
Goal Setting and Planning Training Course for Managers: Priorities, Plans and Progress Reviews

31 May – 4 June 2027
Geneva





Goal Setting and Planning Training Course for Managers: Priorities, Plans and Progress Reviews

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Programme Summary

Goal setting and planning is the subject of this one-week training course for managers, heads of function and team leaders at managerial level, ending in a goal and delivery plan for one team. Many teams carry goals that are long on intent and short on measures, owners and review dates, so priorities drift as the year goes on. The programme moves from priority choice to measurable goals, action plans and progress reviews. Mars Training Centre UK delivers this programme on goal setting and planning to mixed-organisation cohorts.

The Business Case

A goal that cannot be measured cannot be managed, and a plan without owners and review points tends to slip quietly. Managers who choose a few priorities, word them so progress can be seen and check results at fixed intervals give their teams a clear line of sight from daily work to organisational direction, and can explain early why a target is on track, at risk or changed.

- Goal Attainment: Rises as goals are worded with measures, baselines and owners.
- Delivery Slippage: Falls as milestones and progress reviews catch drift early.
- Team Focus: Improves as priorities are ranked against capacity before work is assigned.

Principles and Evidence Base

- SMART Goal Criteria: Test whether a goal is specific, measurable, achievable, relevant and time bound, applied in Session 2.
- Objectives and Key Results OKR: Pair an ambition with measurable results that are reviewed at set points, applied in Sessions 2 and 4.
- Priority Ranking Logic: Orders goals by value and effort so limited capacity goes to the few that matter, applied in Sessions 1 and 3.
- Review Cycle Logic: Compares plan with result at fixed intervals so deviations are corrected early, applied in Session 4.

Intended Participants

- Managers who set annual and quarterly goals for their teams.
- Heads of function who translate organisational priorities into departmental plans.
- Team leaders who turn goals into weekly work and report progress.
- Programme coordinators who track milestones across several teams.
- Human resources partners who support goal cycles and review conversations.

Typical settings include banking, healthcare, manufacturing and public services.



Learning Outcomes

1. Participants will be able to prioritise team goals by value, effort and available capacity.
2. Participants will be able to construct measurable goals using SMART criteria and OKR.
3. Participants will be able to evaluate goal quality against a checklist and revise weak goals.
4. Participants will be able to construct action plans with milestones, owners and resources.
5. Participants will be able to diagnose variances at a progress review and justify corrective actions.
6. Participants will be able to justify a goal and delivery plan to senior stakeholders.

Programme Structure

Day 1: Goal Setting and Planning: Priorities and Direction

Which few outcomes matter most for this team in this period?

- Priority Ranking Matrix
- Stakeholder Expectation Map
- Goal Cascade Diagram
- Capacity and Constraint Check
- Trade-Off Decision Log

Day 2: Measurable Goals: SMART Goals and OKR Design

How is a goal worded so that progress can be seen and judged?

- SMART Goal Test
- Objective and Key Result Draft
- Leading and Lagging Measure Table
- Baseline and Target Sheet
- Goal Quality Checklist

Day 3: Action Plans and Resource Choices

Which actions, owners and resources turn a goal into work?

- Work Breakdown Outline
- Milestone Plan
- Owner and Resource Matrix
- Dependency and Risk Register
- Weekly Priority Planner

Day 4: Progress Reviews and Course Correction

How is progress checked, and what changes when it falls behind?



- Progress Review Agenda
- Goal Scorecard
- Variance Explanation Template
- Re-Plan Options Table
- Accountability Conversation Guide

Day 5: Goal and Delivery Plan for One Team

Do the earlier tools make one plan that the team can run?

- Applying the Session 1 Priority Ranking Matrix
- Testing the Session 2 Goal Quality Checklist
- Reviewing the Session 3 Milestone Plan
- Checking the Session 4 Goal Scorecard
- Completing the Goal and Delivery Plan

Methodology

The programme uses a structured exercise on one prepared team case with a list of organisational priorities, draft goals, resource limits and a set of mid-year results. Participants rank, word, plan and review each goal, record their reasons in a common format and compare results in small groups before applying the same tools to a team from their own organisation.

- Suggested activity: Rewriting five weak goals so each passes a quality checklist.
- Suggested activity: Building a milestone plan with owners for one goal.
- Suggested activity: Running a mock progress review on a goal that is behind.

Capstone Output

Each participant completes a goal and delivery plan for one team. It holds a ranked priority list, measurable goals with baselines and targets, a milestone plan with owners, a goal scorecard and a review calendar. The plan is used at work to brief the team, agree expectations with the line manager and run the first progress review.

Frequently Asked Questions

Is goal setting and planning training suitable for managers new to leading a team?

Yes. Goal setting and planning is taught through a worked team case and templates. The programme assumes some experience of managing work, but no earlier planning role or technical background.



Which frameworks does goal setting and planning training rest on?

Goal setting and planning training rests on SMART goal criteria and Objectives and Key Results, together with priority ranking logic and review cycle logic.

How is the plan from goal setting and planning training used at work?

You use the goal and delivery plan to brief your team, agree expectations with your line manager and run the first progress review against the scorecard.

How does goal setting and planning differ from performance appraisal training?

Goal setting and planning training teaches how to choose, word, plan and review team goals, while performance appraisal training concentrates on rating individual performance and holding appraisal conversations.