

Using SuccessFactors during PRD Cycle

Mapping your Achievements to your existing Goals – for both Performance and Development

For: All Staff

PRD Phase:	Goal Setting	Ongoing Conversations	Year End Review
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Task

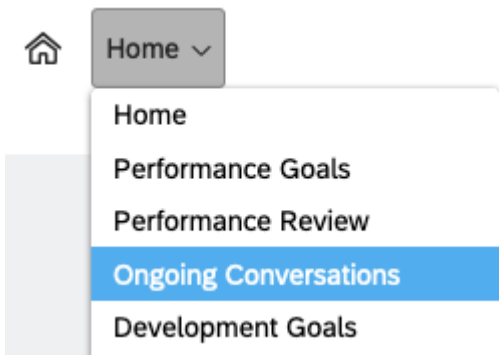
Throughout the year you record your Performance and Development Goals' achievements in Ongoing Conversations.

Outcome

Your Achievements will appear automatically in your Year End Review aligned to your Performance and/or Development Goals.

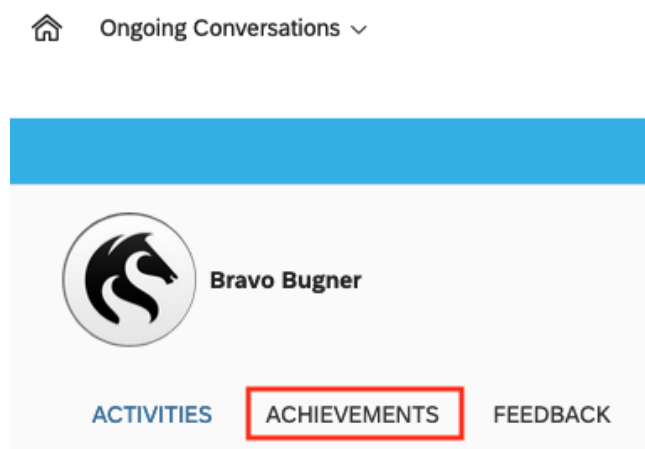
In SuccessFactors

[You have logged in to SuccessFactors](#) and are viewing your 'Home' dashboard – you click on the 'Home' drop-down list and select 'Ongoing Conversations':

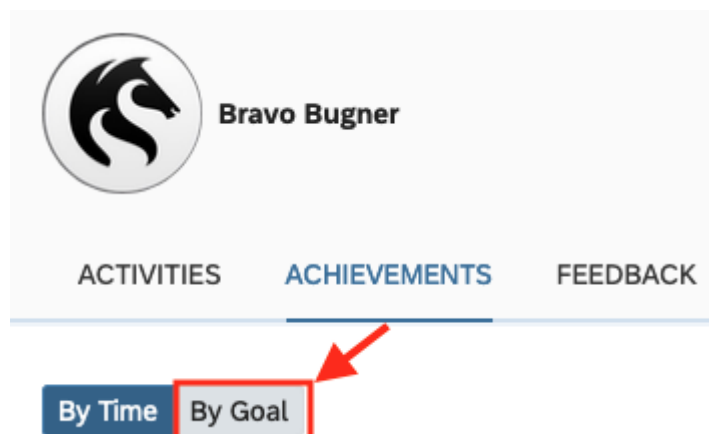


Recording Achievements against Performance Goals

1: The 'Ongoing Conversations' page loads to the default 'Activities' view – click on 'Achievements' tab highlighted to switch view:



2: There are two options to recording Achievements – select 'By Goal' as highlighted to ensure Achievements are recorded against Goals, this way they will automatically display in your Year End Review:



3: 'Performance Goals' are selected by default – next click on 'Add Achievement' to begin:

Bravo Bugner

ACTIVITIES **ACHIEVEMENTS** FEEDBACK

By Time **By Goal** + Add Achievement

By Performance Goal By Development Goal

4: The 'Add Achievement' form opens – enter the 'Achievement Name', 'Achievement Date', and select the 'Performance Goal' from the drop-down list:

Add Achievement

***Achievement Name**

***Achievement Date**

Performance Goals

Performance Goal

Development Goal

Save Cancel

When details have been entered click the 'Save' button.

5: Your Achievement is now recorded against your Performance Goal:

The screenshot shows the user profile for 'Bravo Bugner'. At the top, there are three tabs: 'ACTIVITIES', 'ACHIEVEMENTS' (which is selected), and 'FEEDBACK'. Below the tabs, there are two filter buttons: 'By Time' and 'By Goal' (which is selected). To the right of these filters is a '+ Add Achievement' button. Underneath, there are two sub-filters: 'By Performance Goal' (selected) and 'By Development Goal'. A goal is listed: 'Goal: Conduct security audits every (12 months)'. Below the goal, an achievement is shown: 'Security audit performed'. The text 'Security audit performed' is circled in red. A red arrow points from this text to a three-dot menu. The menu is open and shows three options: 'Request Feedback', 'Edit Achievement', and 'Delete'.

Click the indicated '3-dot' menu for options such as editing the Achievement, or 'Requesting Feedback' from a colleague around your Achievement.

Your Achievements flowing through to the PRD form

During the 'Year End Review' phase of the PRD Cycle all the achievements for each goal will flow through automatically to the Performance Review form:

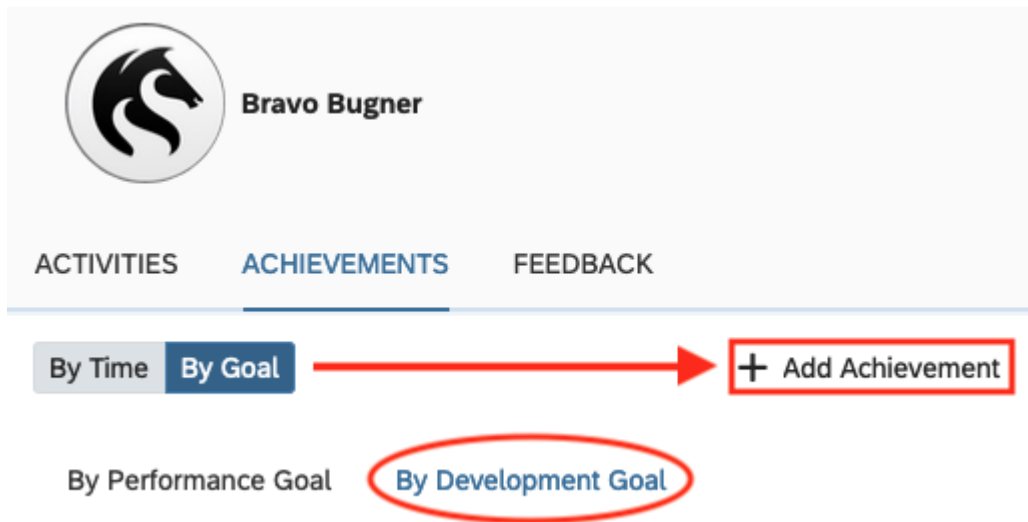
The screenshot shows the 'Achievements' tab selected. Below the tab, there is a trophy icon followed by the text 'Security audit performed' and the date '29/07/2019'.

Recording Achievements against Development Goals

This is a similar process to 'Recording Achievements against Performance Goals'.

Follow steps 1 to 2 then:

3: Click on 'By Development Goal' then click on 'Add Achievement' to begin:



Follow steps 4 to 5 to finish adding an Achievement to your Development Goal.

Next Steps

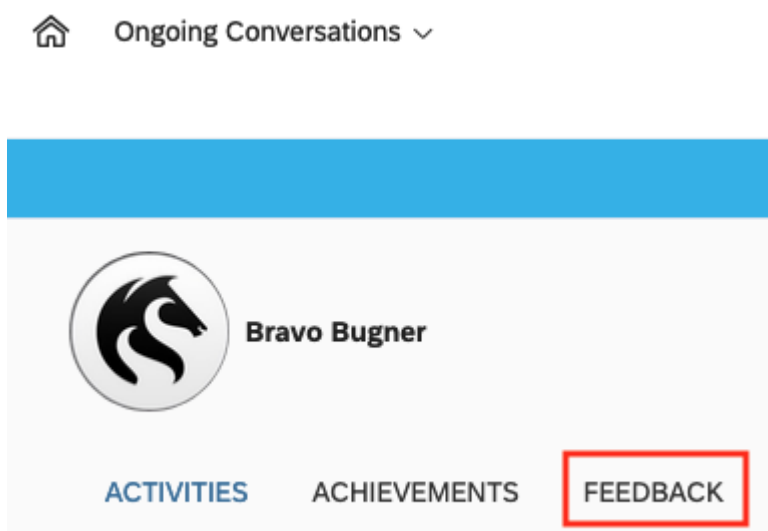
Continue to add Achievements against your Performance and Development Goals throughout the year until the Year End Review phase of PRD.

You can also give and request feedback.

Giving and Requesting Feedback

You can seek feedback from colleagues you worked alongside throughout the year. You can also send feedback to colleagues.

While on the 'Ongoing Conversations' page follow step 1 of 'Recording Achievements against Performance Goals' and then click on 'Feedback' tab:



The 'Feedback' page will list any feedback you have received:

July 2019



Peg Kiera

Great team member, worked on xxx and yyy during 2019.

16 July 2019

Link To Visible to my manager

This page will also list three options for 'Feedback':

Request Feedback View Feedback Requests Give Feedback

Request Feedback attached to Goals


Rather than just general feedback via the 'Request Feedback' link above, *you can request feedback directly on an achievement that is attached to your goal* (either Performance or Development goals):

A: See step 5 of 'Recording Achievements against Performance Goals' above to access the 'Request Feedback' option for the achievement.

The screenshot shows the profile of 'Bravo Bugner' with tabs for 'ACTIVITIES', 'ACHIEVEMENTS', and 'FEEDBACK'. Under 'ACHIEVEMENTS', there are filters for 'By Time' and 'By Goal'. A '+ Add Achievement' button is visible. Below the filters, there are two sub-filters: 'By Performance Goal' and 'By Development Goal'. A goal titled 'Goal' is shown with the description 'Conduct security audits every (12 months)'. Under this goal, an achievement 'Security audit performed' is listed. A red circle highlights the achievement name, and a red arrow points from it to a dropdown menu. The menu contains three options: 'Request Feedback', 'Edit Achievement', and 'Delete'.

B: Complete the 'Request Feedback' form – you can edit the 'Message' which will include the name of the achievement – and select the person you want feedback 'From' – then click 'Send'.

Request Feedback

 Once this request is responded to, only you will have access to the feedback message until you decide to make it visible to others

*From

Search by name

*Message

Since we have worked together on **Security audit performed** 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,
Bravo Bugner

Send

Cancel

[View Feedback Requests](#)

On the 'Feedback' tab page click on 'View Feedback Requests' – this will display a list of requests, when they were sent, and when they were responded to:

Feedback Requests



To: Peg Kiera

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?

B ...
[More](#)

Requested on 26 June 2019 · Responded on 16 July 2019

[Give Feedback](#)

On the 'Feedback' tab page click on the 'Give Feedback' – this will open a form where you can send feedback to a colleague:

Give Feedback

*To

Search by name

*Feedback

Share your feedback to help recipients reflect on their work

Send

Cancel

Next Steps

Throughout the 'Ongoing Conversations' phase your Manager (and PRD Advisor if applicable) can comment on your goals and view achievements you have attached to your Performance and Development goals.