Writing training objectives using SMART

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Key learning points

- How to define the desired behaviours clearly.
- How to develop meaningful training objectives.
- SMART can help you check – it can't help you write.
- Beware of introducing arbitrary numerical goals.

The banal acronym SMART is ceaselessly served up, each time by an author who assumes that the idea of creating objectives that are specific, measurable, attainable, realistic, and time-bound is fresh and enlightening.[1]

How do you design training?

There are some trainers whose preferred approach seems to be to find a range of 'innovative' and 'challenging' exercises and to shoe-horn these into whatever subject they are working on that week. Their hapless delegates find themselves part of some experimental learning process that may – just may – hit the right buttons, but is more likely to leave them bemused and confused. Question them later about the course and they will have hazy memories of a series of disconnected events but no real idea of why they did the things they did – or, often, of why they were there in the first place.

Training is about providing opportunities for learning and it is through learning that we may – or may not – change behaviour. Behaviour is very simple to identify – it's what and how people do, or do not, do. It is visible to others. As trainers we (and/or our 'clients') work out what is or is not wanted in behavioural terms by observing good and bad practice, asking questions of those around us, and considering the wanted and unwanted results of these activities. We use this information to write a training objective which describes the terminal (final and desired) behaviour we are looking for that will be achieved through the skills and knowledge (the learning) supplied by the training. Simple and elegant – but see 'Watch out' inside.

Define the behaviour clearly

Before accepting the responsibility of designing and/or delivering a training event, trainers must clearly define the behaviour/s the client wants the training to change and why. For example, there's someone in the office – let's call her Daisy – whose manager says, 'I don't like her attitude.' This is a meaningless word for the trainer – you can't write an objective that simply says 'The purpose of the training is to change attitudes.' It doesn't clearly describe what you are hoping to change. An attitude is just a habitual way of thought or feeling expressed by the position or posture of the person. The trainer must ask questions to find out what the manager means by Daisy's 'attitude' and what the manager wants to see instead. From this the trainer may discover, perhaps, that Daisy doesn't smile much, or maybe she snaps at customers or doesn't engage with other colleagues, or produces inaccurate work with many spelling mistakes or… a whole raft of behaviours can be encompassed by the attitude word.

Case study

A few years ago a young man came to repair the photocopier in a training company's office. It's a small, friendly place, so he was soon asking questions about the business. He was noticably unimpressed when he learned that it was a management training consultancy.

'I went on a course once with my last company. A hundred of us in a fancy hotel for a day,' he remarked enigmatically.

'Oh yes,' we replied (like all trainers keen to hear about the 'opposition' and pick up any tips). 'What was it about?'

'Mmm. Not sure really … can't remember much … we were told we had to go … waste of time it was.'

'Oh, surely you can remember something?' we pressed.

Long pause.

'I remember that we were meant to stroke each other all the time. Load of nonsense, we all thought.'

We fell silent, realising that (a) it was probably some sort of customer service and/or communication skills programme with a transactional analysis slant and (b) it clearly hadn't achieved its objectives for this delegate – unless bewilderment and cynicism count.

In fact, not only had it not achieved its objectives but it seems that this delegate didn't even know what these were. But objective setting is not an exercise in isolation. Done well and, more importantly, communicated well, it immediately provides a clear map, a path and an end result for the delegates to choose (or not).

Useful verbs and ones to avoid

Objectives, whether training or otherwise, are all about getting from A to B. So any objective needs to imply that something active happens. The verb in a training objective is the key word that denotes observable behaviour. Mostly, for training objectives, keep in mind the idea of 'behaviour'. Words like 'understand', 'appreciate' or 'be aware of' are not behavioural enough because you can't easily observe them.

adjust, alter, analyse, amend, answer, approve, assemble, assess, audit, build, calculate, call, carry out, categorise, check, climb, close, complete, decide, describe, develop, diagnose, divide, draft, draw, eliminate, explain, estimate, extract, file, find, fit, generate, hire, hold, identify, implement, inform, interview, justify, label, lift, list, locate, lower, make, mark, map, monitor, name, negotiate, obtain, operate, perform, prepare, place, plan, prove, question, read, recommend, remove, report, research, review, schedule, select, sell, solve, spend, state, supervise, spell, test, train, translate, turn, update, use, verify, weigh, write

Watch out!

Dr W Edwards Deming[2] made a clear distinction between 'facts of life' and 'arbitrary numerical goals'.

If we believe that our company will go out of business unless we can increase sales by 15 per cent, that is a 'fact of life' and when believed by staff provides a focus for teamwork and the allocation of resources needed to achieve that goal. Goals of this type are non-threateningin the sense that they are not used to measure individual performance but rather they provide a focus for the way forward.

If the sales manager sets a sales goal for each salesman to increase sales by 15 per cent because they think it will motivate staff to work harder, then this is an 'arbitrary numerical goal'. Arbitrary numerical goals result in enormous damage. They cause people to play tricks that damage the organisation but achieve the goal (e.g. sell the wrong product for the customer, or offer a discount to bring the sale forward). They also encourage competition rather than teamwork and make staff cynical about their jobs.

References

1 Dick Grote, 'The Secrets of Performance Appraisal: Best Practices from the Masters', Dick Grote @ http://www.zigonperf.com/resources/pmnews/best_practice_pas.html

2. W Edwards Deming, *Out of the Crisis*, The MIT Press, 2000.

Author

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Develop training objectives

Having done the analysis the trainer can now develop the training objectives for Daisy. Perhaps Daisy will end up able 'to build rapport with others' or 'to use a spell checker'. (See the back page for a list of useful verbs to use when crafting training objectives.) This is the terminal behaviour and it is nearly, but not quite, enough for the trainer to begin their programme design. To make it really tight the trainer needs to add a couple of things, if possible:

- **The conditions for the performance**
  Conditions set are the given circumstances with which Daisy would expect to be provided – for example the tools, the equipment, the time of day, the people present and so on.

- **The standards for the performance**
  Standards are the minimum observable and acceptable standards that Daisy must meet for her new performance to be adequate.

So for Daisy we could break it down like this. By the end of the training Daisy will be able to achieve the following things.

Now the trainer can begin to design a training programme that meets the client's needs exactly and can be evaluated for success – does Daisy change her observable behaviour after the training by building rapport or using the spell checker?

How can SMART help?

So, how can SMART help the trainer to produce meaningful training objectives? The short answer is that it can't. SMART isn't a writing process; it's a checking process. Trying to write a training objective using it is, to say the least, tortuous. In fact, trying to write any sort of objective using SMART as the structure is difficult and it's time that it was recognised that there is a difference between checking something is SMART – an appropriate thing to do – and writing an objective using SMART – which is pretty well an impossible thing to do.

What SMART – in this context Specific, Measurable, Active, Relevant and Time bound – can do is help the trainer to ensure that they have covered all the bases with their client when they have written the objective; in other words, that they've thought of everything. Figure 1 shows how.

Behaviour	Condition	Standard
Build rapport with others ...	... by using, as appropriate, one or more of six verbal and non-verbal strategies ...	... face to face during meetings with her team colleagues in the workplace.
Use a spell checker ...	... In Microsoft Word and PowerPoint 2000 ...	... with no more than 1 spelling error per 1,000 words.

Watch out!

Simply writing a training objective – SMART or otherwise – doesn't guarantee that Daisy will change anything. All the trainer can guarantee is that Daisy, at the end of the training, is *able* to do whatever was described. Learning only takes place when Daisy *decides* to do it. Never – unless you are a genuine Svengali – write a training objective that begins with the words 'By the time they have completed this training delegates will ...'. You just can't be sure.

Time-bound
achievable by the end of the training programme

Relevant
to the needs of the client and the company

Active
uses an active verb that implies change

Measurable
can be observed during the training session

Specific
says exactly what the learner will be able to do

Fig.1: Checking an objective is SMART

Questions and Answers

Q: What does SMART mean?

A: *Smart* originally meant 'stinging and sharp', as in 'a smart blow' – maybe a good description of some training? In business it has come to mean 'clever and intelligent'.

Q: I know that. I mean what does the acronym stand for? And where does it come from?

A: Well, take your choice:

- **S** – specific (thankfully, everyone seems agreed on this one).
- **M** – measurable, motivating, monitored.
- **A** – achievable, actions, active, attainable, agreed, assessable.
- **R** – Relevant, realistic, responsibility, results-oriented, rewarding, relevant.
- **T** – time-bound, tactical, time-based.

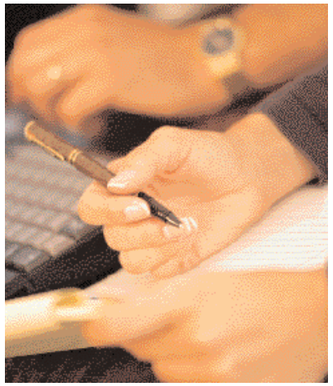
It's no wonder people get confused. As for where it comes from – that is lost in the mists of time, I'm afraid.

Q: How useful is objective setting for the trainer? Surely all you need is to know your subject and make it entertaining for the delegates?

A: Useful? It's vital – the *raison d'être* of what we do. You need it to sell your training to its intended audience, to check it meets organisations' needs exactly, to plan your course structure, to develop relevant activities, to evaluate your training – need I go on?

Q: That'll do – but I'm still confused. What's the difference between an aim, an objective, a target and a goal?

A: Whoa – don't go there! In real life there's none, but in the management and training world there's as many definitions as there are trainers. My advice – make sure that you and your client and your delegates all use the same word and agree a common and understood meaning for that word. That way at least you'll have a common training language.



Expert advice

Dr W Edwards Deming – he of Total Quality Management fame – made a clear separation between numerical standards that are 'facts of life ' and those that are 'arbitrary'.

Facts of life are how things are numerically. So. If the company needs to increase its order book by 50 per cent to ensure that it doesn't make any redundancies, then that's a fact of life – and a meaningful number for everyone to aim for.

But if the same company merely wants more sales because it wants more sales, then any numbers set will be purely arbitrary. And, Deming argues, arbitrary numerical goals are highly damaging. They often impel people to find ruses that fundamentally degrade the organisation but achieve the goal (e.g. use dubious and unethical sales tactics).

The same is true of training objectives, so be careful when you bring in the standard. Why is it acceptable for Daisy to achieve 1 but not 2 errors in every 1,000 words?

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