DAI | DATA ANALYSIS INCORPORATED

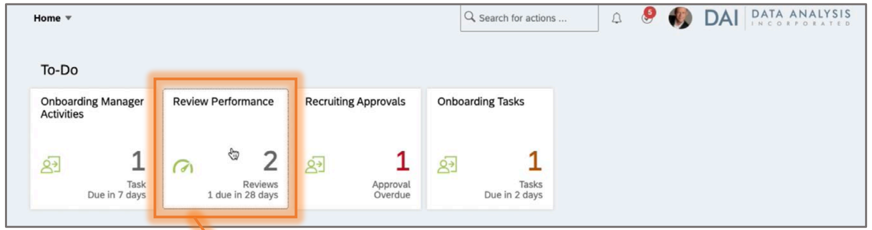
Objective Setting: Manager Guide

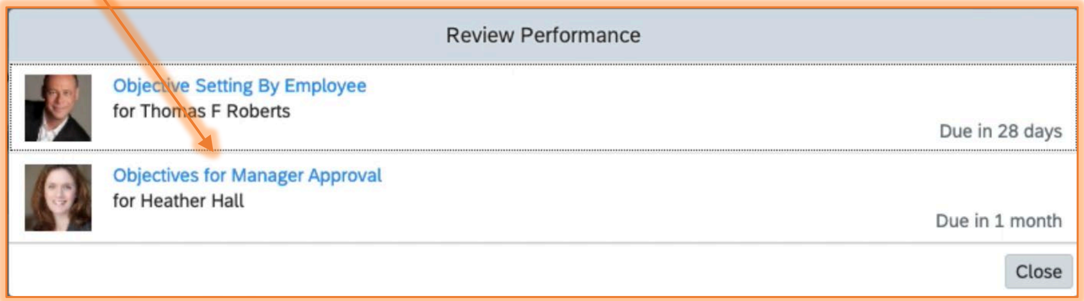
Reviewing Teammate Objectives

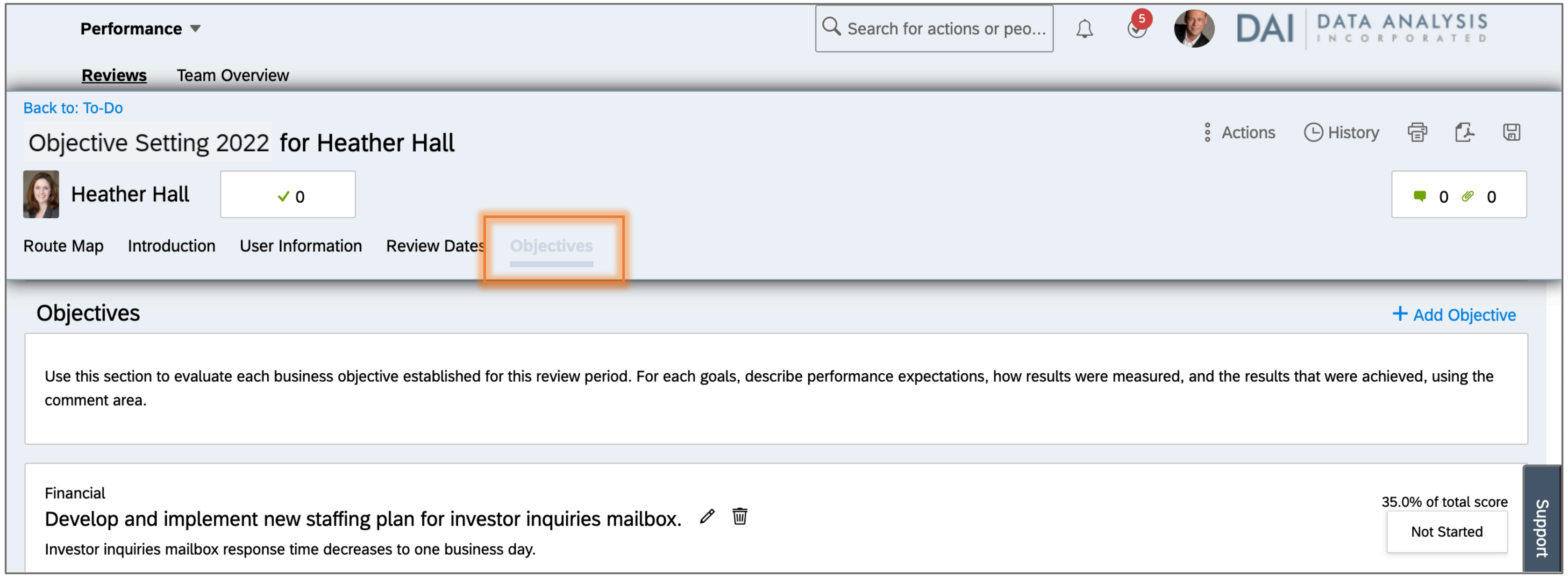
Go to your SuccessFactors homepage and click on the To-Do tile.

Navigate to the Objectives for Manager Approval form for your teammate.

Scroll down to see your Objectives or click on Objectives to jump to that section.



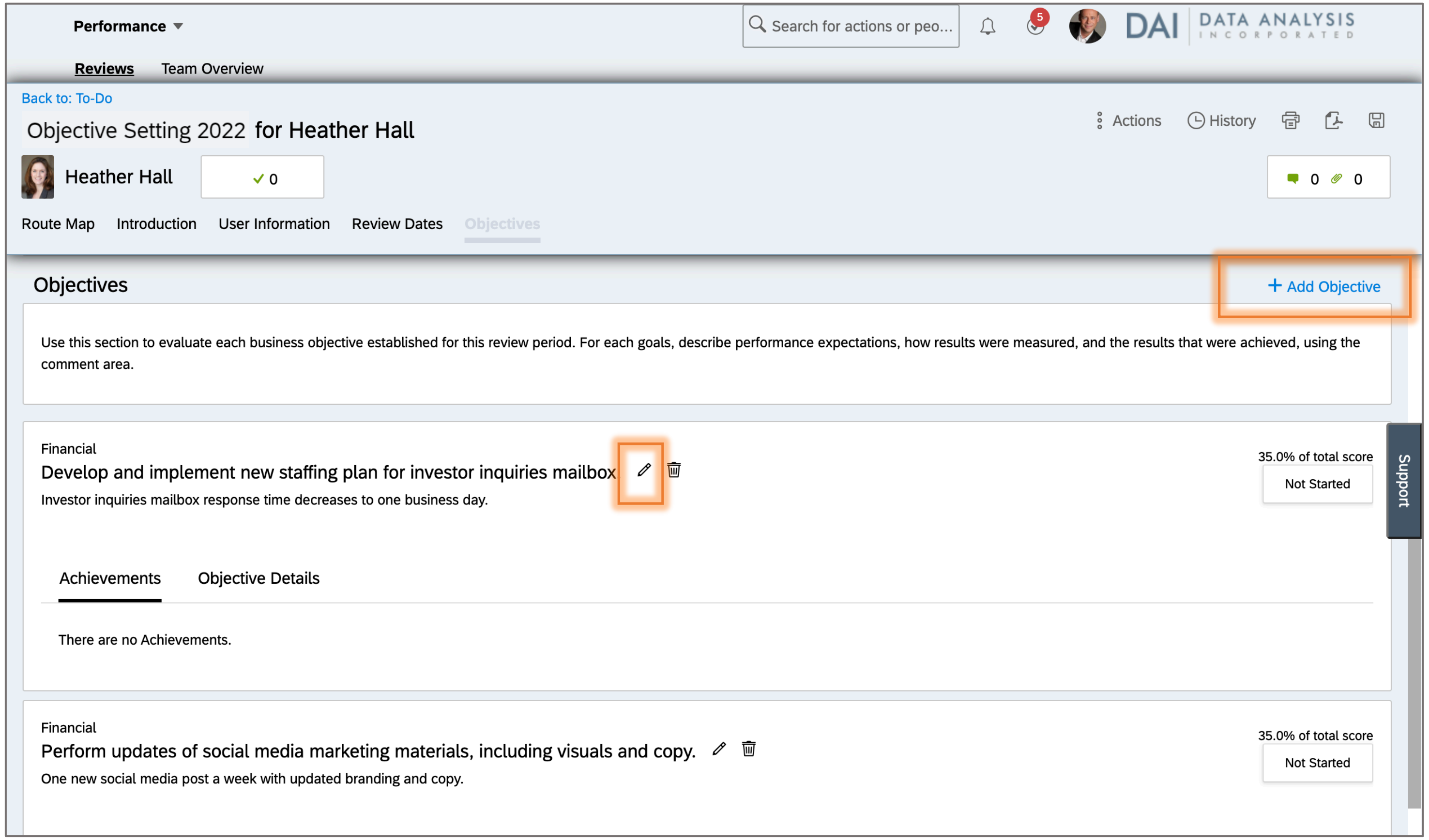




Reviewing Teammate Objectives

Click on Add Objective to enter a new objective.

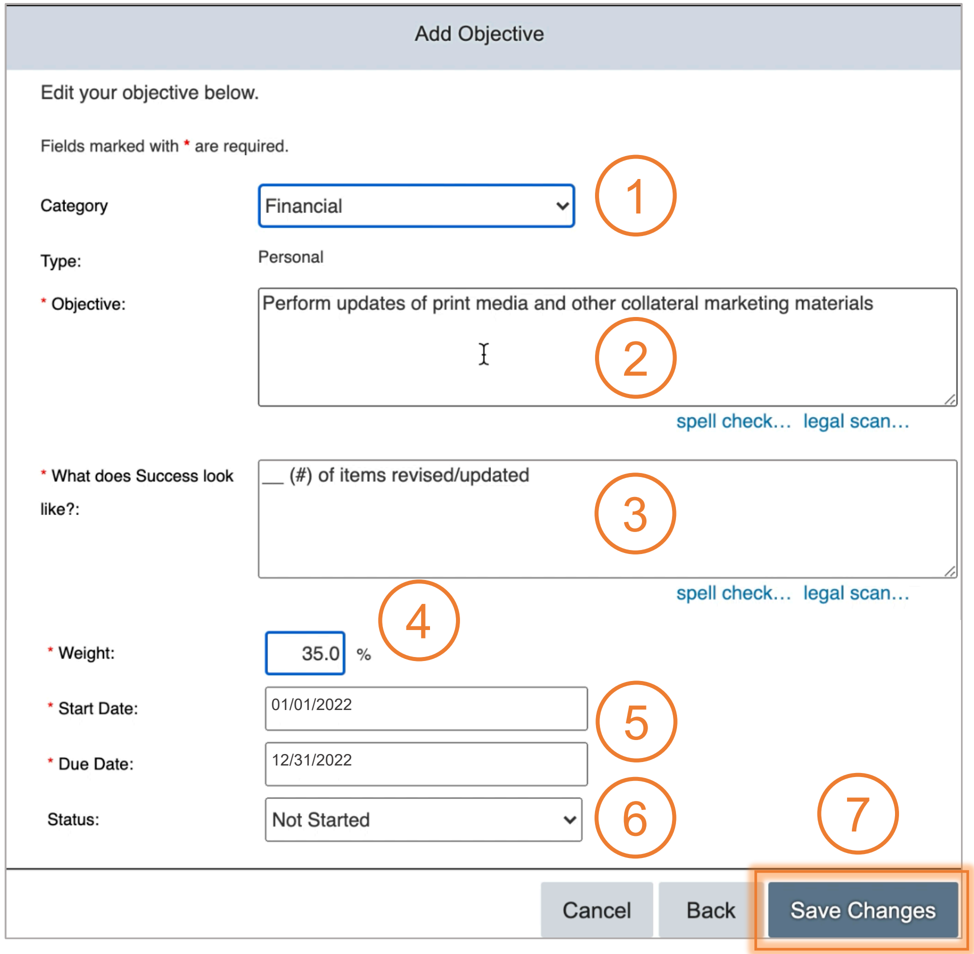
Edit an objective by clicking on the pencil icon.



Reviewing Teammate Objectives

Review **ALL** details for each objective.

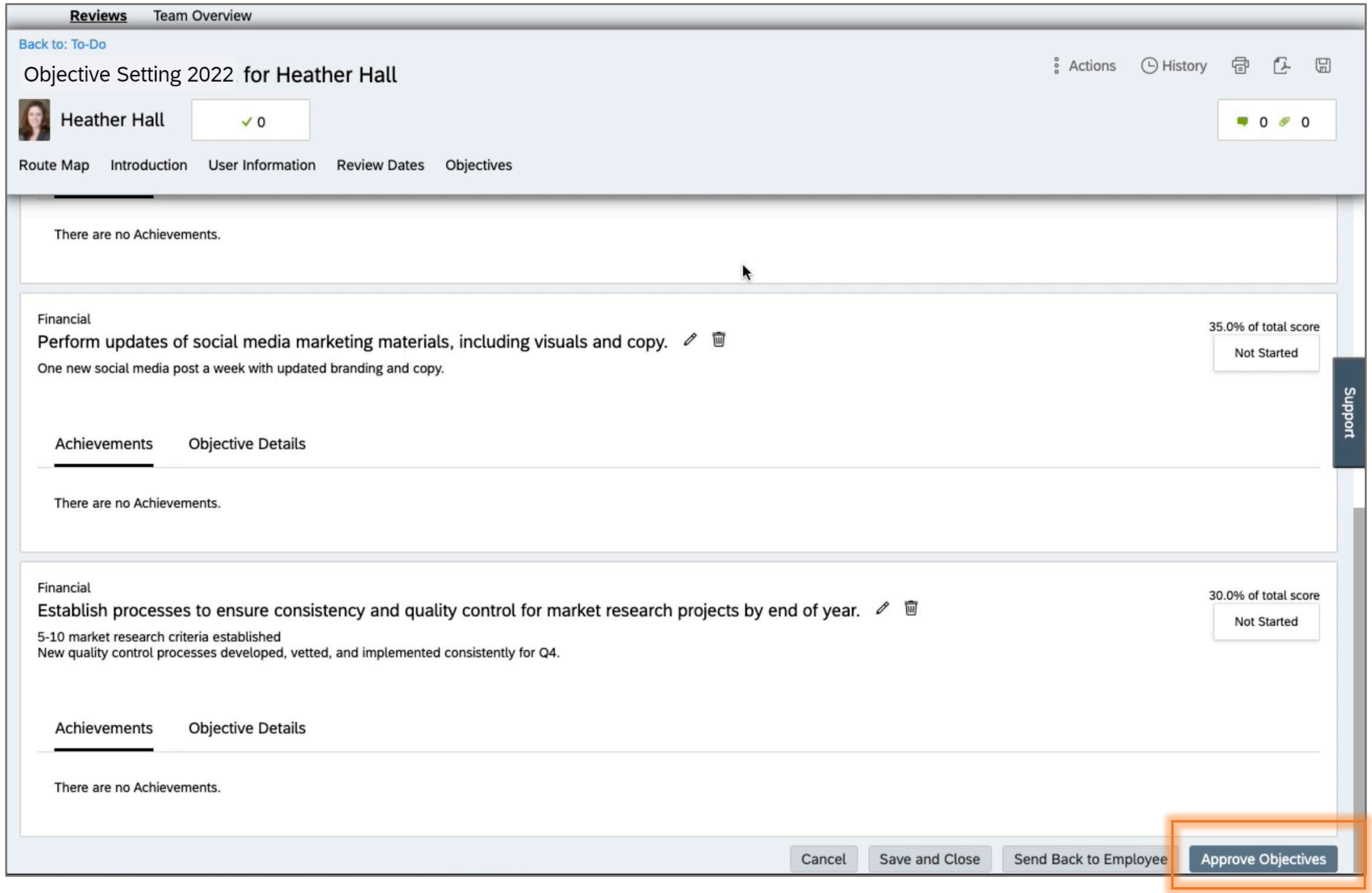
1) The category of the objective
2) The objective description
3) The definition of success
4) The weight for the goal
5) The start and due date
6) The current status
7) **Important: Save Changes** after editing



Prepare questions or suggestions for your 1:1 Meeting with your teammate.

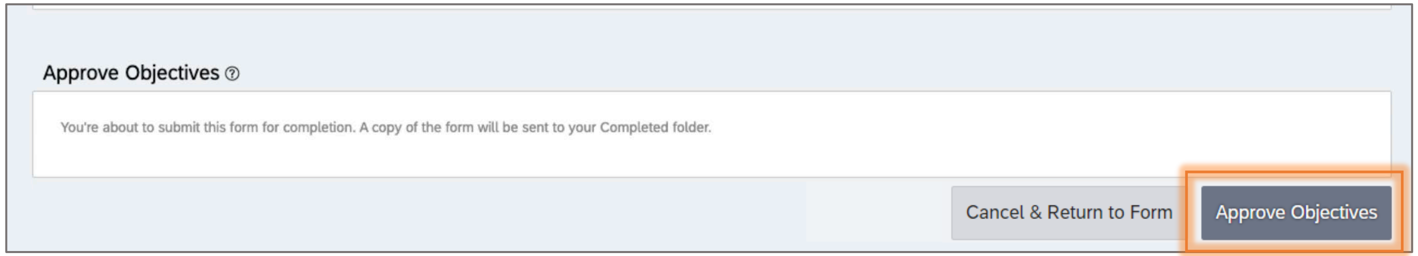
Reviewing Teammate Objectives

Discuss the objectives with your teammate and make any edits or additions during your 1:1 meeting.



Click Approve Objectives to finalize the form.

Click Approve Objectives **again** to complete the process.



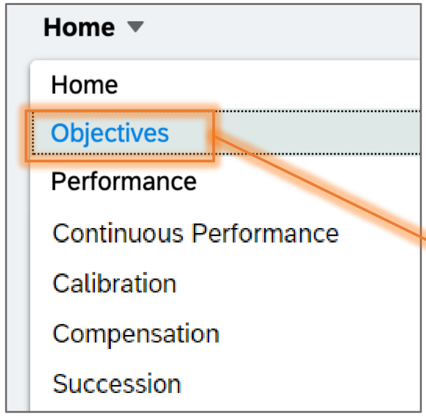
home

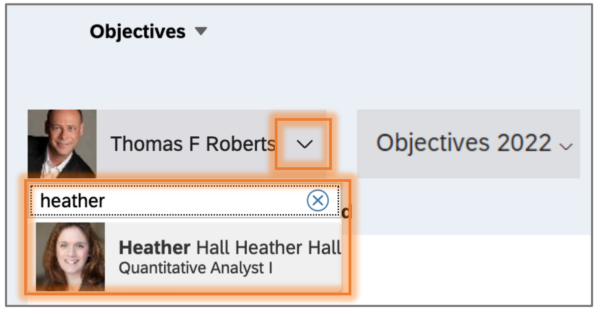
Reviewing Teammate Objectives

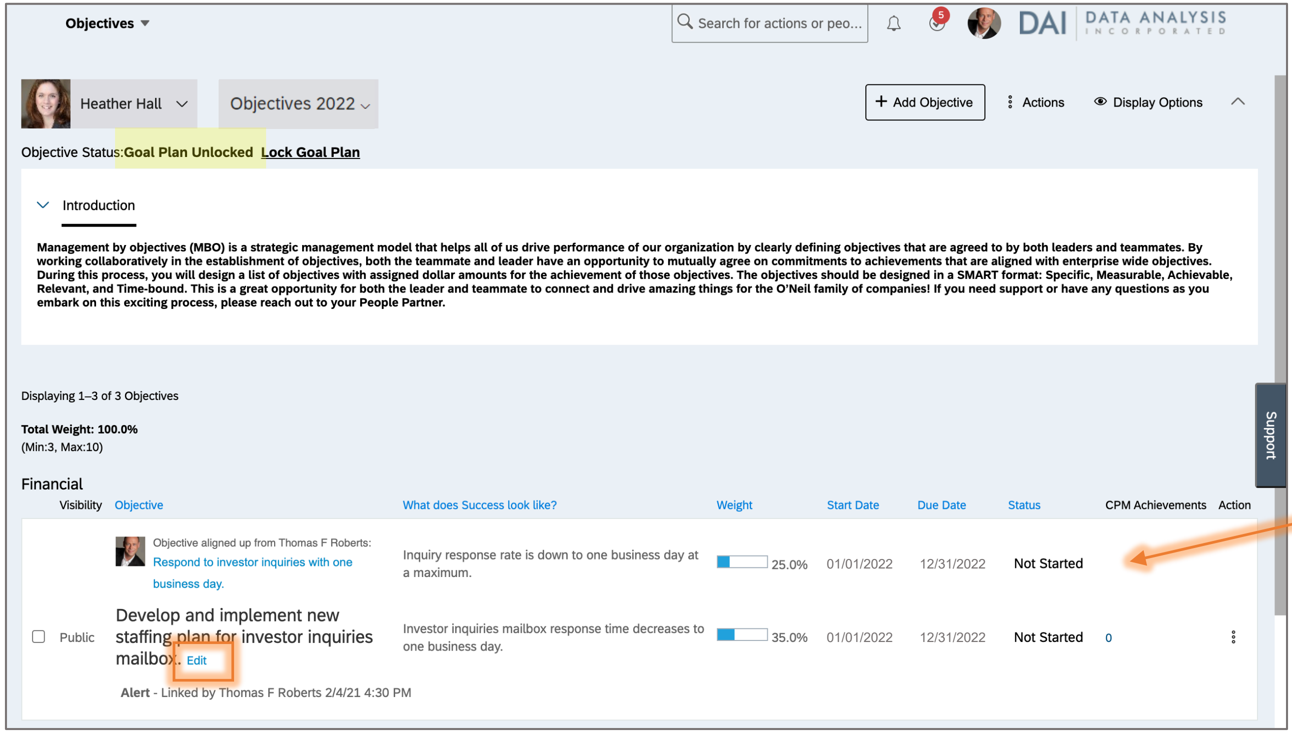
To see teammate objectives after form approval, go to your Home Page and navigate to Objectives.

Click on the arrow next to your name and search for your teammate. Click on their icon to go to their objectives.

To make further changes, ensure the goal plan is unlocked and click Edit underneath the objective.







All objectives will be listed on this form, and you can quickly view the status and weight of each.

DAI DATA ANALYSIS INCORPORATED

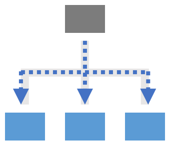
Objective FAQs for Managers

Question	Answer
How many objectives should I have?	We recommend creating 3-5 objectives at the beginning of the year. You can always add more, but it is best to keep the total number under 10.
How often should I update the objectives?	Update the status of your objectives at least quarterly, and make sure to have a conversation with your manager about your updates. Your manager can also see edits you have made through the Objectives screen in SuccessFactors. To add, edit, or remove objectives, discuss with your managers first.
Where can I see examples of SMART goals?	Go to SuccessFactors → Objective → Add New Objective → Library Objectives. SMART objectives are organized by category and ready to be added to your form!
What happens if my manager doesn't give me any objectives?	Your manager may not cascade any goals to you, but you can still develop your own objectives and propose them to your manager. If your manager is not open to this discussion, ask your People Partner to meet to facilitate the conversation.
What should I do if I have been assigned an Objective that I think is impossible to complete?	First, review the objective carefully and identify which parts seem unrealistic. Is the timeline rushed, or is the scope of the project too broad? Would you need more resources to accomplish the goal? Talk to your manager about your specific concerns to help them understand the road to accomplishing this objective.
What if I receive an objective that I cannot complete until someone achieves their objective? How can I make sure they get it done so I can accomplish my objective?	Bring this dependency to your manager's attention to ensure they are aware. We encourage you to coordinate your project with all involved parties so that everyone can plan their efforts accordingly. Remember- objectives are updated quarterly! If the scope or status or your objective changes, you will have a chance to discuss with your manager.

Objective FAQs for Managers

Question	Answer
What if I disagree with a teammate on an objective or a weighting? Who gets the ultimate say?	As the manager, you ultimately decide which objectives should be included in your yearly plan. However, it is important to talk to the teammate and understand why they want to include or delete an objective before you make your decision. Keep in mind that as priorities shift or objectives get completed that you can always revisit this conversation and add other objectives.
How do I cascade Objectives and edit them as they get pushed down?	Go to SuccessFactors → Objective → Click on the checkmark next to the objective → Action → Cascade → Select Teammate → Edit Objective → Cascade. We also have a cheat sheet with detailed step by step instructions and screenshots.
What happens if we need to add or remove an objective during the year?	You should make the edits to the objectives in SuccessFactors. Before you exit the form, check to ensure that the total weight of your current objectives adds up to 100%. If not, make further edits.
What about team or department objectives? How do we enter those?	All objectives should be translated to the level of the individual teammates when they are entered into SuccessFactors. You can create team objectives, cascade objectives, or link objectives to ensure consistency and visibility across objectives for your team.
What if I don't give objectives to my teammates?	Objectives are critical to ensuring we execute on our enterprise-wide goals, and they provide clear expectations for our teammates as they do their day-to-day work. As managers, it is your responsibility to direct the work of your teams. Your teams can develop objectives, but it is up to you to make sure you focus their efforts and clearly outline success.
What if I haven't heard from my execs on the business strategy?	Please reach out to your business leader, or inquire with your People Partner.
What if my teammate's objective is contingent on the work of another teammate?	Our work is complicated, so dependencies happen! As a manager you can ensure that the lines of communication stay open so that everyone involved can plan accordingly. Ensure that you update objectives regularly and link the objectives so that you can maintain visibility.

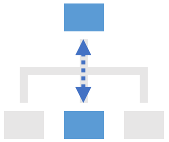
Creating, Linking and Cascading Objectives



Create Group or Team Objectives

When you want to:

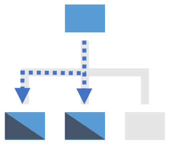
- Assign identical objectives and weighting to multiple teammates
- Distribute effort toward an objective equally



Link your own Objectives to a teammate's objective

When you want to:

- Easily monitor the progress of another goal
- Maintain visibility of an objective that your work depends on, or an objective that is dependent on your work.



Cascade Objectives

When you want to:

- Make a teammate responsible for all or part of the goal
- Capture the teammates contribution to an overall goal
- Create alignment in efforts

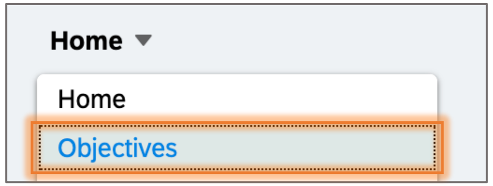
Creating Team Objectives

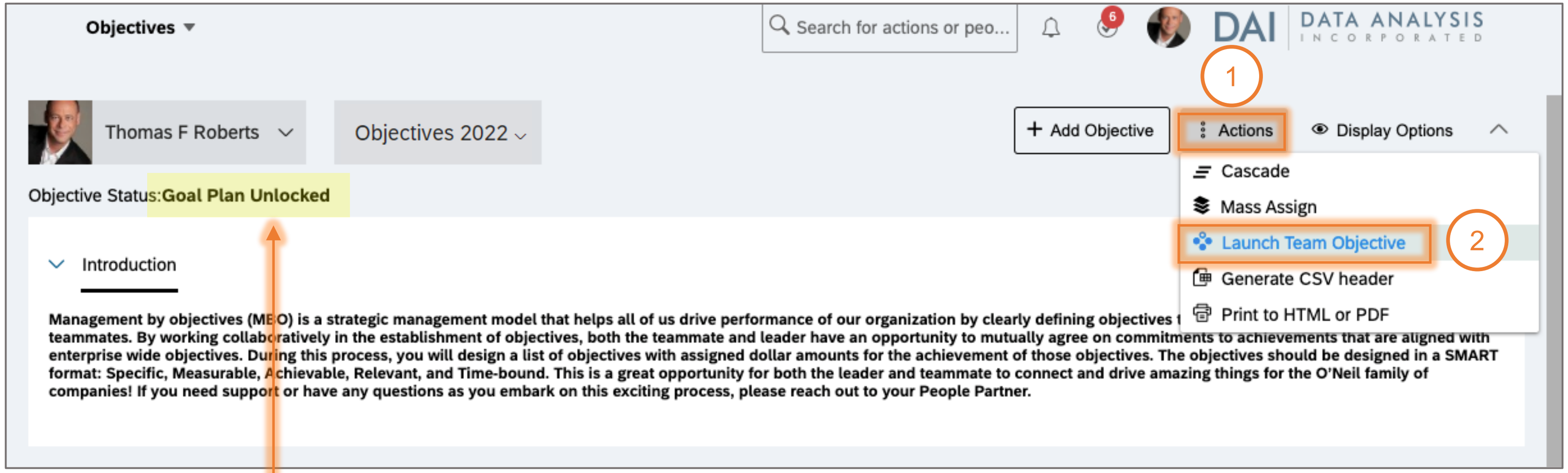
To start, go to your SuccessFactors homepage and navigate to Objectives.

Click on Actions and select Launch Team Objective.

Create Group or Team Objectives
When you want to:

- Assign identical objectives and weighting to multiple teammates
- Distribute effort toward an objective equally

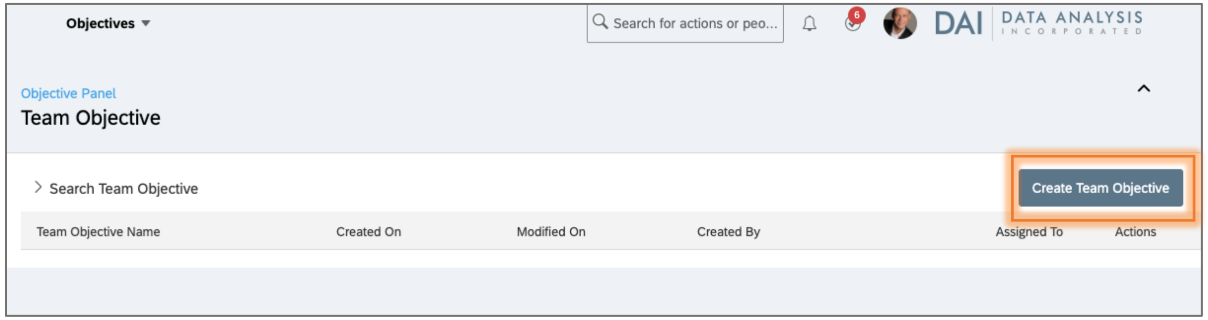




Check that your goal plan is unlocked first, otherwise you cannot make edits.

Create Team Objectives

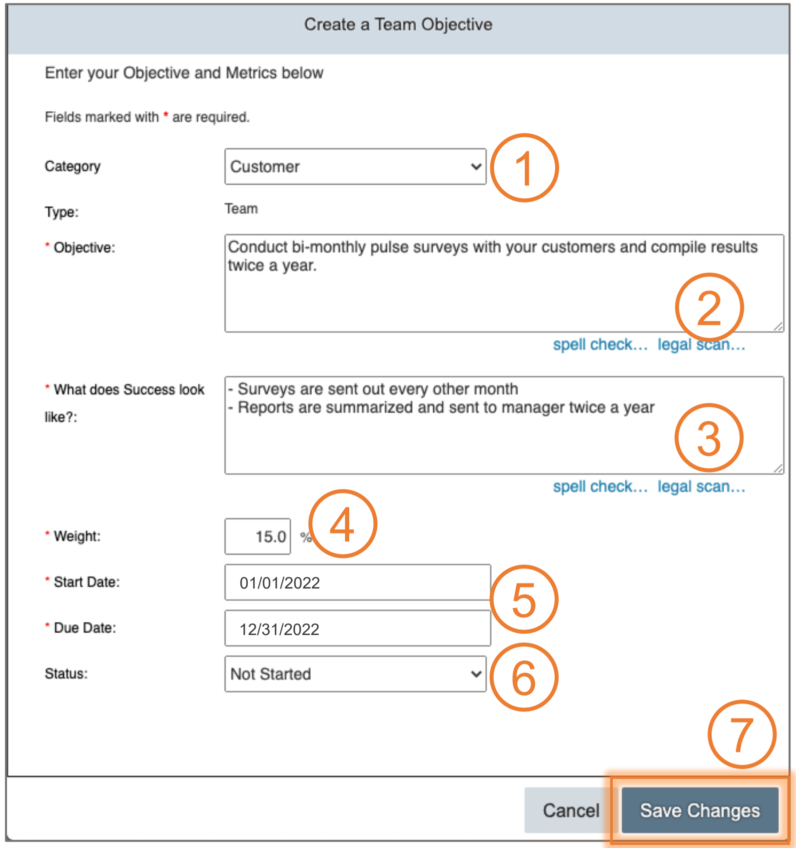
This is the team objectives page. Click on Create Team Objective.



Enter the objective details.

Remember: all details will be the same for all teammates!

Save Changes when complete.



1) The category of the objective
2) The objective description
3) The definition of success
4) The weight for the goal
5) The start and due date
6) The current status
7) **Important:** Save Changes after editing

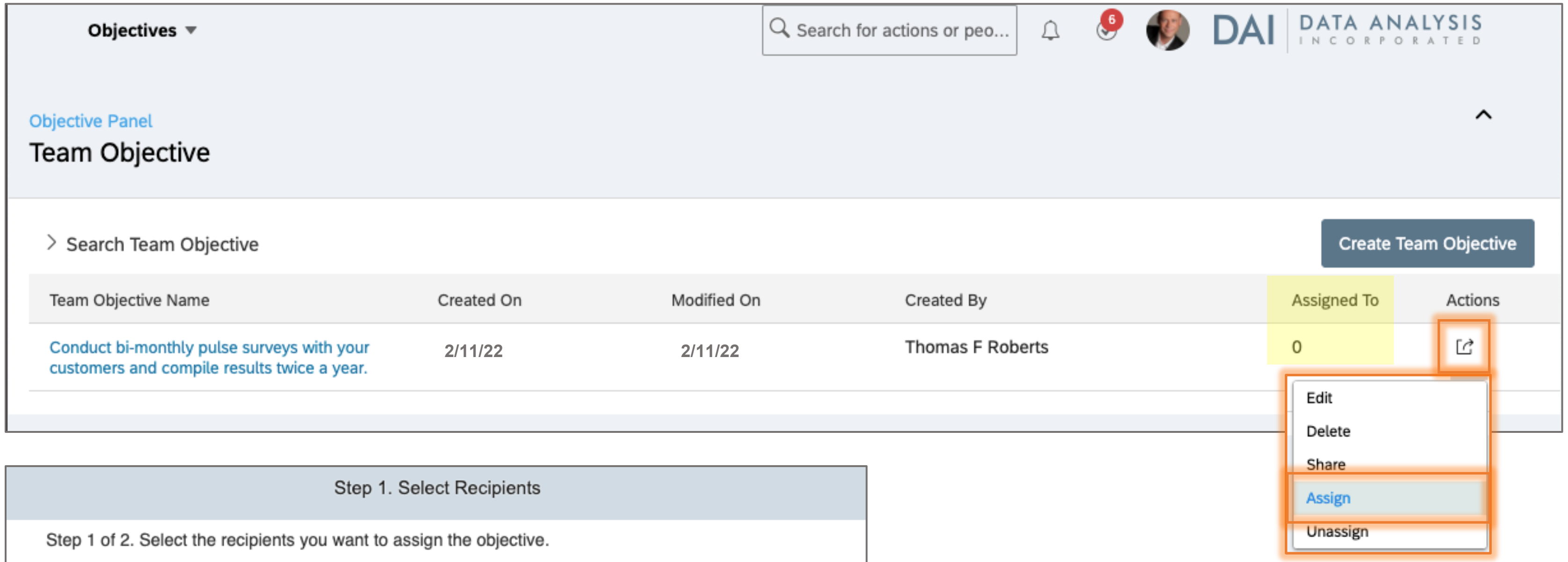
Create Team Objectives

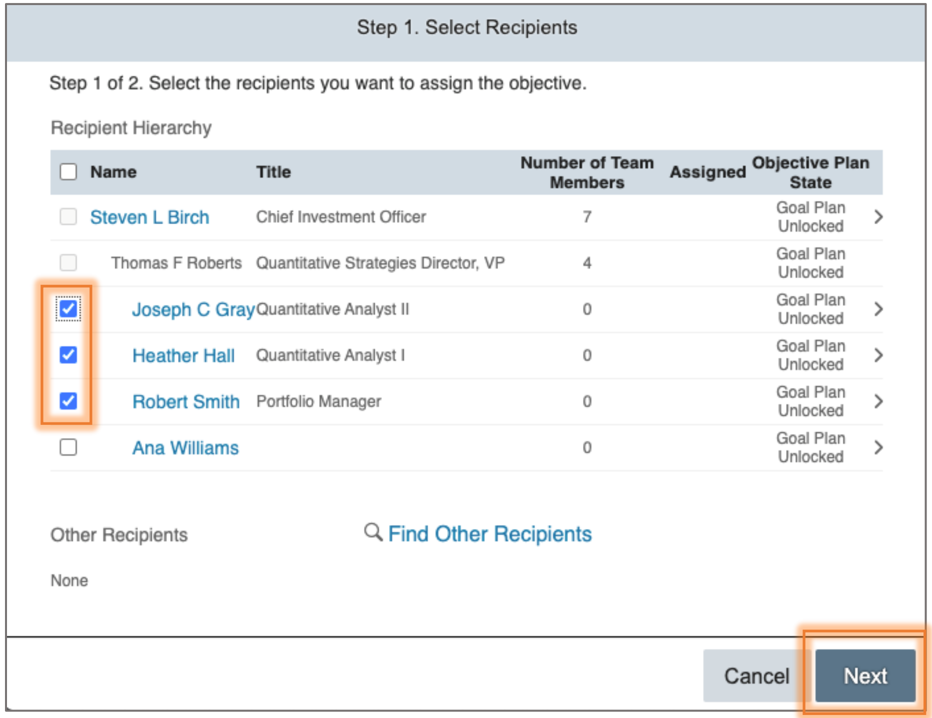
This objective is now listed on your Team Objectives page, but not assigned.

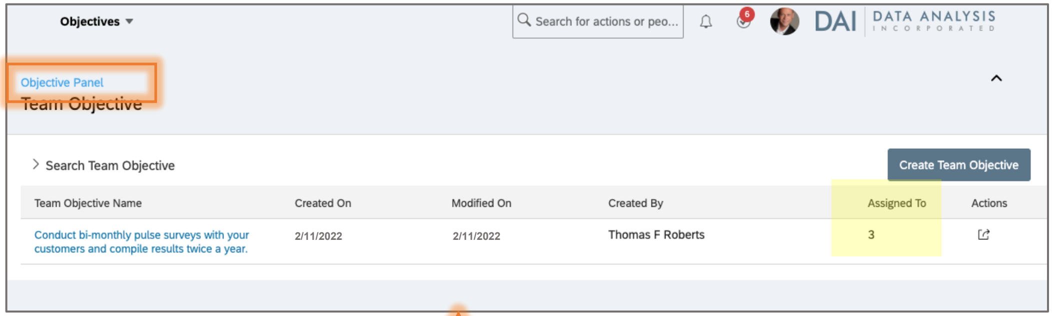
Click on the Action icon and select Assign to select teammates.

Select the recipients for the objective Click Next.

Click on Objective Panel to go back to your objectives page.



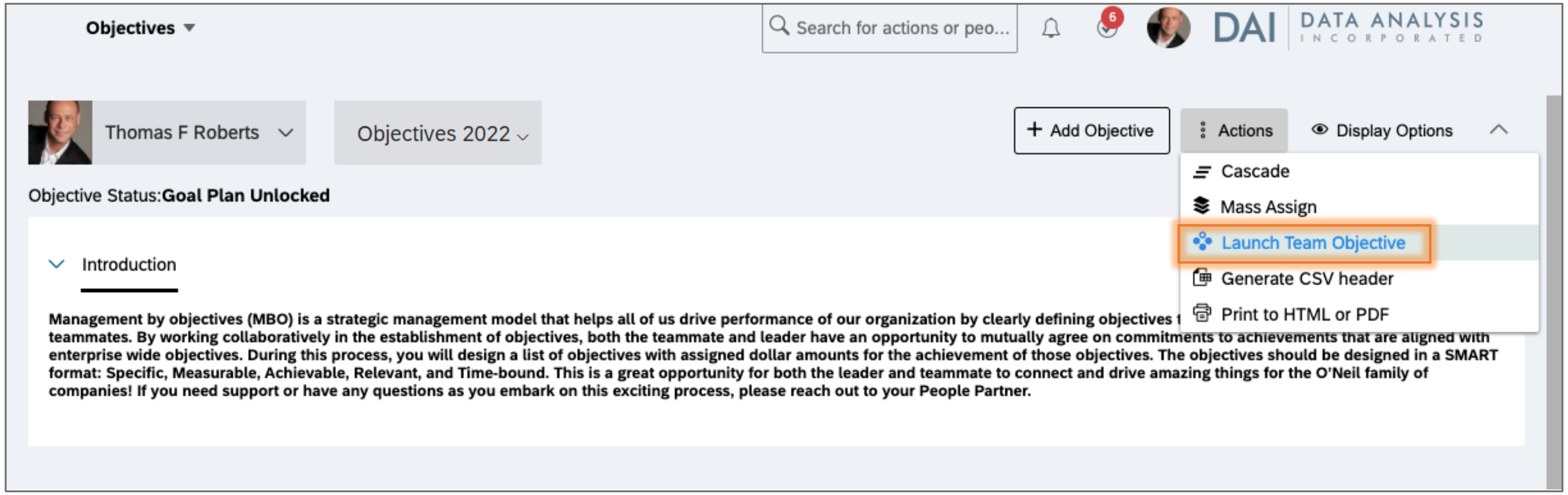




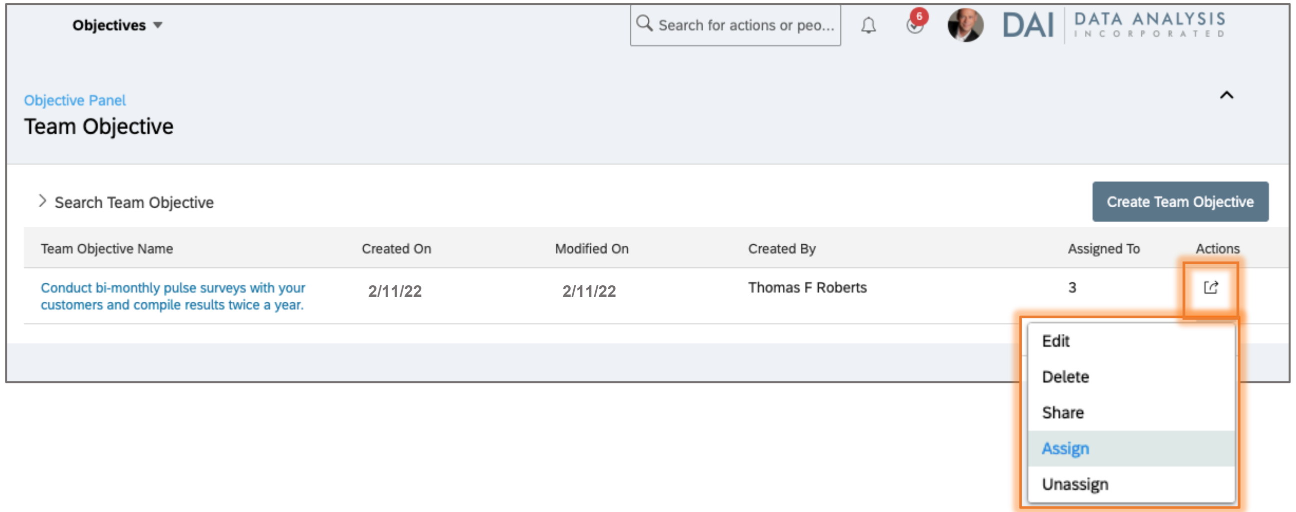
The objective and number of teammates assigned is on the Team Objectives page.

Create Team Objectives

You can access team objectives by clicking on Launch Team Objective at any time.



Click the Actions button to edit the objective or to assign to additional teammates.



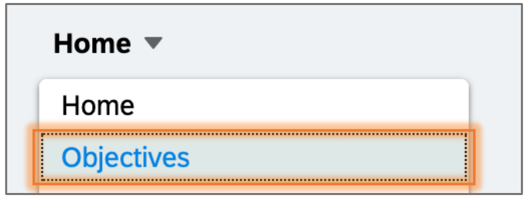
home

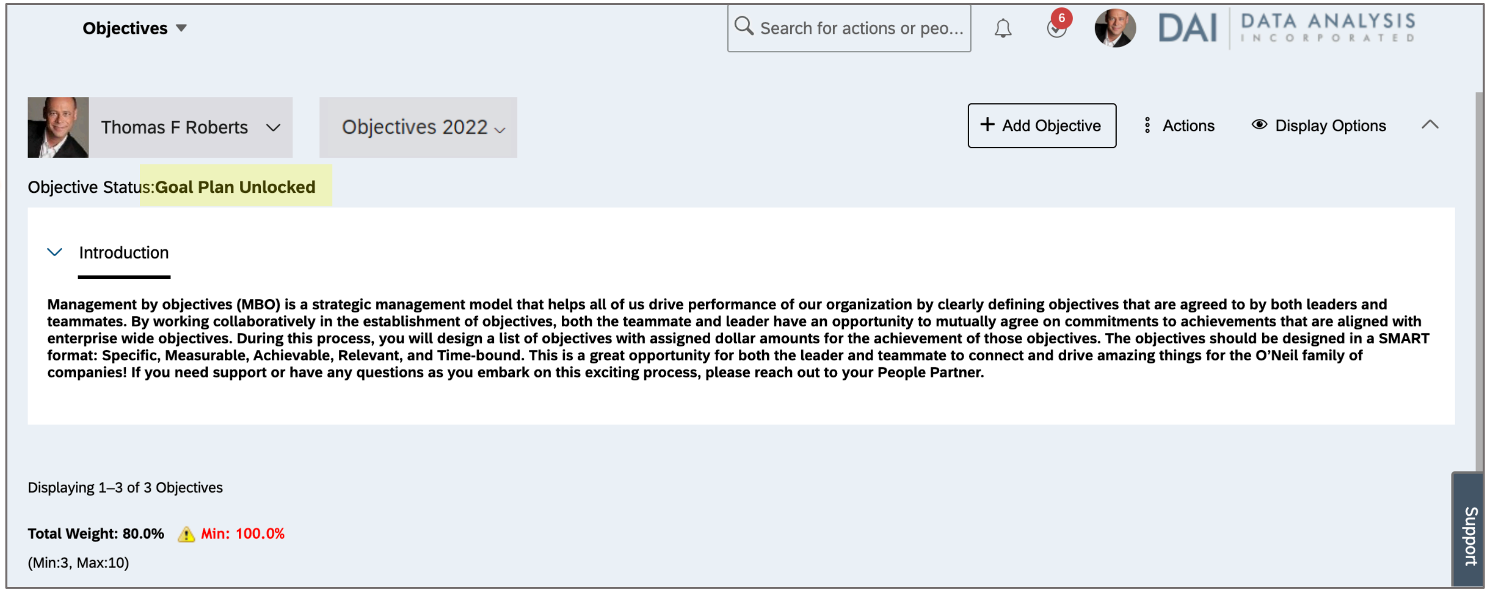
Linking Objectives

Link your own Objectives to a teammate's objective When you want to:

- Easily monitor the progress of another goal
- Maintain visibility of an objective that your work depends on, or an objective that is dependent on your work.

To start, go to your SuccessFactors homepage and navigate to Objectives.



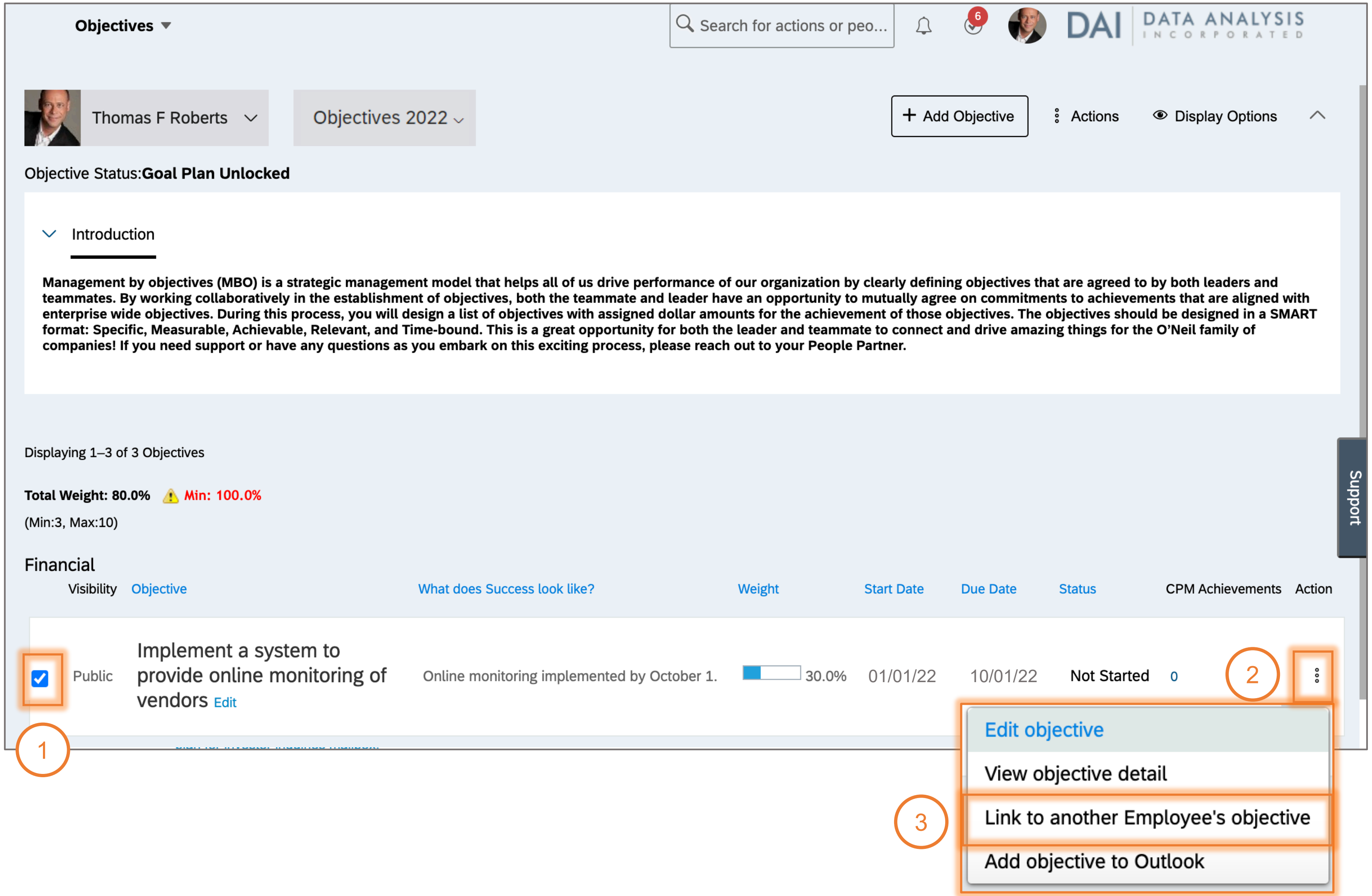


Check that your goal plan is **unlocked** first, otherwise you cannot make edits.

Linking Objectives

Click on the checkbox next to your objective to select it.

Click on the Action icon on the far right to and select Link to another Employee's objective.

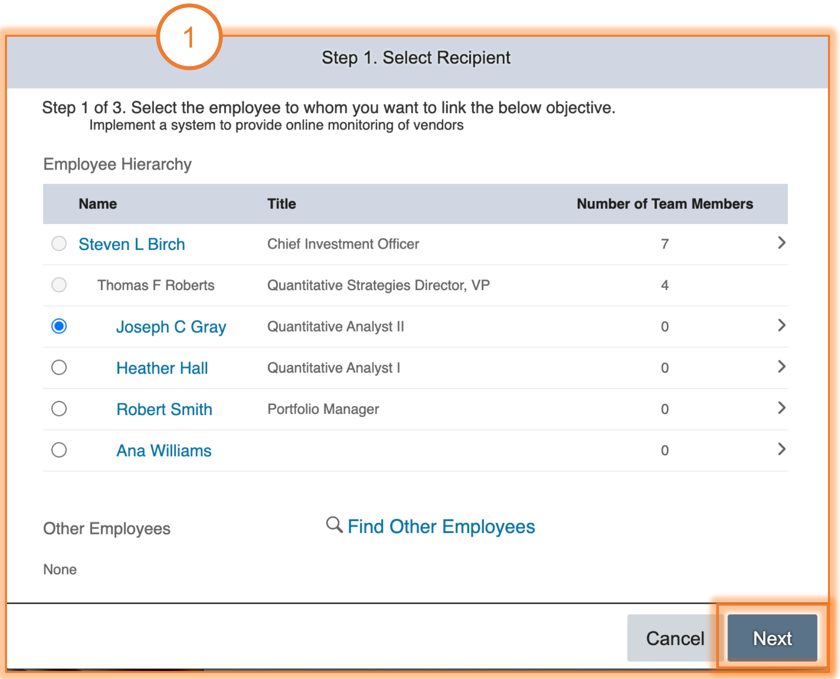


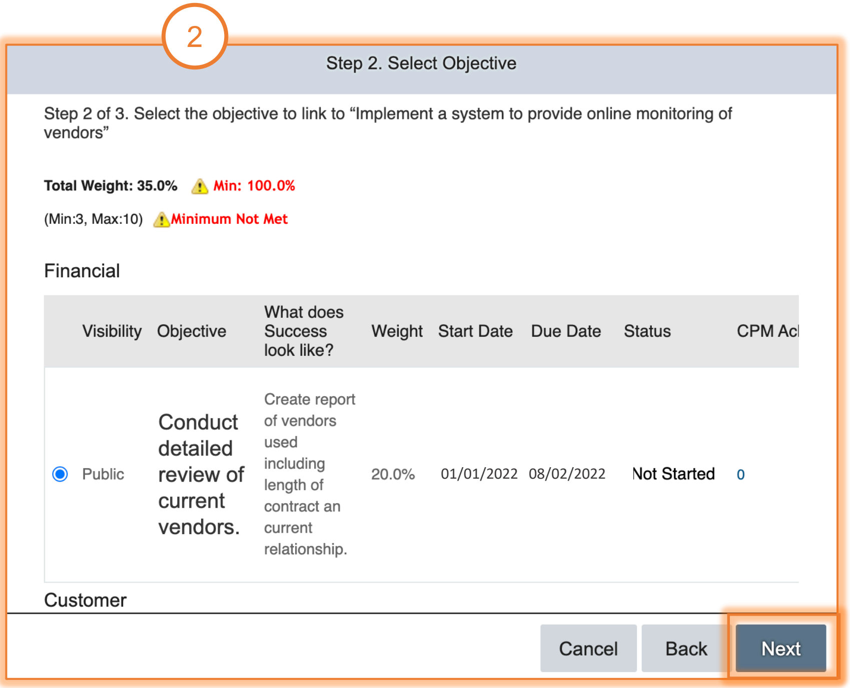
Linking Objectives

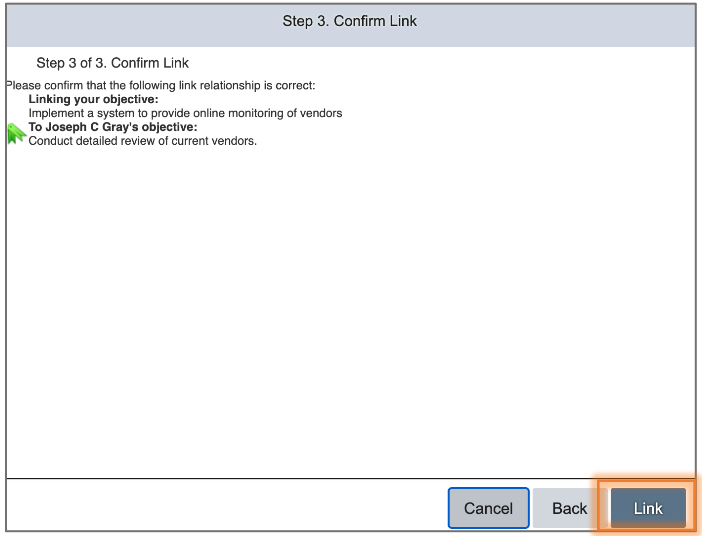
Select the teammate and Next.

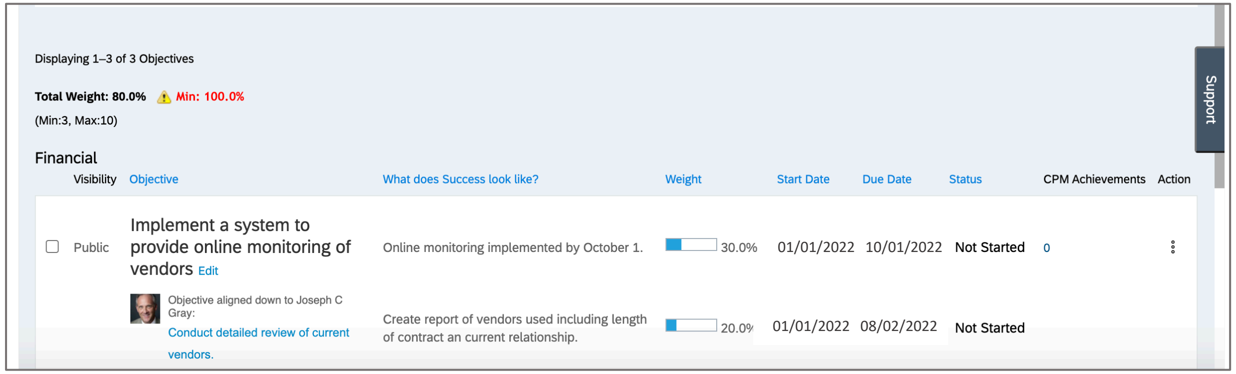
Choose from their list of objectives and click Next.

Review the linked objectives and confirm by clicking Link.









The linked objective is now listed in blue under your objective.

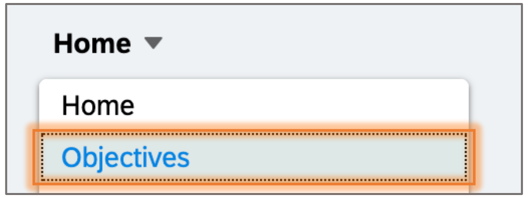
Home

Cascading Objectives to Teammates

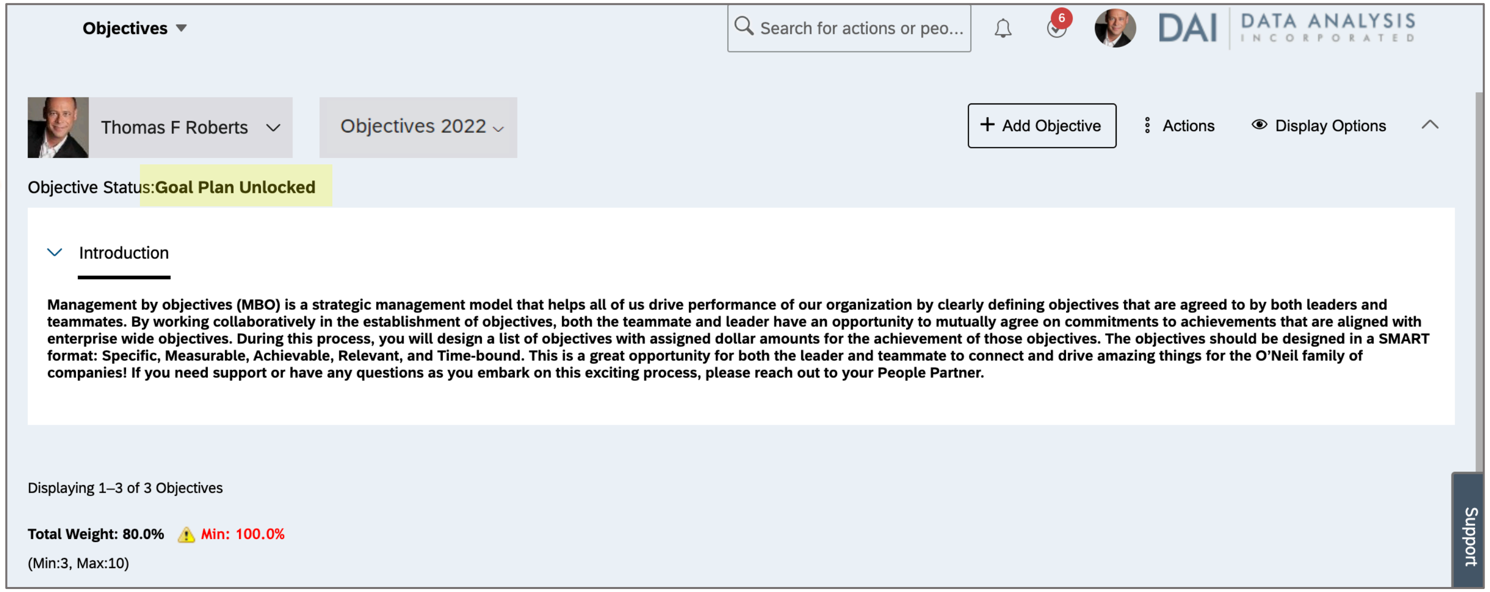
Cascade Objectives
When you want to:

- Make a teammate responsible for all or part of the goal
- Capture the teammates contribution to an overall goal
- Create alignment in efforts

To start, go to your SuccessFactors homepage and navigate to Objectives.



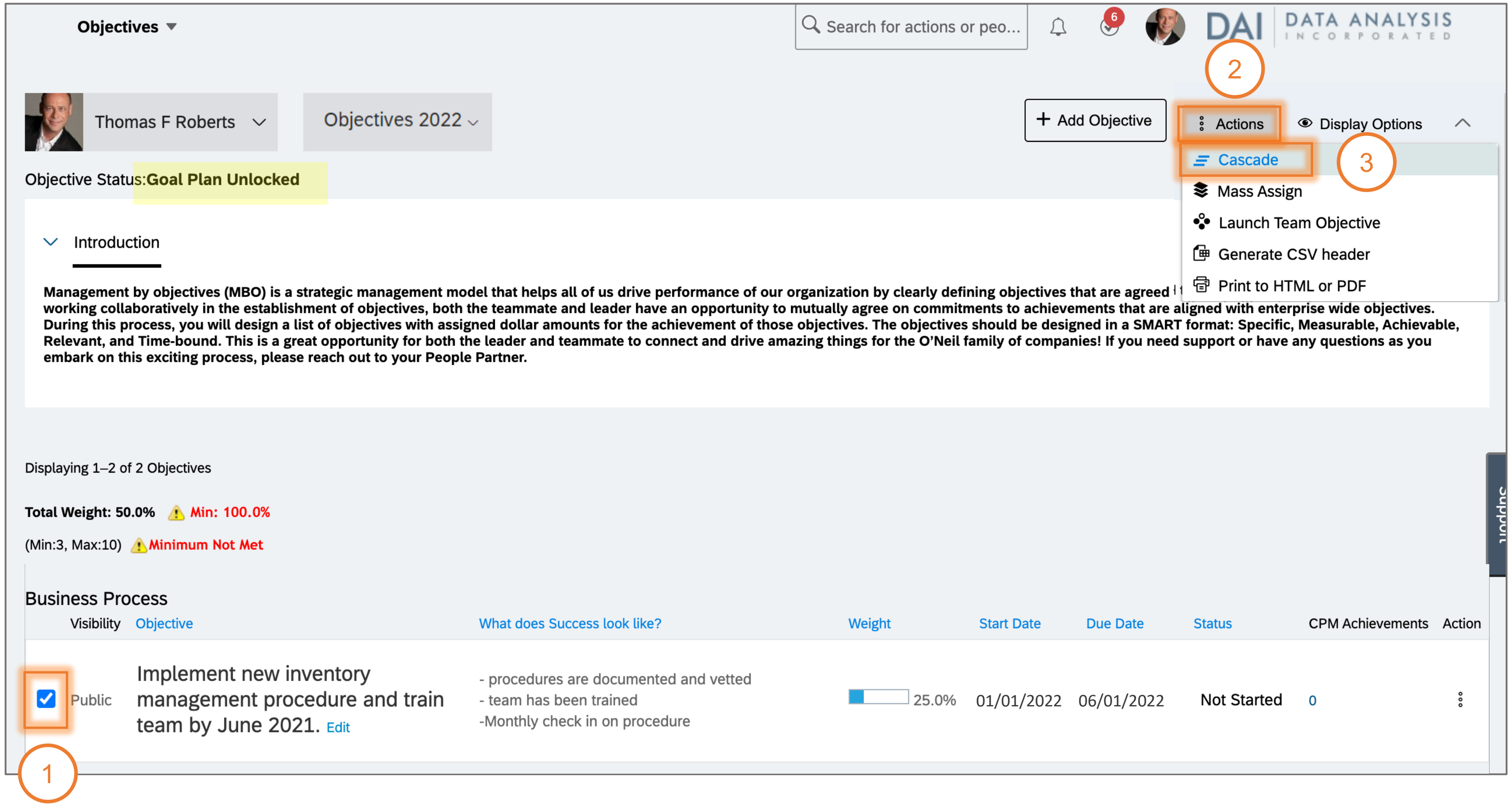
Check that your goal plan is **unlocked** first, otherwise you cannot make edits.



Cascading Objectives to Teammates

Click on the checkbox next to your objective to select it.

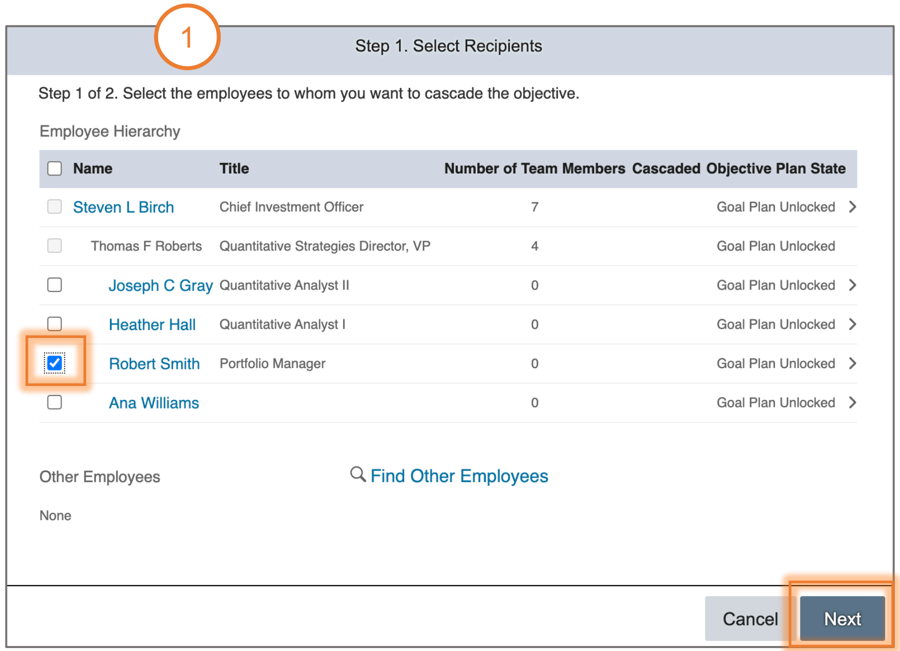
Go to Actions and click Cascade.

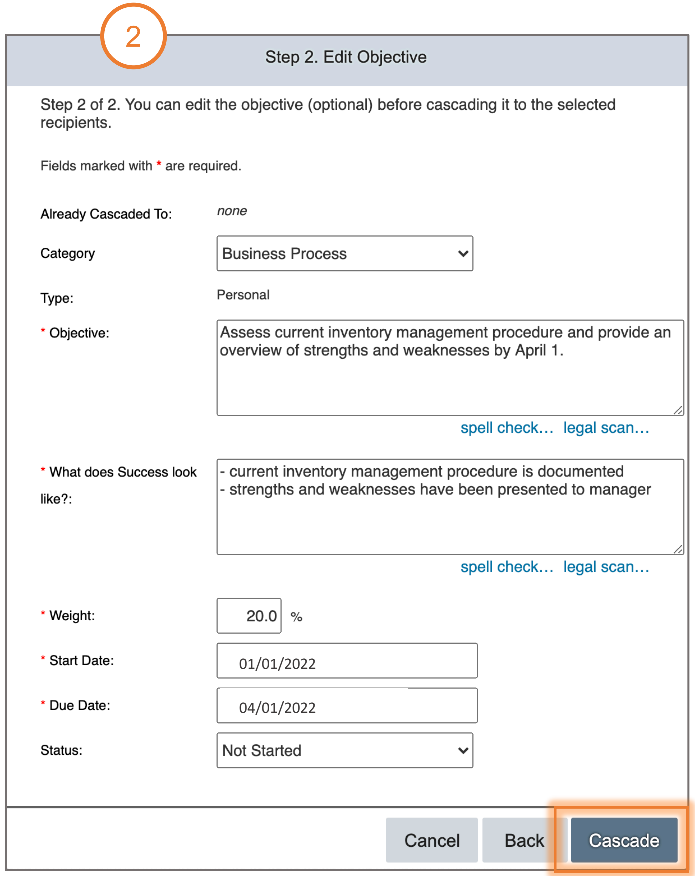


Cascading Objectives to Teammates

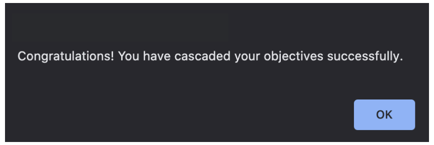
Select one or more recipient by clicking on the checkbox next to their name. Click Next.

Edit the objective to reflect the scope of the teammate's goal. Make sure to adjust the weighting when applicable! Click Cascade when complete.

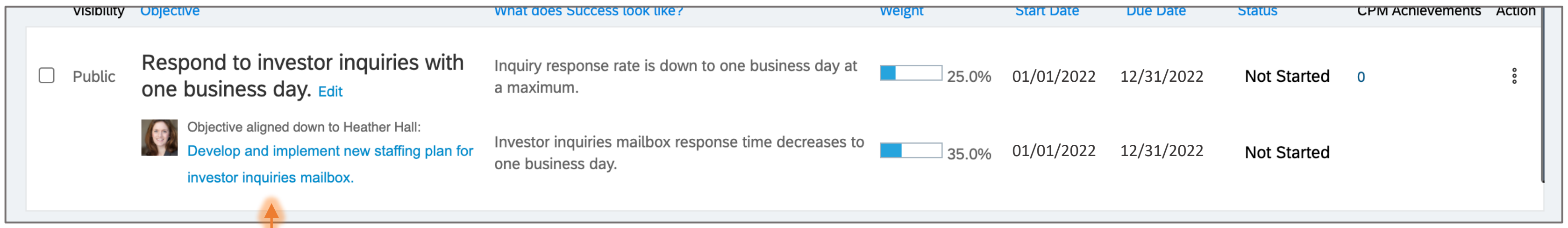




Note: you cannot edit the objective individually for each teammate if you cascade to multiple people. *To cascade the objective with different deliverables or timelines, cascade to one person at a time!*



A confirmation message will appear.



The cascaded objective is now listed in blue under your objective.

Home

Objective Setting 1:1 Best Practices

1) Carefully review the objectives set by your teammate to make sure they are **SMART** goals! Remember- these objectives outline your performance expectations for the year. The clearer, the better!
2) Take time to answer questions the teammate has about their objectives or about company or department strategy.
3) Prepare some questions to ask the teammate as well. Consider a few from the box to the right.
4) Remind the teammate that you will check in on objective progress often, and that you are a resource for them throughout the year.
5) Make any edits needed in SuccessFactors and ensure that the weighting of all objectives adds up to 100%.
6) Approve objectives at the end of the conversation.

Questions to ask during Objective Setting

- What obstacles should we anticipate?
- What else do you need to meet this goal?
- What can I do to support you?
- Would you like help in making a plan?
- What do you think will make the biggest difference?
- What do you think is the right way to approach this?
- What would we have to change to make [X] happen?
- What will you do first?