Performance Management
Follow Up Stage

What is
PERFORMANCE
MANAGEMENT?

Is a cyclical and permanent process where <u>leaders and employees identify</u> to what extent they contribute to the achievement of results, and how they should behave to develop their competencies, as expected by the company

Keep in mind this is your performance appraisal and is separate to your KPIs/VCP goals
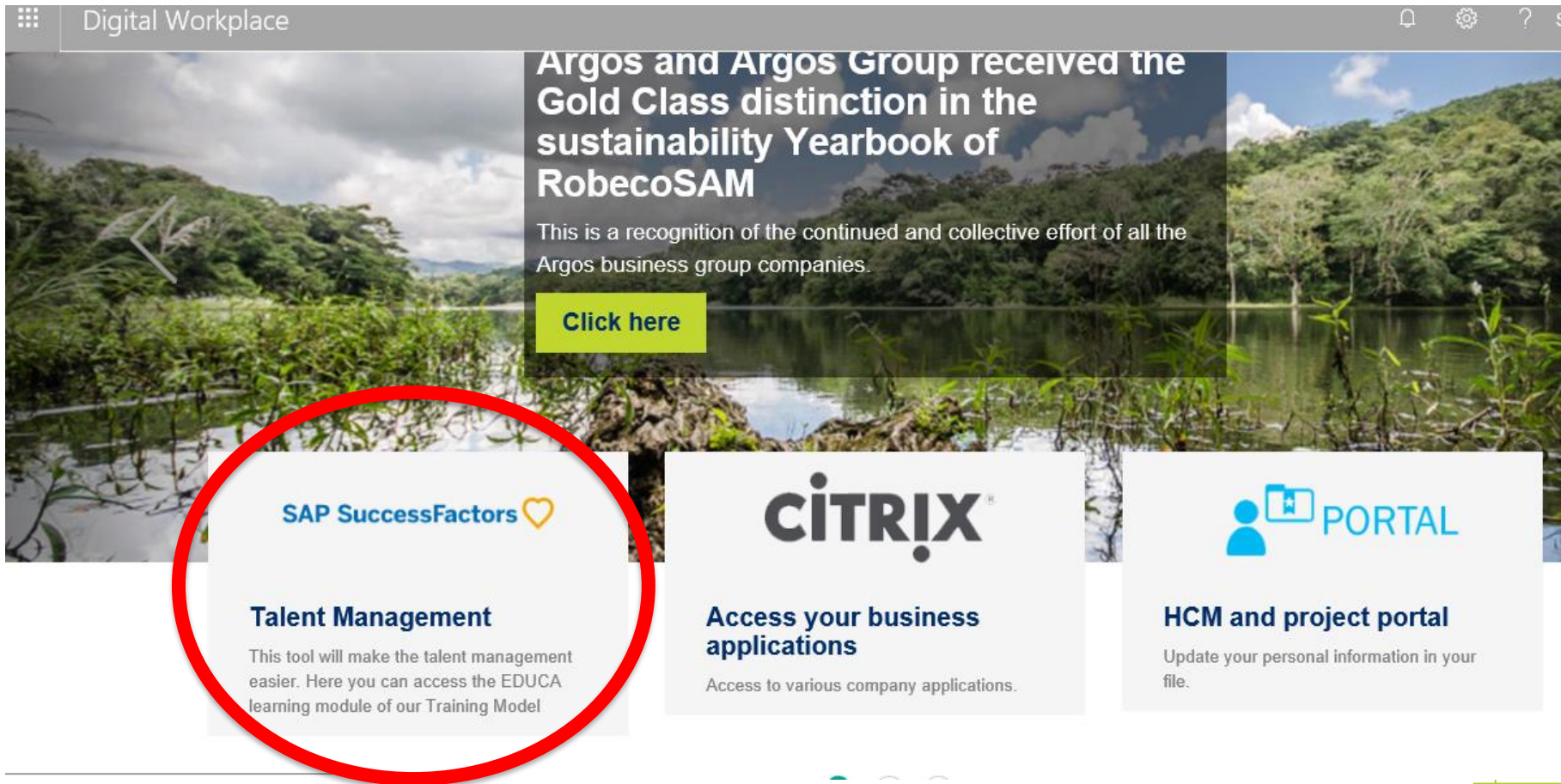
March 6 to
May 31

May 1 to
Sept. 30

PLANNING

FOLLOW-UP

FINAL SCORE

CLOSING

February to
March 2021

October 1 to
January 31, 2021

FOLLOW UP STAGE

- **Performance goals & Development Plan**

  - Update your goals & IDP
  - ******NEW in 2020****** Employees and Managers are able to Add/Delete/Copy goals and/or IDP throughout this stage

- **Competencies ratings**

  You must rate each the competencies

LET'S BEGIN..

Go to DigitalWorkplace and click on SuccessFactors

HOW TO ADD YOUR
PERFORMANCE GOALS?

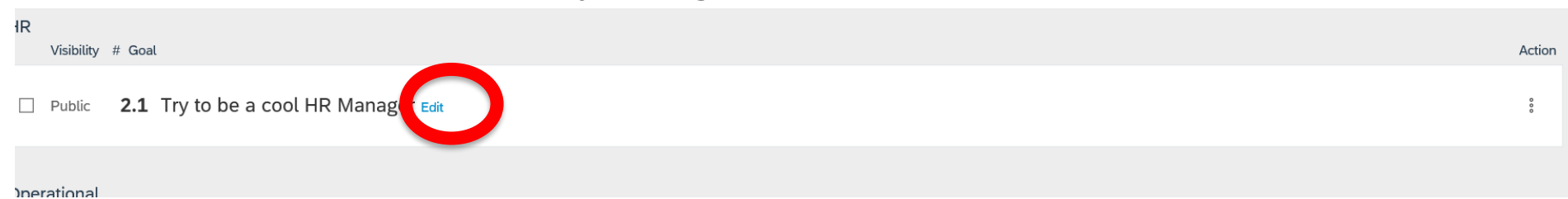Access SuccessFactors and click on the Home button, then click on Performance Goals:

01

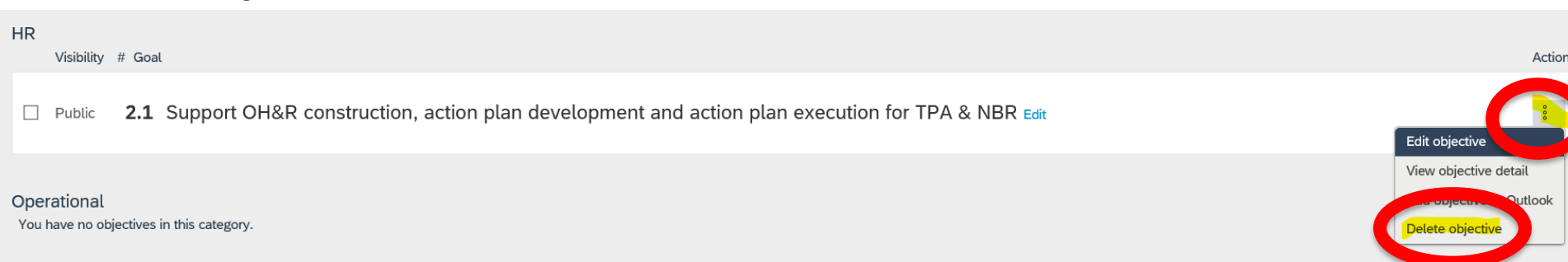| Home ∨ |
|---|
| Home |
| **Performance Goals** |
| Performance Management |
| Development plan |
| Company Info |
| My Employee File |
| Admin Center |

me Off
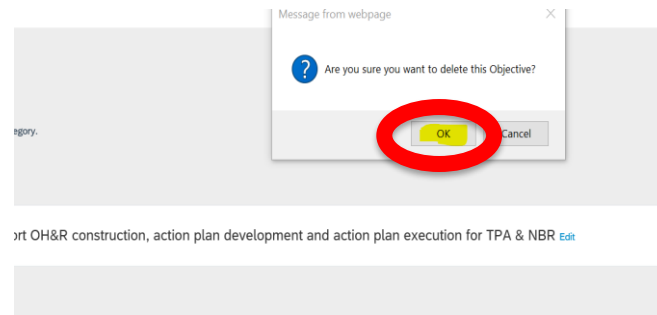time off planned

Org Chart
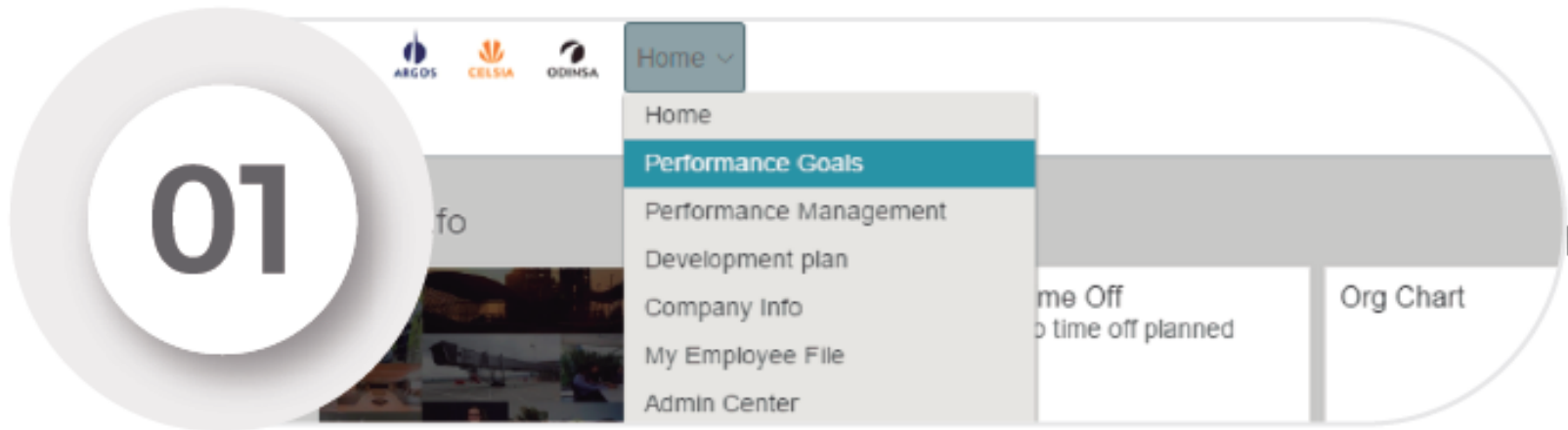
Edit and Deleting Goals

If you need to edit, click edit
You can also add your goals to Outlook as a reminder

If you need to delete, click on the 3 circles and delete objective

Click OK and the goal will be deleted

Editing objectives

When editing objectives, you can save just the changes made or duplicate the objective.

Save as New allows you to duplicate the objective. Make the changes and it will add another objective with the changes and keep the original objective.

NEW TASKS***

Due Date: 12/31/2020

* Status: Not Started

Tasks: + Add Tasks

Cancel Back Save Changes

This feature allows you to breakdown goals that may have several objectives within one goal.

Once you click on "Add Tasks", the current box will expand a bit.

The + allows you to add as many tasks as you would like.
The ↑↓ allows you to move the tasks up and down so that you can place them in the order you would like

Tasks:	*Description	*Start date	*End date	Accomplishment (%)	Action
		MM/DD/YYYY	MM/DD/YYYY		+ ↑ ↓ 🗑

Once you click on "Save Changes", you will be able to see each tasks under each goal

HR

Visibility	#	Goal				Action
☐ Public	2.1	Try to be a cool HR Manager Edit				⋮

Tasks:

Description	Start date	End date	Accomplishment (%)
Try to be nice	04/06/2020	04/15/2020	
Be patient	04/06/2020	04/15/2020	

Adding a New Objective

You can add a goal from personal objective list or a library objective list

Ensure correct year is chosen to add goals

CHRISTY M FOLEY ⌄ | 2020 Performance Goals - CEM (... ⌄ | + Add Objective | ⋮ Actions | ◉ Display Options

Create a New Objective
Add objective allows you to make up your own objective and assign any metrics you want

Copy From Other Objective Plan
Copy from another objective plan allows you to copy a objective from different objective plan into this one

n-going Objective Planning (Unlocked Module)

ntroduction

section you will be able to set/update your individual performance goals, which should reflect the contribution of your position to the company strategy.

a new goal, click on the "Add New" button and then choose the "Create a new goal" option.

Create a New Objective

Choose what type of objective to add.

+ Personal Objective

Personal Objectives allow you to make up your own objective and assign any metrics you want.

+ Library Objective

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

Personal objective: By clicking this option, you can access the template for adding your goal

Add Objective

Edit your objective below.

Fields marked with * are required.

Category: HR

spell check...

* Goal: Conduct 100% of annual performance reviews on time

Start Date: 01/01/2018

Due Date: 12/31/2018

Status: In Progress

Complete the required information for the goal and click on **Save Changes**
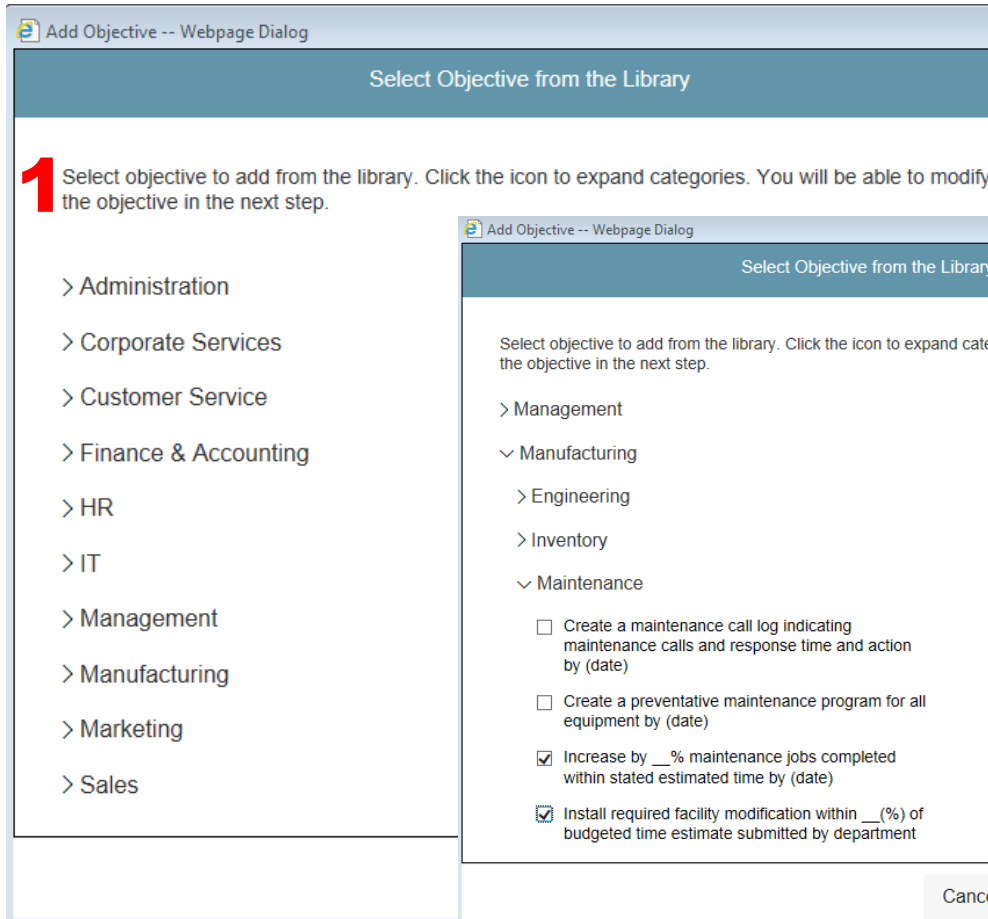
Category: select the perspective to which the goal belongs.

Goals: must be specific, attainable, realistic and timely.

Status: select the actual status of the goal.

Library objective: By clicking this option, you can access a library of goals from various department

Copying Goals from Prior Year
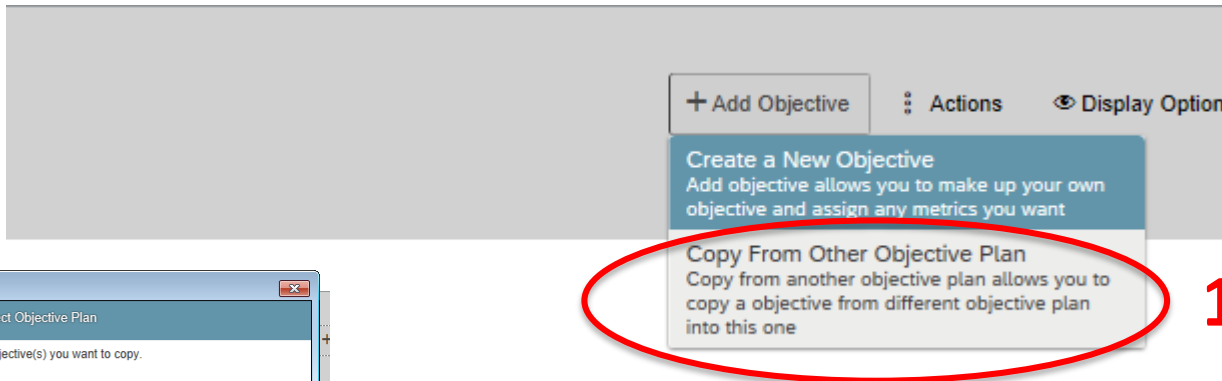
Steps:

1. Click Copy From Other Objective Plan
2. Click circle next to the Plan & click next
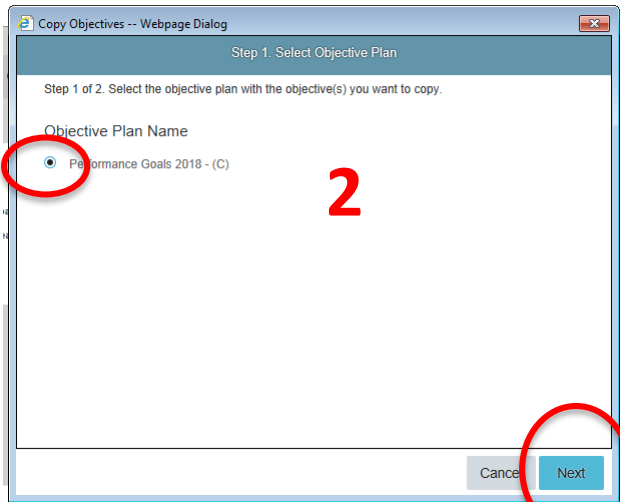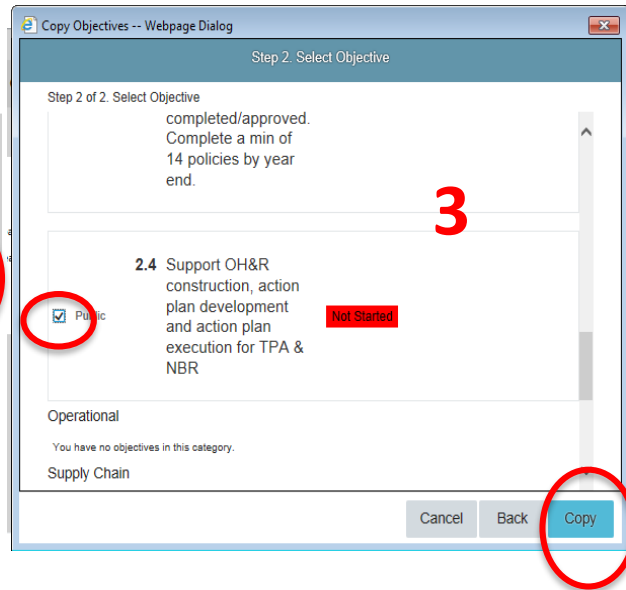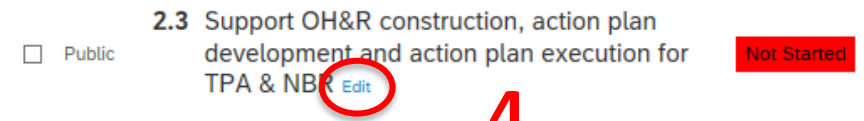3. Click box next to Public for the Goals you wish to copy, then click copy
4. Once it appears on your appraisal, click edit to make necessary changes
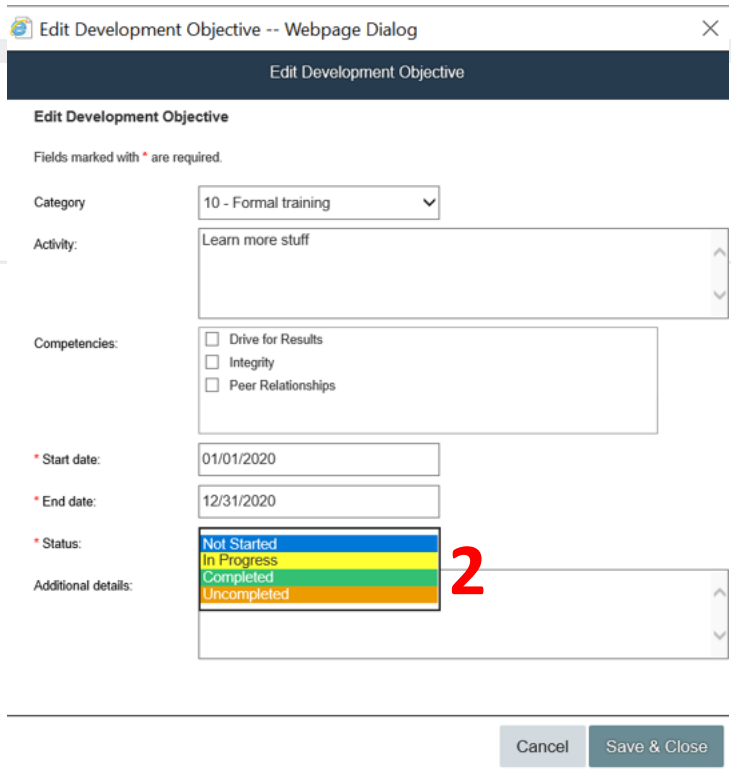
INDIVIDUAL DEVELOPMENT PLAN

You must define activities that will allow you to reinforce your strengths and develop those competencies that are part of your opportunities for improvement, using the 70/20/10 model:

10 - Formal training: it is the learning acquired through courses and structured programs.

20 - Feedback: it is the learning acquired through observation, knowledge transfer and collaborative actions with my peers, employees and immediate leader.

70 - Exposure/Self-Development: it is the learning acquired through daily tasks, challenges and practice.

EDITING IDP
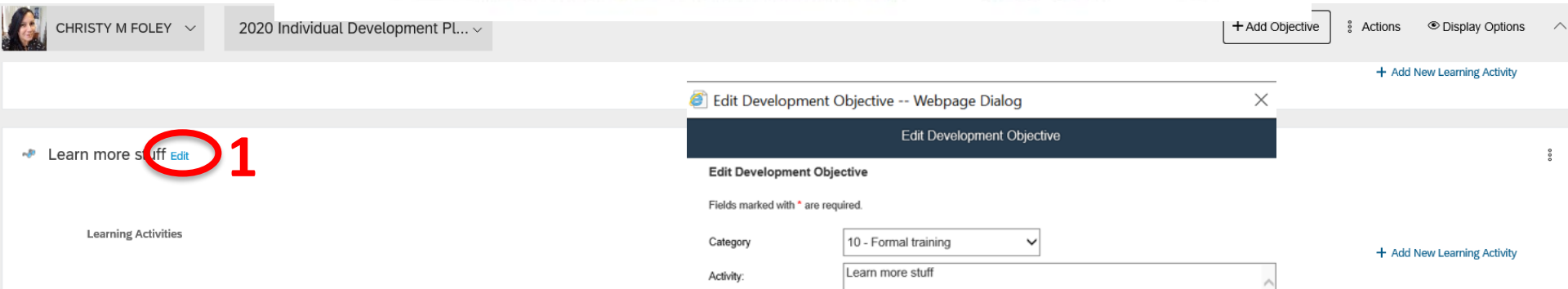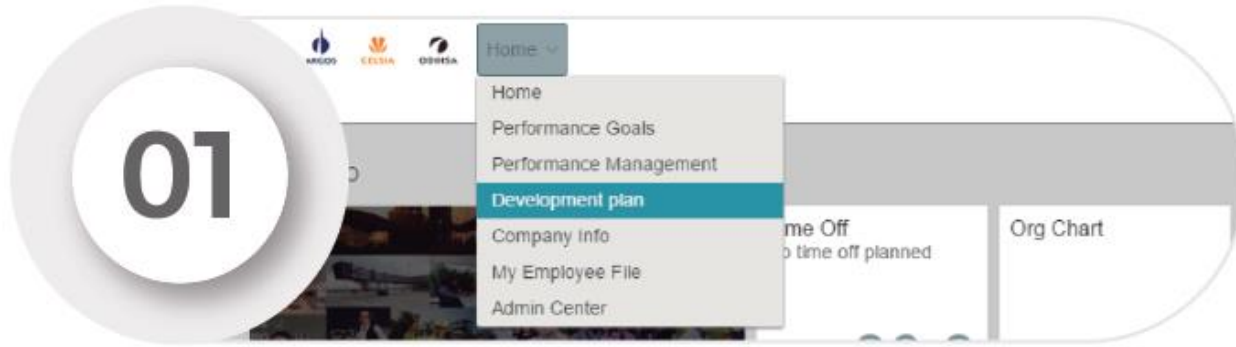
Click on Development Plan in dropdown menu.

Steps:

1. Click Edit
2. Update the IDP status using the dropdown menu; add additional details as needed
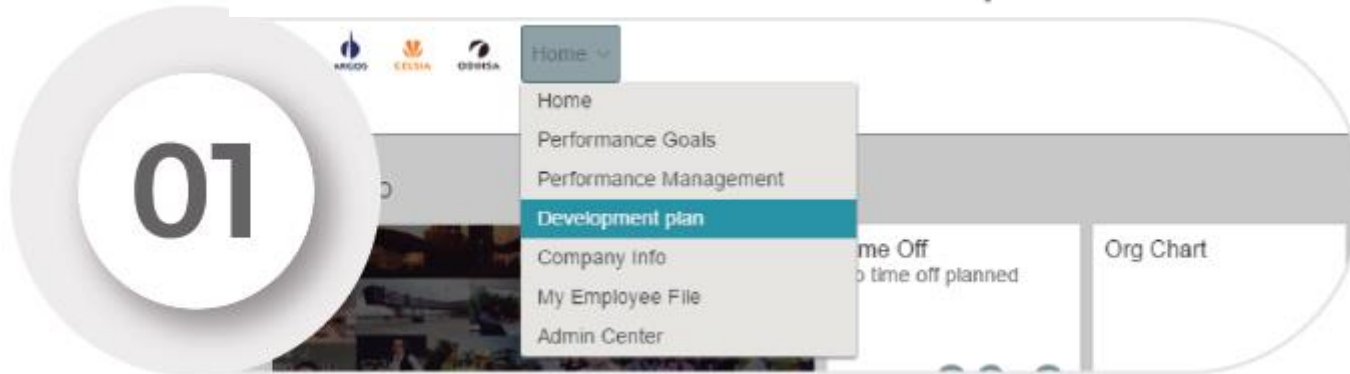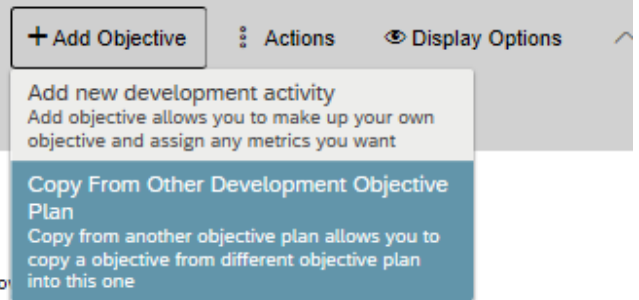3. Click Save and Close

HOW TO ADD YOUR
INDIVIDUAL DEVELOPMENT PLAN

Access SuccessFactors and click on the Home button, then select Development Plan:

01

Home
Home
Performance Goals
Performance Management
Development plan
Company Info
My Employee File
Admin Center

me Off
time off planned

Org Chart

Two Options:
1. Can enter new objectives
2. Copy from prior year

+ Add Objective   Actions   Display Options

Add new development activity
Add objective allows you to make up your own
objective and assign any metrics you want

Copy From Other Development Objective
Plan
Copy from another objective plan allows you to
copy a objective from different objective plan
into this one

to reinforce your strengths and develop those competencies that are part of your opportunities for impro

COPYING OBJECTIVES FROM PRIOR YEAR

2019 Individual Development Pl... ⌄

2020 Individual Development Plan - CEM
2019 Individual Development Plan
Individual Development Plan 2018

IF you see your 2019 IDP, click on this area to get to your 2020

+ Add Objective   ⋮ Actions   👁 Display Options   ⌃

Add new development activity
Add objective allows you to make up your own objective and assign any metrics you want
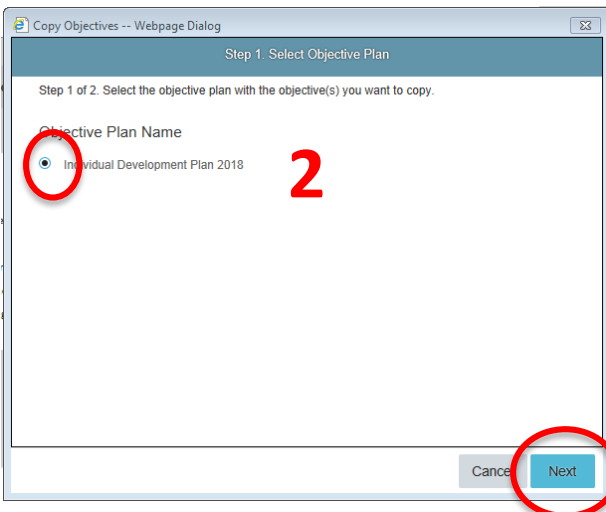
1

Copy From Other Development Objective Plan
Copy from another objective plan allows you to copy a objective from different objective plan into this one

to reinforce your strengths and develop those competencies that are part of your opportunities for impro

Steps:

1. Click Copy From Other Development Objective

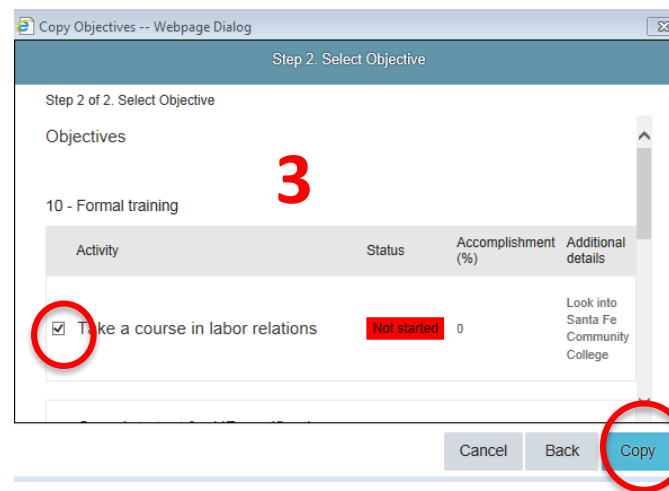Copy Objectives -- Webpage Dialog   ☒

Step 1. Select Objective Plan

Step 1 of 2. Select the objective plan with the objective(s) you want to copy.

Objective Plan Name

◉ Individual Development Plan 2018   **2**

Cancel   **Next**

2. Click circle next to the Plan & click next

Copy Objectives -- Webpage Dialog   ☒

Step 2. Select Objective

Step 2 of 2. Select Objective

Objectives   **3**

10 - Formal training

Activity	Status	Accomplishment (%)	Additional details
☑ Take a course in labor relations	Not started	0	Look into Santa Fe Community College

Cancel   Back   **Copy**

3. Click box next to Public for the IDP you wish to copy, then click copy

4. Once it appears on your appraisal, click edit to make necessary changes

ARGOS

Describe the activity of development

Add development activity

Fields marked with * are required.

Category

| 10 - Formal training |
| 20 - Feedback |
| 70 - Exposure/Self-development |

Activity:

Activity: describe the actions you will perform to reinforce your strengths and opportunities for improvement

Competencies:
- ☐ Drive for Results
- ☐ Ethics and Values
- ☐ Integrity
- ☐ Leading People and Teams

Competencies: corresponds with the activity that you are trying to improve on

* Start date: 01/01/2018

* End date: 12/31/2018

Accomplishment (%):

Cancel   Save & Close

Click Save and Close after completing each category – **must have at least one activity in each category**

Add development activity

Fields marked with * are required.

Category
| 10 - Formal training |
| 20 - Feedback |
| 70 - Exposure/Self-development |

Activity:

Competencies:
- ☐ Drive for Results
- ☐ Ethics and Values
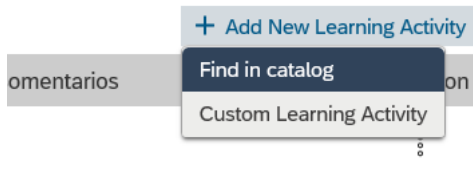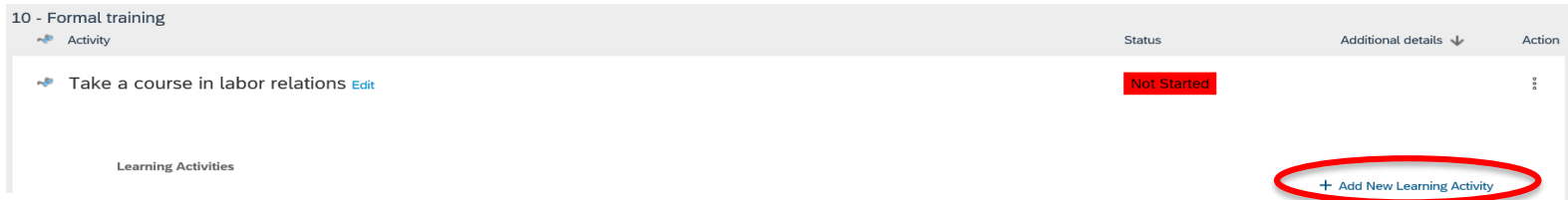- ☐ Integrity
- ☐ Leading People and Teams

* Start date: 01/01/2018

* End date: 12/31/2018

Accomplishment (%):

Cancel   Save & Close

New Learning Activity

THIS IS NOT REQUIRED –

You can add a New Learning Activity (or several) under each IDP. This can be helpful if that particular IDP must be done in several steps

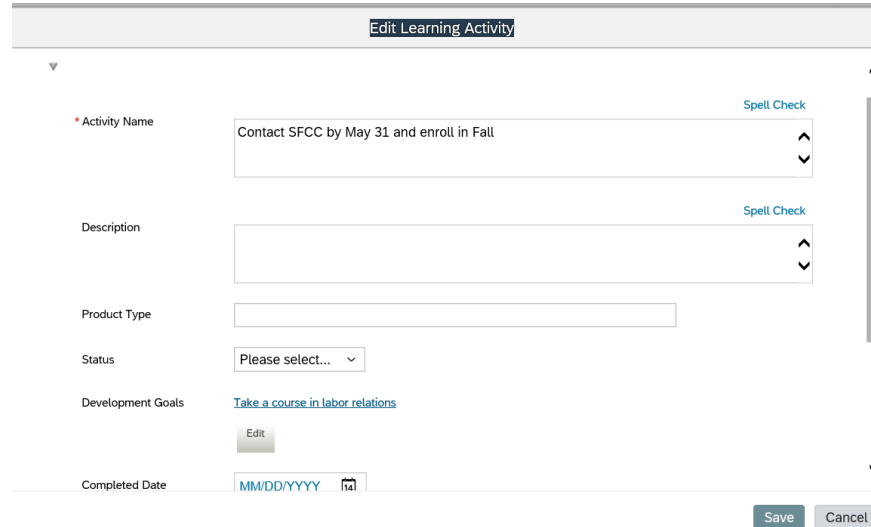When you click on "Add New Learning Activity", you have two options from which to choose.

If you click on "Find in Catalog", you will be taken to EDUCA where you are able to find a specific course
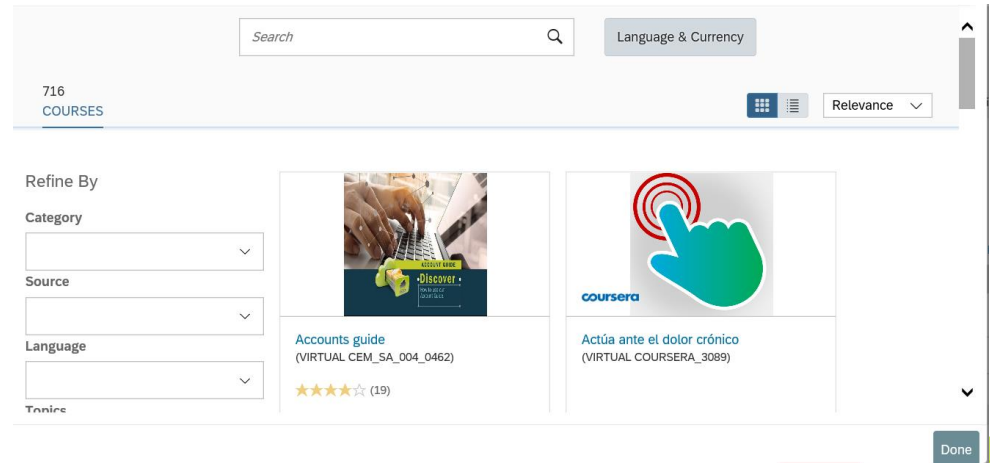
New Learning Activity

If you click on "Custom Learning Activity" a box will pop up where you will enter information. Complete the information in the pop box and click Save
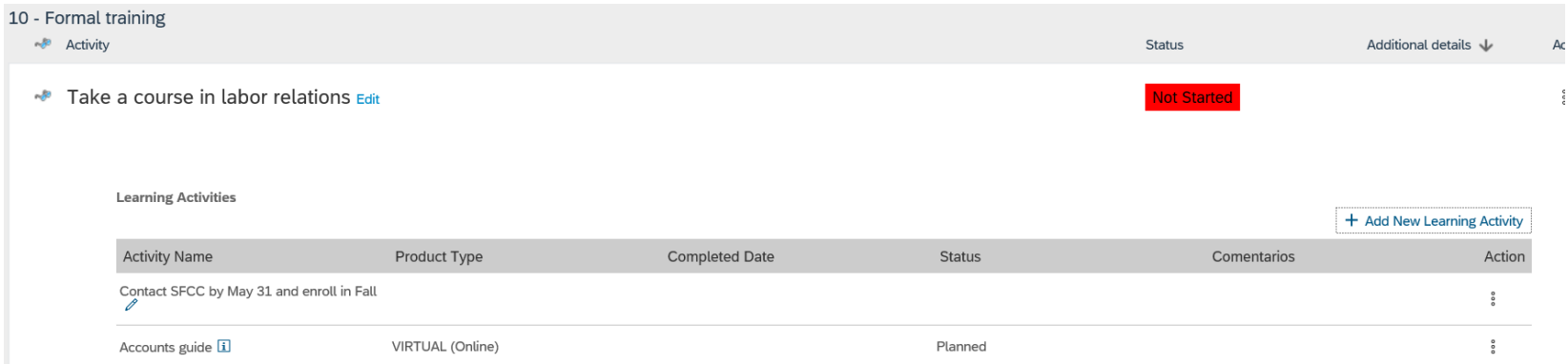
Once you click "Save", you will be able to see each learning activity listed under the IDP

Delete IDP

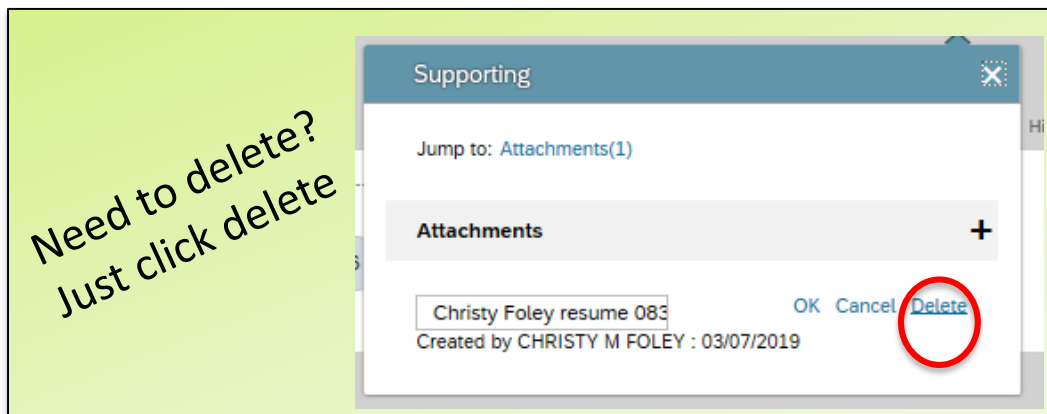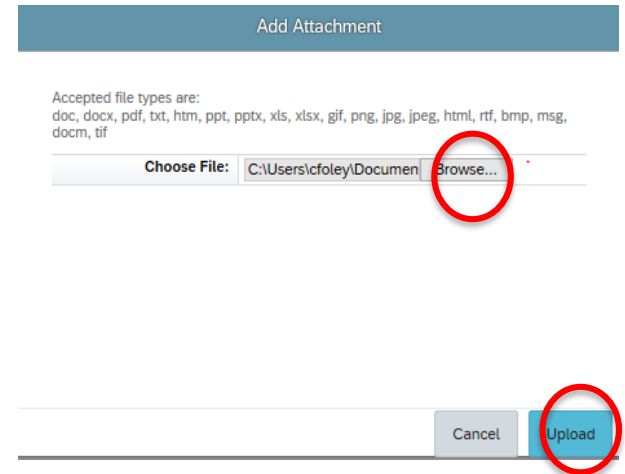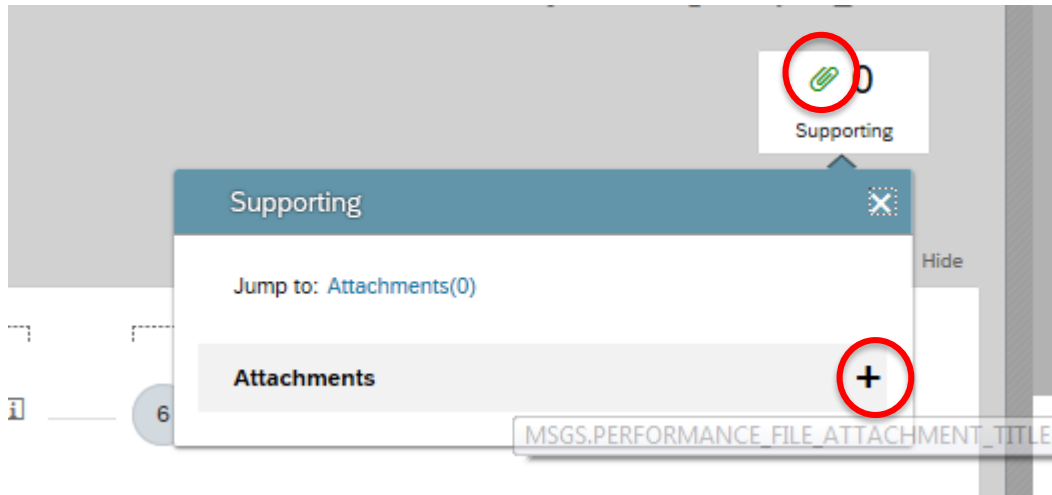To delete an IDP, click on the 3 dots for the drop down menu
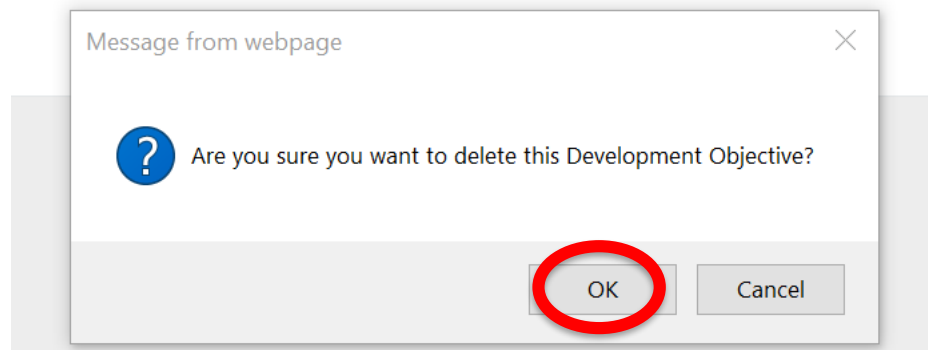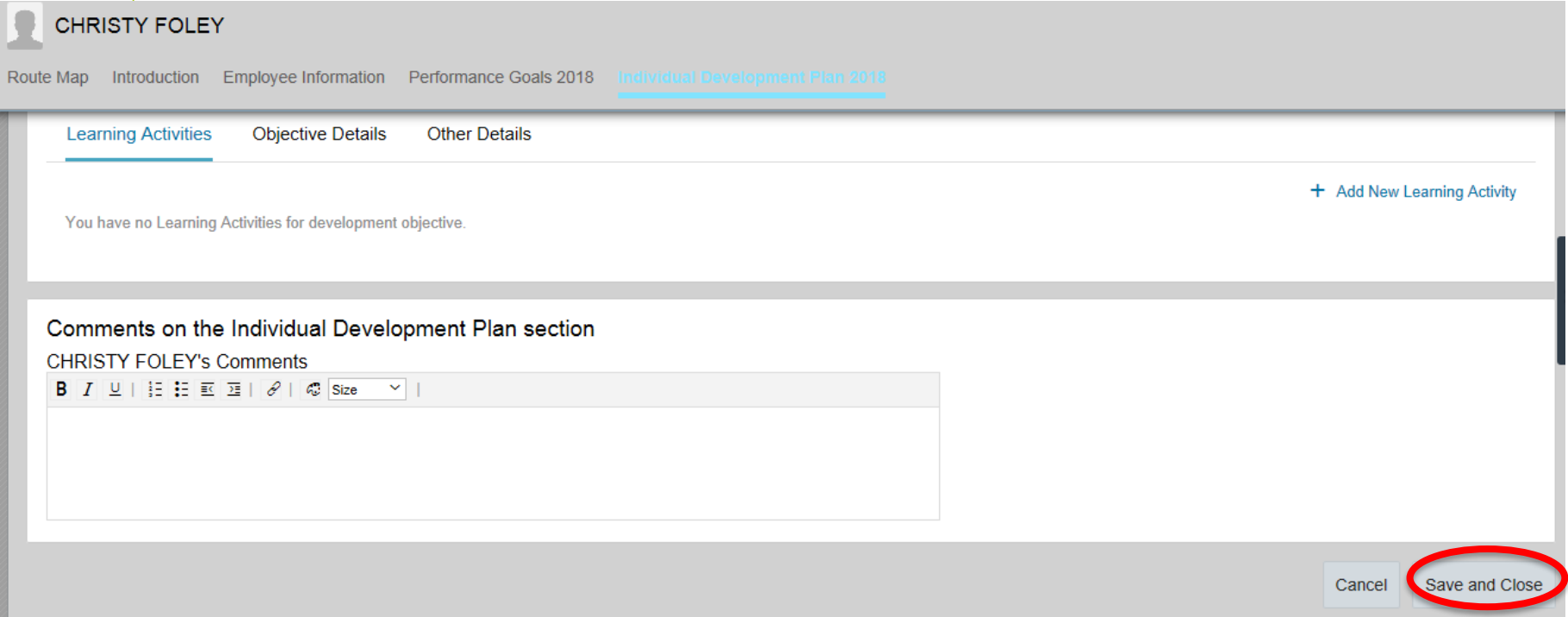
If you would like to add supporting documents to your performance appraisal, complete the following:

click paperclip → click + → click Browse to find document → click Upload

Need to delete? Just click delete

SAVE AND CLOSE

Once you have reviewed the performance appraisal click "Save and Close"

Now that you have edited/added/deleted your goals and IDP activities and rated your competencies,
YOU MUST CONTACT YOUR SUPERVISOR/MANAGER.
You and your leader are able to review the PA at anytime (not at the same time) as you both have access to the form.

Notifications Update:

Managers will not receive notification during Planning and Follow-up stage because the form is in a "Collaborative mode" which means both users have the form available to review it anytime.

The notifications will be received during the Closing stage because the form goes back to an "Iterative mode" which means one user can have the form at a time. In this case, the "Send to Supervisor" button will show up and the notification will be triggered.

PROCESS OVERVIEW

A. Complete the three sections of your appraisal:
   1. Update Performance Goals
   2. Rate and make necessary comments in the Competencies section
   3. Update IDP form with percentage complete to change the status to "In Progress"

   NEW: you can add/delete goals and IDP objectives in this stage.

B. Once complete, let your supervisor or manager know so that they can access. **(There is no "send" option).**

C. Leader to review and update each section accordingly to include rating the competencies. Leader **can let employee know to make changes** or **Send to closing**.

D. Send to "Closing" stage by **September 30, 2020**
   - *Note, once appraisal is in closing stage, you can't change your own competency ratings, only leaders can change theirs.*