



# SMART Goal Planning for Behavioral Health

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February 2021

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# Agenda

- 1 Introduction

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- 2 Understanding SMART Goals

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- 3 Developing SMART Goals

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- 4 Class Exercise: Case Study

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- 5 Conclusion

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# Learning Objectives

Describe the purpose of SMART Goals

Define the 5 components of a SMART Goal

Apply SMART goal development to client scenarios

Chapter

# 01

## Introduction

“We help people live their lives to the fullest potential.”

Our Commitment

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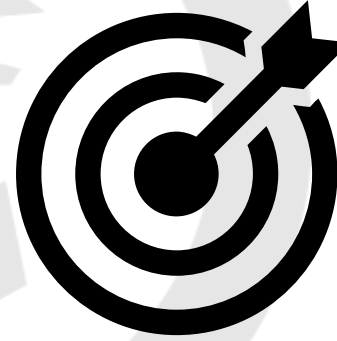
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# What are SMART Goals?

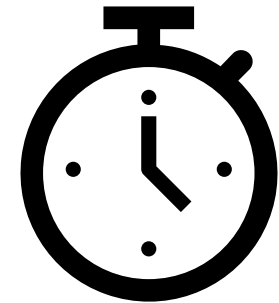
**S**

**PECIFIC**



**M**

**EASURABLE**



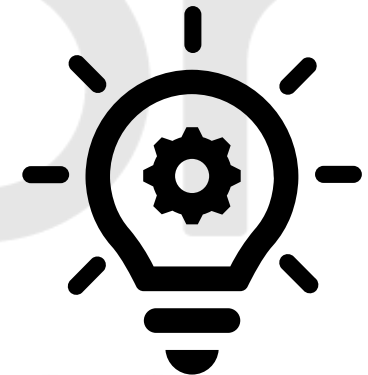
**A**

**TTAINABLE**



**R**

**ELEVANT**



**T**

**IME - BASED**

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# Purpose & Importance of SMART Goals

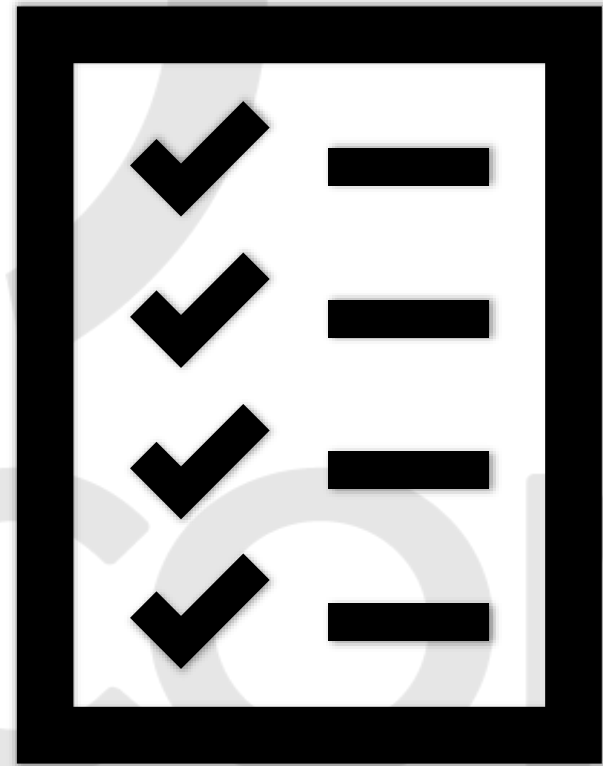


- Guideline for effective goal development
- Helps brainstorm specifics of an idea
- Allow for clarification, focus & application of resources
- Defines how to meaningfully measure progress and identify room for improvement

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# Terminology

- Goals vs Objectives
- Short-term vs Long-term Goals
- Target= the desired level of performance that represents success
- Measure= standard unit used to illustrate success over time



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Chapter

# 02

## Understanding SMART Goals

“We help people live  
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# SMART

- Targeted
- Focused
- Clear
- Easy to understand

Specific



WHAT do I want accomplished?

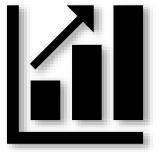
WHO is involved?

WHY is it important?

HOW will I get this done?

# SMART

## Measurable



- Track progress
- Data, numbers, percent
- Identifying success
- Meaningful
- Sensible

How much?

How many?

How will I measure progress?

How will I know when it's accomplished?

# SMART

- Realistic
- Achievable
- Within your control
- “Just Right”

Attainable



Can this be achieved with the given time-frame?

Do I have the resources I need?

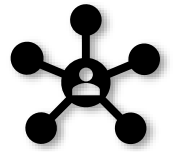
What limitations are in my way?

Is it “too easy” or “too hard”?

# SMART

Relevant

- Worthwhile
- Significant
- Applicable
- Associated with other goals
- Associated with values



Why do I want to do this?

How will it help myself or someone else?

Is it in line with other associated goals?

Is this the right time?

# SMART

## Time-Based



- Time-frame for goal completion
- Target date
- Creates urgency & commitment
- Not too soon or too far away

When will this goal be achieved by?

Is this time-frame realistic?

Should it be closer or further in future?

# Other Considerations



- Does this goal involve changing things about YOU (not changing other people)?
- Does this goal involve changing things that are within your control?
- Will this goal make an immediate improvement in your life?
- Is there another goal you need to reach first before you can accomplish this goal?

[This Photo](#) by Unknown Author is licensed under [CC BY-SA](#)

# How SMART is Amy's Goal?



“I have trouble making friends and I've been feeling lonely... this year, my goal is to get out more and make some friends!”

# A SMART Goal for Amy



“This year I want to make some new friends, so I’ll start by attending at least one social event every week for the next month. Options include dance class, trivia night or book club.”

**S M A R T**



Chapter

# 03

## Developing S.M.A.R.T. Goals

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# Case Study: John



- Living with Anxiety for years
- Increased work stress
- Panic attacks

**“My goal this year is to take better care of my mental health and learn how to manage my anxiety more effectively”**

“My goal this year is to take better care of my mental health and learn how to manage my anxiety more effectively”

# SMART

## Specific



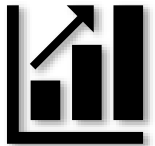
<p><b>What is he going to do?</b></p> <ul style="list-style-type: none"> <li>• Specific</li> <li>• Targeted</li> </ul>	<ul style="list-style-type: none"> <li>• Learn the Grounding technique which is an evidence-based anxiety management skill.</li> </ul>
<p><b>Why will he do it?</b></p> <ul style="list-style-type: none"> <li>• Motivation</li> <li>• Meaning</li> </ul>	<ul style="list-style-type: none"> <li>• To care for his mental health</li> <li>• To increase his confidence and comfort levels</li> <li>• To be successful at work</li> </ul>
<p><b>How will he do it?</b></p> <ul style="list-style-type: none"> <li>• Actions</li> <li>• Behaviors</li> </ul>	<ul style="list-style-type: none"> <li>• Attending therapy</li> <li>• Reading about Grounding</li> <li>• Practicing technique</li> </ul>
<p><b>Who will take the actions?</b></p> <ul style="list-style-type: none"> <li>• Responsibility</li> </ul>	<ul style="list-style-type: none"> <li>• John will take action</li> <li>• John is responsible for this goal</li> </ul>



“My goal this year is to take better care of my mental health and learn how to manage my anxiety more effectively”

# SMART

## Measurable



<p><b>How will John measure his progress?</b></p>	<ul style="list-style-type: none"> <li>• Self-report</li> <li>• Keeping a journal/log</li> <li>• Using an Anxiety scale</li> </ul>
<p><b>How many?</b></p>	<ul style="list-style-type: none"> <li>• 1 technique (grounding)</li> </ul>
<p><b>How much?</b></p>	<ul style="list-style-type: none"> <li>• He will practice is at least 3 times a week when feeling anxious</li> </ul>
<p><b>How will he know when his target is met?</b></p>	<ul style="list-style-type: none"> <li>• John will be able to use his technique to lower his anxiety 2-3 points on the scale</li> </ul>



“My goal this year is to take better care of my mental health and learn how to manage my anxiety more effectively”

# SMART

## Time-Based



<p><b>When will this goal start and end (time-frame)?</b></p>	<ul style="list-style-type: none"> <li>• Start tomorrow</li> <li>• End in 3 months</li> </ul>
<p><b>When will he measure his progress?</b></p>	<ul style="list-style-type: none"> <li>• At least 3 times a week, after practicing technique he will consult anxiety-scale and log results</li> </ul>
<p><b>Is the time-frame realistic for the goal?</b></p>	<ul style="list-style-type: none"> <li>• Yes-</li> <li>• 1 technique, 3x/week, 3 months – this is doable</li> </ul>
<p><b>Should the time frame be closer, further, longer or shorter?</b></p>	<ul style="list-style-type: none"> <li>• No, the time-frame feels appropriate &amp; effective</li> </ul>



“My goal this year is to take better care of my mental health and learn how to manage my anxiety more effectively”

# S M A R T

## Attainable



Does John have the resources he needs to achieve this goal?	<ul style="list-style-type: none"> <li>• Therapist</li> <li>• Books</li> <li>• Time to learn/ practice</li> </ul>
What limitations are in his way?	<ul style="list-style-type: none"> <li>• Work stress</li> <li>• Other responsibilities (family, exercise, etc.)</li> </ul>
Is “too easy” or “too hard”?	<ul style="list-style-type: none"> <li>• “Just right”</li> <li>• Not aiming for total relief, just a reduction in symptoms</li> <li>• This is a first step</li> </ul>
Is it within John’s control to complete these actions?	<ul style="list-style-type: none"> <li>• Yes</li> </ul>

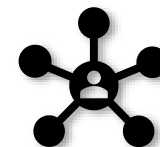




“My goal this year is to take better care of my mental health and learn how to manage my anxiety more effectively”

# S M A R T

## Relevant



<p><b>Is this goal significant &amp; worthwhile?</b></p>	<ul style="list-style-type: none"> <li>• Yes, managing anxiety is key to John’s mental health &amp; professional success</li> </ul>
<p><b>How will it help him or someone else?</b></p>	<ul style="list-style-type: none"> <li>• Reduce his anxiety symptoms</li> <li>• Help manage his stress</li> <li>• Increase his confidence at work</li> </ul>
<p><b>Is it in line with his other goals and/or values?</b></p>	<ul style="list-style-type: none"> <li>• Yes-</li> <li>• Goal of mental wellness</li> <li>• Goal of professional success</li> </ul>
<p><b>Is this the right time?</b></p>	<ul style="list-style-type: none"> <li>• Yes- he feels ready &amp; is prepared</li> </ul>



# John's New SMART Goal:



“Starting tomorrow, during the next three months, I will learn the Grounding technique, and will practice it at work at least three times a week during high-stress moments to help reduce my anxiety symptoms by at least two scale points.”



# Worksheets

**S** **M** **A** **R** **T**

**Specific** **Measurable** **Attainable** **Relevant** **Time Based**

**Specific:** Who? What? When? Where?

**Measurable:** When will you know you met the goal?

**Attainable:** What skills, knowledge, resources do you need to achieve this?

**Relevant:** Why do you want to do this? How will this help you or someone else?

**Time-Based:** How long will it take you to accomplish this?

*My Goal*

Source: [www.socialemotionalworkshop.com](http://www.socialemotionalworkshop.com)

## SMART Goal Setting Worksheet

SMART = Specific, Measurable, Attainable, Relevant, Time-Based

Write down your business goal in the space below.

**GOAL:**

Use the questions below to determine if your business goal adheres to the SMART methodology. If your goal doesn't successfully fulfill each section, rewrite it in the space provided.

**Is your goal specific?**

A specific goal should clearly state what you want to accomplish, why it is an important goal, and how you intend to accomplish the goal.

**Is your goal measurable?**

A measurable goal should include a plan with targets and milestones that you can use to make sure you're moving in the right direction.

**Is your goal attainable?**

An attainable goal should be realistic and include a plan that breaks your overall goal down into smaller, manageable action steps that use the time and resources available to you within the timeline you've set.

**Is your goal relevant?**

A relevant goal should make sense when measured against your business model, mission statement, market, client base and industry.

**Is your goal time-based?**

A time-based goal is limited by a defined period of time and includes a specific timeline for each step of the process.

Provided by Alyssa Gregory, Small Business Information on About.com  
<http://sbinformation.about.com>

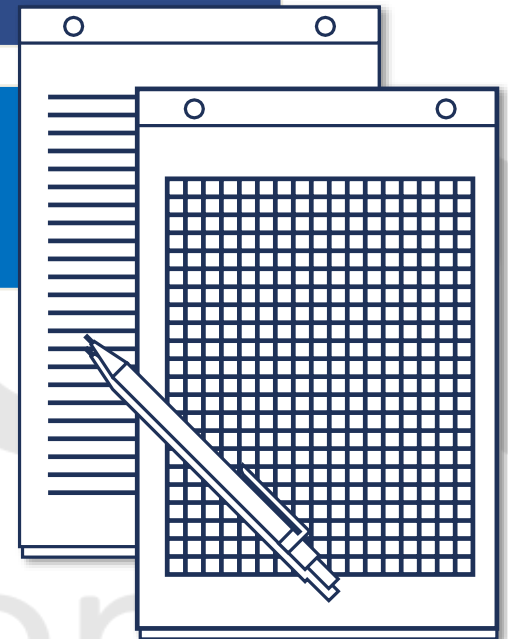
# Revising SMART Goals

Goals are not set in stone

Can be revised or updated at any time

Consider goal progress

- Too difficult?
- Too easy?
- Not enough time?
- Barriers?



Chapter

# 04

## Class Exercise: Case Study

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# Case Study: Leah

- 19 years old
- Away from home for first time
- Homesickness, depressive symptoms
  - sadness, insomnia, low-motivation
- Priority concern: lack of sleep
- Stays up “too late” on phone to avoid thoughts
- **Help Leah develop a SMART goal to improve her sleep habits.**

## [SMART Goal Worksheet](#)



Chapter

# 05

## Conclusion

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# Key Takeaways

- Turn an idea into action
- SMART Goals increase the likelihood of goal achievement
- Invest in the plan by setting intention early
- Clarify ideas & focus efforts
- Can be used in a variety of ways
- Can be revised and updated at any time

**S**

**PECIFIC**

**M**

**EASURABLE**

**A**

**TTAINABLE**

**R**

**ELEVANT**

**T**

**IME - BASED**

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# Additional Resources



[SMART Objectives Brief](#)



at the intersection of mental health and developmental disabilities

[SMART Goals Fact Sheet](#)





Image from: <https://www.hubspot.com/understanding-the-qa-function-on-google-my-business/>

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# Thank You

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Contact Us



Please email

[ClinicalTrainingDepartment@Beaconhealthoptions.com](mailto:ClinicalTrainingDepartment@Beaconhealthoptions.com)

with any additional questions or concerns

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# References

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- <https://www.mhddcenter.org/smart-goals-mental-health-2/>