



Performance Review & Goal Setting Guidelines

Team Member



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Introduction

The Annual Performance Review provides a formal review of individual performance. It is designed to facilitate constructive discussion between the team member and manager in order to clarify performance objectives, provide feedback about the team member's performance with respect to skills and behaviors, set goals for the upcoming year, and serve as a basis for merit increase decisions. Managers and team members are responsible for completing a yearly performance review as part of ongoing performance discussions. Preparation for the performance review discussion begins with the team member completing a self-review.

A self-review is a team member's evaluation of his or her own performance during the year. The purpose of the self-assessment is to think about and give serious consideration to how you performed in meeting expectations for your position.

The Human Resources Department is available to answer questions and to provide assistance to managers and team members on any aspect of the performance management process.

Performance Review Rating System

The numerical rating system is based on a 1-5 scale. 1 being the lowest and 5 being the highest rating available.

Team members receiving a number one rating might display the following behavior:

1 – Does Not Meet Expectations

- Not meeting goals
- Not open to feedback or acting on suggestions for improvement
- Not living the core success attributes

Team members receiving a number two rating might display the following behavior:

2 – Needs Improvement

- Often needs guidance
- Sometimes not meeting goals
- Only does the minimum; is not open to extra duties

Team members receiving a number three rating might display the following behavior:

3 – Meets Expectations

- Completes responsibilities accurately and timely
- Builds good relationships with team members and customers
- Seeks feedback and displays the willingness to act on feedback

Team members receiving a number four rating might display the following behavior:

4 – Exceeds Expectations

- Works independently and prioritizes effectively
- Generates ideas and executes solutions that make a difference
- Utilizes their high level of skill/knowledge to achieve quality results

Team members receiving a number five rating might display the following behavior:

5 – Exceptional Performance

- Recognized as an expert both inside and outside of their team
- Willingness and availability to do whatever it takes to get the job done
- Performance is above and beyond expectations

Performance Review Sections

The Performance Review is divided into 3 sections: The first section is to review goals set for the year. the second focuses on Sun's core success attributes, and the third focuses on skills and behaviors important for your position. Team members will be evaluated on 8 competencies and managers will be evaluated on 10 competencies.

Part 1 – Goals

Part 2 - Sun's Core Success Attributes (4)

- Commitment
- Intensity
- Accountability
- Customer Service

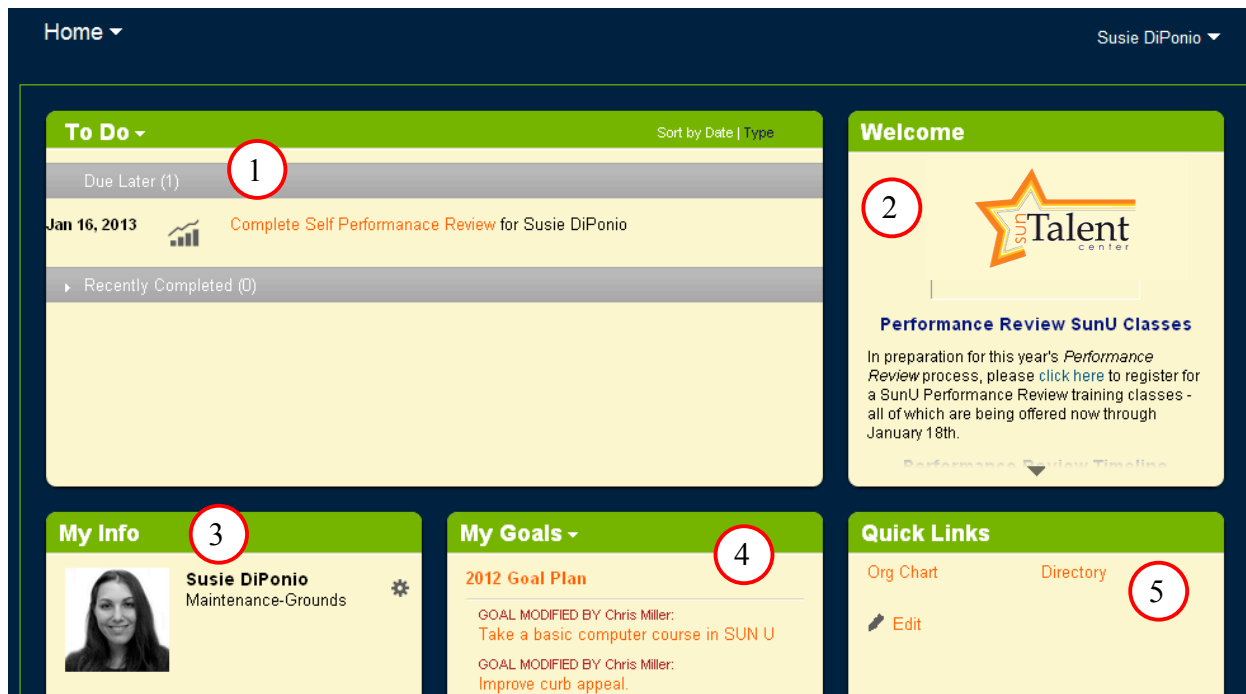
Part 3 - Role Specific (4-6)

(Varies based on department/position)

Home Page

After logging in to the system, you will be taken to the Home page.

1. To Do – Lists items (policies, forms, etc) requiring review/acknowledgement.
2. Welcome – Displays
3. My Info – Displays name, preferred first name (if applicable), location and common ID.
4. My Goals – Displays goals
5. Quick Links – Allows the editing of information on the home page



The screenshot shows the Home Page interface with the following components and callouts:

- 1**: Callout pointing to the 'To Do' section header.
- 2**: Callout pointing to the 'Welcome' section header.
- 3**: Callout pointing to the 'My Info' section header.
- 4**: Callout pointing to the 'My Goals' section header.
- 5**: Callout pointing to the 'Quick Links' section header.

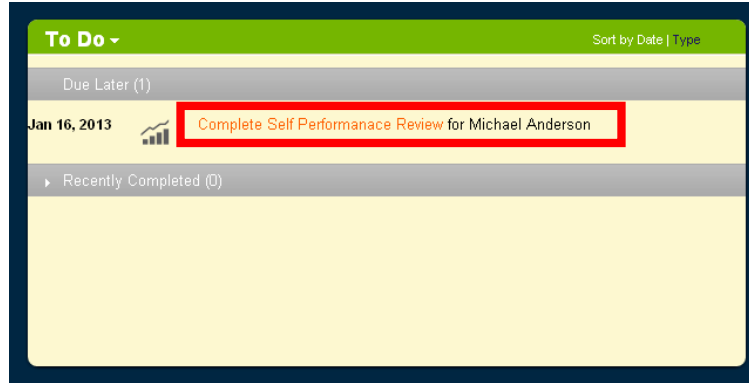
The interface includes a navigation bar with 'Home' and 'Susie DiPonio' (with a dropdown arrow). The main content area is divided into several sections:

- To Do**: A list of tasks. The first task is 'Complete Self Performance Review for Susie DiPonio' due on 'Jan 16, 2013'. Below it is a 'Recently Completed (0)' section.
- Welcome**: A section with the SunU Talent Center logo and a message about 'Performance Review SunU Classes'.
- My Info**: A section displaying the user's profile picture, name 'Susie DiPonio', and location 'Maintenance-Grounds'.
- My Goals**: A section titled '2012 Goal Plan' with two goals: 'Take a basic computer course in SUN U' and 'Improve curb appeal'.
- Quick Links**: A section with links for 'Org Chart', 'Directory', and 'Edit'.

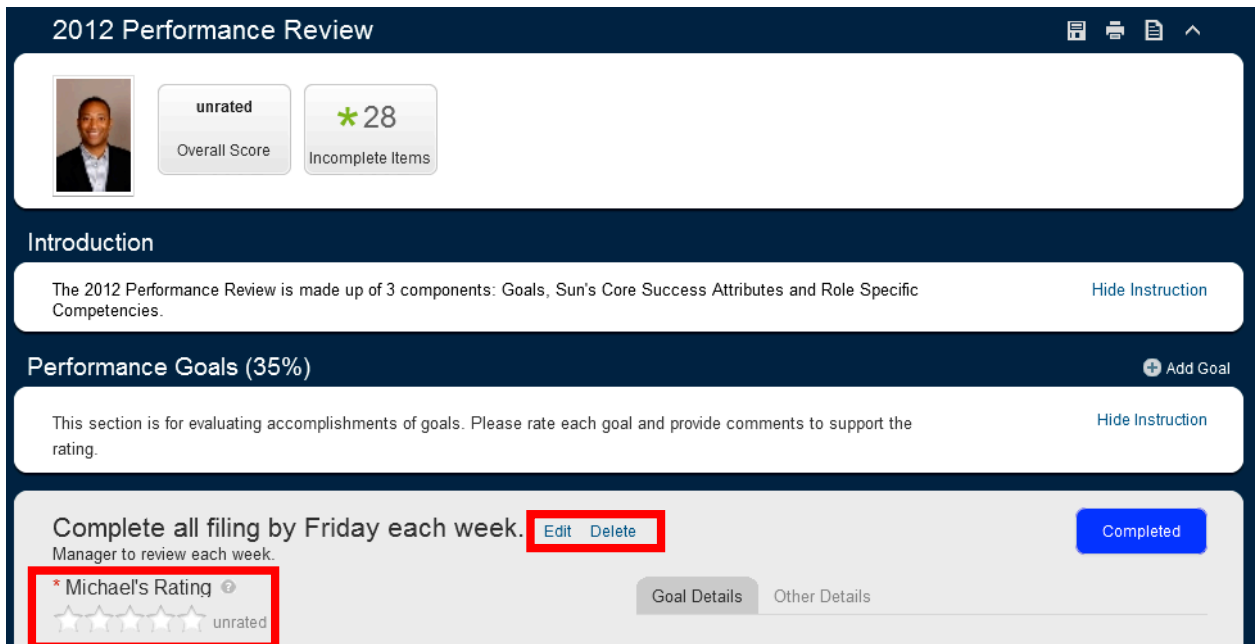
Performance: Self-Review

To complete the self-review of the Performance Review:

1. Click on Complete Self Performance Review in the To Do list.



2. Use the mouse to select your rating for each section: Goals, Core Success Attributes and Role specific competencies. 2013 goals have been imported into the new system. Please review your 2013 goals. You are able to edit the goals by clicking Edit next to the goal. If the goal is no longer relevant due to changing business needs, click Delete next to the goal (see p. 11 for further instructions on Goals).



- 3. Insert comments to support your self-rating. There is a Writing Assistant for examples for the core success attributes and role specific competencies. The tool bar has many editing features such as spelling check and legal scan.

Core Success Attributes (30%)

This section is for evaluating the demonstration of Sun's core success attributes. Please rate each core success attribute and provide comments to support the rating.

Customer Service

Provides timely and professional service to both internal and external customers; is responsive to customer needs and requests; is always courteous to the customer and considers the needs of the customer when making decisions

* Michael's Rating Exceptional Performance

* Michael's Comment **Writing Assistant**

- 4. The Writing Assistant lists examples by rating of Improve, Meets and Exceeds. Choose the example(s) and click Place Quote. Click Cancel or click on the to return back to the review.

Find a quote about Michael's competency

Customer Service
Provides timely and professional service to both internal and external customers; is responsive to customer needs and requests; is always courteous to the customer and considers the needs of the customer when making decisions

Your rating on Michael's competency Exceptional Performance

Select topics below

Improve <ul style="list-style-type: none">appears unresponsive to customersdoesn't help internal customersdoesn't understand customer perspectiveinadequate customer knowledgeinconsistent customer follow-	Meets <ul style="list-style-type: none">considers customer perspectivecourteous to customersfollows throughfollows through with customersgets customer feedbackincludes customer viewpoint in	Exceeds <ul style="list-style-type: none">actively seeks customer feedbackalways follows throughalways helps internal customersalways sees customer's perspectiveconscientious with customers
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Describe Behavior **Give Advice**

Preview Quote Below
I consistently follow through and meet commitments to customers. I handle customer requests personally. I check to ensure that customer needs have been taken care of and that customers are satisfied with the services they have received.

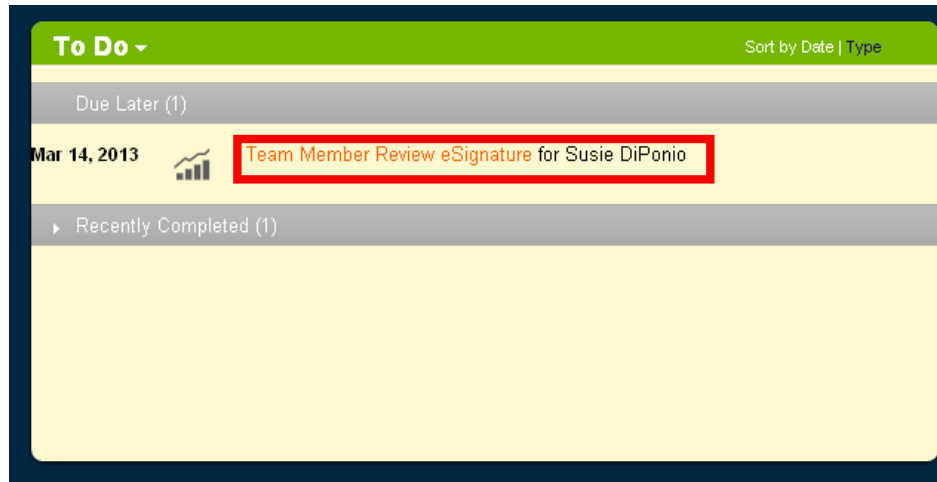
Select a Narrative:
 Michael

Place Quote

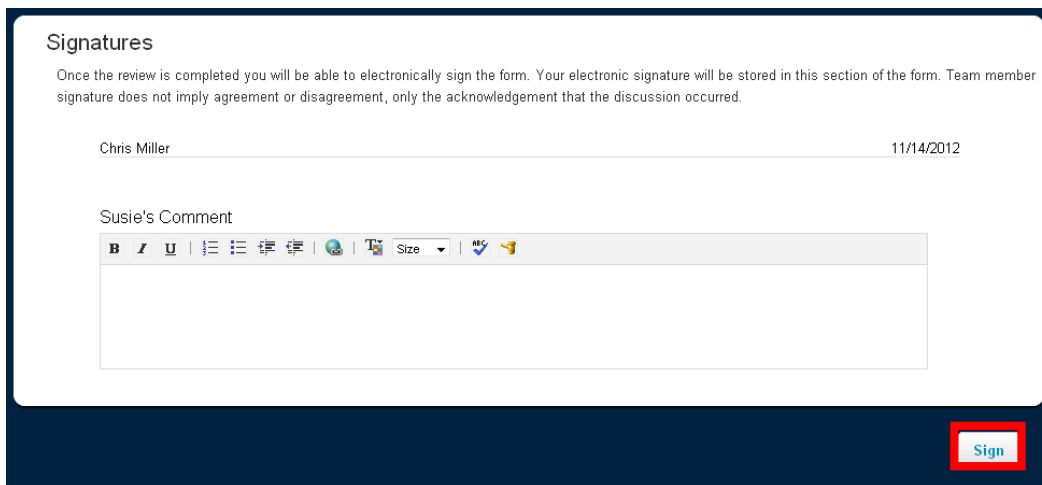
5. Click Finalize Form. Your manager will receive an email that you have completed your self-review.



6. Once you have met with your manager to receive your review, click Team Member Review eSignature to verify that you have met with your manager.

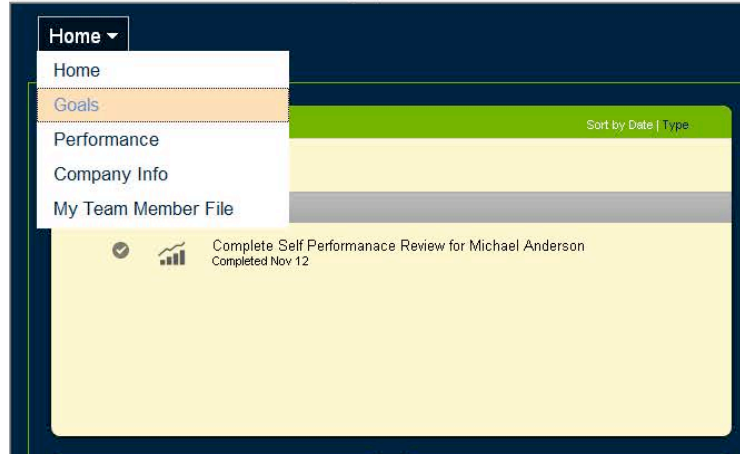


7. Click Sign.

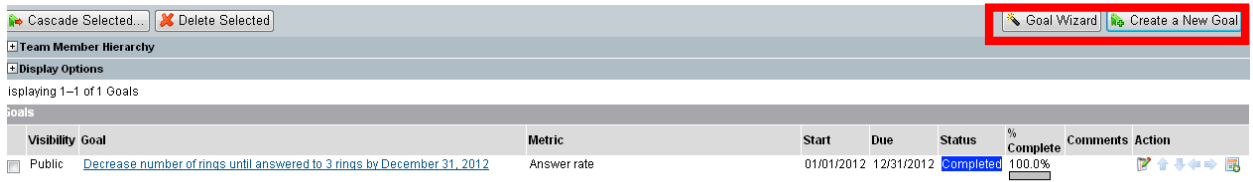


Goal Setting

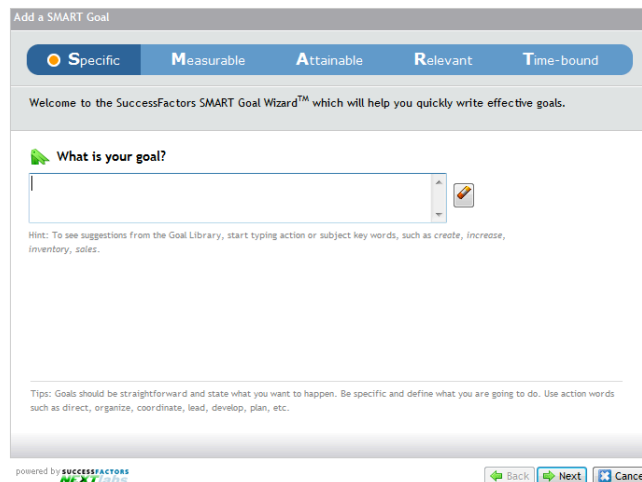
1. Use the dropdown arrow next to Home on the Homepage and click Goals.



2. There are several ways to create goals. The Goal Wizard takes you step-by-step to create SMART goals. The Create a New Goal button allows you to create goals using the Goal Library.

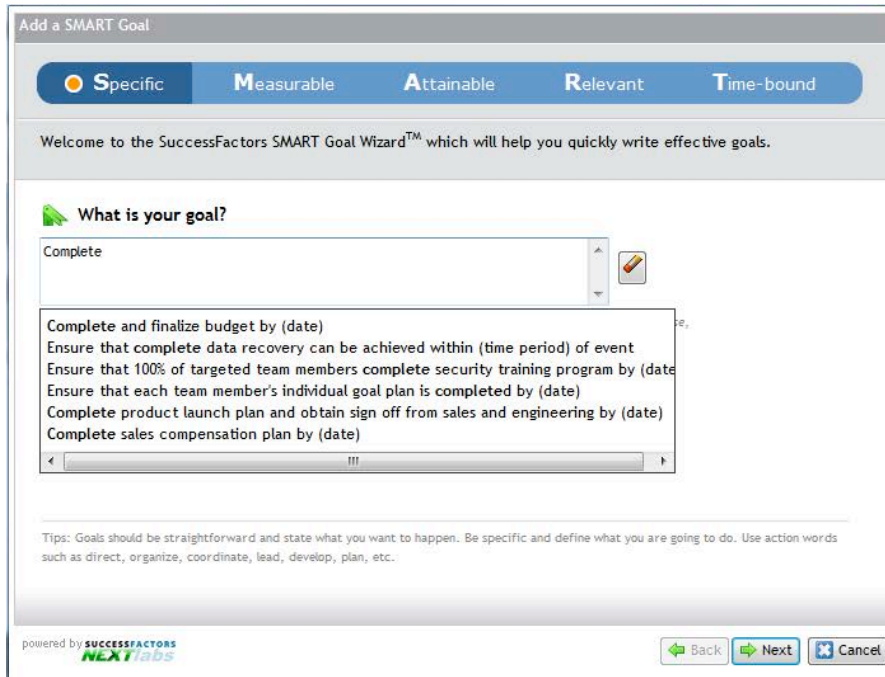


Option 1: Click Goal Wizard. Enter the specific goal.

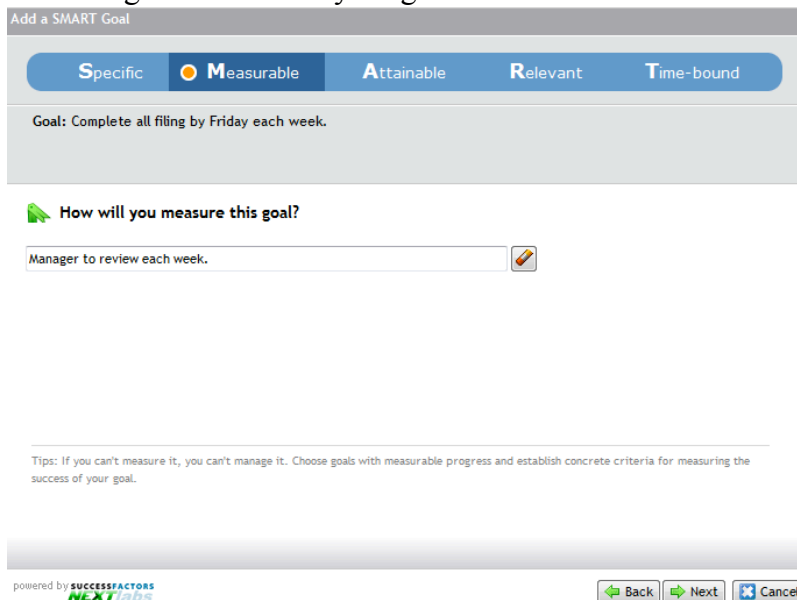




- a. **Specific:** Goals should be straightforward and state what you want to happen. Be specific and define what you are going to do. Use action words such as direct, organize, coordinate, plan, etc.
 As you type in your goal, you may receive goal suggestions from the Goal Library. You can choose whether or not to use these suggestions and/or may need to modify. Click Next.



- b. **Measurable:** Choose goals with measureable progress and establish concrete criteria for measuring the success of your goal.



- c. **Attainable:** Goals need to be within your reach, yet stretch you slightly. If goals are set too far out of reach, you cannot commit to accomplishing them. Success in reaching attainable goals keeps you motivated.

Add a SMART Goal

Specific Measurable **Attainable** Relevant Time-bound

Goal: Complete all filing by Friday each week.
Metric: Manager to review each week.

Is this goal attainable?

No Yes

Tips: Goals must be within your capacity to reach. If goals are set too far out of your reach, you cannot commit to accomplishing them. Goals need to stretch you slightly so you feel you can do it and it will need a real commitment from you. Success in reaching attainable goals keeps you motivated.

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Back Next Cancel

- d. **Relevant:** Make sure each goal is consistent with your other goals and aligned with Sun’s goals, your manager or your department.

Add a SMART Goal

Specific Measurable Attainable **Relevant** Time-bound

Goal: Complete all filing by Friday each week.
Metric: Manager to review each week.

Is this goal relevant?

No Yes

Tips: Goals should be relevant. Make sure each goal is consistent with your other goals and aligned with the goals of the company, your manager, or your department.

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Back Next Cancel

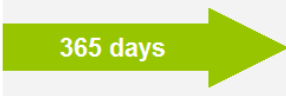
- e. Time-bound: Set a timeframe for the goal: next week, in three months, end of quarter. Putting an end point on your goal gives you a clear target to work towards.

Add a SMART Goal

Specific Measurable Attainable Relevant **Time-bound**

Goal: Complete all filing by Friday each week.
Metric: Manager to review each week.

What is your timeline?

Start Date: 01/01/2012  End Date: 12/31/2012

Tips: Set a timeframe for the goal: for next week, in three months, end of the quarter. Putting an end point on your goal gives you a clear target to work towards. Without a time limit, there's no urgency to start taking action now.

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[Back](#) [Next](#) [Cancel](#)

- f. Review your goal and click Save & Close.

Add a SMART Goal

Confirm and Save

Please confirm your goal and click Save.

Confirm your SMART goal

Specific:	Complete all filing by Friday each week.
Measurable:	Manager to review each week.
Attainable:	✓
Relevant:	✓
Time-bound:	01/01/2012– 12/31/2012

[Add More Details](#)

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[Back](#) [Save & Close](#) [Cancel](#)



Option 2: Click Create a New Goal

Cascade Selected... Delete Selected

Goal Wizard Create a New Goal

Team Member Hierarchy

Display Options

isplaying 1--1 of 1 Goals

Visibility	Goal	Metric	Start	Due	Status	% Complete	Comments	Action
Public	Decrease number of rings until answered to 3 rings by December 31, 2012	Answer rate	01/01/2012	12/31/2012	Completed	100.0%		

- a. Click Personal Goal to create a your own goal without using the SMART method tool or Goal Library.

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.

- b. Create your goal by completeing the fields below.

Add Goal

Edit your goal below.

Fields marked with * are required.

Visibility: Public

*Goal:

3.

4.

5.

6. Metric:

7.

8.

*Start: 01/01/2012

*Due: 12/31/2012

Comments:

Back Save Changes Cancel

Option 3: Use the Goal Library. Click Create a New Goal

Cascade Selected... Delete Selected

Goal Wizard Create a New Goal

Team Member Hierarchy

Display Options

isplaying 1–1 of 1 Goals

Visibility	Goal	Metric	Start	Due	Status	% Complete	Comments	Action
Public	Decrease number of rings until answered to 3 rings by December 31, 2012	Answer rate	01/01/2012	12/31/2012	Completed	100.0%		

a. Click Library Goal

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.

b. Click on the arrow next to each category.

Select Goal from the Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

- Administration
 - Administrative Support
 - Facilities & Maintenance
 - Office Management
- Customer Service
 - Customer Satisfaction & Loyalty
 - Customer Service Management
 - Customer Support
- Finance & Accounting
- HR
- IT
- Management
- Marketing
 - Market Research

c. Select the goal to add. Click Add Selected Goal.

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

Back Add Selected Goal Cancel





3. Click on the edit goal icon  under Action to edit goals.

Cascade Selected... Delete Selected Goal Wizard Create a New Goal

Team Member Hierarchy

Display Options

isplaying 1-1 of 1 Goals

Visibility	Goal	Metric	Start	Due	Status	% Complete	Comments	Action
Public	Decrease number of rings until answered to 3 rings by December 31, 2012	Answer rate	01/01/2012	12/31/2012	Completed	100.0%		   

Edit Goal

Edit your goal below.

Fields marked with * are required.

Visibility: Public

*Goal: [spell check...](#) [legal scan...](#)
Decrease number of rings until answered to 3 rings by December 31, 2012

Metric: [spell check...](#) [legal scan...](#)
Answer rate

*Start: 01/01/2012

*Due: 12/31/2012

Comments: [spell check...](#) [legal scan...](#)

Save as New Save Changes Cancel