

SuccessFactors User Guide

Setting Goals & Continuous Performance



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Before we start a reminder



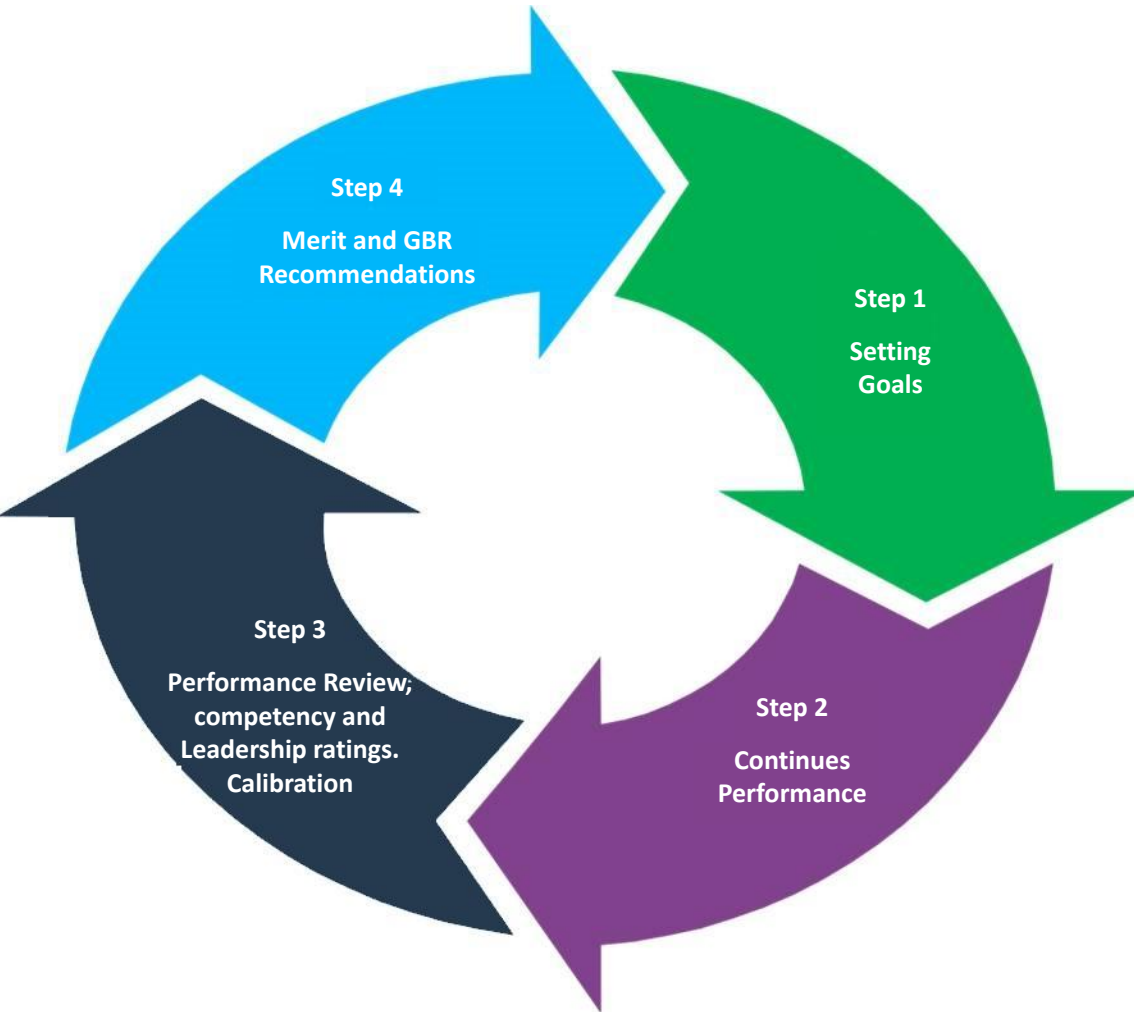
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- Calibration meetings are finalized;
- Now is the time for:
 - Manager 1:1 Meeting /conversation with employee
 - Manager shares information with employee by sending to next step Employee Acknowledgement
 - Employee needs to acknowledge and push to next step (Completed step)

Deadline: End of February



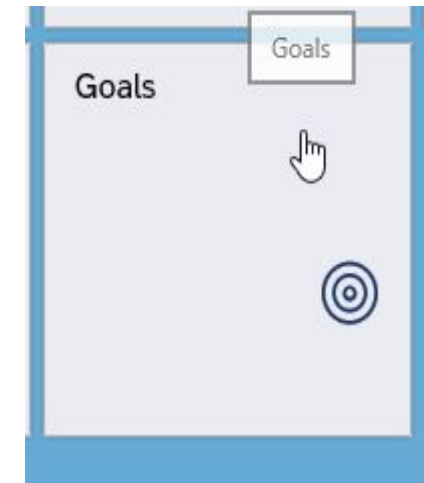
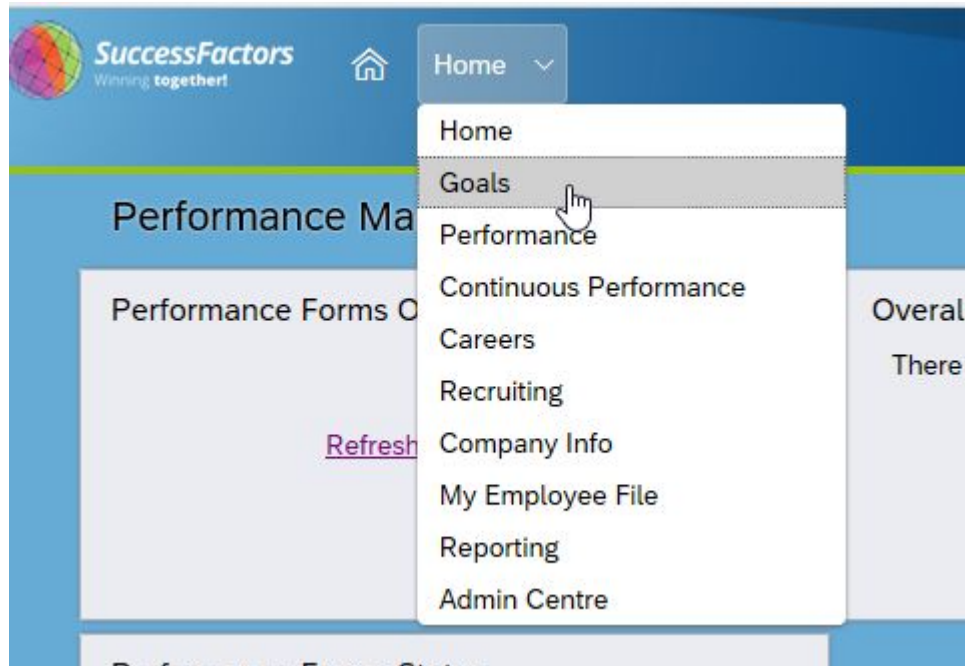
Goals Timelines 2020 cycle



Event	Deadline	Actions
2020 Goal setting	End of March	Set goals – lock goals
2020 Continuous performance	ongoing	Tracking achievements towards goals throughout the year
2020 Mid-year review	June-July	<ul style="list-style-type: none"> - Conversation to go through goals - Comments can be entered - Goals can be adjusted if required
Performance review (end of year)	Will start end of November	



- Access goals through the dropdown or the Goals tile on the SuccessFactors home page





- Setting goals is important to our growth; it creates ownership and accountability to drive success
- Goals should be aligned to the ‘overall allnex goals’
 - EBITDA, Cash Management (e.g. working capital), SHE, Operational Excellence
 - numbers are not set yet
- Create effective goals by using the SMART principles – see next slide

SMART principles

Specific

Specific rather than general. Detailed, particular, and focused on your situation/opportunity. End result plainly stated. Avoid vague, inexplicit language

Measurable

Measurable in quantity, quality or results. Quantifiable and qualitative. Indicate when it will be reached and how it will be measured. Be specific.

Achievable/ Attainable

Achievable within the review period. Practical and achievable, but challenging. Should motivate employees to reach results and identify the barriers (if any).

Relevant /Results oriented

Relevant/Result oriented. Commitments should indicate an activity/performance that produces results and indicate which result/**contribution** to be achieved – needs to be linked to the cascaded commitments

Time bound

Time bound. Commitments should have realistic deadlines and timelines associated with them. Ensure that not all commitments are at the same due date.

Individual Goals and Goal Library



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- **Setting goals** is the first step in the process
- Click on 'Add Goal' and choose between Personal Goal & Library Goal
 - Personal Goal: to create customized goals or
 - Library Goal: to choose amongst some pre-set SMART goals with metrics. These can also be individualized.



Create a New Goal

Choose what type of goal to add.

- + [Personal Goal](#)
Personal Goals allow you to make up your own goal and assign any metrics you want.
- + [Library Goal](#)
Library Goals are selected from an organized library with suggested metrics.

javascriptvoid(0);

Cancel

Setting a individual Goal or a library Goal



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- Create no more than 5 goals
(a warning will be given, but not a hard stop; if you still do you will have problems at year-end).
- Fill in the name of the goal and a more detailed description of the goal and how to achieve it.
- Select weighting that adds up to 100% for all your goals.

Add Goal - Microsoft Edge

https://hcm2preview.sapsf.eu/tqm/Edit?l=1&u=300065&editComp=true&&_s_crb=2%2bhoYXq1pwjeYLFM2ZIZnyTqm24%3d

Add Goal

Edit your goal below.

Fields marked with * are required.

Type: Personal

* Goal Name: Demonstrate successful reduction of risk for organization by (date)

* Description:

* Start Date: 01/01/2019

* Due Date: 12/31/2019

Weight: %

* Status: Not Started

Milestones: + Add Milestones

Cancel Back Save Changes

5:10 AM
10/29/2019



- You can add 'Milestones' to goals
- This way you can divide the goal in smaller targets to be achieved throughout the year.

* Status:

Milestones:

Target Date	Milestones
<input type="text" value="04/01/2020"/>	<input type="text" value="Step 1 of project finalized"/>

Sharing Goals with others



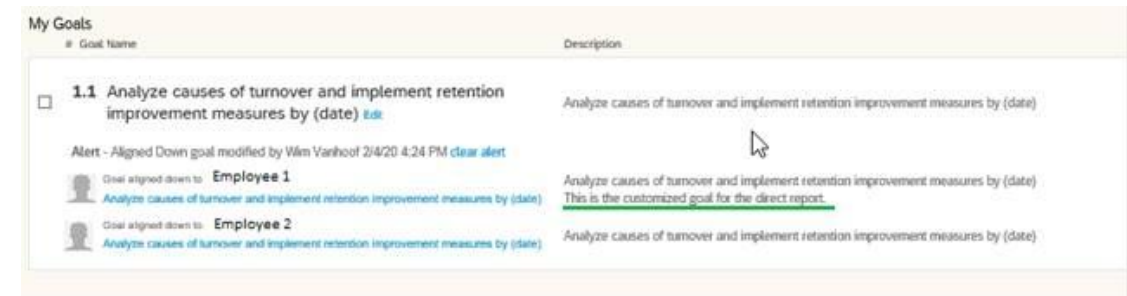
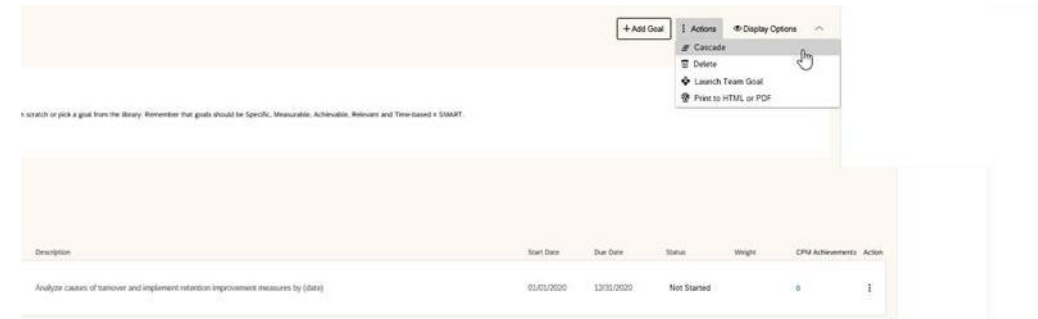
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- **Individual Goals** : Can be cascaded by the manager to your subordinates/team;

the individual can still customize if needed
e.g. site specific goals

- **Team Goals** – Can be assigned to a team (unable to be changed by employee)

****Advise to use *Team Goals* with caution and only on specific occasions as cannot be customized or followed up on****



Cascade Goal

Manager can share their own personal goals with any other employee



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The purpose of a cascade might be when a manager needs others to work on a goal:

1. On Homepage of Goals; Tick the **personal goal** to cascade
2. Under **Action**; Click on **Cascade**
3. New window pop up, Click on the **recipients** (employee)
4. Click on **Next**
5. New window pop up to **Edit Goal Details**
6. Click on **Cascade**

Goal Plan 2013 -

Goal Status: Goal Plan Unlocked

My Goals

Name	Title	Number of Team Members	Cascaded	Goal Plan State
Peter Ware	HR Dir AP (PO5992000052)	7		Unlocked
Carrena Cheah	Reg Business Partner HR Services RGA (PO5992000232)	3		Unlocked
CHOAY FEN CHOW	HR Mgr MYS (PO5992000241)	3		Unlocked
DIANA RAKHMAWATI RAKHMAWATI	HR Mgr IND (PO5992000242)	2	cascaded	Unlocked
Ekdanal Seedala	HR Mgr THA (PO5992000233)	2	cascaded	Unlocked

Other Employees: Find Other Employees

Cancel Next

Step 2 of 2. You can edit the goal (optional) before cascading it to the selected recipients.

Fields marked with * are required.

Already Cascaded To: DIANA RAKHMAWATI RAKHMAWATI and Ekdanal Seedala

Type: Personal

* Goal Name: Finish testing SF for UAT

* Description: Deadline for finalizing is Wednesday 23 October

* Start Date: 01/01/2019

* Due Date: 12/31/2019

Weight: 20.0 %

* Status: On Track

Milestones: + Add Milestones

Cancel Back Cascade

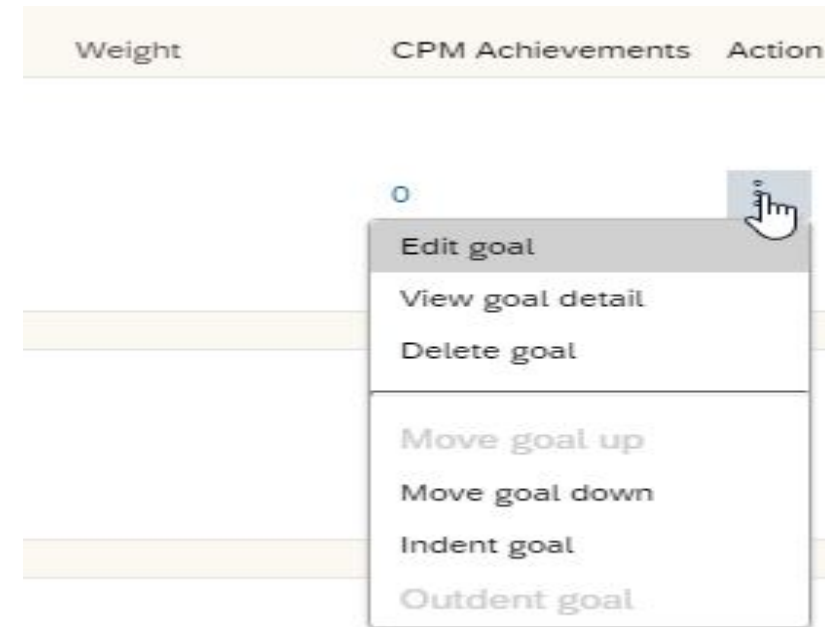
- ❖ Cascade Goal can only be done from a Manager's Personal Goal
- ❖ Goal Details can be different from Manager's hence it is editable



- Goals can be edited, deleted, moved up and down and also indented (major goals and sub-goals)

Note: only when your Goal Plan is in Unlocked status

- View goal detail to see any changes that have been made to the goal.





- Goal plan to be created upon hire date (for the ones that are performance eligible.....)
- Manager/Employee must ensure that at minimum 1 goal is entered into the system, even if the hire is only arriving in the month of December
- Managers must remember to lock goal(s) when they are final

Goal Locking



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To lock goal setting for employees

1. On Home page: click on **Home** dropdown list and go to **Goals**
2. Select **Goal Plan 2020**
3. Click on the arrow next to your name
4. Click on your direct reports
5. Click on **Lock Goal Plan** to lock all the goals after agreement between manager and employee.

- ❖ **Goal Locking occurs 'AFTER' manager and employee have held a meeting to discuss and agree on the individual goals**
- ❖ If the status says '**Goal Plan is Unlocked**' it is editable by employees; any sub-sequent changes will be viewable
- ❖ **REMEMBER: Goals can only be edited when they are unlocked, no edit is allowed after they are locked by the manager.**
- ❖ **However, if goals are locked the employee will be able to comment and track progress**

The screenshot displays the SuccessFactors Goals interface. At the top, the 'Goals' dropdown menu is highlighted with a green box and a '1' in a green circle. Below it, the user's name 'Careena Cheah' is shown with a dropdown arrow, highlighted with a green box and a '2' in a green circle. A search bar is visible below the user name. The 'Direct Reports' section is highlighted with a green box and a '4' in a green circle, listing three employees: Molly Stoneberg, Susie Sun, and Lavenia Tudreu. On the right side, the 'Goal Plan 2019' dropdown is highlighted with a green box and a '5' in a green circle. Below it, the 'Goal Status' is shown as 'Goal Plan Unlocked', and the 'Lock Goal Plan' button is highlighted with a green box and a '6' in a green circle.

Development Plans



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How to create development plans for employees

1. On Home page: click on **Home** dropdown list and select **Goals**
2. Select **Development Plan**
3. Click on **Add Goal**
4. Populate **Add Goal** Box-Save Changes
5. Once a Development Plan is established. The plan is editable and can be tracked.

The screenshot shows the SuccessFactors Goals page. The 'Goals' dropdown menu is open, showing 'Development Plan' selected. The 'Add Goal' button is highlighted with a blue arrow and the number 3. The page shows a user profile for Tina Collins and a 'Development Plan' section with an 'Introduction' link.

Development Plan:

- ❖ Next action to take after performance discussions are completed and part of goal setting for 2020.
- ❖ Supports ongoing performance discussions and documents further development of people
- ❖ Year over year carryover (unless deleted) to support long-term development.

4

The screenshot shows the 'Add Goal' dialog box. The dialog box contains fields for 'Development Goal Name', 'Measure of Success', 'Start Date', 'Due Date', 'Status', and 'Purpose'. The 'Start Date' is set to 01/01/2019 and the 'Due Date' is set to 12/31/2019. The 'Status' is 'Not Started' and the 'Purpose' is 'Select Purpose'. There is an 'Add Milestones' link and 'Cancel' and 'Save Changes' buttons.

5

#	Development Goal Name*	Purpose	Measure of Success	Competencies	Start Date	Due Date	Status	Action
2.1	test	Select Purpose	test		01/01/2019	12/31/2019	Not Started	

Development Plans



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Development Tracking

1. **Status:** Allows Development activity to be tracked
2. **Purpose:** Defines scope of development plan, ie; skill gap, competency, future growth
3. **Competencies:** Select competencies to support development
4. **Milestones:** Establish target dates to monitor and record activity

1

Add Goal

Edit your goal below.

Fields marked with * are required.

* Development Goal Name*

* Measure of Success

* Start Date: 01/01/2019

* Due Date: 12/31/2019

* Status: Not Started, On Track, Behind, Completed

* Purpose:

Milestones: + Add Milestones

Cancel Save Changes

2

* Start Date: 01/01/2019

* Due Date: 12/31/2019

* Status: Not Started

* Purpose: Select Purpose
Close a knowledge, skill or behaviour gap
Enhance a current knowledge, skill or behaviour strength
Develop for a future opportunity

Milestones:

Cancel Save Changes

3

Competencies:

Add Competencies

- 0. Technical/Functional Skills
- Acts decisively
- Builds Trust
- Builds effective teams (L)
- Business Insights (L)
- Collaborates
- Courage
- Customer Focus
- Demonstrates resilience

Comments:

4

Milestones: Target Date: February 2020

Actual Date: MM/DD/YYYY

Competencies: Add Competencies

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Use today's date

Development discussion

Performance discussions should include a development discussion

Encourage employees to think & act upon their development

Best-in-class development supports a blended learning 70-20-10 model



Document what was discussed / action plan (helps to identify overall needed courses; follow up; ISO audits)



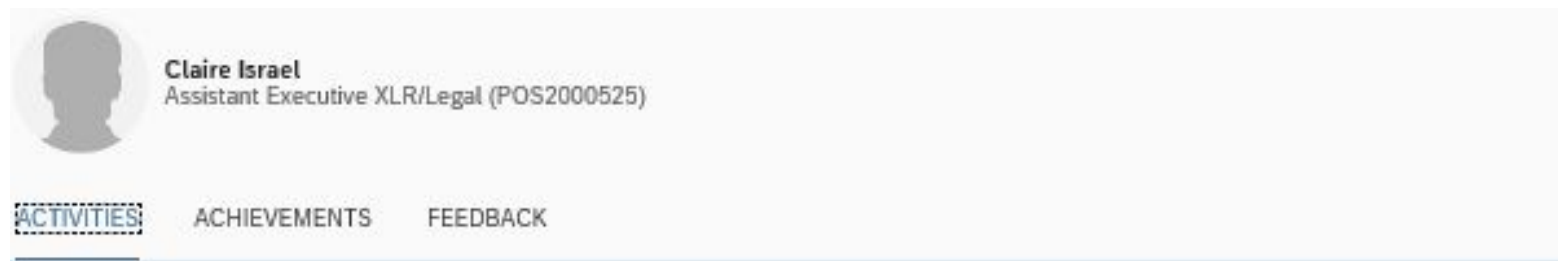
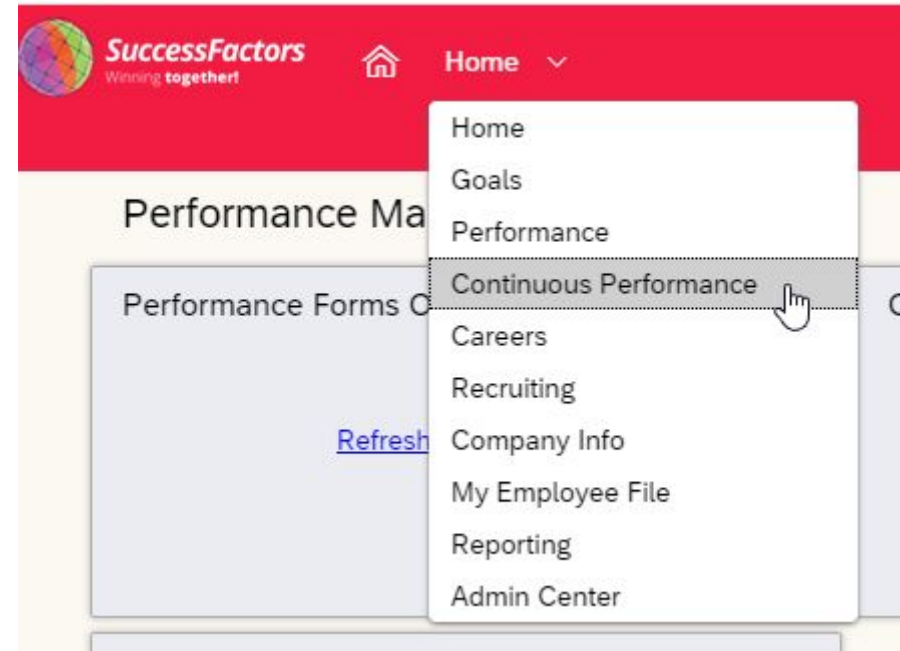
- Mid year review should take place around June – July timeframe
- Manager and employee to go through status of goals, discuss and potentially document comments in the system
- If there is a need for an update of a particular goal, manager will need to unlock goal plan, adapt goals, and lock goal Plan again

Continuous Performance



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- Continuous Performance is a tool to follow up on your goals and also track activities and achievements throughout the performance year.





- Track activities related to goals
- Track achievements towards goals and also link to activities
- Use this as a tool to keep track of what you have completed throughout the year
- Achievements will be visible in the performance form (at end of the year when this is open)

New Activity

*Activity Name

*Status

Goals

Performance Goal

Continuous Performance - Feedback



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- The system provides also an opportunity to ask for feedback from others, as well as giving feedback to someone in the company. Managers can also ask for feedback about the employee.
- Feedback you have asked for about yourself will be visible only to you, but you can share it with your manager.
- Feedback the manager has asked for will be visible to both employee and manager.

FEEDBACK

Request Feedback

i Employee: Once this request is responded to, only you will have access to the feedback message until you decide to make it visible to others. Manager: Once this request is responded to, it will be visible also to the employee.

*From

*Message
Since we have worked together, I'd like to get your feedback. Could you please let me know what you think I did well and provide one constructive suggestion on what I could do better in the future?

Best regards,
Julianne Remvik

Request Feedback View Feedback Requests Give Feedback

Give Feedback

*To

*Feedback
Share your feedback to help recipients reflect on their work

Next steps



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Step 1. Employee and Manager participate in upcoming training presented by your local HR Manager.



Step 2. Employee should consider goals based on their scope of responsibility.



Step 3. Goals should be discussed with your manager and agreed.



Step 4. Employee will create goals in Success Factors (Goals Tab).

Step 5. Alert Manager once goals are inputted.



Step 5. Alert Manager once goals are inputted.



Step 6. Manager will lock goals.

How to prepare for this training?



Action for local HR:

- Send invitation(s) to attend local training
- If needed translate the presentation in your local language
- Run through and get yourself familiarized with Goal Setting & Continuous Performance
- Local training should take place any time NOW, and should be finished by Feb 18th
 - Deadline is **End of March for employees & managers to finish**
- During training, focus particularly on:
 - Setting challenging & high quality goals (see annex)
 - Continuous performance functionality & benefits
 - Start setting individual goals NOW
- Any question, reach out to your regional leads:
 - Julianne Remvik– EMEA
 - Tina Collins – Americas
 - Cameron – AP

Annex

- examples of SMART Goals
- some guidance for mgrs on how to conduct a good 1:1 meeting



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> Safety, Health, Environment

- Operate all plants in accordance with legal and safe procedures and practices and meet SHE goals; meet OSHA recordables below target of X

> Growth & Customer Satisfaction

- Deliver BU NPI of X
- Identify at least 2 M&A potential targets
- Innovation: meet timely all milestones related to project X
- customer responsiveness – complaint handling within X days
- grow territory sales by X% compared to last year
- sign 2-year contract at 'ABC' with Y% marginal income
- Number of customer complaints below X

> Operational Excellence

- Productivity & plant utilisation improvement of X by end of quarter Y
- savings of X \$, purchasing savings of x\$ by end of quarter Y
- quality improvement by implementing project X by end of June
- BU inventory days below X days for region A,B,C, D,.... in every quarter

- ✓ Manufacturing / Business / supply chain/ R&D:
 - ✓ Achieve a xx first time right on all batches produced this year, decrease refrigeration usage in operation X by X% and thus create an annual saving
 - ✓ Encourage optimal trade-off between cost and service level – BU quality CCIR%
 - ✓ Ensure smooth flow products to customer e.g. reduce number of out of spec material with X%
 - ✓ Manage working capital days – reduce DSO with x number of days for customer portfolio
 - ✓ Encourage optimal trade-off between cost and service level – BU quality CCIR%

- ✓ Functional areas
 - ✓ Provide 100% response to all customer care improvement reports in xx days or less, achieve xx% resolution of customer inquiries within 24 hours
 - ✓ Deliver timely critical KPI information to the BU's, in order to take necessary measures where needed
 - ✓ Support legal entity optimization project by closing Legal entity C...
 - ✓ Lead/ contribute to project X (e.g. SAP, SF, ...) in country/region C to ensure successful implementation by <date>
 - ✓ Ensure timely financial reporting at introduction of new ERP

Ensure all customers are satisfied *Not specific, measurable, time bound*

Complete all work assignments on time *Not specific, measurable*

Increase sales by 300% *Not specific, measurable, time bound*

Reduce Defects *Not specific, measurable, time bound*

Role of the manager

- Provide meaningful comments on performance and results; show employees you noticed their efforts
- Provide concrete examples to substantiate
- Document employee performance
- Reinforce expectations and accountability
- Assess strengths and opportunities for development
- Differentiate employees based on performance for recognition, merit, career development

Set the stage

Encourage questions

Focus on performance

Discuss ratings

Listen actively

Summarize opportunities

Create action plan

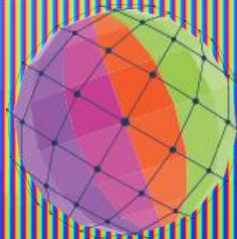
Desired Outcome of conversation

- Understanding/Agreement between your employee and yourself about the rating(s)
(Discussion includes competencies, behaviors, leadership & potential)
- No surprises, employee feels evaluated fairly
- Work relationship is maintained or improved
- Discussion is a balance between past performance and the employee's development for the future
- Enhances both performance and engagement

Development examples

Resource	Description	type	Purpose
In house training	Develop 'hunting skills' to enhance Sales competencies	Learn from education	Grow the business by approaching identified new customers
Allnex Academy	Your base salary explained	Learn from education	understand the mechanism behind base salaries
External course	intended to offer an alternative when internal solution is not available	Learn from education	Follow external course X in order to gain knowledge to implement Y in our department
Webinar	to learn & gain insights around a certain topic	Learn from education	
Networking	to learn, to increase visibility and to share information and insights around a certain topic	Learn from relationship	Learn and understand what other companies are doing in relation to topic X
Coaching	Leverage strengths/abilities for maximum performance, enables behavioral shifts for improved performance	Learn from relationship	Person Y agreed to coach person X in order to improveskill
Job shadowing	learn other roles/jobs through observation and discussion	learn from experience	
Project lead/member	Increase competencies/capabilities or challenge an individual through leading or participating in a (strategic) team	learn from experience	Lead a project team 'X' to analyse, recommend and execute 'deliverable Y' in order to Allnex commitments in the area of ...
Off-the-job experience	to learn, to increase visibility and to share information and insights around new legislation in the area of income tax for companies - e.g. through a professional association	Learn from experience	gain understanding of the 'new legislation X' - to ensure compliance for Allnex reporting

Thank you for your attention



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