

Performance Evaluation Form for Managers



After the employee completes the self review, the form is routed to the manager for review. The manager provides an assessment of performance against agreed goals and competencies listed on the form during the Manager Review. In this guide learn the basic features of the form and process as well as the steps to complete the Manager Review.

1 Getting Started

To get started, select the Manager Review link on the To-Dos list. Forms requiring actions or input are available in the Inbox on the Performance tab which organizes all current and completed forms in a series of folders.

2 Form Sections (see Form Sections)

Form Sections display the information required to complete the form. Sections are added as the form moves through the review process. Instructions are provided for each section.

3 Ratings

Use the rating drop down to select a rating that represents the employee's performance on the item listed. Click on the Rating link to view an expanded definition of each rating listed on the drop-down menu.

4 Comments

Use the comments field listed for each item on the form to provide comments evaluating progress, demonstration of performance, and/or examples to support the ratings provided.

5 Comment Tools

Comments support rich text formats including colors, bold, and bullets. Click in a comments text box and the toolbar appears. Tools include: **Spell Check** | **Legal Scan** | **Writing Assistant**

6 Form Status/Route Map

The current performance stage is highlighted in bright green on the form with required routing actions listed below the progress bar. Routing options are listed below the current stage and vary by participant and differ during the performance process.

Send - Sends the form to the next step.

Route - Routes the form between manager and employee for iterative steps without advancing to the next process stage.

NOTE: After selecting the review option, the form automatically starts the Spell Check and Legal Scan of comments. Complete the scans before sending the form to the next step.

7 Form Toolbar

View Form - Changes display to full form.

View By Section - Changes display to section by section.

View By Item - Changes display to item by item on an individual section.

Spell Check - Spell checks all comments on the form.

Legal Scan - Searches all comments and flags potentially inappropriate words.

Print - Prints the form.

Save - Saves changes and updates to the entire form.

Form History - Review the history of the form through the process.

Notes - Review notes and reminders written about the employee.

Audit Trail - Displays audit trail information related to the process.

Add to Calendar - Creates a calendar entry for the next form step due date.

Performance Management Quick Reference Guide

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Overall Performance Summary

At year-end after completing the review of each section, finalize the review by following the steps below:

- 1 Select the **Overall Performance Summary** section. This section summarizes your ratings regarding the employee's overall performance during the review period.
- 2 Click the **Save** button to update the summary ratings displayed on the form.
- 3 Ratings are listed for each section. Weights are applied to certain sections.
- 4 Performance Management calculates an overall rating for the employee based upon your ratings and assigned weight.
- 5 Select the **Overall Performance Rating** link to learn more about the rating scale and definition.
- 6 Use the **Overall Comments** text box to include factual comments supporting your overall rating.
- 7 If necessary, you may return the form to the employee for additional revisions to the comments or ratings by clicking the button. NOTE: Your comments and ratings will be visible to the employee. Be sure you are ready to share this information with the employee.
- 8 To complete the review, click the button to route the form to the second level manager for review and approval.

Performance Evaluation - Self Review for Edward Employee

Employee Self Review → **Manager Review** → HR Review → Signature → Completed

Send To Edward Employee (7) | Send to HR Approval step (8)

Overall Performance Summary	Rating	Weights
Performance Goals	3.0 / 5.0 (5)	60.0%
Implement a customer retention program to increase retention rates.	3.0 - Meets Expectations	
Conduct monthly reconciliation of computer reports to operating reports	3.0 - Meets Expectations	
Core Competencies	3.0 / 5.0 (3)	15.0%
Job Knowledge	4.0 - Satisfactory with Commendation	
Dependability	3.0 - Meets Expectations	
Productivity	3.0 - Meets Expectations	
Quality	3.0 - Meets Expectations	
Communication	2.0 - Satisfactory with Reservation	
Integrity/Ethics	3.0 - Meets Expectations	
Role Specific Competencies	3.0 / 5.0	25.0%
Customer Service	3.0 - Meets Expectations	
Product Knowledge	3.0 - Meets Expectations	
Sales Goals	3.0 - Meets Expectations	
Sales Team Support	3.0 - Meets Expectations	
Teamwork	3.0 - Meets Expectations	

Overall Comments
Comments by Manny Manager: (6)

Writing Assistant | Coaching Advisor

Job Knowledge: Understands duties and responsibilities, has necessary job knowledge, has necessary technical skill, understands company mission/values, keeps job knowledge current, is in command of critical issues.

Meets (1)

Positivity: (2) Narrative: You Edward (3)

Place Text | Close Window

Spotlight: Writing Assistant

The Writing Assistant provides suggested text to quickly build review comments for competencies and values. Use the **Writing Assistant** to review sample descriptions of behaviors and performance levels. To add comments to the review, click the **Writing Assistant** link in the **Comments** toolbar. A new window will appear.

- 1 Select attributes and display suggested text.
- 2 Change the positivity and the narrative of the text.
- 3 Click the **Place Text** button to insert the text in the comments field. Multiple text can be added to each comment field. This is only a guide. You should edit the text to your specific review feedback.

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