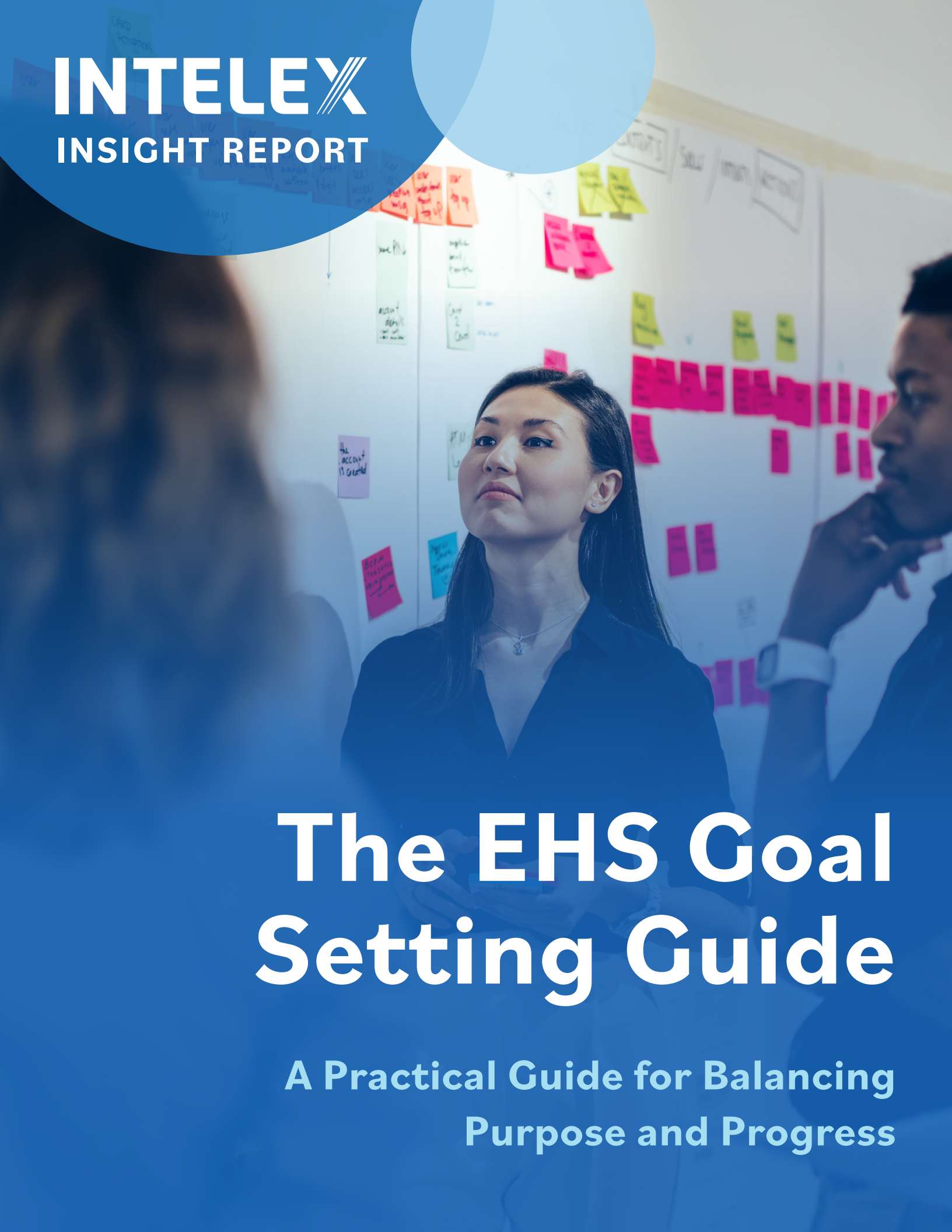


The background of the entire page is a photograph of a woman with long dark hair, wearing a dark blue shirt, looking upwards and to the right. She is in a meeting room, and the wall behind her is covered with numerous colorful sticky notes (pink, yellow, orange, green) and whiteboards. The image is overlaid with a large blue circular graphic in the top left corner.

INTELEX

INSIGHT REPORT

The EHS Goal Setting Guide

A Practical Guide for Balancing
Purpose and Progress

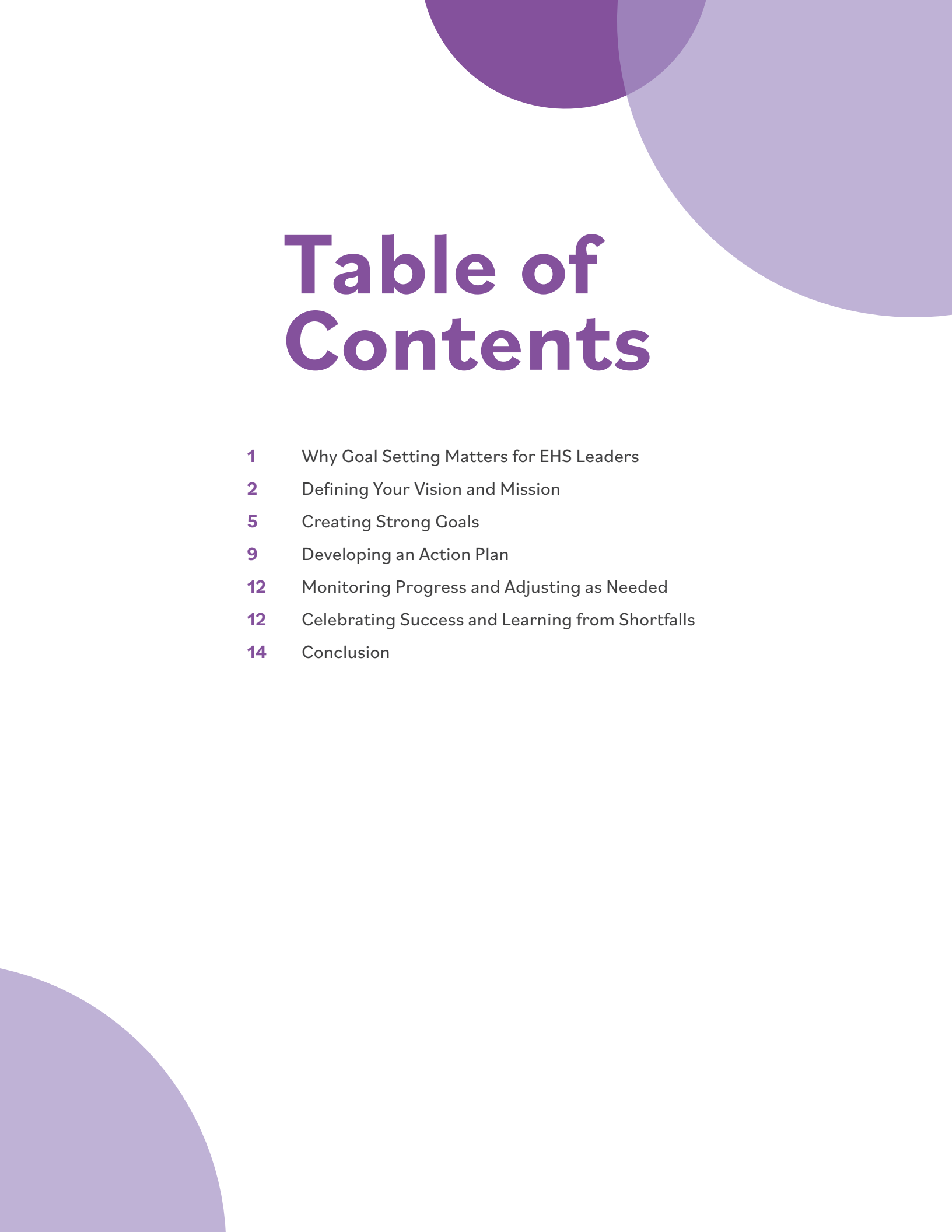


Table of Contents

1	Why Goal Setting Matters for EHS Leaders
2	Defining Your Vision and Mission
5	Creating Strong Goals
9	Developing an Action Plan
12	Monitoring Progress and Adjusting as Needed
12	Celebrating Success and Learning from Shortfalls
14	Conclusion



Why Goal Setting Matters for EHS Leaders

EHS leaders juggle everything from worker health and compliance to ESG and sustainability. With so many competing priorities, it's easy to get caught up in tasks and lose sight of the bigger picture.

That's where goal setting comes in. Clear goals turn scattered efforts into focused strategy. They sharpen priorities, keep teams aligned, and provide a roadmap for real progress—not just box-checking.

Strong goals do more than track safety performance—they create accountability, highlight where to focus resources, and help your program keep improving over time. Whether you're aiming to reduce incidents, strengthen culture, or meet new compliance standards, the right goals are what turn safety plans into measurable outcomes.

This guide will walk you through setting high-impact, achievable safety goals that drive meaningful results—and keep your program moving forward.



Before you set your goals, get clear on why they matter. Effective safety programs start with a clear vision and mission. Vision defines the future you want to create. Mission defines how you'll get there.

Defining Your Safety Vision and Mission

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Create a Safety Vision Statement

Your safety vision is your long-term aspiration. It should be:

- Clear and concise (1–2 sentences)
- Emotionally resonant
- Aligned with company values and purpose

Prompt questions to guide you:

- What does world-class safety look like in your organization?
- How should safety shape daily decisions, behaviors, and culture?
- What's the ideal future you want to create for your team?

Example Safety Vision:

“To build a workplace where every employee feels responsible for safety and goes home healthy every day.”

Create a Safety Mission Statement

Your mission defines how you'll achieve your vision. Focus on purpose and action.

Prompt questions to guide you:

- What is the role of the safety team in fulfilling the vision?
- How do you intend to lead, support, or empower others?
- What principles will guide your daily work?

Example Safety Mission:

“Through education, technology, and cross-department partnerships, we proactively identify risks, prevent incidents, and foster a culture where safety is a shared value.”

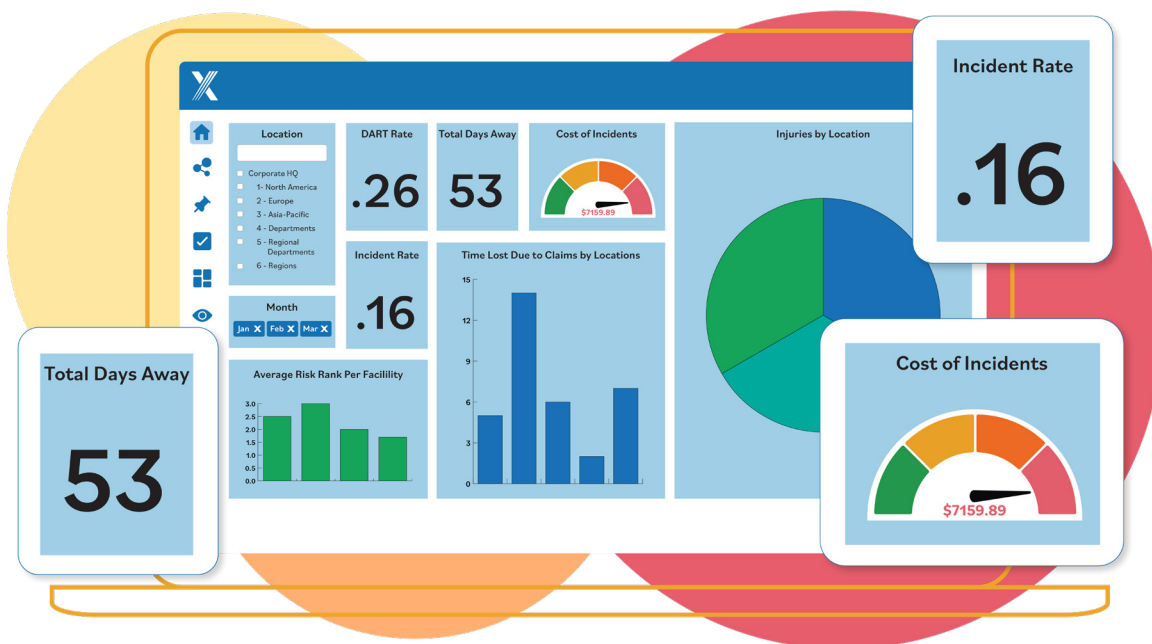
Intelix Tip

Crafting Your Vision and Mission

- **Involve others.** Ask employees and leaders for input. Their feedback builds alignment and ownership.
- **Keep it simple.** One or two strong sentences will stick better than a paragraph.
- **Test it.** Share your draft with others—if it doesn't resonate or inspire, revise until it does.
- **Gain endorsement.** Once finalized, share it widely and ensure leadership supports it. Their buy-in sets the tone.

Quick Win

Use Intelix reporting to assess your current baseline across key safety and compliance metrics. Knowing where you are today makes it easier to set meaningful goals for tomorrow.



Creating Strong Goals

Start with the big picture. Strong goals connect safety priorities directly to your company's business strategy. To get there:

- Meet with executive leaders to understand top objectives.
- Review KPIs, ESG goals, and annual reports.
- Partner with HR, Operations, and Compliance to identify shared priorities.

Grounding your goals in existing business priorities strengthens buy-in and clarifies impact.

Identify Gaps, Risks, and Opportunities

Next, assess where things stand. Where are your biggest risks, blind spots, or cultural gaps? What systems or behaviors are blocking your safety vision?

Use these insights to shape focused, impactful goals.

Define What Success Looks Like

A strong goal focuses on **outcomes, not tasks**. Ask:

- What results do we want to achieve?
- How will we measure progress?
- How will this goal advance both safety and business priorities?

This is where the **SMART** framework comes in.



HOW TO CREATE STRONG GOALS

01 SPECIFIC

Be clear and focused. Spell out exactly what you want to accomplish—no vague language.

02 MEASURABLE

Define how you'll track progress. Choose metrics or milestones that show whether you're moving in the right direction.

03 ACHIEVABLE

Make sure it's realistic. Consider your resources, timeline, and team capacity to set goals that are challenging yet doable.

04 RELEVANT

The goal should tie directly to your EHS mission and align with broader business priorities.

05 TIME-BOUND

Set a clear deadline. A defined timeline creates urgency and keeps the team accountable.

Example Goals in Action

Example 1

Company Priority

- Attract and retain younger, digitally savvy workers.

EHS Goal

- Roll out mobile health and safety reporting tool to 100% of deskless employees by end of Q2.

Why It Works

- Younger, digitally native generations expect these kinds of tools in their workplace, and innovative solutions like this help position the company as a forward-looking, worker-first employer.

Example 2

Company Priority

- Reduce non-value-added costs across operations.

EHS Goal

- Keep workers' comp costs flat by reducing recordables to below 2.0 TRIR by end of Q4, aligned with Manufacturing's case cost reduction goal.

Why It Works

- Connects EHS improvements directly to financial impact.



Outline Your Goals

Fill in the template for your own SMART health and safety goal.

COMPANY PRIORITIES	
01	
02	
03	

Goals to support the company priorities above

GOAL 01	SPECIFIC MEASURABLE ACHIEVABLE RELEVANT TIME-BOUND	
GOAL 02	SPECIFIC MEASURABLE ACHIEVABLE RELEVANT TIME-BOUND	
GOAL 03	SPECIFIC MEASURABLE ACHIEVABLE RELEVANT TIME-BOUND	

Keep Goals Front and Center

- **Keep goals visible.** Making them easy to see helps maintain a clear and focused roadmap.
- **Use them as a reference point.** Regularly revisit goals to prevent drift and keep efforts aligned.
- **Reinforce accountability.** Clear goals ensure everyone understands their role in achieving success.
- **Leverage your tools.** Use project management software, dashboards, and check-ins to keep goals front and center.
- **Build team commitment.** Regular goal-focused meetings foster a shared sense of ownership and progress.

Quick Win

Keep goals visible by building a homepage dashboard in your EHS management system.

Visibility drives accountability—and helps your team stay focused on what matters most.



Developing an Action Plan

Once you’ve mapped out the steps to reach your goals, prioritize tasks and organize them in the right order. This helps you spot dependencies—like tasks that need to be done before others can start—and prevent bottlenecks.

Most goals involve multiple players, which makes clear roles essential. Without them, deadlines slip, ownership gets messy, and progress stalls.

The RACI model helps by making sure everyone knows their role and what’s expected at each step—and preventing confusion and finger-pointing when things go off track.

R	RESPONSIBLE	Who will do the task? This is the person(s) responsible for getting the job done.
A	ACCOUNTABLE	Who will be accountable for the task being completed on time and properly? This person is often the Responsible person’s direct supervisor or team lead.
C	CONSULTED	Who will contribute to the completion of the task? May be one person or multiple people, such as internal or external subject matter experts, who are not responsible for completing the task but support the execution by providing expertise and knowledge.
I	INFORMED	Who needs to know the status of this task? Frequently the person who’s responsible for the next activity in the sequence, or another collaborator whose work depends on the outcome of the task. Informed individuals may need periodic updates on the task’s status or performance prior to completion.



Example of a RACI Matrix

Task	EHS Manager	IT Lead	Operations Manager	Safety Champions (Frontline Reps)	Executive Sponsor
Define user requirements for mobile reporting	R	C	C	C	I
Evaluate technology options	C	R	C	C	I
Approve technology selection	C	A	I	I	R

Assign Responsibilities

Fill in tasks and assign roles to meet your goal.

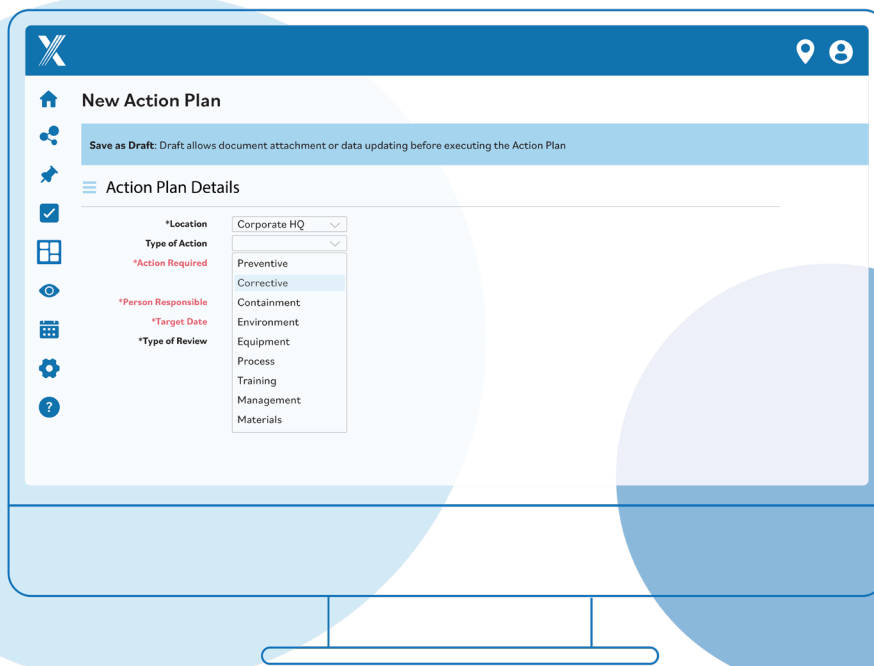
Task	Role 1	Role 2	Role 3	Role 4

Keep the Momentum Going

- **Set clear owners.** Assign each task to a specific person so there's no confusion about responsibility.
- **Break work into checkpoints.** Smaller milestones make it easier to spot delays early and keep momentum.
- **Review regularly.** Quick, consistent check-ins help resolve roadblocks before they slow you down.

Quick Win

Use **Action Plans** to quickly assign, track, and manage digital tasks across departments. Action Plans help transform strategic goals into coordinated daily actions that move you closer to your vision.



The screenshot shows a web application interface for creating a new action plan. The header is blue with a white 'X' logo and location/user icons. The main content area is titled 'New Action Plan' and includes a 'Save as Draft' note. Below this is the 'Action Plan Details' section with several dropdown menus: 'Location' (Corporate HQ), 'Type of Action' (Preventive, Corrective, Containment, Environment, Equipment, Process, Training, Management, Materials), 'Person Responsible', 'Target Date', and 'Type of Review'. A sidebar on the left contains various icons for navigation.



Monitoring Progress and Adjusting as Needed

Set a Regular Review Schedule

Set a regular review schedule to maintain visibility into progress and give stakeholders opportunities for feedback and course correction.

- Set regular check-ins—daily, weekly, or monthly, depending on the project's scope.
- Use digital updates when real-time meetings aren't practical.
- Focus check-ins on progress, challenges, and next steps.

Evaluate and Adjust

Ask yourself:

- Are tasks on track?
- Are results meeting expectations?
- Are resources available when needed?

If progress stalls, scan your activities to spot bottlenecks or lagging tasks.

- Stay flexible as you pursue your EHS goals.
- Be ready to pivot if challenges arise.
- Reassess regularly to ensure your goals stay relevant and realistic.

Adjustment isn't failure—it's how resilient safety programs succeed over time.

Adjustment isn't failure—it's how resilient safety programs succeed over time.

Celebrating Success and Learning from Shortfalls

Recognize Achievements

Recognizing good performance builds morale, reinforces positive behavior, and shows people their work matters.

Celebrate progress, no matter the outcome. Giving credit where it's due reinforces trust and engagement.

Acknowledge Wins and Setbacks

Don't just spotlight wins. Addressing both successes and setbacks creates a culture of learning and continuous improvement.

Safety isn't all-or-nothing. Progress happens step by step, and every gain—big or small—matters.

Health and safety isn't pass/fail—it's a journey, and every step counts.

Capture Lessons Learned

When things don't go as planned, document lessons learned to fuel continuous improvement.

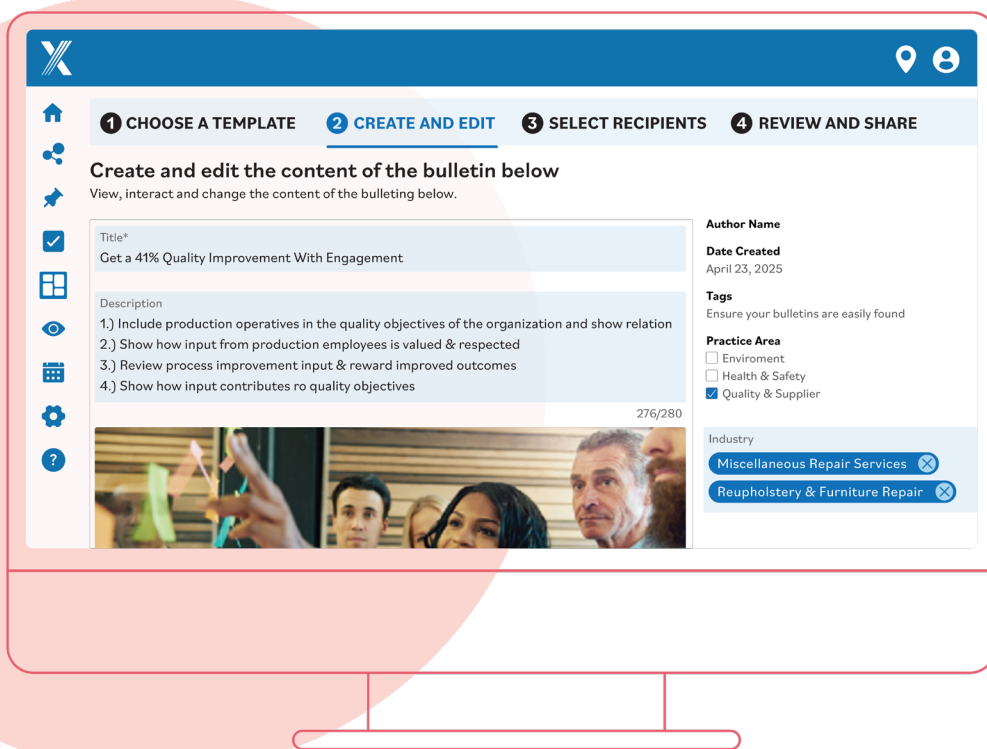
Intelex Tip

Communication is Key

- **Keep everyone updated.** Regular updates ensure all stakeholders stay aligned and engaged.
- **Close the feedback loop.** Create clear channels for teams to ask questions and share concerns.
- **Make it visible.** Share wins and progress visibly using dashboards, bulletin boards, or digital bulletins.

Quick Win

Use the **Bulletins** feature to keep employees engaged with relevant, targeted content—on any device. Notify teams of critical process changes, key reminders, or wins. You can also gather real-time feedback with polls and surveys to measure engagement.



The screenshot shows the 'CREATE AND EDIT' step of the bulletin creation process. The interface includes a progress bar at the top with four steps: 1. CHOOSE A TEMPLATE, 2. CREATE AND EDIT (active), 3. SELECT RECIPIENTS, and 4. REVIEW AND SHARE. Below the progress bar, the title 'Get a 41% Quality Improvement With Engagement' is entered. The description lists four points: 1.) Include production operatives in the quality objectives of the organization and show relation, 2.) Show how input from production employees is valued & respected, 3.) Review process improvement input & reward improved outcomes, and 4.) Show how input contributes to quality objectives. The author name is 'Author Name', the date created is 'April 23, 2025', and the tags are 'Quality & Supplier'. The practice area is 'Quality & Supplier'. The industry is 'Miscellaneous Repair Services' and 'Reupholstery & Furniture Repair'. A photo of three people is shown at the bottom.

1 CHOOSE A TEMPLATE **2 CREATE AND EDIT** **3 SELECT RECIPIENTS** **4 REVIEW AND SHARE**

Create and edit the content of the bulletin below
View, interact and change the content of the bulletin below.

Title*
Get a 41% Quality Improvement With Engagement

Description
1.) Include production operatives in the quality objectives of the organization and show relation
2.) Show how input from production employees is valued & respected
3.) Review process improvement input & reward improved outcomes
4.) Show how input contributes to quality objectives

Author Name
Author Name

Date Created
April 23, 2025

Tags
Ensure your bulletins are easily found

Practice Area
☐ Environment
☐ Health & Safety
☒ Quality & Supplier

Industry
Miscellaneous Repair Services
Reupholstery & Furniture Repair



Take a Measured Approach to EHS Goal Setting

It's tempting to aim for sweeping change when setting EHS goals—but lasting progress happens step by step. Focus on making consistent progress over time. A balanced, steady approach leads to stronger long-term results and better safety outcomes.

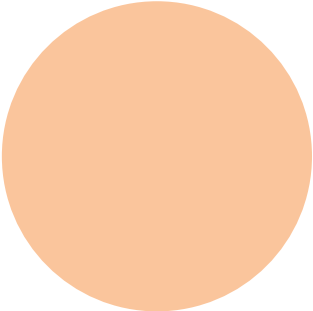
Real-World Example: Ampcontrol's EHS Journey

Intelex is proud to have been part of many important EHS improvement initiatives.

In 2019, Ampcontrol set a goal to improve its EHS maturity. To support this, the company upgraded its safety management software to Intelex. Over the next two years, they closely tracked their process improvements, and the results were significant:

- 76% fewer recordable injuries.
- 70% wider access to mobile tools.
- 633% increase in HSEQ inspections completed.
- 81% more safety conversations between leaders and frontline teams.
- 490% increase in hazards reported.

Balancing EHS goals with broader business priorities is never simple. But safety professionals who navigate competing demands and keep stakeholders aligned prove the value of their programs—and deliver tangible success for the people counting on them.



Progress happens
over time - a
balanced approach
is key to long-term
success.

Start a Conversation

Ready to see how our suite of software can drive real results for your safety, health and environment goals? Book some time to see what's possible.

Pricing Information

Looking for a custom quote or pricing details? We'll give you a breakdown of the total business value of our software, projected ROI and both hard and soft dollar benefits.

Personalize Your Demo

Prefer to go solo? Use our demo builder to create your own personalized online experience. Choose from our pre-made demos or handpick features from our EHSQ solutions to make it your own.

Disclaimer

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For over 30 years, Intelix has been making a difference in the world by helping our 1,400 customers achieve safer, more sustainable operations. Our web and mobile solutions streamline and simplify environmental, safety, quality and risk management, empowering organizations to meet the challenges of an increasingly complex marketplace while minimizing negative social, environmental and human impacts. Intelix is proud to be an operating company of Fortive Corporation, which provides strength in numbers, strength in skills and perspectives and strength in our shared conviction to make an impact.