



talent

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Goals 2.0 Quick Start



Day-One Set Up (5 Quick Checks):

- Roles & Settings
- Hub Tiles
- Focus Tags
- Templates
- Report Access (Exports)



First Goal Recipe (Coaches & Mentees):

- 1 Create from template (or blank) → add 1–2 Focus tags
- 2 Define success criteria (clear+ measurable)
- 3 Add 2–3 sub-steps and set a due date
- 4 Schedule a check-in
- 5 Attach first artifact (plan, short clip) in Evidence

Pro Tip: Keep criteria and evidence lightweight; momentum beats perfection on day one.

Decision → Action → Proof



Decision: Open At-Risk to see who needs you today



Action: From Mentee Directory, open the person → update Goal Detail



Proof: Add/link Evidence → Export a quick report for your leader or team



Tags, Checks, & Evidence

- ✓ Keep focus tags tight
- ✓ Use checks to keep goals moving
- ✓ Evidence links back to criteria



Reporting in 30 Seconds

At-Risk by Coach → Where Support Is Needed
Completion Rate vs Org Avg → Momentum
Top Focus Tags → What You're Working On



Quick Wins by Role

Mentee: Use My Goals; check the Data Indicators panel; mark one sub-step today

Coach: Add a coach note + schedule the next Progress Check before leaving Goal Detail

Leader: Open Goals Set for Others + Coach Directory; balance caseloads; follow up on sites with higher at-risk counts



Common Issues

Too many tags → Cap at 4–6, define each, archive quarterly

Missed Progress Checks → Use reminders, reschedule not skip

Evidence Chaos → Link to criteria, aim 1 artifact per sub-step