

# Guide to Goal Cascading

## 2013 Extended Goal Plan for Benjamin Lee

Switch Plan: 2013 Extended Goal Plan

Use this worksheet to add or update your goals. To quickly add a new goal, click the "create a new goal button" or browse the Hierarchy section to find an existing goal to add to your plan.

The screenshot shows the 'Cascade Selected' dialog box with the following content:

**Step 1. Select Recipients**

Step 1 of 2. Select the employees to whom you want to cascade the goal.

Name	Title	Number of Team Members	Cascaded
Darlene Sharp	VP, Marketing	2	<input type="checkbox"/>
Benjamin Lee	Director, Marketing	5	<input checked="" type="checkbox"/>
Jaylynn Biersch	Public Relations	0	<input type="checkbox"/>
Carolyn R. Fields	Product Marketing Manager	0	<input type="checkbox"/>
Jameson Matheson	Web Manager	0	<input type="checkbox"/>
Jackie O'Connor	Social Marketing Manager	0	<input type="checkbox"/>
Andrea Toucas	Community Specialist	0	<input checked="" type="checkbox"/>

**Step 2. Edit Goal**

Step 2 of 2. You can edit the goal (optional) before cascading it to the selected recipients.

Fields marked with \* are required.

Already Cascaded To: Betsy Brown and Jackie O'Connor

Visibility: Public

Category: Financial

\*Goal Name: Provide quarterly reporting of inventory to appropriate managers

\*Metric: Quarterly inventory reports distributed

\*Weight: 50.0%

\*Start Date: 01/01/2013

\*Due Date: 12/31/2013

Visibility	#	Goal Name*	Metric	Weight	Start Date	Due Date	% Complete	Status	Action
Public	2.1	Implement an online	Online survey implemented	20.0%	01/01/2013	06/28/2013	30.0%	On Track	

Cascading objectives enables you to align your team's objectives with the company's strategic goals.

### It's Easy

#### 1 Cascade Selected Goal

To cascade a goal, click the goal's check box and click **Cascade Selected...**

#### 2 Select Recipients

The Select Recipients window opens. Click the check box next to the direct report to whom you want to cascade the goal. You can cascade the goal to multiple employees at the same time. Click the Find Other Employees link to view other employees in your reporting structure. When done, click **Next**.

#### 3 Edit Goal

The Edit Goal window opens. Here you can edit fields to align the goal with each employee's role before cascading the goal. Edits made to the cascaded goal will only appear in the recipient's goal and will not update your original goal. When done, click **Cascade** to cascade the goal to the selected employees' Goal Plan.

The screenshot shows the 'Goal Alignment Spotlight' report for the goal 'Lower average cost of spend in client acquisition'. It includes:

- Organizational Alignment:** Total number of employees aligned to this goal: 6 Employees. Of the 12 Employees on Carla Grant's team, 6 Employees are not aligned to this goal.
- Status of Aligned Goals:** A bar chart showing the status of aligned goals: 2 Not Started, 2 On Track, 2 Behind, 2 Completed.
- Completion of Aligned Goals:** A pie chart showing the completion rate: 50% Past Due (50%), 50% Not Yet Due (50%), 0% Completed (0%).
- Table of Aligned Goals:**

Goal Name	Category	Owner	Status	Start Date	Due Date	% Complete	Progress
Grow profit margins	Financial	Daniel Cortez	On Track	01/01/2013	12/31/2013	0%	Not Yet Due
Lower average cost of spend in client acquisition	Financial	Carla Grant	On Track	01/01/2013	12/31/2013	15%	Not Yet Due

### Spotlight: Goal Alignment Spotlight

Use the Goal Alignment Spotlight to track progress on cascaded goals. To create a report, click the icon in the Action column. The report displays:

- Total number of employees aligned to the goal.
- Status of aligned the goals.
- Completion rate of the aligned goals.
- Hierarchical listing of the aligned goal. Click the magnifying glass icon to expand or contract the view.