

# Developing Cross-Functional Team Goals

## How to use this worksheet

To be effective, a cross-functional team should first identify where there are gaps between the team's specific goals and the institution's goals. While the existing institutional goals are helpful, the team will need to identify underlying problems that it can tackle. This worksheet will help the team structure these gaps as problem statements following this form: [X] percent of [problem facers] are not engaging in [Y part] of [Z process]. Once the team has formulated problem statements, it will focus on how it can address these problems, which will turn into team-specific goals.

Meet as a team and use this guide as a worksheet to develop the team's goals. This guide starts from existing institutional goals, moves through the process of creating a clear problem statement, and ends with creating a ranked list of goals that the team alone can tackle. We encourage the team to fill out the tables and spaces provided as it generates responses to the prompts.

Once the team has developed its goals, we encourage it to present those goals to the institution's leaders and individual managers so they can see what the team is working on and provide their thoughts. We also provide a tracking sheet, where the team can record and regularly revisit the team-specific goals that it has developed—we suggest setting quarterly meetings. Revisiting goals can help the team adjust the scope of the goals and even make larger changes. Whether or not the team decides to change those goals, regularly checking in on them can help reinforce them for the team and for others who work with the team.

### Step 1 | Take existing, institutional goals and describe them in more detail

List institutional goals in the first column. Use the questions below to identify measurable outcomes for each problem and processes that affect those outcomes. These questions will help a team articulate what to measure and what processes should be working well for the institution to achieve satisfactory outcomes. There may be complicated systems in play for some of these goals, and in those cases, we encourage the team to choose a few of the most important processes and focus on them.

The subsequent questions ask for details about the process and try to quantify the problem. This process may unfold over multiple meetings and might need individual work (for example, finding out more information outside a meeting). If some questions are hard to answer, use the space to note what assumptions are being used instead (for example, approximate numbers based on a previous year) or how certain problems may need to be discussed with the institution more broadly (for example, the problem is not clear, which can complicate efforts to address it).

| <b>Existing institutional goal</b> | <b>What are the measurable outcomes of this goal?</b> | <b>What process or processes affect these outcomes?</b> | <b>Who is affected by this process?</b> | <b>What percentage of people are affected by this problem?</b> | <b>Where in the process do most of the problems occur?</b> |
|------------------------------------|---|---|---|--|--|
|                                    |   |   |   |  |  |
|                                    |   |   |   |  |  |
|                                    |   |   |   |  |  |
|                                    |   |   |   |  |  |

## Step 2 | Craft a clear problem statement

The previous step helped the team identify details about each institutional goal that it can use to craft a problem statement. Use these details to fill in the blanks in the problem statement form below. We also provided three criteria to aid in developing useful problem statements.

In step 4, the team will use these problem statements to generate team-specific goals.

### Form:

**[X] percent of [problem facers] are not engaging in [Y part] of [Z process]**

### Criteria

**Specific and observable:** Be clear about which people and what parts of the process are included.

**Measurable:** Describe a problem that is measurable and, if possible, state its scale.

**Neutral:** Do not speculate about the cause of the problem or its solution.

| Draft statements |
|------------------|
|                  |
|                  |
|                  |
|                  |
|                  |
|                  |

### Step 3 | Review the problem statements

After drafting the problem statements above, check each of the problem statements for the criteria below. If it does not meet one or more of the criteria, revise the problem statement and revisit this checklist.

Once the team has generated problem statements that pass all the criteria, write them under the problem statement column in the table for Step 4.

| <b>Problem statement</b> | <b>Is it clear who is facing the problem?</b> | <b>Is it clear what parts of the process are being affected by the problem?</b> | <b>Are there specific data points being used?</b> | <b>Does the problem exclude causes and solutions?</b> |
|--------------------------|---|---|---|---|
|                          | <input type="checkbox"/>                      | <input type="checkbox"/>  | <input type="checkbox"/>                          | <input type="checkbox"/>                              |
|                          | <input type="checkbox"/>                      | <input type="checkbox"/>  | <input type="checkbox"/>                          | <input type="checkbox"/>                              |
|                          | <input type="checkbox"/>                      | <input type="checkbox"/>  | <input type="checkbox"/>                          | <input type="checkbox"/>                              |
|                          | <input type="checkbox"/>                      | <input type="checkbox"/>  | <input type="checkbox"/>                          | <input type="checkbox"/>                              |

### Step 4 | Create specific goals for the team

Using specific, measurable, and neutral problem statements, the team can create team goals. Specifically, these are goals that are unique to the team, with tasks that are feasible and within the team’s scope.

When thinking about how the team can address this problem, also think about how this goal is distinct from what other teams may be doing to address the same problem. Consider that for some problems, the team plays a supporting role. Even if the goal is minor or in support of another team’s work (for example, generating a short report for someone else), the team is now able to articulate a team-specific goal with a clear scope.

| <b>Problem statement</b> | <b>(Team goal)<br/>How can the team address this problem in 2024?</b> | <b>How can the team collaborate with others to achieve this goal?</b> | <b>What outcome is the team measuring for this specific goal?</b> |
|--------------------------|---|---|---|
|                          |   |   |   |
|                          |   |   |   |
|                          |   |   |   |
|                          |   |   |   |
|                          |   |   |   |

### Step 5 | Set priorities for the team’s goals

Place the goals from the team goal column in step 4, above, into the table below and evaluate them based on the criteria below. Use the space below to write notes about them and give each a rating for each question, ranging from 1 (not at all) to 4 (very much). We suggest doing the ratings one column at a time (for example, completing all impact ratings before moving to feasibility).

After filling out these details, use the qualitative and quantitative ratings to rank these goals from the first to last priority. The balance between qualitative and quantitative ratings is up to the team. The goal with the highest total rating might not be the first ranked goal if there are other notes that are more important or if the team gave one question more weight than the others.

| Team goals for 2024 | How much impact would achieving this goal have on the institutional goals? | How feasible would it be to achieve this goal? | How specific to the team is the goal? | Rank |
|---------------------|--|--|---------------------------------------|------|
|                     | Notes:   | Notes:   | Notes:                                |      |
|                     | Rating:  | Rating:  | Rating:                               |      |
|                     | Notes:   | Notes:   | Notes:                                |      |
|                     | Rating:  | Rating:  | Rating:                               |      |
|                     | Notes:   | Notes:   | Notes:                                |      |
|                     | Rating:  | Rating:  | Rating:                               |      |

| Team goals for 2024 | How much impact would achieving this goal have on the institutional goals? | How feasible would it be to achieve this goal? | How specific to the team is the goal? | Rank |
|---------------------|--|--|---------------------------------------|------|
|                     | Notes:   | Notes:   | Notes:                                |      |
|                     | Rating:  | Rating:  | Rating:                               |      |
|                     | Notes:   | Notes:   | Notes:                                |      |
|                     | Rating:  | Rating:  | Rating:                               |      |

## Step 6 | Present team goals to the institution's leadership

Once the team has agreed on its goals and priorities, it should present the list to team members' managers and to institutional leaders. The goal of the meeting should be to get leaders' thoughts on the problem statement and goals. Some questions for the team to discuss with leaders are:

- Are the assumptions behind the problem statement accurate?
  - If the answer to this question is no, the team or another group may need to gather more information to make the problem statements reflect the institution's context more closely.
- Are the team's goals within the scope and role of the team?
  - If the answer to this question is no, the team could initiate a larger discussion on the role of the team and reformulate the goals with this information in mind.
- Are the team's goals feasible and measurable?
  - If the answer to this question is no, the team should revise its goal or work to find data that could be used as outcomes. (This work can be done with other teams.)

The team can also use other questions from this worksheet to structure the discussion with leadership and managers. After this meeting and any revisions that arise from it, the team should have a list of goals and priorities that should guide its operations for the year.

## Step 7 | Use the goal-tracker spreadsheet to keep track of the goals

Once the team has finalized the goals, place each goal into a separate tab in the goal-tracker spreadsheet (also available for download on this document's landing page). Whenever the team makes changes to the goals, the team should update the tracker to make sure everyone can follow the rationale for the changes. Whether or not any changes are recorded in the tracker, we recommend that the team meets quarterly and answer the following questions:

- Have the goals changed?
  - They might change because of changed priorities and resources from the institution or other teams, or because the nature of the problem has shifted (for example, because changes have occurred in the contextual details the team worked on in step 1).
- Have the goals been guiding the team's work in the last quarter?
  - This question can remind the team to keep its goals in mind as it works, and if it is not doing so, to consider ways to integrate the goals into regular meetings and work (for example, by revisiting them at the starts of meetings).