational goals can be updated as and when needed. When ready, simply delete or edit an existing organisation goal with the updated information. Doing so will not retrospectively update users' performance objectives that have previously been linked to that goal. The updated organisational goal will only show as an option for new performance objectives set from that point onwards.

## 5. Reporting on Organisational Goals

To run a report capturing both organizational goals and the related performance objectives your employees have created, go to **Admin > Reports > Performance Objectives report**. This will give you a detailed report ready for further analysis for a desired data range.



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