

The EveryMundo 36Y

Process Details and Guidelines

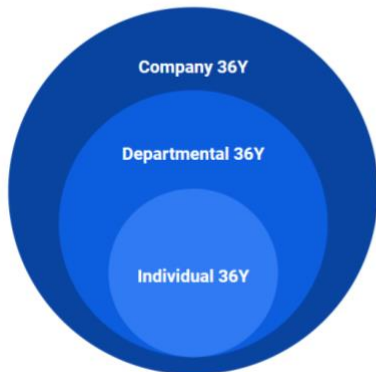
The 36Y breaks down our company strategy into concrete goals that we can all rally behind. It also gives all employees the ability to focus on goals that maximize individual growth and their contributions to the success of the Company. This document provides an overview of our yearly and quarterly process, along with tips to ensure that we're writing actionable, well-aligned goals.

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Introduction

36Y ensures goal alignment, prioritization, and transparency across EveryMundo. A 36Y is a set of goals to be achieved in the next 3 months (the 3), 6 months (the 6), and by year's end (the Y). There are three levels, each one nested below the other. This structure aligns all of us behind our highest priority activities.



The 36Y process is set in motion with the release of the Company's goals - the "Company 36Y"

Department and team Leads define goals that nest under those Company goals - the "Departmental 36Y"

Individual goals nest under those departmental goals - the "Individual 36Y"

These steps provide an outline of the 36Y process from start to finish. Following that is a detailed breakdown of the process on a quarterly basis.

High Level 36Y Process Summary

1. Exec team and Company Goal Owners draft the Company 36Y at the end of each year
2. Department Leads review this draft, provide notes and feedback
3. Once finalized, the Company 36Y is shared company-wide (Y-Goals, 3-Goals, and 6-Goals)
4. Leads draft Departmental 36Ys aligned with the Company 36-Y (Y-Goals, 3-Goals, and 6-Goals)
5. Leads review departmental goals with adjacent dept Leads, ensuing cross-dept goal dependencies are documented
6. Leads review draft departmental 36Ys with their teams for feedback - any final changes to departmental goals are made
7. All Employees draft individual 36Ys, ensuring that individual goals align with departmental goals
8. Individuals review drafts with their peers and Leads for feedback and to ensure alignment
9. Once finalized, all Employees post individual 36Ys to JIRA

10. This process repeats every quarter: Y-Goals do not change - our quarterly 3-Goals are updated at the start of each quarter

A. 36Y Detailed Quarterly Process Overview - Company and Departmental Goal Setting

The goal writing and review process takes place every quarter, and the steps involved may vary based on where we are in the year. The following quarterly breakdown explains these steps in detail.

This section functions as a summary of the Company and Departmental goal setting process each quarter. Guidance on writing individual 36Ys can be found in [section C](#). Like any process in the Company, it is subject to change and improvement.

Q1:

In December of each year, the Exec team begins the process of goal setting for the year ahead. This sets in motion the process of departmental and individual 36Ys.

Once Company goals for the year have been confirmed (The “Y-Goals”), the Exec team works from the end backwards to write our goals for the first quarter (The “3-Goals”). We consider the key results in Q1 that will serve as building blocks towards our larger Y-Goals; in effect, those become our 3-goals for Q1. This is the same approach that all Leads adopt when crafting their departmental 36Ys, i.e. we imagine that we have achieved our goals for the year and define what we need to do on a quarterly basis, in terms of key results, to ensure progress towards our ambitious but attainable Y-goals.

Y Goals (Our Ambitions): At the start of the goal setting process, Company and Departmental Leadership frame goals for the year: the Y-Goals. To do this, we ask and answer three central questions.

Company Y-Goals should ask and answer these three questions:

1. Why is the goal important?

- Answering this question allows Company and departmental leadership to document how a goal contributes to our strategic objectives. The company's strategic objectives are highlighted on the first page of the EM 36Y. Our goal should always be in alignment with this strategy.

2. What do we want to achieve?

- Now that we have documented how each goal supports EM's strategy, we must spell out what we are specifically trying to achieve. This is where we isolate our goal and think of it as something concrete and tangible.

3. How do we know it's been achieved?

- Answering this question ensures that we've taken the time to define how we will monitor completion for every goal. A goal should be binary—we either achieved it or we came up short. When we write goals, we aim to leave no doubt about what achievement looks like.

We publish our ambitious Y-goals once, at the start of the calendar year. They act as guideposts for our quarterly goals, which are more tactical. Y-goals are meant to be bold but attainable. Since they are written a year in advance and therefore more difficult to project, they are less tactical and broader than 3 or 6 goals.

3 Goals (Execution): Considering where we want to be in 12 months, what tactical results do we need to achieve in the next 3?

3-goals generally fall into one of two categories - completion based goals (e.g, launch a new product) or KPI-based goals (decrease reported critical bugs by 5%).

When writing your 3-goals, consider questions 2 and 3 above, i.e. note the concrete results that you are working towards this quarter and ensure that each goal has an attached binary outcome.

6 Goals (Intention): Again, we work from the end backwards. Considering where we want to be 12 months from now, what intention do we need to set in order to keep us on

pace towards our Y-Goals. When writing the 6-goals, same as the 3s, we identify the results we think we need to achieve 6 months from today (in this case, by the end of Q2).

Q2

Check Q1 3-goal progress and then create 3-goals for Q2. Note: *see the section in this document entitled “[Conducting the quarterly goal check-in](#) for more information about the check-in process.*

3-Goals: When writing 3-goals for Q2, we consider what was missed in Q1. Do any of those goals become 3-goals in Q2? Or are some no longer relevant? Our 3-goals should be as actionable as possible, so we consider whether the incomplete goals for Q1 are essential to success for the year.

- Refer to the 6-goals from Q1 but take a fresh view. Assuming no major stumbling blocks, most 6-goals from Q1 will directly inform 3-goals in Q2.
- If there are several incomplete but essential goals remaining from Q1, this will likely impact the number of 6 goals that can become 3 goals.
- We have the benefit of 3 months of experience and goal change and maintenance is a feature of the process. Consider what we have learned and what is feasible, given any goals from Q1 that you left on the table.
- We keep in mind the Y-goals to remember where we are ultimately trying to land.

6 Goals: Create 6-goals, listing the Y-goal that each 6-goal is nested beneath.

- Just as in Q1, considering where we want to be at the end of the year, what results do we need to achieve in six months?
- We are mindful of our Y-goals to reinforce where we are ultimately trying to land.

Q3

Check Q2 3-goal progress and then create 3 and 6-goals for Q3. As always, list the Y Goal each 3-goal for the quarter is nested under. *In terms of the method and approach,*

when writing 3 and 6-goals for the quarter, departments follow the logic detailed under Q2.

Q4

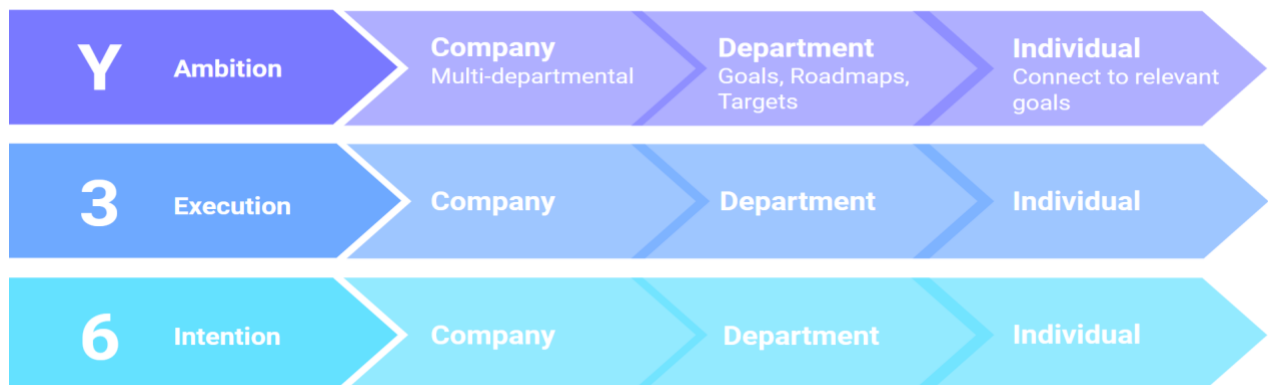
Check Q3 goal progress, create your 3 goals for Q4.

3 Goals:

At this point in the 36Y process, we are only 3 months from the end of the year so we key in our Y-goals. As Y-goals are written at the beginning of the year, they may seem less concrete than the more tactical goals that we've been writing each quarter. 3-goals for the last quarter of the year are not a cut/paste of the Y goals. We revisit the progress we have made in the previous nine months and write our tactical quarterly goals and desired results accordingly.

A visualization of the 36Y Process at the start of each year

1. **Starting with Y-Goals (our Ambition)**
2. **Confirming our 3-Goals (short-term Execution towards our Y-Goals in 3 months)**
3. **Confirming our 6-Goals (medium term Intention towards our Y-goals in 6 months)**



Conducting the quarterly goal check in (to be done at the conclusion of every quarter):

At the conclusion of every quarter, all 36Ys - Company, Departmental and Individual - should include goal “check-ins”. These function as goal progress post-mortems. This is our way of taking inventory of what we accomplished, what we have left on the table, and what we learned along the way in terms of shifting priorities and unforeseen dependencies. Please consider the below framework when conducting your check-in.

Important note: the check-in should never be a defensive exercise. Of course, individuals in the company can be both productive and engaged while falling short on their goals. This may be due to unforeseen circumstances and time-sensitive job responsibilities impeding goal progress. All of these realities are taken into account during individual feedback sessions.

Quarterly Check-In Format (*see below for more info on a suggested format - you are free to use other formats that address the same questions*)

3-Month Goals

3-month Goals Achieved:

3-month Goals Not Achieved:

List your incomplete goals and briefly explain the reasons for the incompleteness (e.g: unforeseen dependencies; change in priorities; unexpected other workloads; progress made but not enough time to reach completion/expected progress; etc.)

6-Month Goals

Review your 6-month goals from the previous quarter and determine the following for each goal:

- Goal becomes a 3-month goal for the upcoming quarter (modifications are ok)
- Goal becomes a 6-month goal for the upcoming quarter (modifications are ok)
- Goal is removed from the 36Y

Y Goals

Are any of the Y goals no longer achievable, or are all Y-goals still on target for the year?

OVERALL

What were the biggest opportunities/challenges you experienced this past quarter in pursuit of your goals? What did you learn?

B. Departmental 36Ys - Goal Setting Instructions and Tips

Once the Company 36Y has been completed, all departmental Leads are accountable for completing a departmental 36Y. As previously noted, each departmental goal must align with at least one Company goal. That Company goal that aligns with the departmental goal should be noted on the departmental 36Y.

Example 3-Goal Alignment: Company→Department

- *Q1 2021 Company 3-Goal:*
 - Ensure early Q2 readiness for first iteration of employee feedback and alignment program
- *Q1 2021 Operations Departmental 3-Goal:*
 - Design first iteration of employee feedback, alignment, and development program, and determine the follow-up work and cadence

When writing goals for the year or for a particular quarter, we identify the departments or individuals that act as dependencies - If the pursuit of a particular goal in some way depends on another department or individual's work, we note that information within the ticket on JIRA.

Writing Departmental Y-Goals (Our Ambition)

As noted in section A, the structure of a departmental 36Y should mirror the structure of the Company 36Y. Before beginning the departmental goal setting process, each Lead takes the time to understand the scope of the Company 36Y. Leads pinpoint their department's contribution to the pursuit of each Company goal. Once that understanding has been achieved, each Lead begins the process of writing departmental goals. As noted, when writing the departmental Y-goals, the Lead should ask and answer *three* central questions (outlined below).

1. Why is the goal important?

- This is the opportunity to specify how a departmental goal aligns with a particular Company Y-goal or goals. By answering this question, we can ensure that departmental goals are always relevant.

2. What do we want to achieve?

- Now that we've documented how each departmental goal aligns with a Company goal or goals, this is an opportunity to spell out what each department is trying to achieve. We are as specific as possible in our wording. Our goals should be tangible. They should be written in terms of binary outcomes, i.e. a goal is either complete or incomplete and there should be little to no room for subjectivity.

3. How do we know it's been achieved?

- Answering this question ensures that we've taken the time to define how we *measure* success for every goal. We avoid vague statements starting with words like "improve." Y goals should not be subjective. Here we truly specify what it means to be done with a goal in a way that leaves no room for interpretation.

Writing Departmental 3 and 6-Goals:

Departmental 3 and 6-goals set the tactical agenda for every team in the Company. As with the Y-goals, departmental quarterly should always align with the Company's quarterly goals. As noted, 3 Goals tend to fall into one of two categories - completion based goals (e.g., launch a new product) or KPI-based goals (increase conversion rate to 5%).

Departmental Leads may reference the following question: Considering where the department is aiming to be at the end of this year, what specific, tangible results do we need to achieve in the next quarter?

C. Individual 36Ys - Goal Setting Instructions and Tips

Once Leads finalize departmental goals, all Employees write individual 36Ys. Before beginning the individual goal setting process, each team member should fully grasp their department's 36Y - it is necessary for everyone to understand how we are prioritizing our work on a team basis before setting individual goals. Each employee begins the process of writing individual 36Ys once they understand their individual contribution to their department's 36Y.

Employees should find direct individual contributions to their departmental Y-Goals and 3-Goals and ensure they drive individual goals. With that in mind, *each individual goal should align with at least one departmental goal*. If there are no direct contributions by you to a specific goal, then we define how our jobs are enabling someone else on our team to directly pursue a departmental goal. If it is still not clear, Lead should work with individual team members to understand what contribution you can make

Example 3-Goal Alignment: Department→Individual

- Q1 2021 Operations Departmental 3-Goal: Ensure that all Employees have their Bill of Rights with an accountable manager(s) for each right.
- Q1 2021 Operations Team Member 3-Goal: Update and distribute updated Bill of Rights cards for each employee

Setting Individual Goals:

When setting Individual 3-goals, a department's goal agenda for the quarter should help define individual accountability. Leads setting departmental goals for the quarter can ensure an understanding of individual contributions to a particular quarterly goal. Once everyone understands that individual contribution, we draft our Individual 36Ys for the quarter (following the below tips).

Note: for anyone new to the process, you can find many examples of both departmental and individual 36Ys [here](#) on Confluence. Please feel free to apply the format used and suggested by your department lead. When finished, you should post your individual 36Y within your department's 36Y section.

D. Individual and Departmental Goal Writing Tips - For Y and 3 Goals

- A departmental goal should list the Company goal or goals that it is nested beneath.
- An individual goal should list the departmental goal or goals that it is nested beneath.
- The tried and true [S.M.A.R.T goal framework](#) continues to be a useful guide for tech companies like ours. If properly followed, the EM 36Y process should ensure that we are all writing goals which are specific, relevant, and time bound.
- Ensuring goal measurability (the “M” in SMART) is key, however. As mentioned, all goals (especially 3 goals) should be written in a way that ensures a clear understanding of what it means to have achieved that goal. Goals should never be subjective. We should specify what it means to be *complete* with a goal in a way that leaves no room for interpretation. When a goal has been achieved, what hard-evidence will validate that achievement to someone else in the company? If we cannot think of what that hard evidence will be, the goal may need to be edited.
- Use active, assertive verbs that are outcome-oriented and reflect achievements: Avoid vague statements that don’t reflect your active stake in every goal.
 - Verbs to use: create, deliver, execute, plan, define, complete.
 - Verbs to avoid: help, support, contribute
- As mentioned, avoid vague goal statements starting with words like “improve,” or “optimize” as they’re open to interpretation.
 - Poorly worded goal: “Improve customer experience and engagement through regular business reviews”
 - Well worded goal: “Launch newly updated quarterly business review framework across all customers”

Ensuring individual development goals

Employees are encouraged to identify and achieve goals that build on their individual job skills. Expanding your skills to maximize your individual value is absolutely encouraged for its own sake. When individual employees itemize such goals on their 36Y, they should tie them to specific departmental goals.

Example personal development goal:

- Complete a training course to build better product prototypes and documentation to achieve a more efficient product output.

In this case, this individual is aiming to build skills which are in alignment with a departmental goal to increase the efficiency of our product output. If an employee cannot articulate how a personal goal ties to one of their department's goals, that could be a sign of lower priority or misalignment. If there are other competing priorities, he or she might consider tabling the goal and revisiting it in a future quarter.

E: Using JIRA to input and track goals

All goals live in our task and ticket management platform (JIRA). Teams meet at least bi-weekly to review progress against their 36Ys. This ensures we have the right tracking and accountability in place to give feedback against our goals in real-time and adjust priorities accordingly. All employees post individual 36Ys to JIRA.

F. 36Y - Other Key Notes

Special note for Product Management and Engineering - leveraging other planning methods

Members of EM's Product or Engineering departments engage in other regular goal setting and work planning activities and frameworks outside of 36Y. Product management is responsible for maintaining product roadmaps, for example.

In either case, members of either department should apply goals from these other frameworks to departmental or individual 36Ys. For example, in the product roadmap, the product management department reflects its contribution to 2021 Company Goal #2, “Launch new Fare Marketing products and business lines, and bring new products to market faster.” In that case, members of the product management team can reference the roadmap and cut/paste into individual and departmental 36Ys as appropriate.

There are Company goals for which a department or an individual's contribution is not reflected in planning frameworks beyond the 36Y. For example, 2021 Company Goal #6 (“Enhance EveryMundo brand equity beyond our products and industry, to include technical assets & thought leadership, company practices, and workplace”), requires contribution from all product and engineering teams. That contribution should be documented in both Departmental and Individual 36Ys, wherever possible.

Accountability for individual 36Ys

According to the Employee Bill of Rights, managers are responsible for ensuring the completion of individual 36Ys for their direct reports. Managers should also:

- Provide guidance on how to write individual 36Ys by following company guidelines
- Help ensure that individual goals align with team and company goals
- Encourage team members to include individual goals that support both personal growth and contribution to departmental goals
- Follow-up and check-in on goal progress

More on Goal Alignment:

As indicated in the introduction, our company goals illustrate how we plan to achieve our strategic vision at EveryMundo. Departmental goals are intended to ensure the achievement of our company goals. Individual goals are intended to ensure the achievement of our departmental goals while giving everyone space for individual growth that contributes to the success of their teams. This is what we mean when we talk about

alignment. Below is an example of goal Company→Department→ Employee Alignment.

Please review this chart from the top down:

Goal Type	Example
Company	Complete second formal round of the Feedback & Alignment Program company-wide
Departmental	Lead and execute launch of the of Feedback and Alignment Program by May and compile managerial feedback for distribution
Individual	Draft all of the Google forms necessary to complete and execute launch of the program

36Y is a working process and framework - we're always looking for opportunities to optimize. For more information, questions, or suggestions, please don't hesitate to reach out. **Contact the Ops team at MundoOps@everymundo.com**