

Using SuccessFactors during PRD Cycle

Cascading Goals to members of your team and view team members Goals

For: Managers/PRD Advisors

PRD Phase:	Goal Setting	Ongoing Conversations	Year End Review
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Task

Managers/PRD Advisors can cascade Performance Goals to individuals or multiple staff within their area. The goal(s) that are to be cascaded need to be created prior to cascading.

If you haven't done so, please follow "Guide – SuccessFactors – PRD Goal Setting for All Staff" to add your own Performance Goals.

Outcome

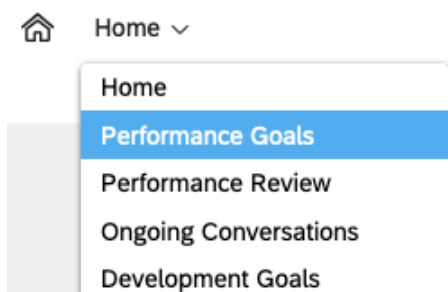
- Performance Goals are cascaded to one or more individuals in your team.
- View team members goals prior to, or during, a Performance and development conversation.

In SuccessFactors

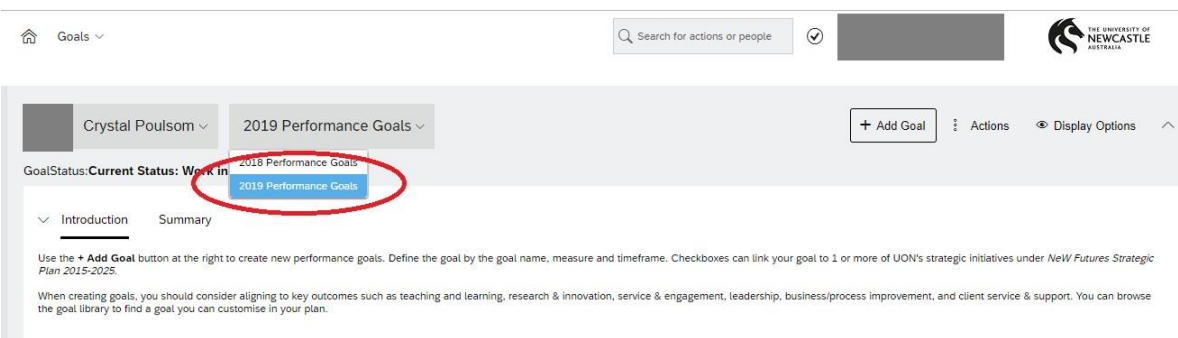
[You have logged in to SuccessFactors](#) and are viewing your 'Home' dashboard.

Cascading a Performance Goal

1: Click on the 'Home' drop down menu in the top left corner of your screen and select 'Performance Goals'.

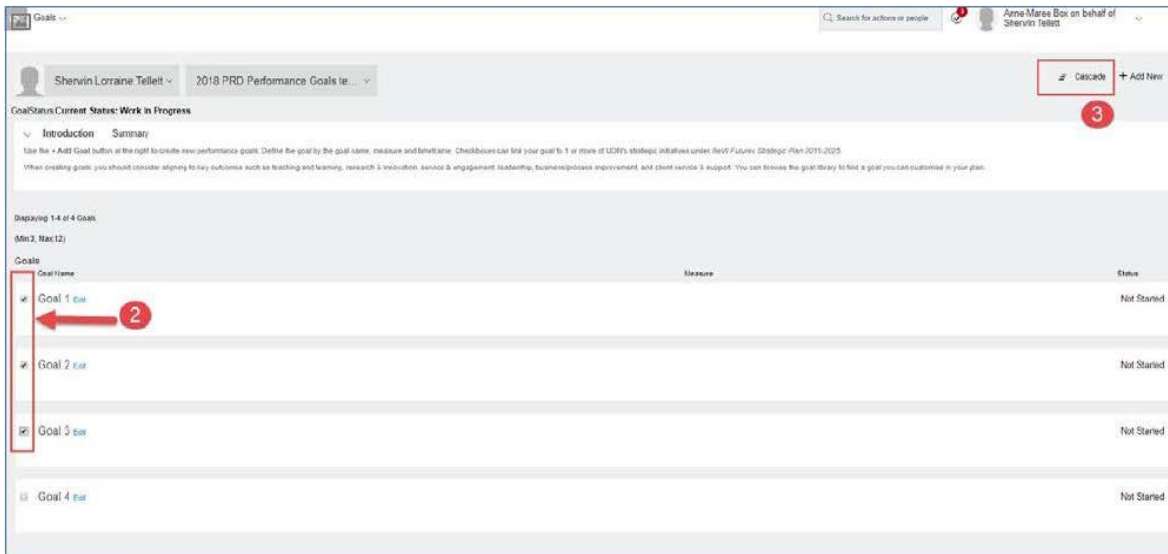


The Performance Goal form will load. Ensure you have current Performance Goals selected in the drop down (Performance Goals for previous years will be there as well).



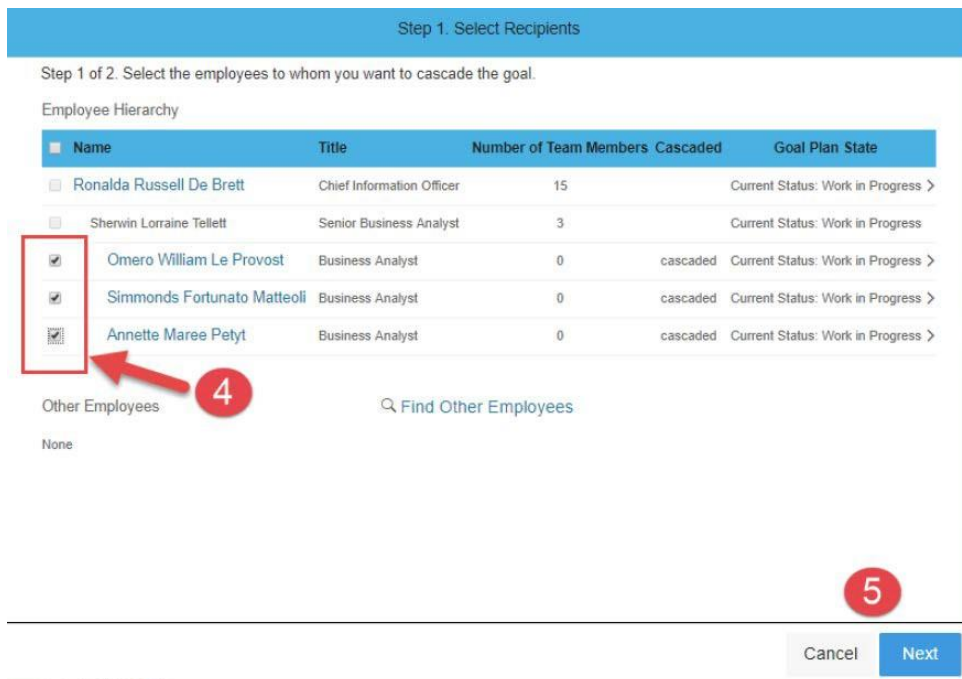
2: You will see your Performance Goals listed. Select the Performance Goals that are to be cascaded to your employee(s).

3: Select 'Cascade' in the top right corner.



4: Select the Employee(s) to cascade the Performance Goal(s) to.

5: Click 'Next'.

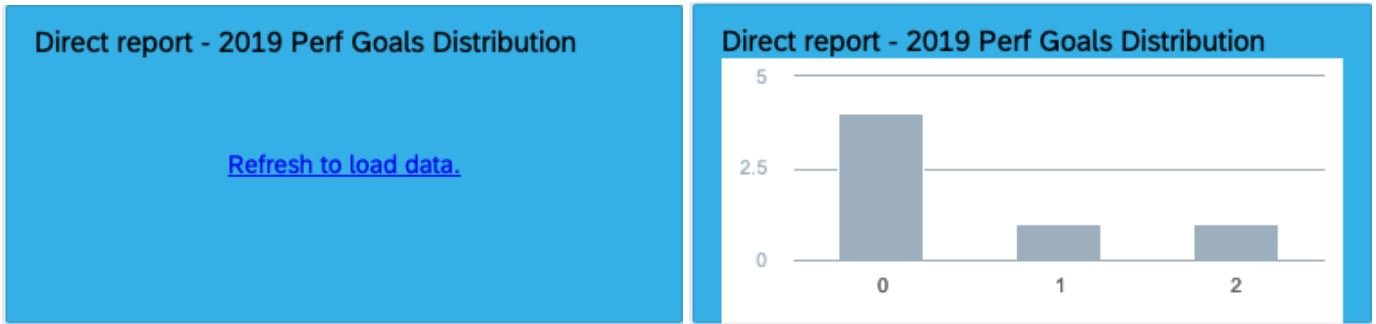


6: Edit any part of the Goal if required.

7: Click on Cascade. The Performance Goal(s) will now cascade to the employee(s). Note this may take a few minutes to update in Employee(s) Performance Goals.

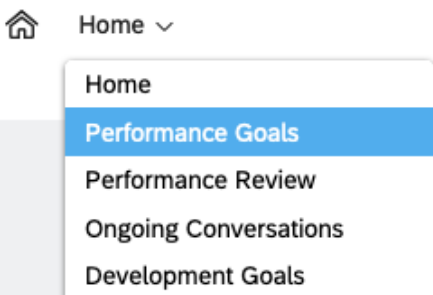
Viewing Employees Performance Goals

On your SuccessFactors home page there will be a graph showing the distribution of goals for staff you are responsible for – click on the ‘Refresh to load data’ to reveal the latest values, with goal count on x-axis:



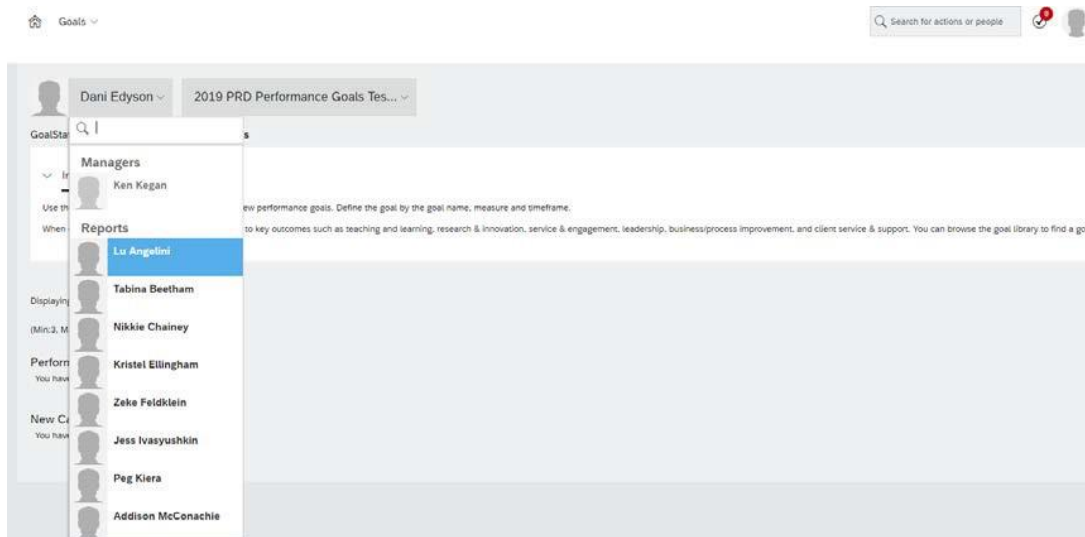
To see each of your employee’s goals:

1: Click on the ‘Home’ drop down menu in the top left corner of your screen and select ‘Performance Goals’.



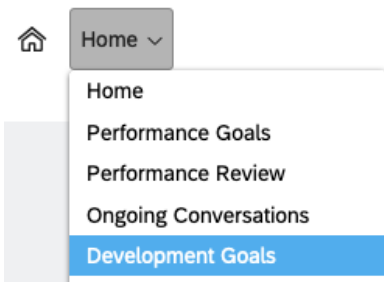
2: The Performance Goal page will load. Ensure you have ‘2019 Performance Goals’ selected in the drop down (Performance Goals for previous years will be there as well).

3: Click on your name at the top, you will see a list of your Reports displayed. Select the employee you would like to view. You will then be able to view the Performance Goals they have entered, and edit if required. Note: If you cannot locate the employee in the dropdown menu you can also use the search function at the top of the dropdown list.



Viewing Employees Development Goals

1: Click on the 'Home' drop down menu in the top left corner of your screen and select 'Development Goals'.



2: The Development Goal page will load. Ensure you have '2019 Development Goals' selected in the drop down (Development Goals for previous years will be there as well).

3: Click on your name at the top, you will see a list of your Reports displayed. Select the employee you would like to view. You will then be able to view the Development Goals they have entered, and edit if required. Note: If you cannot locate the employee in the dropdown menu you can also use the search function at the top of the dropdown list.

