

SuccessFactors Tips

Featured Tip : Differences Between **Goals** and **Development**



Goal Plan

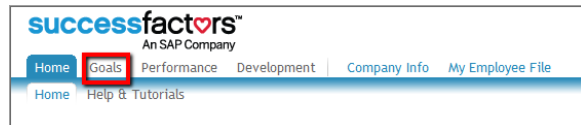
Goal setting lists all the goals you are expected to complete in your position to help meet department and organizational goals. Goals are expected to be completed within a given timeframe and you will evaluate these during a review event. An example goal may include a project deliverable.

Development Plan

Development planning outlines the path or course of action an employee can take to enhance their own career development or further develop skills needed for job performance. In this page you may create a plan to develop further knowledge or skills for your current role, a future role or a general skillset.

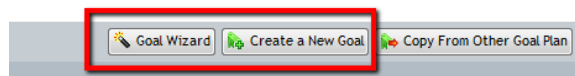
How To: Add a Goal Plan

- You can access Goals from the Home page of SuccessFactors. You can also access the Goal section from within your self-review form.
- Click the Goal menu. This takes you to the **Goal Plan** page. This page stores all goals that you have created in the system. It is an online worksheet that records and tracks goals in one central place.
- As you progress with your goals, you can go to the Goal plan and update their status.



- You can create a new goal using the **Goal Wizard** button. You can also create a new goal from the **Create a New Goal** button.

Note: If you wanted to copy a goal from one year to the next you could use the **Copy From Other Goal Plan** button.



Goal Wizard

The Goal Wizard will assist you with adding a SMART Goal. Smart Goals are Specific, Measurable, Attainable, Relevant and Time-bound. To begin creating your goal, answer the questions and follow the steps in the wizard.

Note: Once you start typing in the free form box, SuccessFactors will provide you will sample wording that you can select if you like.

SMART Goals

When you include all the attributes listed above, you create a goal that can be objectively tracked and measured, which can make it easier for you to see progress on the goal, and easier for others to evaluate your performance on the goal. Some examples of SMART goals are:

- Listen in on 4 customer service calls per month.
- Decrease operational costs by 10% by June 30.
- Implement a formal ordering system by the end of Q2 to track office supply inventory.

Add Goal

If you choose to **Create a New Goal** you will manually go through the SMART process. You will need to ensure that you address each of the SMART steps to make sure to develop goals that are easily trackable and accountable.

Additional Goal Tips

- **Individual employee goals should align with organizational goals and objectives.**
- **Explore all of the built in options available to you when setting goals.** For example, the Library Goal button provides you with a wealth of appropriate goals from a specific perspective such as Service, Quality, and HCAHPS, etc.
- **You can include a variety of business goals in the Goal plan.** These include short-term, long-term, and departmental goals.

How To: Add a Development Plan

- You can access Development Plans from the Home page of SuccessFactors. You can also access the Development section from within your self-review form.
- Click the Development menu. This takes you to the **Development Plan** page. This page stores all goals that you have created in the system. It is an online worksheet that records and tracks goals in one central place.
- As you progress with your developmental goal, you can go to the development plan and update the status of that goal.



- You can create a new development plan using the **Create a New Development Plan** button.

Note: If you wanted to copy a development plan from one year to the next you could use the **Copy From Other Development Plan Goal** button.

The image shows the 'Add Development Goal' form. It has a title bar 'Add Development Goal' and a sub-header 'Add Development Goal'. Below the header, it says 'Fields marked with * are required.' The form contains several fields: '*Development Plan:' with a text area and a 'spell check...' button; '*Start Date:' with a date picker set to '10/01/2012'; '*Due Date:' with a date picker set to '09/30/2013'; 'Status:' with a dropdown menu set to 'Choose One'; 'Purpose:' with a dropdown menu set to 'CurrentRole'; and 'Learning Activities:' with an 'Add Learning Activity' button. At the bottom right, there are 'Save & Close' and 'Cancel' buttons.

Add Development Goal

Complete all of the fields. Use the **Add Learning Activity** button to define activities that will help you gain this skill or knowledge. Development goals may include taking a training class, finding and spending time with a mentor or attending continuing education classes.

Additional Development Tips

- **The Development section is a working section where you can outline course recommendations, review course progress, and monitor results.** This section is also sometimes called Learning and Development, Career Path Planning, or Development Goals.
- **Development plans are essential to growing and motivating employees.** Learning and development opportunities cover many different aspects of development including project management, leadership and professional development and technical skills enhancement.

If you need additional assistance, please contact the **SuccessFactors System Administrator** for your entity.