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# Performance Management Follow Up Stage

# What is **PERFORMANCE** MANAGEMENT?

Is a cyclical and permanent process where leaders and employees identify 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



February to  
March 2021

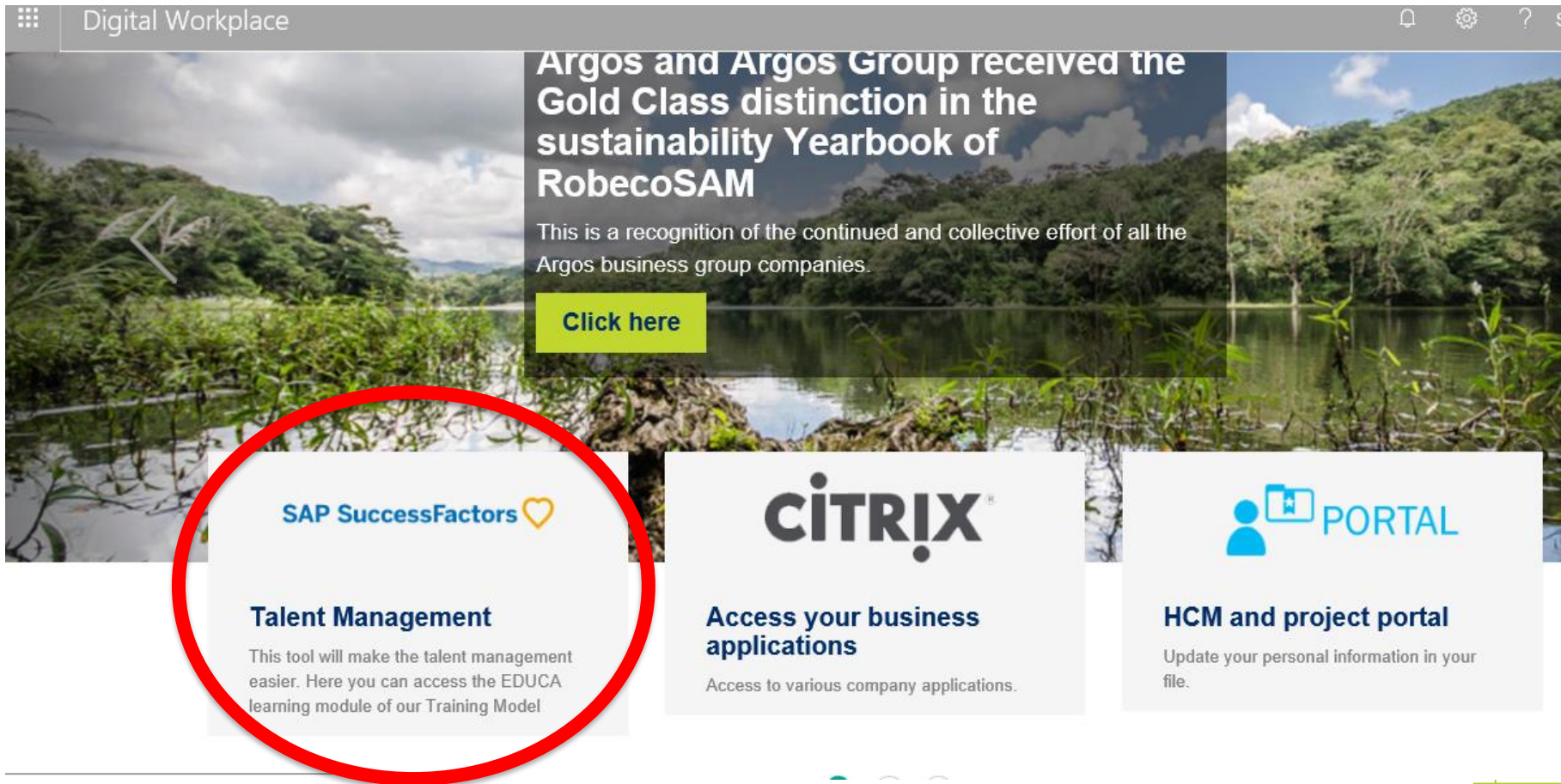
October 1 to  
January 31, 2021

- **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



The screenshot shows the 'Digital Workplace' interface. At the top, there is a navigation bar with a hamburger menu icon, the text 'Digital Workplace', and notification, settings, and help icons. Below the navigation bar is a large banner image of a tropical landscape with a river and lush greenery. Overlaid on the banner is a news article with the following text:

**Argos and Argos Group received the Gold Class distinction in the sustainability Yearbook of RobecoSAM**

This is a recognition of the continued and collective effort of all the Argos business group companies.

[Click here](#)

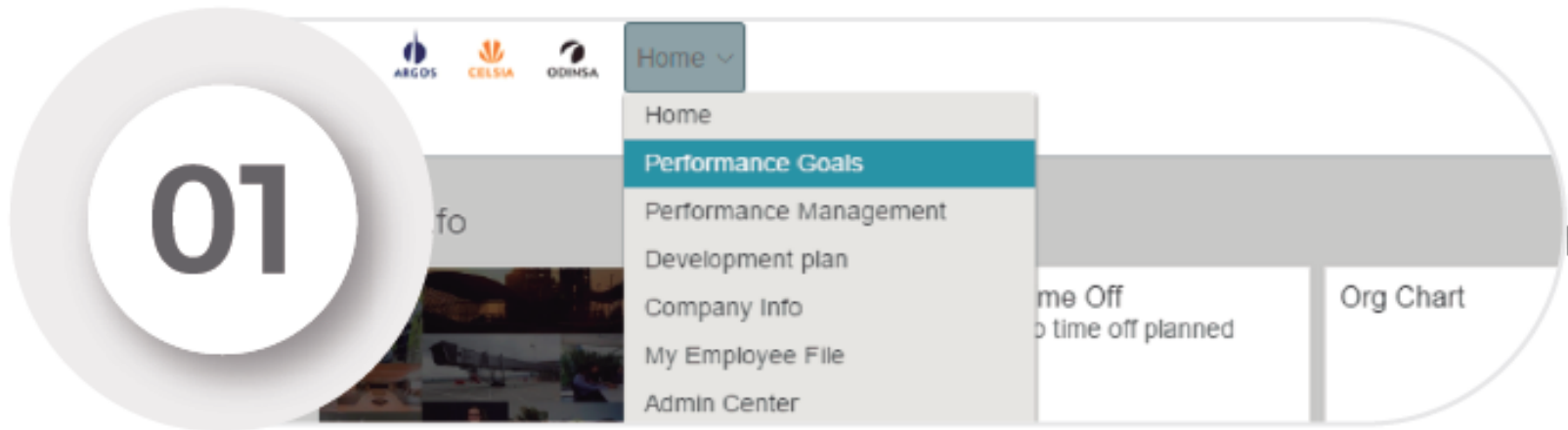
Below the banner are three application tiles:

- SAP SuccessFactors** (with a heart icon)  
**Talent Management**  
This tool will make the talent management easier. Here you can access the EDUCA learning module of our Training Model
- CITRIX**  
**Access your business applications**  
Access to various company applications.
- PORTAL** (with a person and document icon)  
**HCM and project portal**  
Update your personal information in your file.

A red circle highlights the SAP SuccessFactors tile.

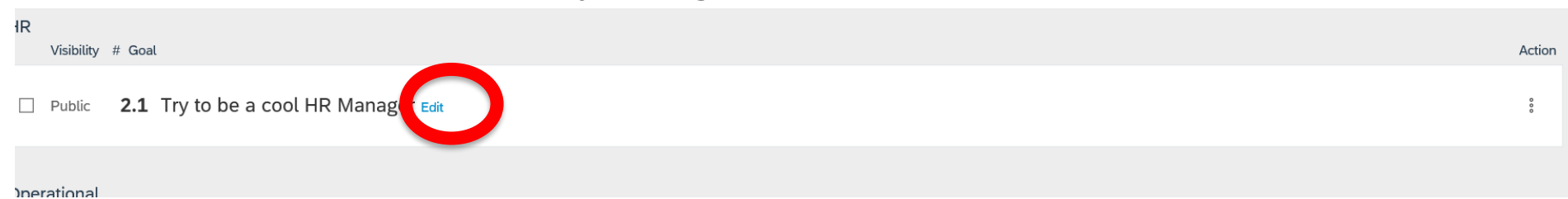
# HOW TO ADD YOUR PERFORMANCE GOALS?

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

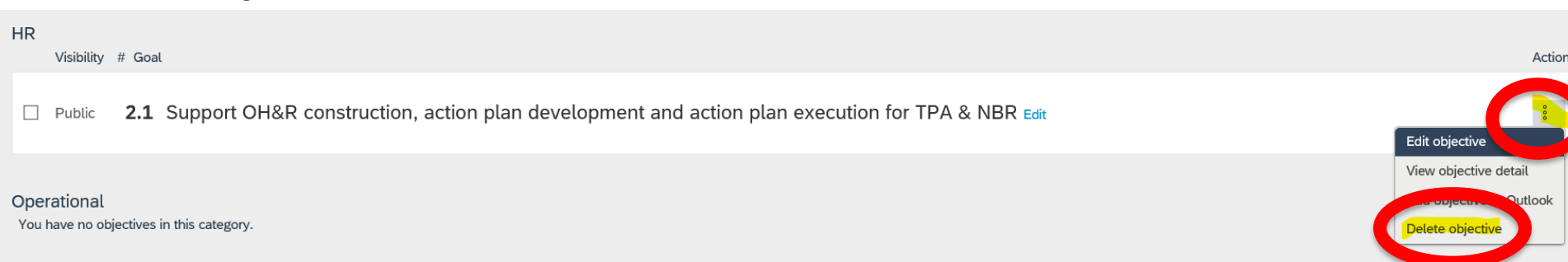


# Edit and Deleting Goals

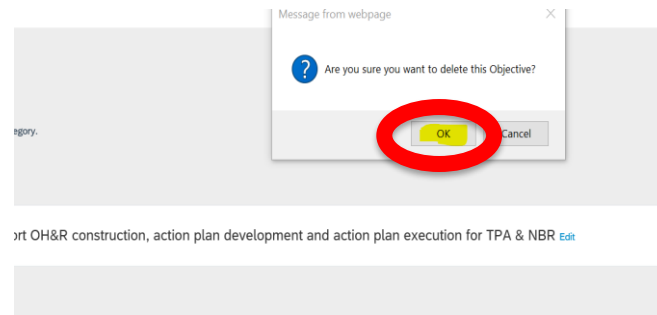
If you need to edit, click edit  
 You can also add your goals to Outlook as a reminder



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



Click OK and the goal will be deleted



# Editing objectives

Edit Objective -- Webpage Dialog

### Edit Objective

Edit your objective below.

Fields marked with \* are required.

Category:

\* Goal:  [spell check...](#)

Start Date:

Due Date:

\* Status:

Tasks: [+ Add Tasks](#)

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:

\* Status:

Tasks: + Add Tasks

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

*Description	*Start date	*End date	Accomplishment (%)	Action
<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	+ ↑ ↓ 🗑

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

1-ongoing Objective Planning (Unlocked Module)

Introduction

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

To add 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:

\* Goal:  [spell check...](#)

Start Date:

Due Date:

Status:

Complete the required information for the goal and click on [Save Changes](#)

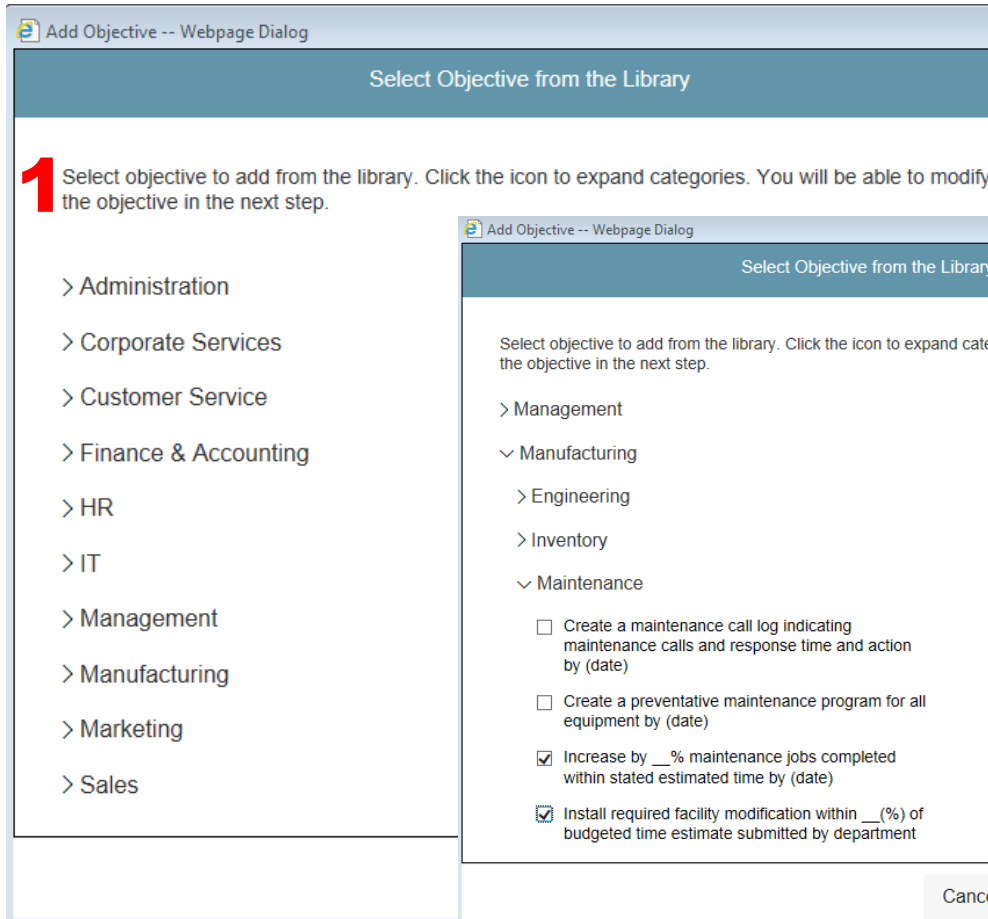
**Category:** select the perspective to which the goal belongs.

**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

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



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

- > Administration
- > Corporate Services
- > Customer Service
- > Finance & Accounting
- > HR
- > IT
- > Management
- > Manufacturing
- > Marketing
- > Sales

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

- > Management
- Manufacturing
  - Engineering
  - Inventory
  - Maintenance
      - Create a maintenance call log indicating maintenance calls and response time and action by (date)
      - Create a preventative maintenance program for all equipment by (date)
      - Increase by \_\_\_% maintenance jobs completed within stated estimated time by (date)
      - Install required facility modification within \_\_\_(%) of budgeted time estimate submitted by department

**2**

Edit your objective below.

Fields marked with \* are required.

Category: Finance

\* Goal: Increase by \_\_\_% maintenance jobs completed within stated estimated time by (date)

Start Date: 01/01/2018

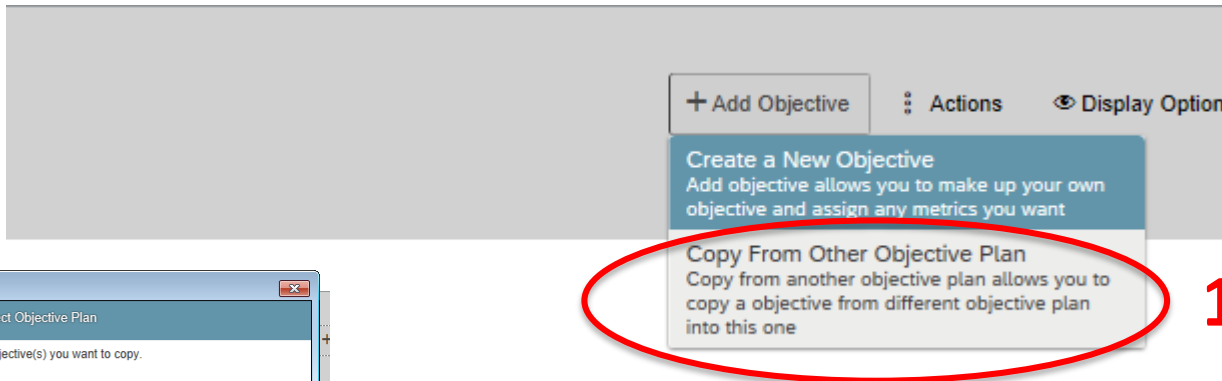
Due Date: 12/31/2018

Status: Not Started

Cancel Back **3** Save Changes

Cancel Back Add Selected

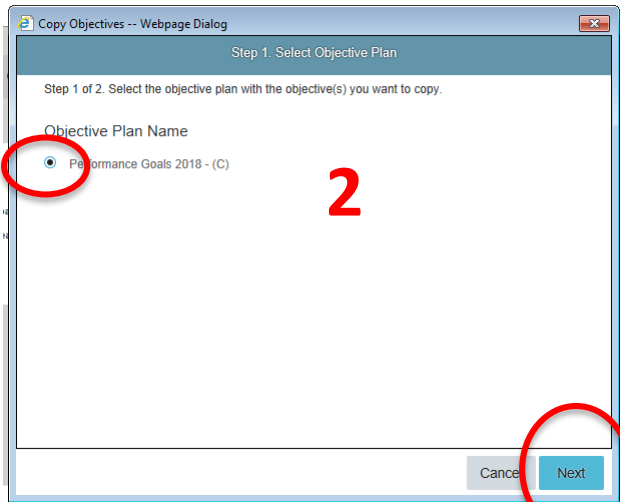
# Copying Goals from Prior Year



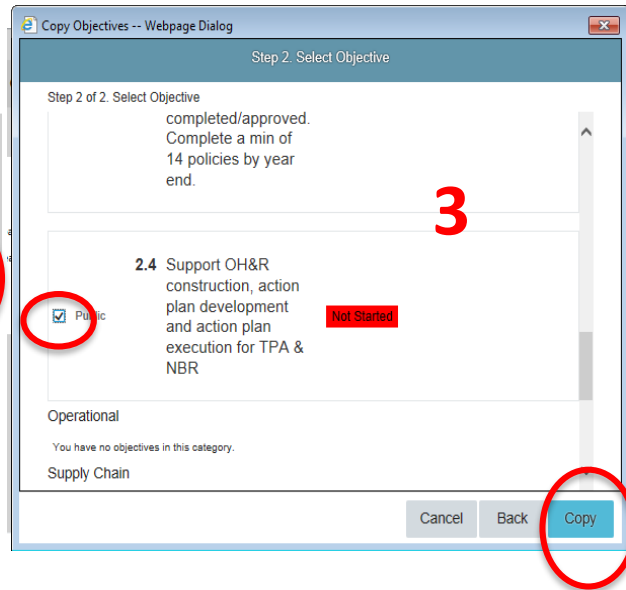
1

Steps:

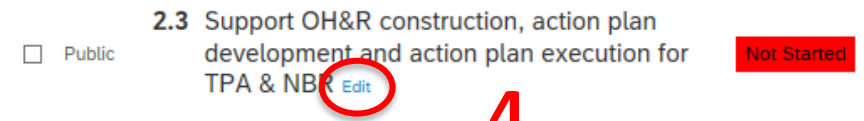
1. Click Copy From Other Objective Plan
2. Click circle next to the Plan & click next
3. Click box next to Public for the Goals you wish to copy, then click copy
4. Once it appears on your appraisal, click edit to make necessary changes



2



3



4

## INDIVIDUAL DEVELOPMENT PLAN

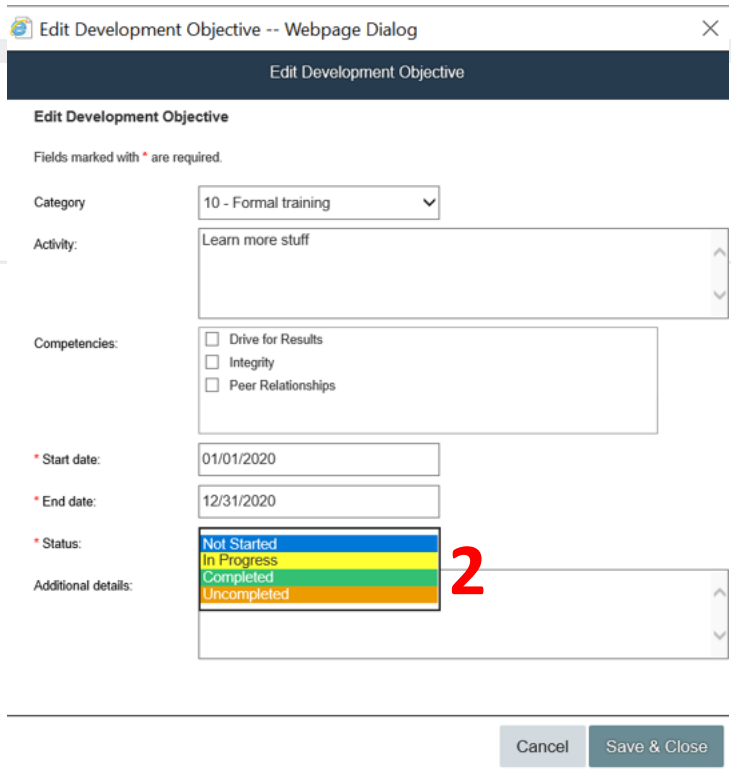
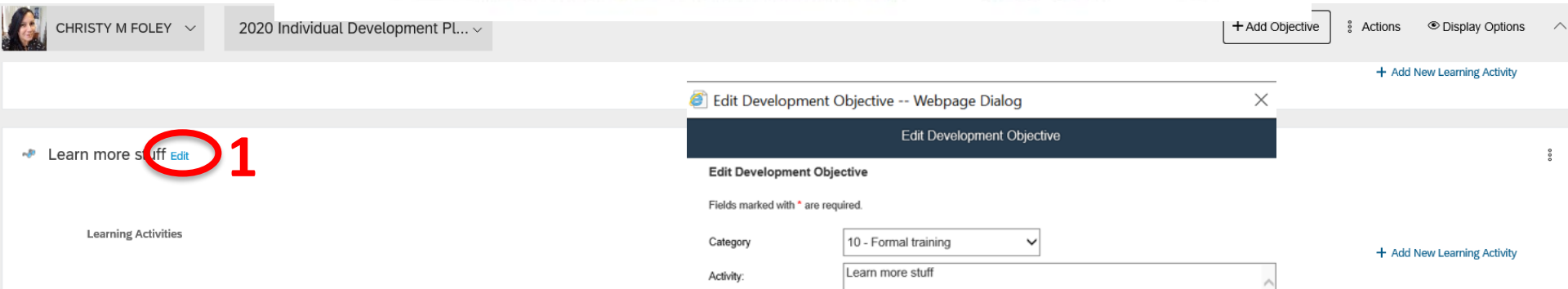
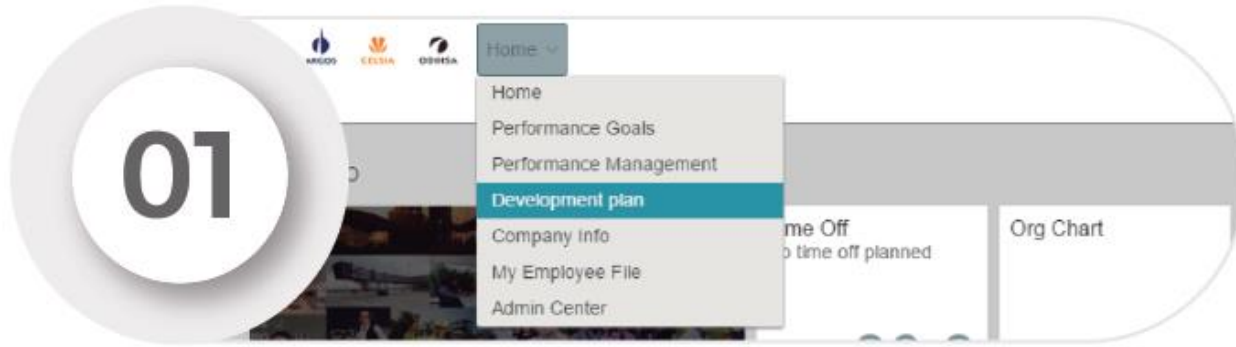
You must define activities that will allow you to reinforce your strengths and develop those competencies that are part of your opportunities for improvement, using the 70/20/10 model:

**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



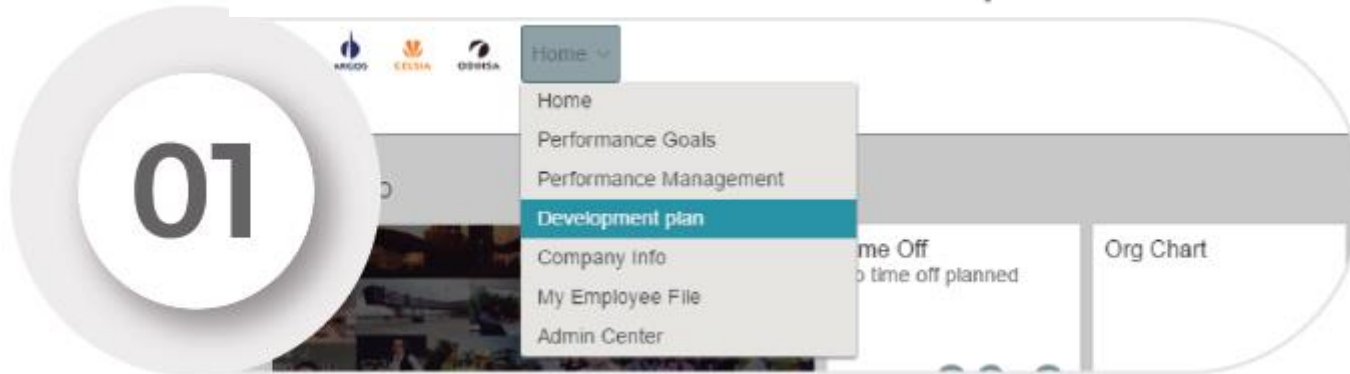
Click on Development Plan in dropdown menu.

Steps:

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

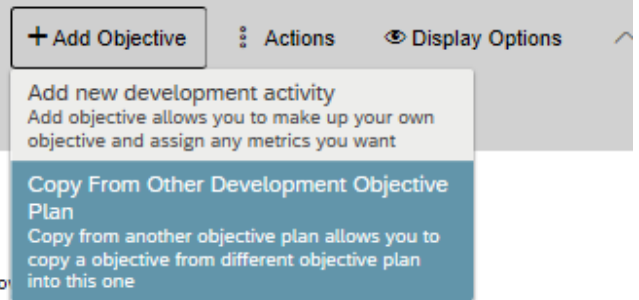
# HOW TO ADD YOUR INDIVIDUAL DEVELOPMENT PLAN

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



## Two Options:

1. Can enter new objectives
2. Copy from prior year



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

# 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

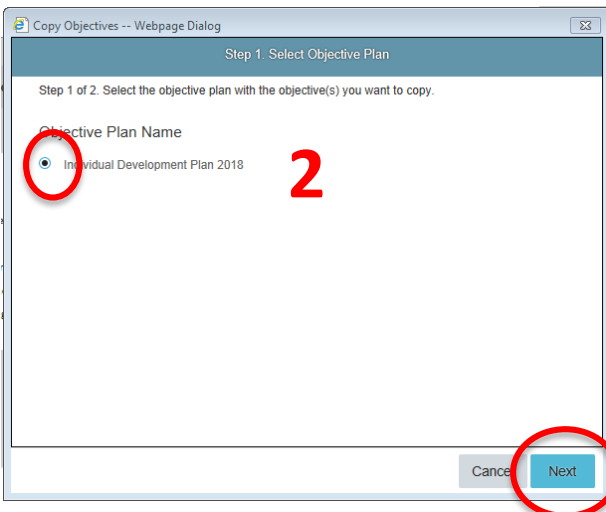
Copy From Other Development Objective Plan  
Copy from another objective plan allows you to copy a objective from different objective plan into this one

1

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

Steps:

1. Click Copy From Other Development Objective
2. Click circle next to the Plan & click next
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



Copy Objectives -- Webpage Dialog

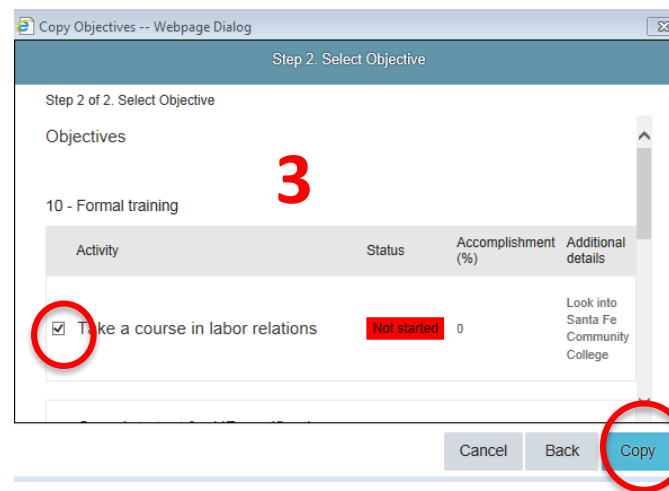
Step 1. Select Objective Plan

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

Objective Plan Name

Individual Development Plan 2018

Cancel Next



Copy Objectives -- Webpage Dialog

Step 2. Select Objective

Step 2 of 2. Select Objective

Objectives

10 - Formal training

Activity	Status	Accomplishment (%)	Additional details
<input checked="" type="checkbox"/> Take a course in labor relations	Not started	0	Look into Santa Fe Community College

Cancel Back Copy



# ADDING A NEW OBJECTIVE

## Describe the activity of development

### 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
- Business Relationship

\* Start date:

01/01/2018

\* End date:

12/31/2018

Accomplishment (%):

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

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

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  
 Deep Relationships

\* Start date:

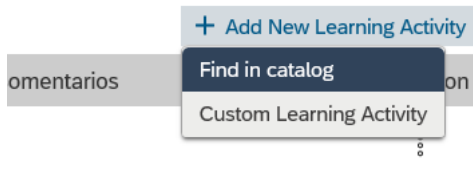
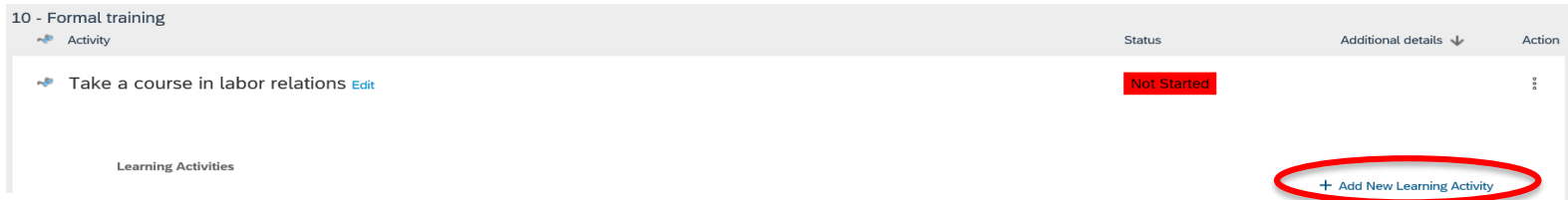
\* End date:

Accomplishment (%):

# New Learning Activity

THIS IS NOT REQUIRED –

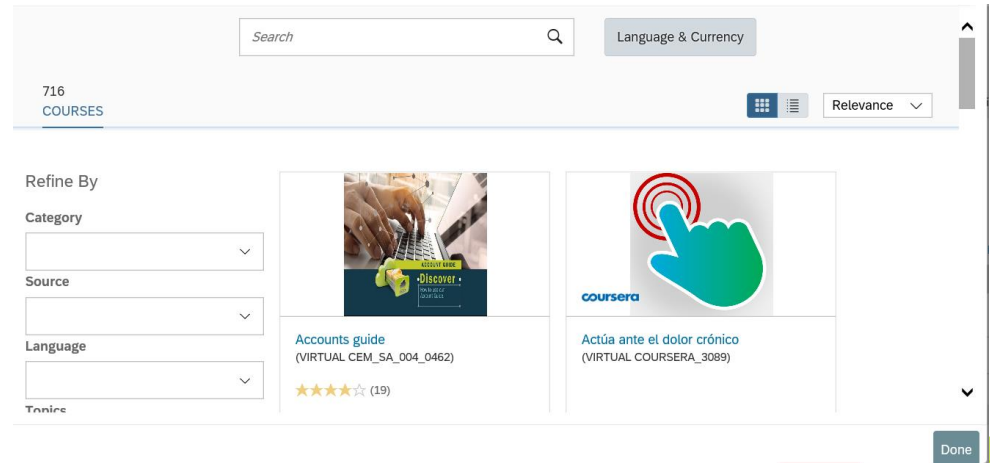
You can add a New Learning Activity (or several) under each IDP. This can be helpful if that particular IDP must be done in several steps



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



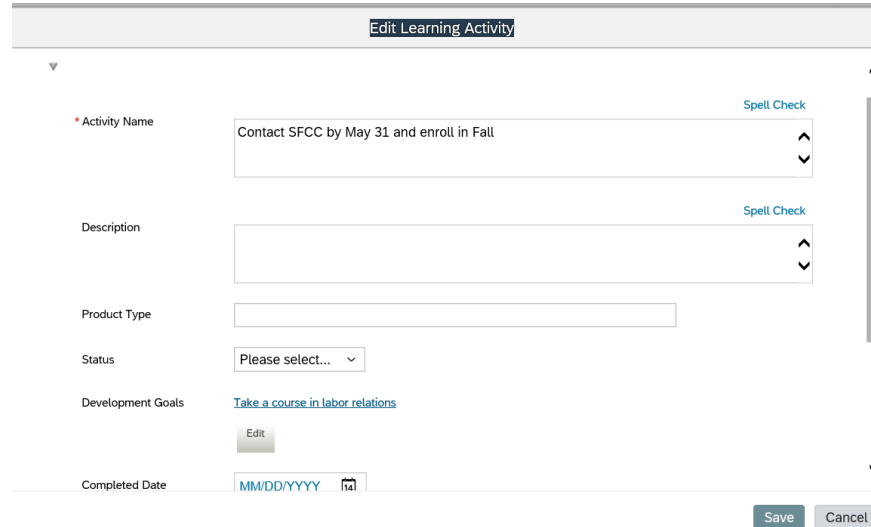
If you click on “Find in Catalog”, you will be taken to EDUCA where you are able to find a specific course



# New Learning Activity

- + Add New Learning Activity
- Find in catalog
- Custom 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

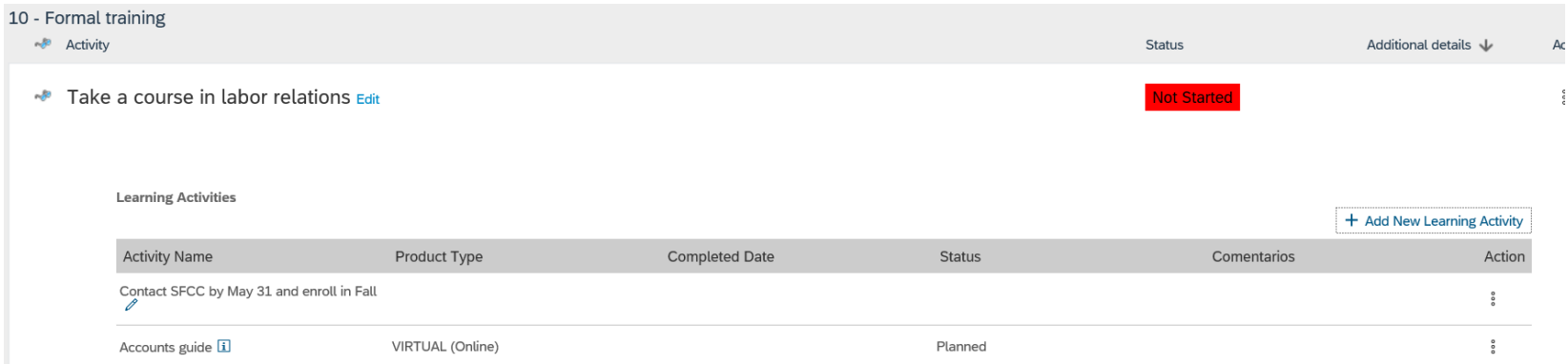


The screenshot shows a form titled "Edit Learning Activity" with the following fields:

- Activity Name: Text input with "Contact SFCC by May 31 and enroll in Fall" and a "Spell Check" link.
- Description: Text input with a "Spell Check" link.
- Product Type: Text input.
- Status: Dropdown menu with "Please select..." selected.
- Development Goals: Link to "Take a course in labor relations" and an "Edit" button.
- Completed Date: Date input with "MM/DD/YYYY" placeholder and a calendar icon.

Buttons for "Save" and "Cancel" are at the bottom right.

Once you click “Save”, you will be able to see each learning activity listed under the IDP

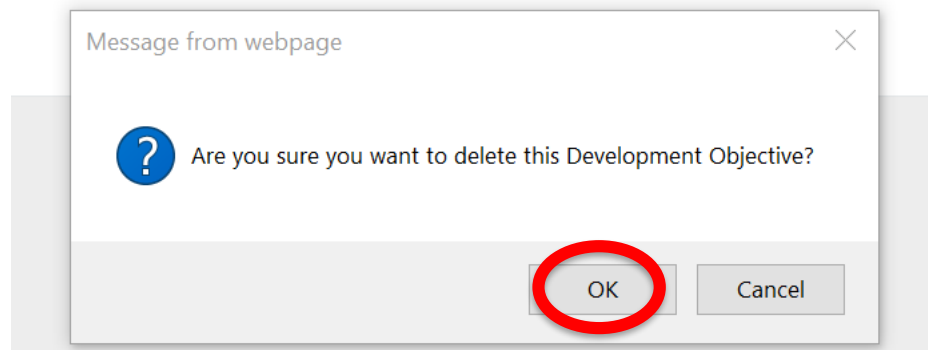


The screenshot shows the IDP interface with a table of learning activities. The table has columns for Activity Name, Product Type, Completed Date, Status, Comentarios, and Action.

Activity Name	Product Type	Completed Date	Status	Comentarios	Action
Contact SFCC by May 31 and enroll in Fall			Not Started		
Accounts guide	VIRTUAL (Online)		Planned		

# Delete IDP

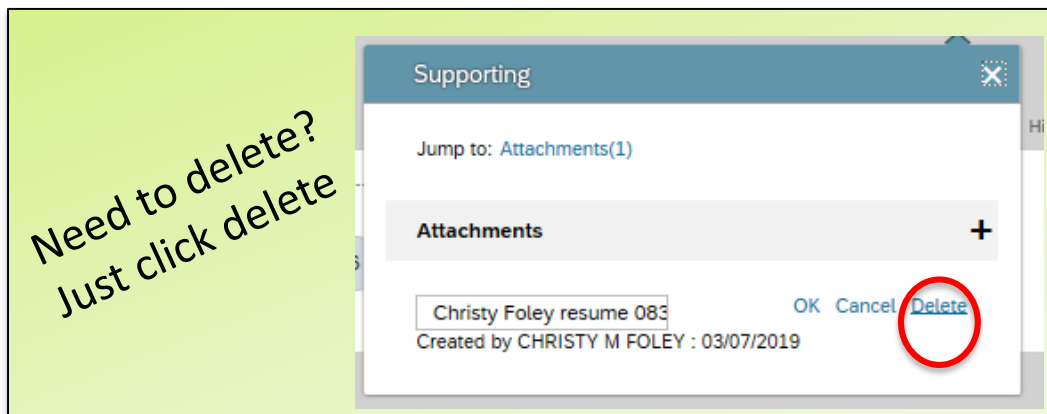
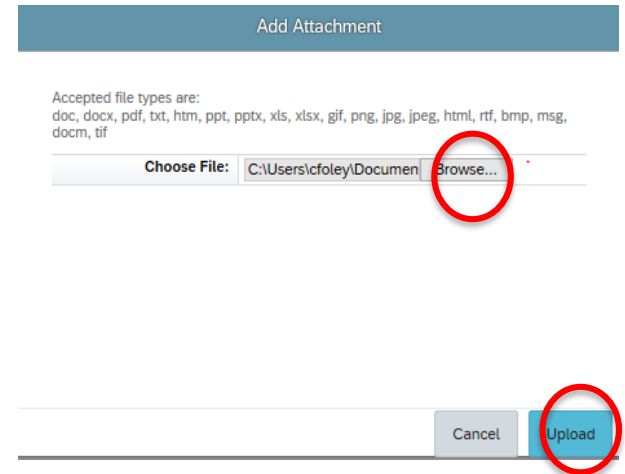
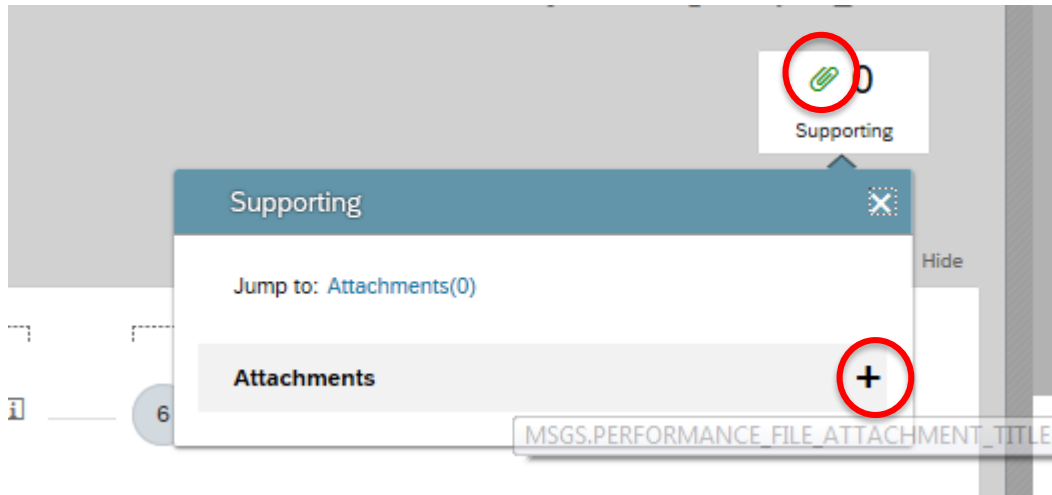
To delete an IDP, click on the 3 dots for the drop down menu



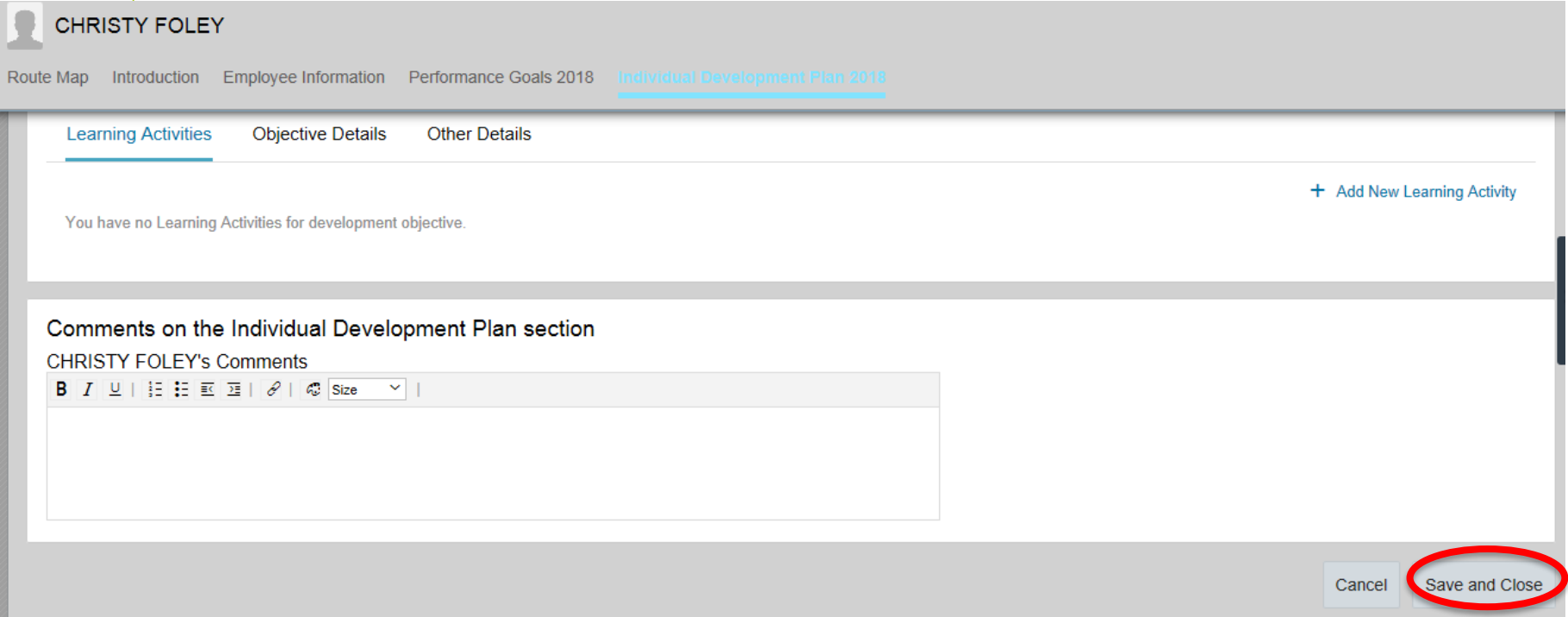
# ADDING DOCUMENTS

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*



# SAVE AND CLOSE



CHRISTY FOLEY

Route Map Introduction Employee Information Performance Goals 2018 Individual Development Plan 2018

Learning Activities Objective Details Other Details

+ Add New Learning Activity

You have no Learning Activities for development objective.

Comments on the Individual Development Plan section

CHRISTY FOLEY's Comments

B I U | | | | | | | | Size

Cancel 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.***