

Managing an Employee's Goals

The **Goals** form provides a collaborative area for you and your employee to create and track progress on the goals that your employee will focus on during the review period. In this guide, learn how to cascade, add, edit, delete, and/or monitor the goals on your employee's goal plan. Your employee's goals will be visible to you after they have been entered by the employee in the Goal Plan.

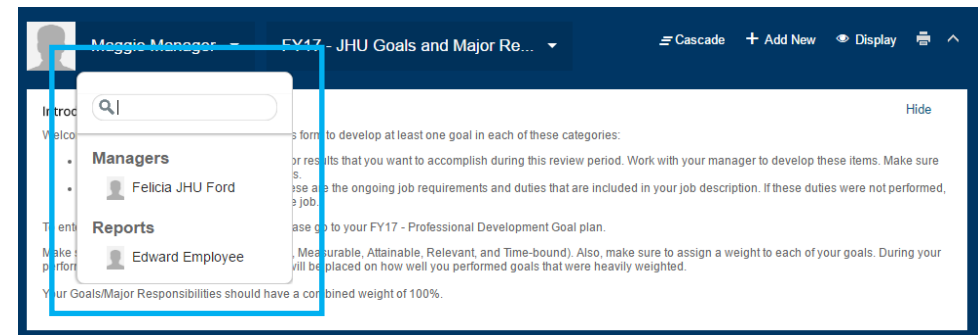
Setting Your Goals

To set your own goals, please [click here to access the Goals \(for Employees\) Quick Reference Guide](#). Please note, it is recommended that you set and share your goals with your employees prior to having employees draft their goals.

Viewing your Employee's Goals

The **Employee Hierarchy** can be used to view other employees' public goals, both up and down your hierarchy, to ensure goal alignment within the team and organization.

As a manager, you can also view and manage all of your employees' private goals. Click a name in the hierarchy to view that employee's goals. *Note that goals default to "private" status. If an employee prefers to create "public" goals, they may do so with your approval.*



Evaluating Employee Goals

You can review either your employee's Goal Plan or Development Plan. For JHU employees, check to see that your employee has created at least one goal in each of these three categories (JHHS employees should only use the Goals and Professional Development categories):

- **Goals:** These appear on the Goal Plan and are the priority outcomes or results that you want to accomplish during the upcoming review period. Make sure that these goals are aligned to your department's goals.
- **Major Responsibilities (JHU Only):** These appear on the Goal Plan and are the ongoing job requirements and duties that are included in your job description. If these duties were not performed, it would severely impact the nature of the job.
- **Professional Development:** These appear on the Development Plan, and are the steps that your employee would like to take to enhance job-related skills and capabilities.



Check to see that the weighting for the Goals and Major Responsibilities has a combined total weight of 100%. Evaluate each Goal and Major Responsibility item to ensure they include SMART components and the weighting accurately reflects the level of importance or priority. *If any changes or edits need to be made to your employee's Goals or Major Responsibilities, you can let your employee know or you can edit them yourself.*

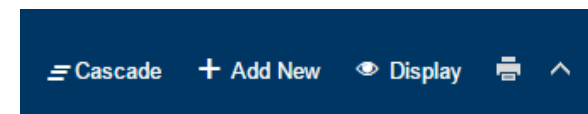
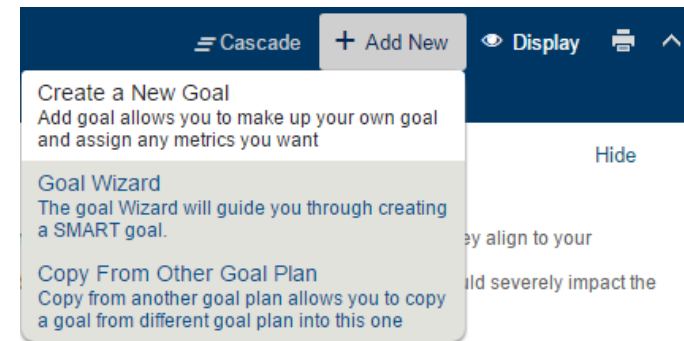
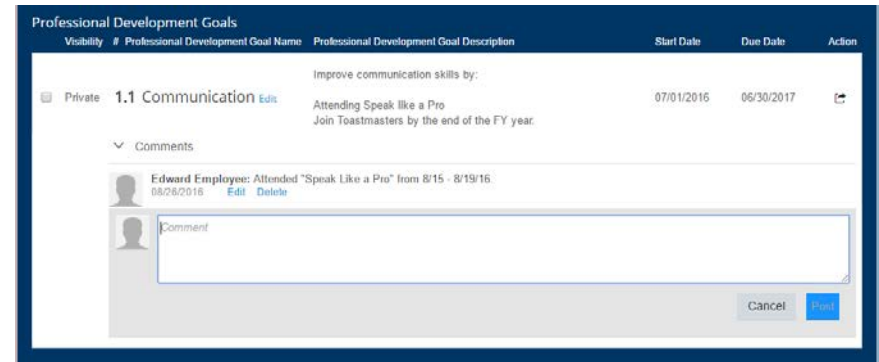
Commenting on Goals

Managers and employees have the ability to engage in back-and-forth commenting directly on the Goal Plan. Enter notes in the "Comments" field and click "Post." Once a comment is posted, it is immediately visible to the other party. Managers and employees can edit and delete their comments. At this time, any comments that are entered on the Goal Plan do not appear on the Performance Form.

Adding Employee Goals

You can add goals to your employee's plan. To add a new goal, click **Add New** in the upper right corner of the screen, then select one of the following:

- Click **Create a New Goal** to add a goal with custom metrics or select a goal with predefined metrics from the Goals Library.
- Click **Goal Wizard** to step through the process of creating a SMART goal. A new window will open to guide you.
- If you have used myPerformance for more than one year, you can also copy goals from a prior year's goal plan. Click **Copy From Other Goal Plan** and select the year you wish to copy. Select the goals you want to copy; you can then update or edit them.
- You can **Cascade** your goals to an employee. The employee would then inherit your goal in their individual goal plan. Goals that have been cascaded can be edited once they are in the employee's plan to indicate how the employee will contribute to the shared goal.



Add Goal

Click **Create a New Goal** and then select **Add Goal** to create a goal with custom metrics. A new window will open; complete the sections as described below:

- **Visibility:** You may choose for your employee's goal to be public or private (default). Be aware that a private goal is not a personal goal; it is still visible to you. If a goal is public, then it is visible to any employee.
- **Category:** Every goal must be assigned to a category. Goals is the default, but JHU employees may also choose Major Responsibilities.
- **Goal Name:** Type in the name of the goal.
- **Goal Description:** Type in the goal description.
- **Weight:** Enter a percent to indicate the goal's relative importance to other objectives on the Goal Plan. Your goals will be automatically calculated so you can see when they add up to 100% on the goal plan.
- **Start/Due Date:** Enter the dates that the goal is to start and be completed by.
- **Tasks:** Use this to add sub-tasks to help you track progress on the goal.

Please note that the **Goal Name** field is required (indicated by the red asterisk). Click **Save Changes** to save the goal and return to the Goal Plan.

Add Goal

Edit your goal below.

Fields marked with * are required.

Visibility:

Category:

* Goal Name:

Goal Description:

Weight: %

Start Date:

Due Date:

Tasks: [+ Add Tasks](#)

Add Library Goal

The **Goal Library** assists with writing goals by providing templates with suggested content and metrics. To use the Goal Library, follow these steps:

- Click **Create a New Goal**.
- Click **Add Library Goal**.
- Use the folders to browse functional job areas and review the sample goals provided in the goal library.
- Click a check box and click **Add Selected Goal** to select an objective.
- The Goal Library pre-populates the Add Goal window with suggested content, which can be edited as needed.

Create a New Goal

Choose what type of goal to add.

Add Goals allows you to make up your own goal and assign any metrics you want.

Library Goals are selected from an organized library with suggested metrics.

Select Goal from the Add Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

- Administration
 - Administrative Support
 - Achieve a customer satisfaction rating of at least ___ for services provided during (time frame) Satisfaction survey score
 - Become more proficient with computer software by attending ___ (#) of training courses per (time period) # of courses attended
 - By (date), document all administrative procedures for position in the case of absence # of procedures documented
 - By (date), follow all departmental policies and procedures # of policies and procedures not followed
 - By (date), meet ___ % of all agreed upon deadlines % of deadlines met
 - Conduct ___ (#) training sessions with other administrative personnel on new skills # of trainings conducted
 - Improve response time to customer requests to (unit of time) by (date) Average response time to requests
 - Reduce overtime hours ___ % by (date) Overtime reduction rate

Goal Wizard

Use the Goal Wizard to help you write SMART objectives. From the **Add New** dropdown menu in the top right corner, click **Goal Wizard** to step through this process.


- Select the **Category** for the goal (Goal or Major Responsibilities).
- Type the name of your goal and then click **Next**.
- **Enter** how you will measure this goal, then click **Next**.
- Is this goal attainable? Select the **Yes** or **No** checkbox. If no, click **Back** to modify the goal. Click **Next**.
- Is this goal relevant? Select the **Yes** or **No** checkbox. If no, click **Back** to modify the goal. Use the drop-down menu to select **Goal Alignment**, if any. Click **Next**.
- **Enter** the dates that the goal is to start and be completed by, then click **Next**.
- Select **Add More Details** to add additional information. You are required to enter a goal weight (how much this goal contributes to your overall annual rating), and you will do that by selection **Add More Details**. When you are finished, select **Save & Close**.

Add a SMART Goal

Specific	Measurable	Attainable	Relevant	Time-bound
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Welcome to the SuccessFactors SMART Goal Wizard™ which will help you quickly write effective goals.

What is your goal?
Category | Goals



Hint: To see suggestions from the Goal Library, start typing action or subject key words, such as *create, increase, inventory, sales*.

Tips: Goals should be straightforward and state what you want to happen. Be specific and define what you are going to do. Use action words such as *direct, organize, coordinate, lead, develop, plan*, etc.

Cancel Next

Add a SMART Goal

Please confirm your goal and click **Save**.

Confirm your SMART goal

Specific:	(Goals) Develop a strategic plan for organizational learning by (date)
Measurable:	Strategic plan submitted and approved
Attainable:	✓
Relevant:	✓
Time-bound:	07/01/2016 — 06/30/2017

[Add More Details](#)

Cancel Back Save & Close

Editing Employee Goals

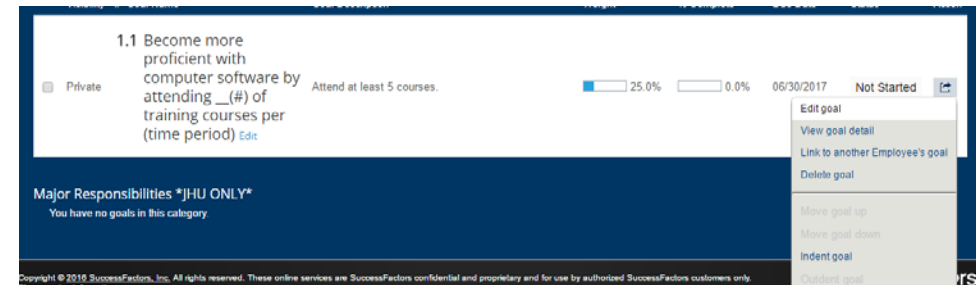
After a goal has been added to your employee's Goal Plan, it may be edited by you or your employee if changes are needed.

- Click **Edit** next to the goal title on the Goal Plan to edit the goal. The Edit Goal window will appear and you can change any aspect of the goal in the same way that you entered the goal originally.
- Click **Save Changes** to save the goal and return to the Goal Plan.



Goal Actions

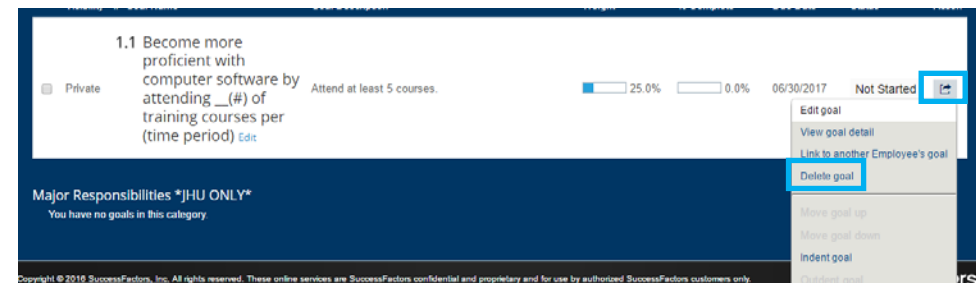
- Select the gear icon to display the **Actions** dropdown menu.
- To link a goal with another employee's goal, select **Link to another Employee's goal**, and then select the employee to whom you want to link the goal. Those two employees will then share the goal and can track progress together.
- Other functions available from the Actions menu include:
 - View goal detail
 - Delete a goal (note that goals can only be deleted from the goal plan; not from a Performance Form)
 - Move goals up or down in the form
 - Indent or outdent goals



Deleting Employee Goals

To delete a goal from your employee's Goal Plan:

- Select the action icon to display the **Actions** dropdown menu.
- Select **Delete goal**.
- Click **Ok** in the text box to delete the selected Goal(s) from the Employee's goal plan **or**
- To keep the goal, click **Cancel**.
- Click on the box next to the goal to deselect the goal.

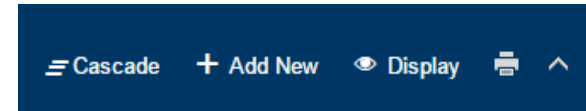


Please discuss any goal changes with the employee prior to making and changes or deletions.

Cascading Goals

You can cascade or link your goal to your employees, which means that the employee will inherit some of your goals. These goals can be edited once they are on the employee's Goal Plan to reflect how the employee will support or contribute to the goal.

- Click the box next to the goal you wish to cascade or link.
- Select **Cascade** from the upper right corner of the screen.
- Click the box next to the employee(s) you wish to select, then click **Next**.



Display Options

Select **Display** in the upper right corner to change the information displayed on your Goal Plan by **checking or unchecking boxes** and clicking the **Update** button.

