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# Stretch Goal Audit

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# Ready to Stretch

## STRETCH GOAL AUDIT

Built on the stretch goal research of Sitkin, See, Miller, Lawless and Carton (2011)

Most of us set a big goal by asking whether it is big enough. The research suggests a more useful question is whether we are in a position to carry it. Stretch goals fail more often than they succeed, and when they fail it is rarely because people lacked ambition.

This audit helps you look at a stretch goal you are considering, or one you are already in the middle of, against the three conditions that give it a chance. Purpose, Track Record and Space. You can do it on your own, and it is more useful again if your team does it separately and you compare answers.

It takes about twenty minutes. Be honest about where you are. A tick you can't back with an example isn't worth much to you.

### PART ONE

#### YOUR STRETCH GOAL

Write the goal down as plainly as you can. What are you trying to achieve, and by when?

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Before going further it is worth checking that this really is a stretch goal. Sitkin and his colleagues define one by two features, and a goal that is only hard work is a different thing and doesn't need this audit.

|                                                                                                                      | NOT REALLY               | PARTLY                   | CLEARLY                  |
|----------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| Extreme difficulty. This goes well beyond our current performance, it isn't the next step up.                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Extreme novelty. Working harder at what we already do won't get us there. We will have to find a new way of working. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

*If you ticked Not really for both, you have a challenging goal and not a stretch goal. That is fine, and most goals should be exactly that.*

## PART TWO

### THE THREE CONDITIONS

Read each statement and tick the answer that is true today, not the one you hope will be true in six months. Where it says we, think about the team or organisation that will carry the goal.

#### Purpose

Purpose is the reason to stretch when nothing is forcing you to, and it is what keeps people going when the goal gets difficult.

|                                                                                                                   | NOT REALLY               | PARTLY                   | CLEARLY                  |
|-------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| I can say in a sentence or two why this goal matters, and the reason is one that people other than me care about. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| The people doing the work can see how what they do each day connects to it.                                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| It is a bit scary. We don't yet know how we are going to get there.                                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| We would still want this if nobody was pushing us to do it.                                                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| This is clearly the main thing, and it isn't competing with a long list of other priorities.                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

What is your evidence? When did you last hear someone on the team describe this goal in their own words?

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How many did you tick as Clearly? \_\_\_\_ out of 5

## TRACK RECORD

The track record that supports stretch is one of learning, experimenting and delivering when it was hard. A record of getting the job done the same way each time can work against you, because success makes us comfortable.

|                                                                                                              | NOT REALLY               | PARTLY                   | CLEARLY                  |
|--------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| We are coming off recent wins and people are confident in what we can do.                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| In the last year or two we have taken on something we didn't know how to do, and learned our way through it. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## TRACK RECORD CONT.

|                                                                                                           | NOT REALLY               | PARTLY                   | CLEARLY                  |
|-----------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| We have run experiments that didn't work and used what we learned from them.                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| We have delivered when conditions were difficult as well as when things were running smoothly.            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| When something has worked for us, we still question whether it is the right approach for what comes next. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

What is your evidence? Name the specific project, experiment or difficult period you were thinking of.

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How many did you tick as Clearly? \_\_\_\_\_ out of 5

## SPACE

Space is the condition most of us struggle with, and Sitkin rates it as the more critical of his two. It covers resources, and it also covers the time to experiment, reflect, learn and review.

|                                                                                                                         | NOT REALLY               | PARTLY                   | CLEARLY                  |
|-------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| We have the people, money and time to pursue this without stripping them from work that still has to be done.           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| We can absorb an experiment that fails without it becoming a crisis.                                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| There is regular time set aside to reflect on what we are learning, and it is kept separate from reporting on progress. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| I have time in my own week to think, and I protect it.                                                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| We have stopped or paused something to make space for this.                                                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

What is your evidence? What have you stopped, and where in the calendar does the reflection time sit?

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How many did you tick as Clearly? \_\_\_\_\_ out of 5

## PART THREE

### WHERE YOU STAND

For each condition, count the statements you ticked as Clearly. Four or five means the condition is in place. Two or three means it is partly there and close enough to work on. None or one means it is not there yet.

#### Purpose

Purpose is the reason to stretch when nothing is forcing you to, and it is what keeps people going when the goal gets difficult.

| CONDITION    | NUMBER TICKED CLEARLY | IN PLACE, PARTLY, OR NOT YET |
|--------------|-----------------------|------------------------------|
| Purpose      | <input type="text"/>  | <input type="text"/>         |
| Track Record | <input type="text"/>  | <input type="text"/>         |
| Space        | <input type="text"/>  | <input type="text"/>         |

Now find your position below using Track Record and Space. These four positions come from Sitkin, Miller and See (2017), and the advice in each is theirs. Treat partly as not yet in place for this step.

| YOUR POSITION                        | WHAT THE RESEARCH SUGGESTS                                                                                                                                                                                                                                   |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Track Record and Space both in place | You are in the best position to stretch, and the research says you are also the least likely to do it, because success breeds caution. Go for it. The thing to watch is comfort. (Sitkin calls this position thriving but complacent.)                       |
| Track Record in place, Space not yet | You have the confidence and not the space. Hold the stretch goal and build space first. Stop something, free up resources, put the reflection time in the calendar, and then come back to it. (Confident but constrained.)                                   |
| Space in place, Track Record not yet | You have the space and not the recent wins. Use the resources to run small experiments where a loss is cheap and the learning is quick. Expect many of them not to work. The ones that do rebuild the confidence a stretch needs. (Discouraged but capable.) |
| Neither in place                     | This is the position where stretch goals are most tempting and most likely to fail. Don't set one now. Pursue small wins that rebuild momentum, energy and resources, and revisit the stretch when you have some behind you. (Failing but grasping.)         |

Then look at Purpose, the condition I add to Sitkin's two. If it is not yet in place, do that work first whichever position you are in. A stretch goal that people don't care about will be dropped for an easier one the first time it gets hard.

## PART FOUR

### ONE COMMITMENT

Which of the three conditions most needs your attention right now?

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What specifically will you do about it, and when?

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What usually gets in the way, and what will you do about that?

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Who will you ask to check in with you on this, and when?

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### A Note on the Science

Track Record and Space are drawn from the work of Sim Sitkin and his colleagues, who argue that stretch goals are most likely to succeed where an organisation has strong recent performance and slack resources. The four positions in Part Three and the advice attached to them are theirs. Their 2011 paper is a theoretical model, and the closest experimental test is Gary and colleagues (2017), who found that stretch goals improved performance for a few participants while many abandoned them for lower goals.

Purpose is my addition and isn't part of their model. So is the wider reading of Space to include learning and reflection, and the view that a track record of learning matters more than a track record of delivery. This audit is a reflection tool built on that research. It has not been validated as a measure, so use your results to start a conversation and not as a score.

### References

Gary, M.S., Yang, M.M., Yetton, P.W., & Sterman, J.D. (2017). *Stretch goals and the distribution of organizational performance*. *Organization Science*, 28(3), 395-410.

Sitkin, S.B., Miller, C.C., & See, K.E. (2017). *The stretch goal paradox*. *Harvard Business Review*, 95(1), 92-99.

Sitkin, S.B., See, K.E., Miller, C.C., Lawless, M.W., & Carton, A.M. (2011). *The paradox of stretch goals: Organizations in pursuit of the seemingly impossible*. *Academy of Management Review*, 36(3), 544-566.