

Strategic Talent Assessment and Reporting System



Goal Plan Quick Reference Guide



The **Goals** tab provides managers and employees with a work area to enter and manage their goals. In this guide, learn how to create, cascade, and edit goals.

1 Get Started

To view your Goal Plan or interact with an employee's Goal Plan, click on the **Goals** tab.

2 Create Goals

To add goals to the plan, select one of the following:

Click the **Create a New Goal** button to add a new goal directly to the plan. A new window will open where you will populate the goal details.

Click the **Goal Wizard** button to step through a writing process for creating a S.M.A.R.T. goal. A new window will open to guide you through the process.

3 View Others' Goals

Employee Hierarchy allows an employee to view his/her manager's goals and allows a manager to collaborate by reviewing, commenting on, aligning, and editing the goal plans of his/her staff.

Click the magnify icon to view an employee's plan.

Indicates the name of the current Goal Plan displayed.

Use the **Find user** search box to search for employees and view their goal plans.

4 Display Options

Select the display options by checking box(es) and clicking the **Update** button to change the columns displayed.

5 Cascade Goals

A manager may cascade a goal to a direct report. This allows a manager to align his or her goal(s) with others. To cascade goals to individuals, select the goal check box and click the **Cascade Selected** button.

6 Alignment Up & Down

A cascaded goal appears in the manager's plan and the recipient's goal plan and can then be edited by the manager and employee to align with their role. An aligned goal will display with an or icon on the plan. Arrows will appear if you have the Align Up and Align Down display options selected.

https://performancemanager.successfactors.com/#focus - SuccessFactors: 2008 Goal Plan for Manny - Windows Internet Explorer

Welcome, Manny Manager Options Logout

Home Goals Performance Development Company Info Employee Files Reports

2008 Goal Plan for Manny Manager

Goal setting is the **first step** in our annual performance process. The Employee and their Manager together define "WHAT" the employee is going to accomplish. During the review period, you will have the opportunity to review and, if necessary, modify these goals with your manager.

Note: All business goals are initially created as private. To make a goal public, simply click on the glasses to the left of the goal. Private goals are only viewable by the employee and their management. Public goals are also viewable by those who report to you within your organizational hierarchy.

Cascade Selected... Goal Wizard Create a New Goal

Employee Hierarchy Dave Director (ddirector) Find user: Go Advanced search

Manny Manager Edward Employee

Display Options Aligned Up Aligned down Alerts Visibility Last Modified Measurement Weight Start Due Status % Complete Tasks Update

Displaying 1-2 of 2 Goals

Customer	Visibility	#	Goal	Measurement	Weight	Start	Due	Status	% Complete	Action
	<input type="checkbox"/> Public	1.1	Conduct focus groups and surveys by (date) to identify customer needs and preferences	Research conducted and analyzed	0.0%	01/01/2008	12/31/2008	Not Started	0.0%	
	<input type="checkbox"/> Private	3.1	Attend a training in performance management soft skills	Training attended	0.0%	01/01/2008	12/31/2008	Not Started	0.0%	

Business Operations

Learning and Growth

Visibility	#	Goal	Measurement	Weight	Start	Due	Status	% Complete	Action
<input type="checkbox"/> Private	3.1	Attend a training in performance management soft skills	Training attended	0.0%	01/01/2008	12/31/2008	Not Started	0.0%	

7 Goal Details

Click on a goal title to review details including cascade information and history of changes to the goal.

NOTE: Performance and Development goals are automatically linked to Performance Review forms on the Performance tab. SuccessFactors automatically updates changes made in the Goals to the Performance and Development Plan form.

8 Goal Information and Action Icons

Perform any of these tasks on individual goals:

Edit the goal.

Use the arrows to change the order of your goals in the plan.

Add to Calendar - Creates a calendar entry that may be imported into Microsoft Outlook Calendar.

Adding a Goal

Click the button. Select the button to enter goals directly. A new screen will open; complete all the sections as described below.

- 1 **Visibility** – By default, goals are marked as private, viewable by you and your manager. Change the visibility to public to make your goal viewable by everyone within the system.
- 2 **Category** – Assign a goal to a category.
- 3 **Goal** – Enter details that clarify the goal and your role in achieving the goal.
- 4 **Measurement** – Enter the successful outcome of your goal, including quantifiable measures and milestones.
- 5 **Weight** – Enter percentage to indicate relative importance to your overall plan. Total of all weights must add up to 100%.
- 6 **Start/Due Date** – Enter the estimated start and completion dates for the goal.
- 7 **Status** – Use the drop down menu to select the current status of the goal.
- 8 **% Complete** – Track progress toward completion of the goal.
- 9 **Tasks** – Add specific activities and target dates for completing the task. Use the icon to add tasks and icon to remove actions.
- 10 Click the button to save the goal, close the window, and return to the goal plan.

Goal Library

The **Goal Library** provides a template to assist in writing goals. Browse folders and select goals from an organized library with suggested metrics. To view the Goal Library, click the button and select the button.

1. Use the folders to browse functional job areas.
2. Use the radio button to select a Goal.
3. Click the button to open the edit Goal window. The Goal Library pre-populates the form with suggested content. Add metrics, tasks, and specific details to the goal.

Spotlight: Goal Wizard

Use the **Goal Wizard** to write effective Goals easily. Click on the button to step through the process of writing a S.M.A.R.T. goal. Goal Wizard constructs goals based upon your inputs. A new window opens.

- 1 To see suggested text from the goal library, type in actions or key words. The wizard automatically suggests goals based upon your entry.
- 2 Select a suggested goal or continue writing your own goal and then click the button.
- 3 The Goal Wizard steps through a series of screens to aid in building the details of the goal. Advance through the process by continuing to click the button.
- 4 On the final screen, review and confirm the details of the goal. Click the button to edit the goal. When done, click the button to add the goal to the plan.

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Cascading a Goal

Cascading a goal enables managers and direct reports to collaborate and align goals **within their own hierarchy**. To cascade a goal, managers will select the check box for a given goal and click the button.

- 1 The Select Recipients window opens. Select the check box next to employees to whom you want to cascade the goal.
- 2 If you do not see the appropriate employees, click the **Find Other Employees** link to search for employees.
- 3 Click the button to review the goal details before cascading.
- 4 The **Edit Goal** window opens. Here you can edit fields, add steps or additional comments regarding the expected performance of the selected employee(s). **NOTE:** Any edits made to the goal will only appear in the recipient's goal and will not update the original goal.
- 5 Click the button to cascade the goal to the recipient's plan, or click to select additional recipients. To close the window without cascading the goal, click the button.

Cascade a Goal to Yourself

To copy goals to your plan from your manager's or employee's plan:

1. Use the Employee Hierarchy to browse your direct report's goal plan.
2. Use the check boxes to select the goal(s) that you want to copy.
3. Click button to copy the goal details to your plan.
4. Return to your goal plan by clicking the **Goal** tab. Use the edit icon to edit fields to add additional information regarding your expected performance on the goal.

Spotlight: Writing Effective Goals with S.M.A.R.T.

Regardless of the type of goal ensure that your goals are S.M.A.R.T. Use the S.M.A.R.T. goals methodology to write effective goals. Overall, whenever you create a goal, try to ensure it is:

- S**pecific Goals should be straightforward and clearly define the task(s) that you would like to achieve.
- M**easurable Establish concrete criteria for measuring progress toward the attainment of each goal that you set.
- A**ttainable Goals must be within your capacity to reach. You cannot commit to accomplishing goals that are too far out of your reach, or unreasonable.
- R**elevant Make sure each goal is consistent with other goals you have established and fits with your immediate and long-range plans.
- T**ime Bound Setting an end point on your goal gives you a clear target to work towards.

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