

Using SuccessFactors during PRD Cycle

Adding Goals – both for work priorities and your development plan

For: All Staff.

PRD Phase:	Goal Setting	Ongoing Conversations	Year End Review
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Task

Either before or after meeting your manager for setting priorities and development goals:

- Performance Goals are created in SuccessFactors, with measures on completion
- Development Goals are created, aligned to the 70:20:10 development model

Outcome

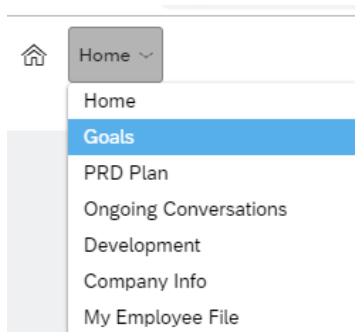
Performance Goals and Development Goals are entered in the Goal Setting form.

In SuccessFactors

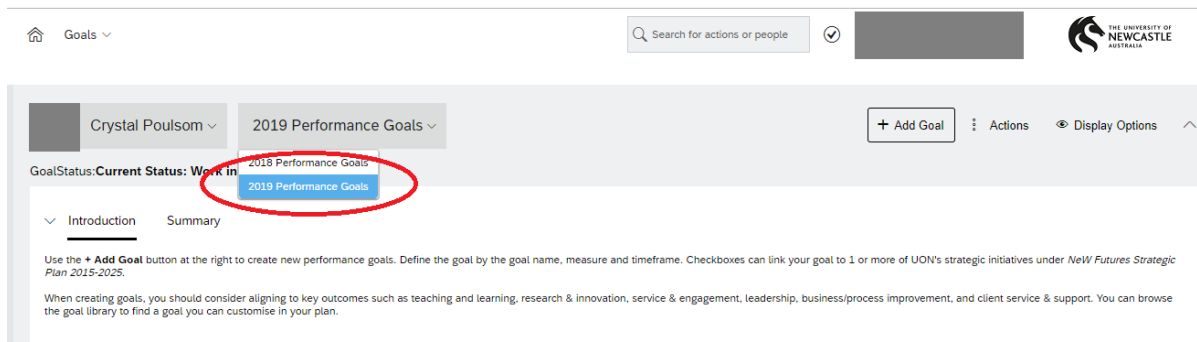
[You have logged in to SuccessFactors](#) and are viewing your 'Home' dashboard.

Adding Performance Goals

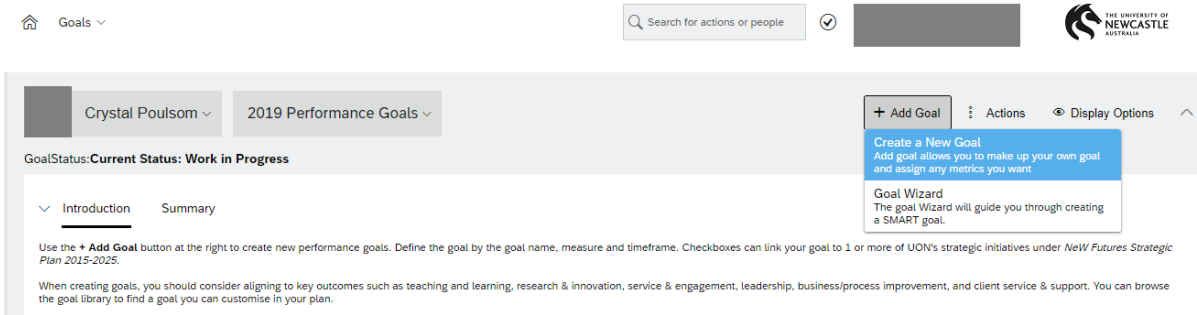
1: Click on the 'Home' drop down menu in the top left corner of your screen and select 'Goals'.



2: The Performance Goal form will load. Ensure you have '2019 Performance Goals' selected in the drop down (2018 will be there as well).



3: Click on '+ Add Goal' then choose either 'Create a new Goal' or 'Goal Wizard'



4: Choose the type of Goal to add – Personal or Library.

5: Enter the details of your Performance Goal.

Edit Goal

Edit your goal below.

Fields marked with * are required.

Type: Personal

* Goal Name:

Measure:

* Start Date:

* Due Date:

Status:

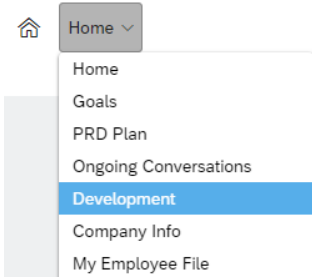
Comments:

Although 'Measure' is optional, adding measures helps to know when the goal is achieved: this can be simply 'Produce X number of documents' or 'Event ran on due date'.

5: Continue to add Performance Goals, they will be listed in the 'Goals' section of the form. There is a minimum of 3 Performance Goals, and a maximum of 12.

Adding Development Goals

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



2: The Development Goal form will load. Ensure you have '2019 Development Goals' selected in the drop down (2018 will be there as well).

3: Click on '+ Add Goal'. The 'Add Development Goal' window will be displayed.

A screenshot of the 'Edit Development Goal' form. The form has a blue header with the text 'Edit Development Goal'. Below the header, there is a section titled 'Edit Development Goal' with a note: 'Fields marked with * are required.' The form contains several fields: 'Category:' with a dropdown menu showing 'Current Role' and a tooltip with options 'Future Role', 'Current Role', and 'Personal'; '* Development Goal Name:' with a text input field containing 'Learn to screen capture'; 'Experience on the job activities (70%):' with a large text area; 'Exposure to others activities (20%):' with a text area containing 'Ask colleague how they capture images for their documents.'; 'Education and formal training activities (10%):' with a large text area; 'Other comments:' with a text area containing 'This will help me produce 'Getting Started' guides for one of my PRD Goals for 2019.'; '* Start Date:' with a date input field containing '01/02/2019'; '* End Date:' with a date input field containing '28/02/2019'; and 'Status:' with a dropdown menu showing 'Not Started'. At the bottom right, there are two buttons: 'Cancel' and 'Save & Close'.

4: Complete your Development Goal.

Select 'Category' choice: this will mainly be 'Current Role' but could be for 'Future Role' as part of career planning and progression, or 'Personal' development goals – you can add all three.

Enter one or more descriptors for the 70:20:10 development model to clarify how the development goal will be achieved.

Narrow the date range if applicable, then click 'Save & Close' when complete.

You will see your Goals being listed in that section, you continue to add more.

When you have completed adding both Performance Goals and Development Goals, you have completed the first step of the 2019 PRD Plan process. You can come back and add new goals or edit existing goals at any time. Your Manager and PRD Supervisor (if applicable) can view your Goals and edit if required. Formal approval of your Goals will occur in April / May as part of the larger 'full' 2019 PRD Plan form within SuccessFactors. The Goals you enter now will be automatically linked.