

Performance Management Fundamentals

Unleash the power of SuccessFactors Performance Management system



Table of Contents

About this Guide	1
<i>Document Conventions</i>	1
Overview of Performance Management	2
<i>Form Route Map</i>	2
Access Performance Forms	3
<i>Access Forms from the To Do Section</i>	3
<i>Access Forms from the My Forms Page</i>	3
Folders Used in Performance Management	4
Navigate Performance Forms	5
Timing of the Goals and Performance Process	6
Ongoing Feedback	6
<i>Edit Goals</i>	6
<i>Add Comments</i>	7
<i>Spell Check</i>	7
<i>Legal Scan</i>	8
<i>Writing Assistant</i>	8
Self Review.....	9
<i>Advance the Form</i>	9
<i>Employee Enters Comments and Ratings</i>	10
Manager Review.....	10
<i>Manager Icons</i>	11
<i>Team Overview Page (for Managers)</i>	11
<i>Ask for Feedback (for Managers)</i>	12
Stack Ranker (for Managers).....	13
Calibration	14
Performance Review Meeting.....	14
Employee Signature	15
Manager Signature	15
View Completed Forms	16



About this Guide

The *Performance Management Fundamentals* guide is a reference tool for employees and managers when managing performance-related activities in SuccessFactors. Use this guide to support your system training.

Note: Always confirm with your manager or Human Resources team for policies/procedures that may have changed.

Disclaimer Notice

Every effort was made to ensure that the content in this document was complete and accurate at the time of publishing. However, information is subject to change. Aasonn cannot assume responsibility for any errors or omissions due to ongoing configuration, software or process changes.

Document Conventions

Text Element	Meaning
Bold text	Bold text is used to call out user interface elements on the screen when taking action on them, such as clicking a button or tab.
<i>Italic text</i>	Italic text is used to emphasize important information, such as a key term used for the first time.
<i>Note/Tip</i>	Notes and tips indicate neutral or positive information that emphasizes or supplements important points of the main text.



Overview of Performance Management

Performance review forms are used by employees and managers to update progress - and to evaluate the employee's results towards meeting their goals and the demonstration of competencies/values. Performance forms are launched by Human Resources at the beginning of each new performance period.

Performance Management tools in SuccessFactors provide immediate accessibility to assist year-round discussions about performance. Using SuccessFactors ensures that performance reviews are fair, consistent, and based on actual performance.

Form Route Map

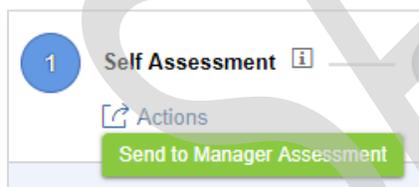
Performance forms follow a step-by-step process from start through completion. A *route map* at the top of the form helps guide users through the process. These steps display to everyone involved making the review process transparent. Route maps vary based on performance form type and may also vary based on the employee's position or team hierarchy.



The route map shows the current step in blue. Steps to the left have been completed, and steps to the right will be completed in the future. The form is sent to the next step by clicking an option at the bottom of the form:



Some steps of the route map also allow users to move a form forward by clicking **Action** in the current step, then clicking an option from the drop-down list. For example, clicking the **Self Assessment** phase reveals the **Send to Manager Assessment** option. Click an option to move the form forward.



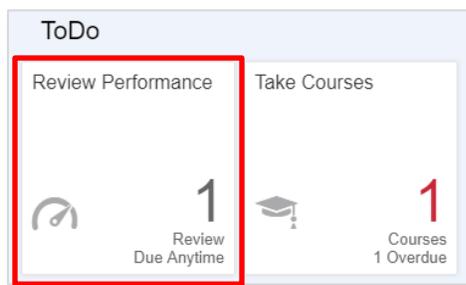
Access Performance Forms

Users can access performance forms from two locations within SuccessFactors: the **To Do** section on the Home page or the **My Forms** page.

Note: Email notifications are often sent when a form is sent to the next user in the route map. If an email notification is sent, the user can also access a form by clicking the link in the email notification message.

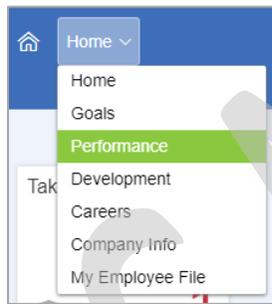
Access Forms from the To Do Section

The **To Do** section on the SuccessFactors Home page lists items that are due. Click the To Do tile to open it. For example, the tile below appears in the employees' **To Do** section when the performance review form is ready for his/her input.

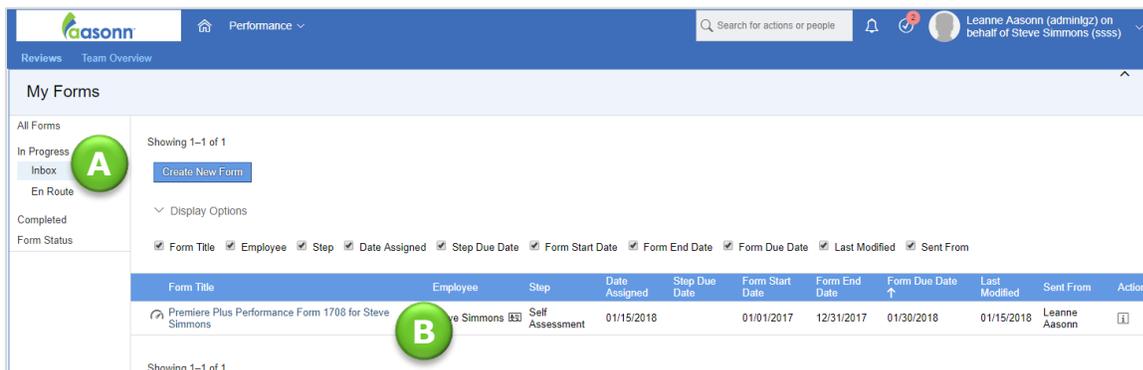


Access Forms from the My Forms Page

Use the My Forms page to access all performance forms. To access the My Forms page, choose **Performance** from the SuccessFactors navigation menu.



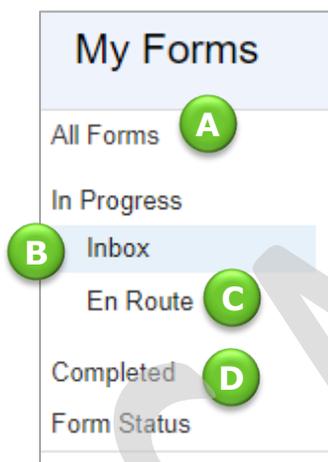
Forms are organized by folder. Forms in the **Inbox** require input and show as hyperlinks. Click on a form name to display it.



- A. Choose a folder in which to view forms — Inbox is the default view.
- B. Forms display in a list. Click a form link to open it.

Folders Used in Performance Management

Use the **Performance** page to view all performance forms. Access forms by folder, which are labeled according to stage. For example, completed forms are listed in the **Completed** folder. See the following folder descriptions.



- A. All Forms shows all forms (in all stages).
- B. Inbox manages all the forms requiring input. Forms remain in this folder until sent to someone else.
- C. En Route stores read-only copies of all the active forms users have worked on and sent to other people for action.
- D. Completed archives all completed forms.



Navigate Performance Forms

The screenshot displays the Aasonn Performance Management interface for a 'Premiere Plus Performance Form 1708 for Steve Simmons'. The interface includes a top navigation bar with the Aasonn logo, a search bar, and user information for Leanne Aasonn. Below the header, there are tabs for 'Route Map', 'Employee Information', 'Review Information', 'Performance Goals', 'Upcoming Performance Goals', 'Core Competencies', and 'Job Specific Competencies'. The 'Route Map' section shows a sequence of steps: 1. Self Assessment, 2. Manager Assessment, 3. Calibration, 4. Performance Discussion, 5. Employee Acknowledgement, and 6. Manager Acknowledgement. A 'Route Map' diagram above the steps shows a path from 'Assessment' to 'Signature'. The 'Employee Information' section displays details for Steve Simmons, including his manager (Ian Iverson), division (Administration (ADMIN)), location (Philadelphia, PA (US_PHL)), department (Engineering (ENG)), and title (Network Architect). Callout boxes A, B, C, D, and E are overlaid on the interface to highlight specific navigation features.

- A. Click **Actions** to access form options: Spell Check or Legal Scan the entire form, view information about the form, or add a meeting to outlook.
- B. Click **History** to search for the form subject's previous and current performance forms.
- C. The form toolbar includes Print, Save, and Save as PDF.
- D. The Route Map illustrates each phase of the performance review process. Click  on the side of the Route Map to scroll and display all phases. Click the current phase for actions/options for sending the form forward.
- E. The form headers allow quick access navigation to different sections of the form.

