

Managing an Employee's Goals

The **Goal Plans** provide a collaborative area for you and your employee to create and track progress on the goals your employee will focus on during the review period. In this guide, learn how to view, edit, add, cascade, 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 Plans.

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. Access the *Employee Hierarchy* from within your own goal plan.

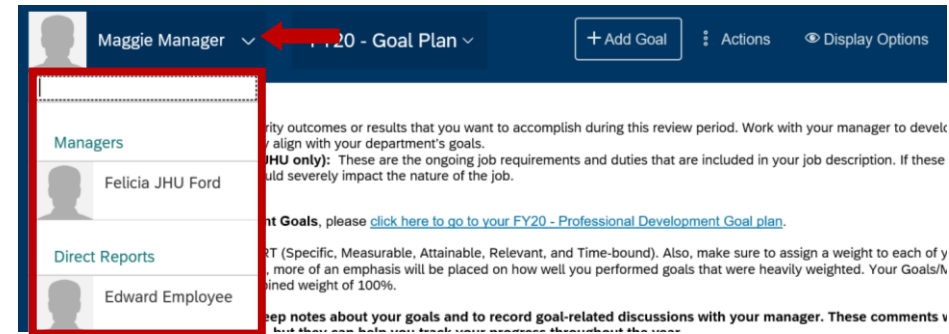
- Click **Home** in the upper-left corner of the screen.
- Click **Goals** from the drop-down menu.
- Click the dropdown arrow next to your name to access the search box and employee hierarchy.
- Click on the dropdown arrow next to Goal Plan to switch between or select the goal plan you would like to view.
- Type a name in the box or click on a name in the hierarchy, to view that employee's public goals.

Please note: Goals default to "private" status. If an employee prefers to create "public" goals, they may do so with your approval.

Evaluating Employee Goals

There are two goal plans for each performance cycle. Employees will enter goals and major responsibilities on the **Goal Plan** and development goals on the **Professional Development Plan**. You can review either of your employee's goal plans.

- **Goals:** These appear on the Goal Plan and are the priority outcomes or results employees want to accomplish during the upcoming review period. These goals are typically project-based, will end at some point in time, and align to the department's goals.



- **Major Responsibilities (JHU Only):** These appear on the Goal Plan and are the ongoing job requirements and duties included in an employee's job description. If these duties were not performed, it would severely impact the nature of the job. Major responsibilities goals will typically be performed for as long as the employee remains in the position.
- **Professional Development:** These appear on the Development Plan and are the steps 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 goals has a combined total weight of 100%. Evaluate each goal 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.*

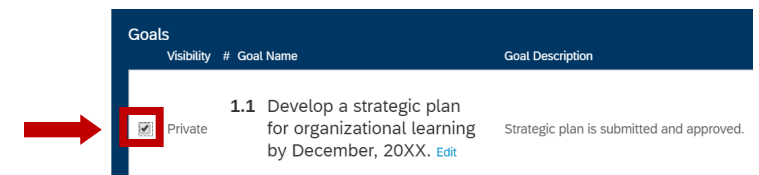
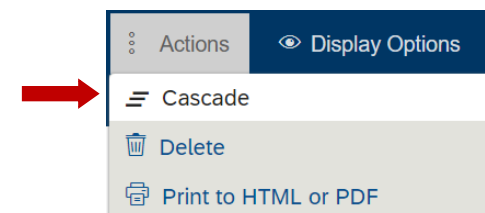
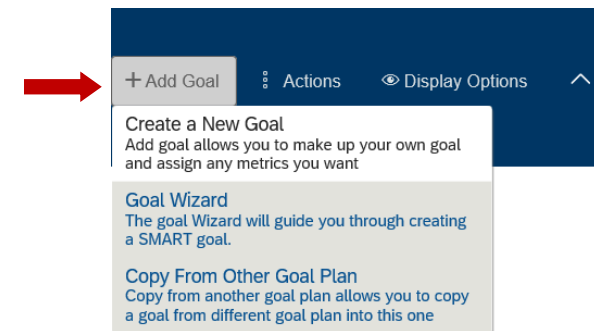
Adding Employee Goals

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

- Click **Create a New Goal** to add a custom goal or select a predefined goal 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.
- You can also copy goals from the prior year's goal plan, if you and/or your employee have used the goal plans in myPerformance in the previous cycle. Click **Copy From Other Goal Plan** and select the year and plan you wish to copy. Select the goal(s) you want to copy by checking the box(es) next to the goal(s); once goals are transferred, you can update or edit them.

Please note: you must copy your goals before the prior year's goal plan closes and the plan is archived, approximately three months after the new cycle begins. If you need to copy goals after the previous year's goal plan has been archived, please contact your HR Rep.

- You can **Cascade** goals to an employee from you own goal plan by clicking in the box next to the goal(s) you wish to cascade, click **Actions**, select **Cascade**, click in the box next to Name to select all team members, or next to one or more employee. Click **Next**. You will have the option to edit the goal prior to cascading it. Click **Cascade** to send the goal(s) to an employee's goal plan. These goals can then be edited by the employee, to reflect how he or she will support or contribute to the cascaded 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 and include SMART components (Specific, Measureable, Attainable, Relevant, and Timely or Time-bound.)
- **Weight:** Enter a percent to indicate the goal's relative importance to other objectives on the Goal Plan. All of your employee's goal weights combined should add up to 100%. The **Total Weight** is 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.
- **Status:** Choose from the dropdown options: Not Selected (default, means you are not using this feature), In Progress, Complete, Paused, or Cancelled, to indicate the status of your goals.

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.

Commenting on Goals

Managers and employees have the ability to engage in informal 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.

Please note: Goals from the goal plans automatically transfer to performance forms when available, however, any comments that are entered on the Goal Plan do not appear on the Performance Form. **Formal comments should be entered on the Midyear and Annual Review Performance Forms.**

Add Goal

Edit your goal below.

Fields marked with * are required.

Visibility:

Category:

* Goal Name:

[spell check...](#) [legal scan...](#)

Goal Description:

Weight: %

Start Date:

Due Date:

Tasks:	Target Date	Task	Action
	<input type="text" value="12/30/2019"/>	<input type="text" value="Present draft initiative plan."/>	+ ↑ ↓ 🗑️

Status:

Professional Development Goals

Visibility	#	Professional Development Goal Name	Professional Development Goal Description	Start Date	Due Date	Action
Private	1.1	Communication	Improve communication skills by: Attending Speak like a Pro Join Toastmasters by the end of the FY year	07/01/2016	06/30/2017	🗑️

Comments

Edward Employee: Attended "Speak Like a Pro" from 8/15 - 8/19/16
08/26/2016 [Edit](#) [Delete](#)

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** to select an objective.
- The Goal Library pre-populates the Add Goal window with suggested content, which can be edited as needed.

Please note: goals from the Goal Library are very narrow in focus and task oriented. They can be a good starting point for identifying specific tasks that fall under a larger goal category (i.e. Administrative Support, Customer Service, or Financial Support.) Most employees will likely need to combine several of these tasks under one goal title, to more accurately reflect the scope of work they do in relation to a goal category.

Create a New Goal

Choose what type of goal to add.

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

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

Cancel

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

<input checked="" type="checkbox"/> Achieve a customer satisfaction rating of at least __ for services provided during (time frame)	Satisfaction survey score
<input type="checkbox"/> Become more proficient with computer software by attending __ (#) of training courses per (time period)	# of courses attended
<input type="checkbox"/> By (date), document all administrative procedures for position in the case of absence	# of procedures documented
<input type="checkbox"/> By (date), follow all departmental policies and procedures	# of policies and procedures not followed
<input type="checkbox"/> By (date), meet __% of all agreed upon deadlines	% of deadlines met
<input type="checkbox"/> Conduct __ (#) training sessions with other administrative personnel on new skills	# of trainings conducted

Cancel Back **Add Selected**

Goal Wizard

Use the Goal Wizard to help you write SMART objectives. From the **Add Goal** 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. 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 including the goal weight (the goal's relative importance to other objectives on the Goal Plan) and to add tasks and/or Status. When you are finished, select **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.

Add a SMART Goal

SPECIFIC >> MEASURABLE >> ATTAINABLE >> RELEVANT >> TIME-BOUND

Welcome to the SuccessFactors SMART Goal Wizard™ which will help you quickly write effective goals.
What is your goal?

Category:

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.*

Add a SMART Goal

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

Confirm your SMART goal

Specific: (Goals)
Develop strategic plan for organizational learning by December, 20XX.

Measurable: Strategic plan is submitted by due date and approved.

Attainable: ✓

Relevant: ✓

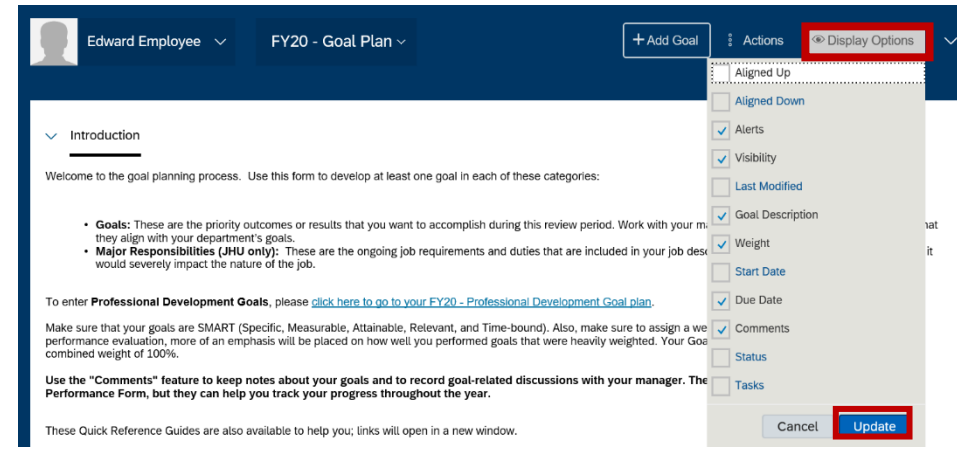
Time-bound: 07/01/2019 - 06/30/2020

[+ Add More Details](#)

Goals			
Visibility	#	Goal Name	Goal Description
<input checked="" type="checkbox"/>	Private	1.1 Develop a strategic plan for organizational learning by December, 20XX	Strategic plan is submitted and approved.

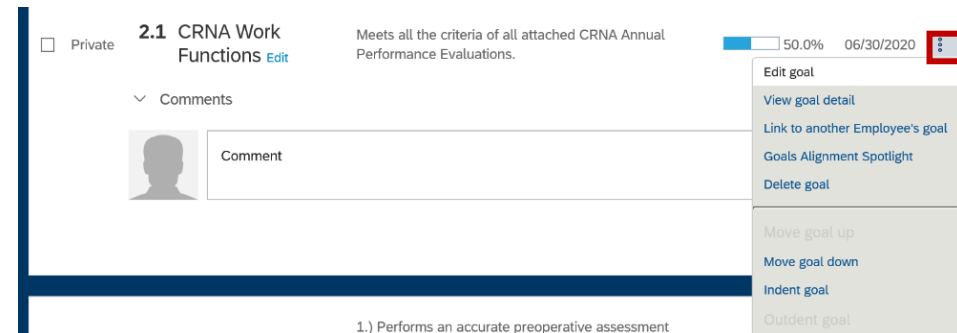
Display Options

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



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
 - Move goals up or down in the form
 - Indent 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.