

TOASTMASTERS
INTERNATIONAL

GOAL SETTING AND PLANNING

The Leadership
Excellence Series



**WHERE LEADERS
ARE MADE**





GOAL SETTING AND PLANNING

The Leadership
Excellence Series

© 2018 Toastmasters International. All rights reserved. Toastmasters International, the Toastmasters International logo, and all other Toastmasters International trademarks and copyrights are the sole property of Toastmasters International and may be used only with permission.

Item 314A



**WHERE LEADERS
ARE MADE**

www.toastmasters.org

THE LEADERSHIP EXCELLENCE SERIES

Toastmasters International's *The Leadership Excellence Series* is a set of presentations addressing the subject of leadership. Members will learn about the skills that they need to be successful leaders inside and outside of Toastmasters.

Presentations in *The Leadership Excellence Series* may be offered by any club member and require 10 to 15 minutes to present.

CONDUCTING THE PRESENTATION

"Goal Setting and Planning" discusses the processes leaders use to set goals and develop plans to achieve those goals. This product consists of four parts:

- ▶ Definition and explanation of the presentation
- ▶ Guidelines for your introduction to the audience
- ▶ Outline for the development of your speech
- ▶ PowerPoint presentation

In Your Own Words

The outline is not a script and should not be read word-for-word. Instead, use the document as a guide for presenting the material in your own words and with your own narrative style. The outline is a structure on which to build your presentation. Use the points of the outline to develop your speech, but be the author of your own oration.

Here are some tips on using this outline to develop and deliver your presentation:

- ▶ Study the outline carefully. Familiarize yourself with the general structure. Preparation is the key to a successful presentation.
- ▶ Use the outline to build your own speech using your own words. Prepare a set of notes indicating where you wish to pause, gesture, or add special verbal emphasis. Highlight key words or sentences to help you present the material most effectively.
- ▶ Be expressive when delivering your speech. Use all of the presentation skills you have learned as a Toastmaster including vocal variety and gestures.

USING VISUAL AIDS EFFECTIVELY

Visual aids add interest to any presentation and help your audience retain information. If you plan to use the PowerPoint slides for this presentation as visual aids, make sure you have the equipment and technology needed to share the slides with your audience. It is recommended that you test your technology and equipment in advance. In the outline, there are indications for placement of the PowerPoint slides. Each is numbered. For example, V1 refers to the first visual.

Please note that the first slide in the PowerPoint show is a title slide and is not included in this numbering system.

If your presentation is taking place in a fully in-person format but you do not have the equipment needed to share the PowerPoint, you could create a flip chart using the visuals from the slides.

Follow these tips when using visual aids in an in-person setting:

- ▶ Set them up and test them before the meeting begins. Place them so they are easily visible to listeners.
- ▶ Bring backup equipment in case your technology fails.
- ▶ Display your visuals only when they are needed. If you are using a flip chart, flip the page back out of view when you are finished with it.
- ▶ Remember not to stand between the screen or flip chart and your audience or you will block their view.
- ▶ Maintain eye contact with your listeners. If you must turn your back to point out something, pause as you point it out, and then resume speaking only after you are once again facing your audience.

Follow these tips when using visuals in the online or hybrid setting:

- ▶ Share your screen. Be sure your PowerPoint presentation is visible in the room and on the screens of those members participating from another location.
- ▶ Consider having someone else share the visuals so you can maintain eye contact with the camera.
- ▶ Consider an online whiteboard when sharing information, as it will be visible to both members in the room and those participating online.
- ▶ Consider enlisting the assistance of a partner to join the meeting on their computer in the room with you so that they can facilitate the remote attendees and monitor what is happening online. This is a good practice for all hybrid meetings.
- ▶ Test your online platform and technology before the meeting begins. Have an online participant confirm they can see everything as expected.
- ▶ Forgo visual aids altogether if you cannot be sure they will work for everyone in attendance.
- ▶ Share any handouts or other documents you use as part of your presentation with all attendees in advance or via the chat function of your meeting app so that all participants have access to them at the same time.

BENEFITS AND OPPORTUNITIES

By giving this presentation, you will be helping your club build excellence and move toward the possibility of being a Distinguished club—or reaching an even greater Distinguished status.

While this is an outlined presentation, it still provides a good opportunity for you to further practice speaking and build your presentation skills.

GOAL SETTING AND PLANNING

Introducing the Presenter

TIPS FOR THE PRESENTER: WRITE YOUR INTRODUCTION

All prepared speeches in Toastmasters require an introduction. A proper introduction of you and your speech is important to the success of your presentation. Use the following as a guide in writing your introduction:

- ▶ Include the purpose of *The Leadership Excellence Series*.
- ▶ Explain why “Goal Setting and Planning” is important for a Toastmasters club, stating the purpose and one or more objectives of your presentation.
- ▶ Incorporate some background about yourself.
- ▶ Read *When You’re the Introducer* in *A Toastmaster Wears Many Hats* (Item 1167D) for further details on giving a proper introduction.
- ▶ Give your finished introduction to the person who will be introducing you.

TIPS FOR THE INTRODUCER

- ▶ Ask the presenter any clarifying questions.
- ▶ Rehearse the introduction.

GOAL SETTING AND PLANNING

Outline

INTRODUCTION:

Successful leaders focus on what they want to achieve. They know what they want, and they devise ways to get it. The secret to their success is their ability to set and achieve specific goals. The abilities to set clear goals and plan how to achieve them are important leadership skills. If you cannot identify and communicate goals and plan how to achieve them, you will have difficulty fulfilling other leadership responsibilities.

DEFINITIONS

- ▶ A **goal** is a specific objective you and your team must achieve.
- ▶ A **plan** is the blueprint for achieving these goals.

CHARACTERISTICS OF GOALS

Goals should not be grand or complex. They need only be statements of results you hope to achieve. For example, a Toastmasters Club President's goal may be "To be a Distinguished Club by June 30." A Vice President Education's goal may be "To have four members earn a Level 2 award by May 31."

A goal has several characteristics. It is:

- ▶ **Specific.** It clearly states what must happen.
- ▶ **Measurable.** Results can be easily validated.
- ▶ **Action-oriented.** It begins with the word "to," followed by a verb.
- ▶ **Realistic.** It is challenging, yet practical and achievable – not too high or low.
- ▶ **Time-bounded.** It contains a timetable for achievement.

IMPLEMENTING GOALS

- ▶ **Involve team members in setting goals.** People increase commitment to goals when they are involved in setting them. They develop a sense of ownership and will take responsibility for results since they have a personal stake in them.
- ▶ **Write each goal, for best results.** This will make a goal easier to remember. It also will be easier to track your progress toward it.
- ▶ **Consider what you must do to achieve it,** once you have written a goal. What problems or obstacles could be encountered? By identifying and resolving potential conflicts now, you will be able to focus on the goal.
- ▶ **Regularly review progress toward the goal.** Are you where you should be in accomplishing it? If so, great! If not, determine the reason for the delay and then take action.

V1

V2

V3

V4

V5

PLANNING PROCESS

A plan describes how a goal will be achieved. It provides the structure needed to accomplish daily organizational activities. A plan outlines the necessary activities, the resources to be allocated, and how the work will be assigned. It gives guidance and direction to everyone involved in achieving the goal. A plan ensures the object will be achieved efficiently and effectively. Planning is important for several reasons:

- ▶ **Planning reinforces goals.** Planning puts goals in the forefront. Since goals are the starting point for plans, leaders always remember their goals.
- ▶ **Planning makes leaders more future-oriented.** Leaders are forced to look beyond the present to project what will happen in the future.
- ▶ **Planning enables leaders to coordinate decisions.** Decisions should not be made without considering their effects on the future.
- ▶ **Planning ensures efficient use of resources.** Without planning, resources are often overused or wasted, putting a strain on deadlines and stress levels. Leaders that make wise use of manpower and materials have a happier workforce and a productive process.

V6

FIVE STEPS TO PLANNING

Once goals are determined, the planning process can be broken down into five easy steps.

1. Establish strategies. Identify how you will achieve the goal. List the specific steps that must be taken to move toward the goal.
 - Example: If a Club President's goal is to be a Distinguished Club, they should list the specific steps the club must take if it were to achieve this goal by using the Distinguished Club Program.
2. Set a timetable. Priorities and scheduling are critical to planning. Make a list of tasks according to their priority and establish specific deadlines for their completion.
 - Example: A club should establish a deadline for meeting the Level 2 award goal.
3. Assign responsibilities. Delegate tasks to the team, matching the task to the person best suited for it. The success of a team depends on all members fulfilling their responsibilities. Be sure that each team member commits to completing their assigned duties.
 - Example: The President assigns the task of having two members earn Level 2 awards this year to the Vice President Education. In turn, the Vice President Education identifies two members who are close to completing Level 2 and talks with them about completing the Level by the deadline. If the members agree and commit, the Vice President Education schedules these members to speak so they can meet the deadline.
4. Anticipate obstacles. Good leaders think about potential problems.
 - Example: The Vice President Education realizes one of the potential Level 2 award recipients will be out of town for several meetings, so they schedule the member to speak only at meetings the member will be able to attend.
5. Modify the plan as necessary. Even leaders with the most vivid imaginations cannot possibly imagine all of the challenges or problems that may occur as a team strives to achieve its goals. Leaders must be flexible and change plans as needed.

- Example: If the Vice President Education realizes one of the individuals trying to achieve their Level 2 award will not achieve it in time, the Vice President Education looks to the rest of the club members, who may be close to achieving the award, to fulfill that goal.

Involvement

As in setting goals, you should involve team members in the planning process. Participation allows team members to:

- ▶ Exercise creative ability
- ▶ Apply problem-solving skills
- ▶ Increase commitment to achieve the established goals

V7

V8

V9

THE DISTINGUISHED CLUB PROGRAM

Toastmasters International's Distinguished Club Program is an excellent example of goal setting and planning. It shows the club how to set goals at the beginning of the year and determine how to achieve these goals. It also includes a document to write down these goals and plans. The format could also be used for the work place or for other organizations to which a member belongs.

CONCLUSION

Careful goal setting and planning are the keys to achieving results and to making an individual a successful leader. By using the information conveyed, a person will be able to set goals and develop plans that will result in achieving those goals.

Evaluation Guide

Evaluator's Name _____

Presentation Title _____ Date _____

- ▶ How effective was the speaker's introduction in helping the audience understand the purpose of *The Leadership Excellence Series* and the presentation itself?
- ▶ Was the presenter adequately prepared? How heavily did the presenter rely on notes or the outline itself?
- ▶ How did the speaker use vocal variety to enhance this presentation?
- ▶ What other techniques did the speaker use to personalize and augment the presentation? Were they effective? How?
- ▶ Did the speaker display the visuals smoothly and at the appropriate times? How could the speaker improve?
- ▶ What aspect of the speaker's presentation style did you find unique? Why?
- ▶ Did the speaker present the material clearly and simply so audience members could easily use the information to improve their own leadership skills?
- ▶ What could the speaker have done differently to make the presentation more effective?
- ▶ What did you like about the presentation?



www.toastmasters.org