Goals: Creating & Updating Performance and Development Goals

Overview

- This document guides employees through the steps to properly create, edit and update individual performance and development goals. Goals can be created or updated at any time throughout the year.
- Note that performance goals are different from development goals and are located in difference sections of the **Career and Development** tile. Performance goals are located under **Goals**, while development goals are located under **Career Development.**
- Despite being in different locations and having a different focus, performance and development goals are created and updated in the same way.
- There are several methods for adding performance or development goals, including manually writing the goals or adding from the goal library. Additionally, an employee may have goals that are added or assigned by their manager or shared with them by their manager or another employee.
- New or updated goals are submitted for manager approval.

Contents

1. Navigating to the Self-Service Module for Performance Goals

1. **Performance goals** are in the **Career and Performance** section. You can access this section in two ways:

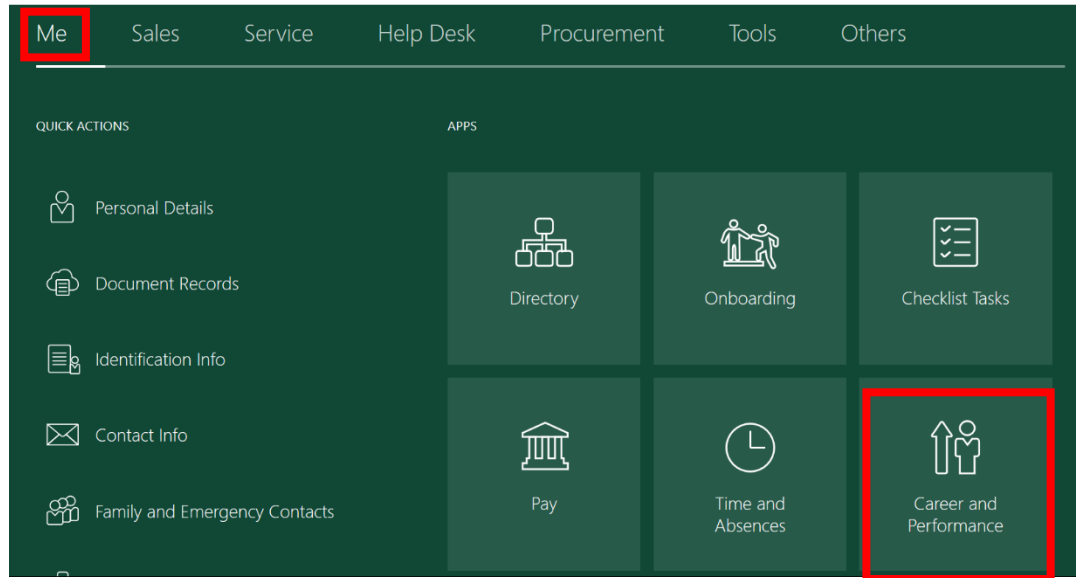   a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

   b. Under the **Me** section, click the drop-down arrow, and select **Career and Performance** from the dropdown list.
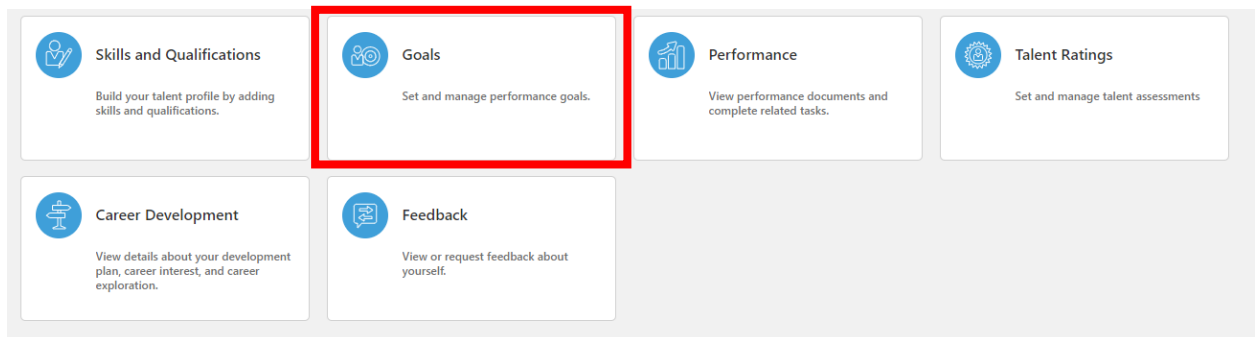
c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Career and Performance** tile on the main page.

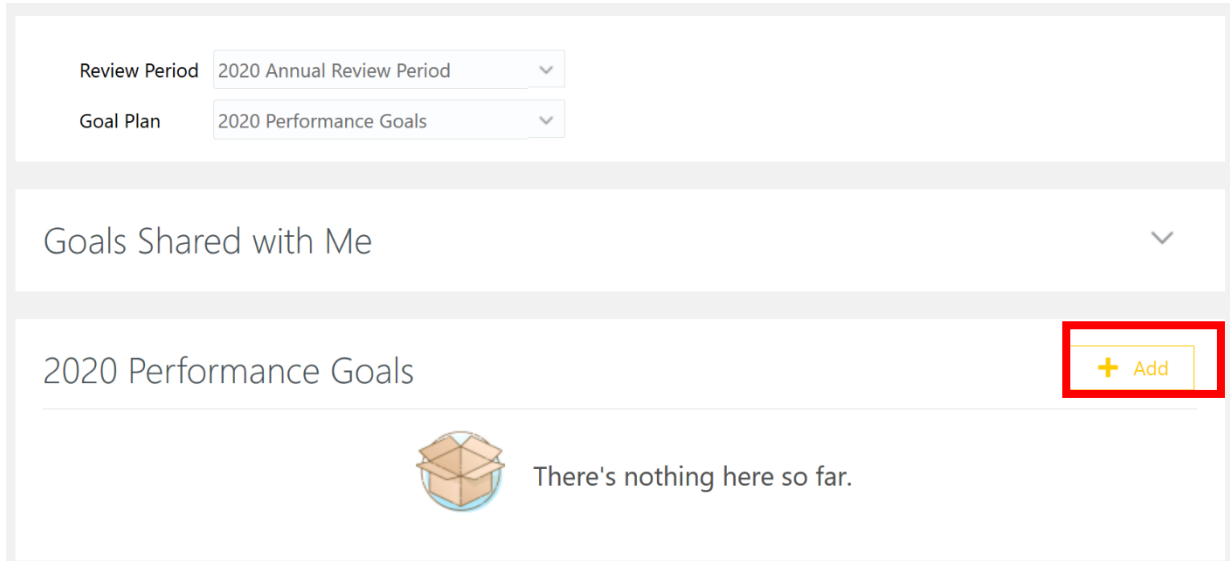2. Upon entering the **Career and Performance** tile, click on the **Goals** button.

a. When managing a **Performance Goal**, you can add goals, view details, view the status of a goal, edit, or update a goal.

i. **Goals Shared with Me** – This is a performance goal, referred to as 'Shared Goal', which your manager or other employees have shared with you. You can choose to add shared goals or ignore them.

ii. **Performance Goals** – This view provides a list and detailing of current performance goals for the year selected. A goal can be added by clicking the **+ Add** button in the section's right corner.
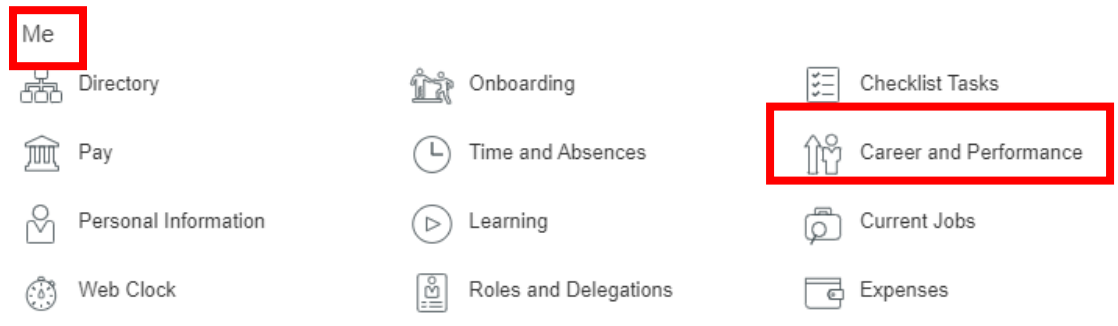
2. Navigating to the Self-Service Module for Development Goals

1. **Development Goals** are in the **Career and Performance** section. You can access this section in two ways:

    a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.
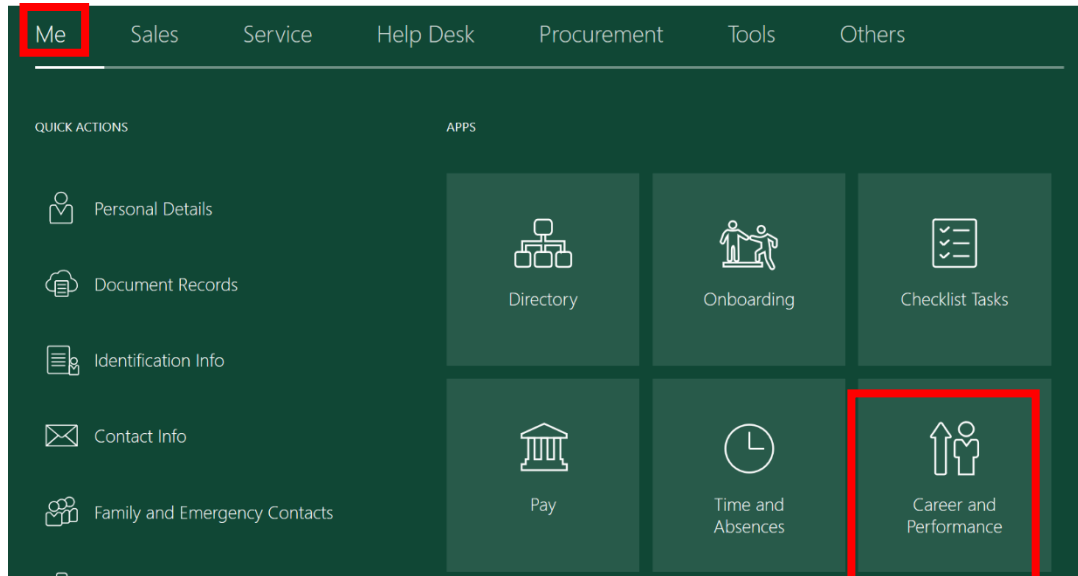

    b. Under the **Me** section, click the drop-down arrow, and select **Career and Performance** from the dropdown list.
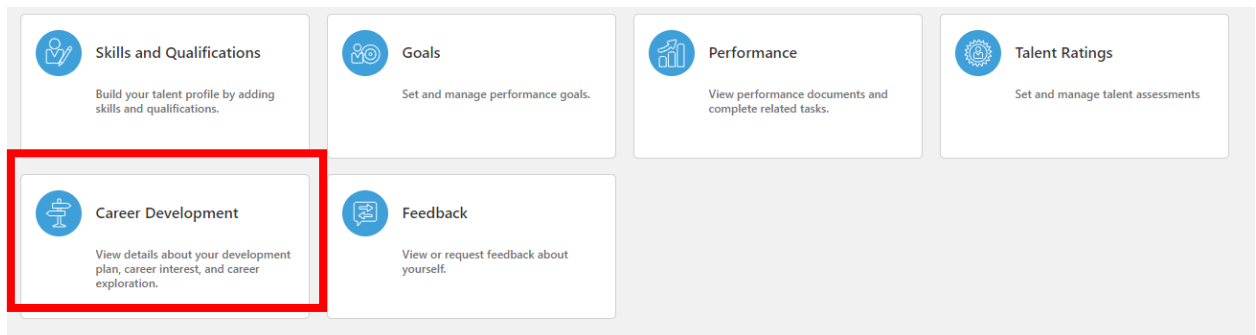
c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Career and Performance** tile on the main page.

3. Upon entering the **Career and Performance** tile, click on the **Career Development** button.

a. When managing a **Development Goal** you can add goals, view details, view the status of a goal, edit, or update a goal. Development Goals will appear under the

Development Plan section. To add a Development Goal, click the **Add** button.

Development Plan   [+ Add] ^

Active Goals ▾   Actions

There's nothing here so far.

3. Creating Performance or Development Goals

1. After clicking **Add** to create a performance or a development goal, as described in the previous section, you will see the **Basic Info** screen for the goal. Scrolling down, you will also see sections for **Measurements** and **Tasks**.

2. You can add goals either by typing manually or selecting common performance goals from a library. To create a goal manually, first type a goal in the **Goal Name** field and complete the remaining fields as appropriate. Alternatively, you can add a performance goal by selecting an option from the goal library. To add a performance goal from the goal library, use the drop-down menu under the **Library Goal** field to select a goal. This then auto populates the remaining sections and their respective fields. Please note, library goals are meant to be used as a starting point and will need to be revised and expanded to meet your specific needs.

   a. **Library Goal** – This is a pre-set goal from a stored library of goals that auto populates the remaining fields for the performance goal profile.
   b. ***Goal Name** – This is the name of the goal.
   c. **Description** – This describes the goal.
   d. ***Start Date** – This is the recorded start date of a goal, which could be the current date or future dated as appropriate.

e. **Category** – A dropdown menu of a potential grouping that this goal corresponds with.

f. **Status** – A dropdown menu that records progress with the goal.

g. **Success Criteria** – Required criteria for the goal to be marked a success.

3. Optionally, after inputting details about your goal, you can also add **Measurements** by selecting the **Add** button. Measurements are specific measures for successful goal completion.

4. Once you have added the appropriate measurements, click **Save**.

a. <u>Measurement Name</u>: this can be any name (i.e. Excel workbooks completed)
b. <u>Unit of Measure</u>: choose from none, currency, number, or percent
c. <u>Start Date</u>: choose a day which the measurement should take effect
d. <u>End Date:</u> choose a day the measurement should conclude

5. After adding measurements, you also have the option to add tasks to your goal. This is usually done when it will take multiple actions to complete a goal. To add a Task, click the **Add** icon.

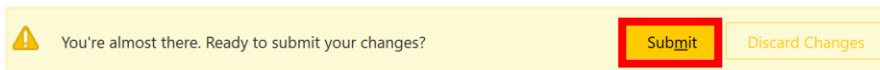6. Afterwards, input the following fields as necessary.

    a. <u>Name</u>: enter a task name

    b. <u>Type</u>: select the type of task from the drop-down menu

    c. <u>Status</u>: choose from Not Started, In Progress, Completed, or Overdue

    d. <u>Priority</u>: defaults to medium but can be adjusted as desired

    e. <u>Completion Percentage</u>: may auto-populate depending on status. Can change as needed.

    f. <u>Start Date:</u> choose a day which the task should take effect

    g. <u>Target Completion Date:</u> enter the date the task should be completed

    h. <u>Related Link</u>: copy and paste the desired link in box.

7. After completing all of the required fields, scroll to the top of the page and click **Save and Close** in the top right-hand corner to create the team goal.
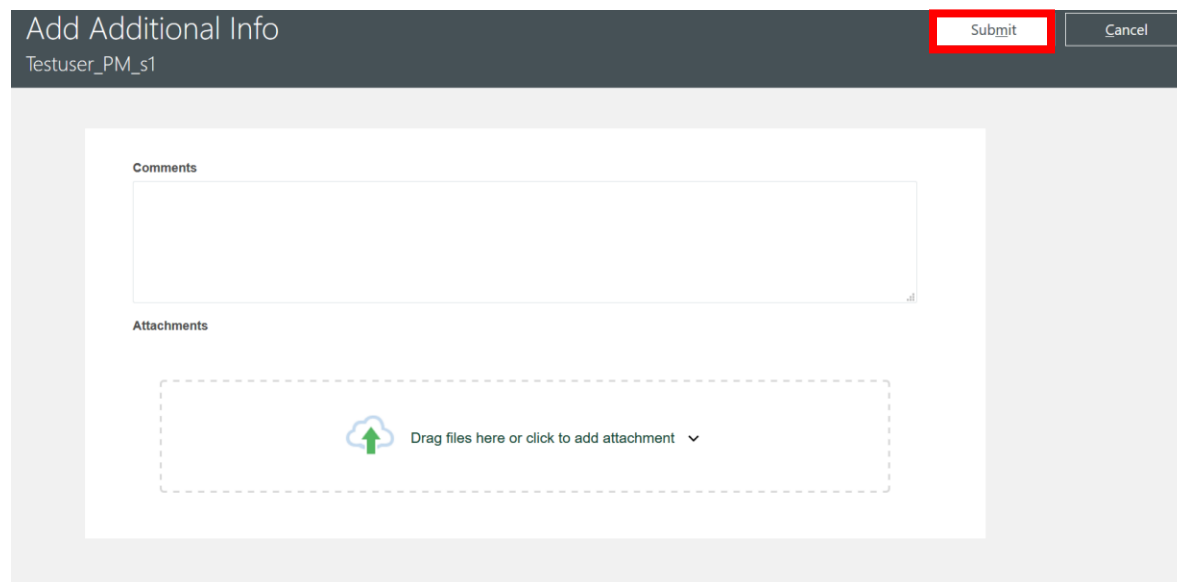
Add Performance Goal	Save and Close	Cancel

8. In the **Goals** section, select the **Submit** button.

⚠ You're almost there. Ready to submit your changes?   **Submit**   Discard Changes

    h. **Note**: Upon a goal's submission for approval, additional goals cannot be added until this goal has been approved. In order to submit multiple goals at once, enter all other goals as described in previous steps. Once all are entered, select **Submit**. Goals in need of submission are indicated by the blue dot next to their name.

9. On the **Add Additional Info** screen, you can add comments to your manager about the goal(s) you are submitting, or you can add supporting documents, as applicable. When finished, select the **Submit** button in the top right corner of the screen.

Add Additional Info
Testuser_PM_s1   Submit   Cancel

Comments

Attachments

☁ Drag files here or click to add attachment ⌄

10. A goal's pending status is viewed in the yellow box in the section where the goals are listed, this box will disappear after approval. When it reads, "Approval in Progress. See how it's going.," you can select "See how it's going." to view progress.

2020 Performance Goals

⚠️ Approval in progress. See how it's going.

Sort By Display Sequence ▾

🔵 Time Management
Improve ability to manage priorities and meet deadlines.

Status   Weight
Not started   0%

    i.   Optional: On this screen you can select the **Withdraw** button to retract the goal before it is approved.

TE 2020 Performance Goals   Withdraw
    Testuser_PM_s1

⚠️ Approval in Progress

2020 Performance Goals has been submitted for approval

Your Goal Plan 2020 Performance Goals has been submitted for approval.

ignite

4. Updating and Editing Performance or Development Goals

1. Navigate to the **Goals** or **Career Development** section as described in previous sections, depending on whether you are managing a Performance or a Development Goal. Note: If any goal is submitted but not yet approved, you will not be able to edit the goal.

2. Select the goal you want to update or edit by clicking on the name of the goal. This will open the goal.

2020-21 Performance Goals

Actions

☐ Priority Management

Status   Weight
Not started   0%

3. When the goal opens, you can update or edit any field as needed by selecting the **Edit** or **Add** buttons, as appropriate.

4. **Submit** the updated goal for approval as described previously.

5. Sharing Performance or Development Goals

1. It is possible to share one or more of your goals with others as a suggestion or a way to save them time. For example, if you have a goal that would also apply to a co-worker in the same role, you can share it with them. Then they can simply accept it and submit it for approval rather than entering the goal themselves. You can also receive shared goals from co-workers or your manager. As with any performance goal, shared goals still require manager approval. The following steps detail how to share and receive a goal.

   a. Share a goal by selecting the checkbox next to the goal name of the goal you wish to share. Note: this example uses a performance goal but the process is the same for development goals.

   b. Select **Share** from the **Actions** drop down.

c. Decide who to share the goal with, such as, direct reports who will auto populate, however, you can share with anyone. Select a worker from the dropdown or type the name in manually. Then check the task box and the worker box.

Selected Goals

Time Management

☑ Share tasks

Share Goals With

☑ | Add Worker [_____ ⌄]

☑ ZN **Ms. Zoe Nagle**
Manager, Compliance

d. Click the **Submit** button.

6. Receiving Shared Performance Goals

1. Shared **Performance Goals** will show up in the **Goals Shared With** Me section of the Goals tile. Receive a goal by selecting the **Add as My Goal** button under the **Goals**

Shared with Me tab.

2. Select which **Goal Plan** you wish to add this shared goal to from the dropdown. Then select **Save and Close**.

3. Complete the submission steps and the goal will be submitted to your manager for approval.

7. Receiving Shared Development Goals

4. Shared **Development Goals** will show up in the **Goals Shared With** Me section of the **Career Development** tile. Receive a goal by selecting the **Add as My Goal** button under the **Goals Shared with Me** tab. If you do not want to accept the goal you can select **Hide** to make it go away or do nothing and it will remain visible for later use.
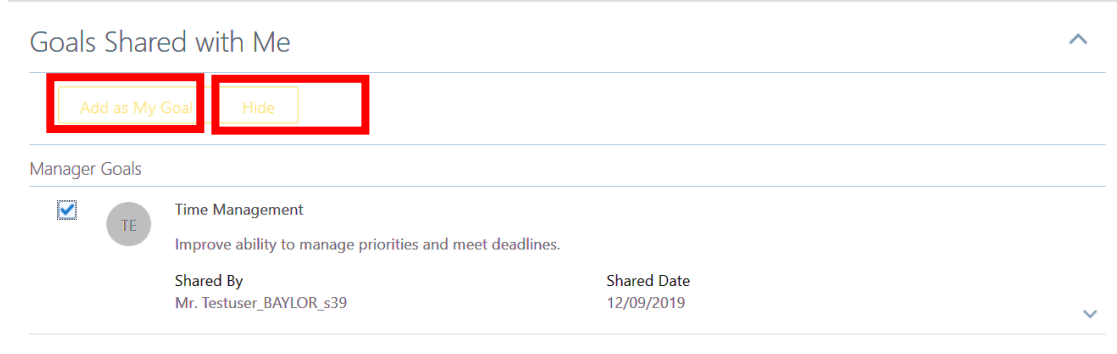
5. If you select **Add as My Goal**, select **Save and Close** on the next screen.

6. Complete the submission steps and the goal will be submitted to your manager for approval.