

# The Performance Culture System™

## Goal Management Guide

This guide explains how Goal Management works in The Performance Culture System™ and includes a few best practices to help you improve the ways goals are managed inside your organization.

# Results!



# Why Goal Management?

Getting the results you want in your organization requires clear goals and accountability which is the essence of Goal Management.

- Track Cascading and Agile goal progress
- Update goal with comments for automated team updates
- Record and report on final results

## Goal Measurements

Goals can be one of four types of measurements:

- Currency
- Percentage
- To Be Completed
- Units



*Our % complete slider automatically updates for metric based goals.*

## Goal - User Access

Our Goal Management feature includes a role based workflow. Below is an outline of access to goals based on the user role.

- Admin and Super Users can create all types of goals as well as edit all goals in the system.
- Manager Users can create Department and Individual goals.
- Manager Users can edit goals:
  - where they are listed as the Person Responsible (listed under Your Goals)
  - assigned to their direct reports (listed under Team Goals)
  - where they are listed as a Contributor (listed under Your Goals > Contributor)
- Employee Users can create Individual goals.
- Employee Users can edit goals:
  - where they are listed as the Person Responsible (listed under Your Goals)
  - where they are listed as a Contributor (listed under Your Goals > Contributor)

\*Note: Manager users and Employee users have limited editing abilities for goals where they are listed as a Contributor. Goals can also be edited or deleted by the Goal Creator.

## Goal Responsibility & Contributors

Our Goal management feature includes a role based workflow. This role -based workflow not only controls who can access, and delete goals, but also automated email notifications.

# Cascading Goals vs. Agile Goals

## Cascading Goals

Creating cascading goals, beginning with your Company goals, ensures the organization is aligned and understands, not only the desired results, but also how their goals are connected to the big picture.

### Cascading Goal Sample

Company Goal is to *Increase New Profit by 20% over previous year end*



- Department Goal is for *Accounting to Reduce Discretionary Budgets by 5%*
- Department Goal is for *Sales to Generate Organic Growth by 3%*
- Department Goal is for *Operations to Reduce Supplies On Hand by 5%*



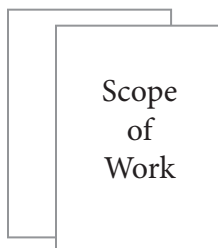
- Individual Goal is for *AR to Implement Online Payment Discount Program*
- Individual Goal is for *Product Mgr to Revise Drop Shipment Procedures*

## Agile Goals

Agile goals are focused on managing deliverables rather than business results and are great for self-driven individuals and teams.

And since these types of goals are typically project-based, may not align perfectly to a higher level goal, and historically have little tracking; managing agile goals is becoming increasingly more important.

**Note: If you want to create agile goals, do not align the goal to a parent goal on the Add Goal form. Goals that are not aligned to a higher goal will appear in a separate section on the Report View.**



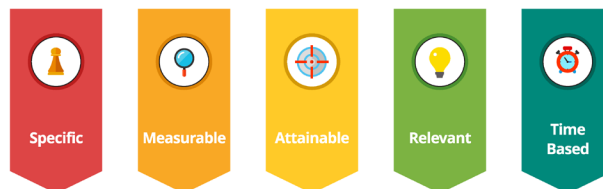
**Project-based  
Team Goal  
Short Term or Pivot  
Goal**



# Creating Goals

In creating goals, there are few things to consider such as:

- What measurement type best tracks the progress?
- Who is ultimately responsible for moving the goal forward?
- Are there any contributors to this goal?
- How does it align with other goals?



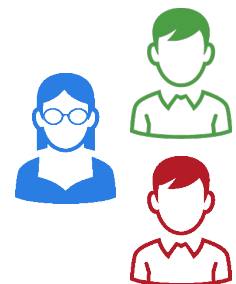
We recommend using S.M.A.R.T. goals as a guideline. S.M.A.R.T. goals and objectives have a much greater chance of being accomplished rather than a general goal that may be left open to interpretation.

Available fields for creating a goal:

- Goal Title (260 characters) - give the goal a brief, but easily recognizable title.
- Measurement - select the appropriate measurement type for the goal.
- Target - if you select a metric measurement, input the target for the goal.
- Goal Type - select the appropriate goal type. (Company, Department, Individual)
- Align to Parent Goal - (optional) select a parent goal from the list if you are creating a department or individual goal.
- Person Responsible - this is the person most responsible for driving the results of the goal.
- Contributors - select any team members that contribute to the success of the goal. There can be multiple contributors.
- Start Date - assign a start or beginning date for the goal.
- End Date - assign an end or due date for the goal.
- Additional Information - list any additional information helpful in completing, measuring, or tracking the goal. There is a link option to include a URL or other relevant document stored online.



***Unless selected otherwise, the Person Responsible and any Contributors of the goal will automatically receive a “New Goal” email.***



*Note: If you are working to input goals for your team but are not ready for emails to be sent, list yourself as the person responsible. When you are ready to send the emails, update the goal for the appropriate person responsible and any contributors.*

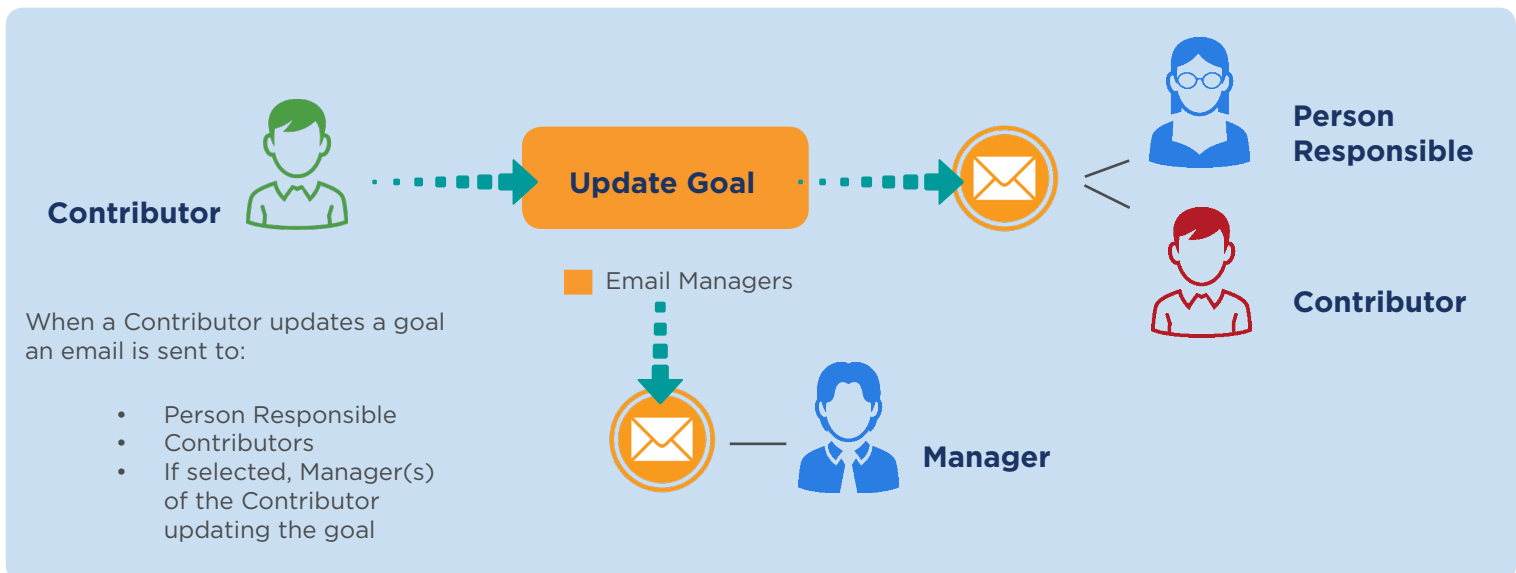
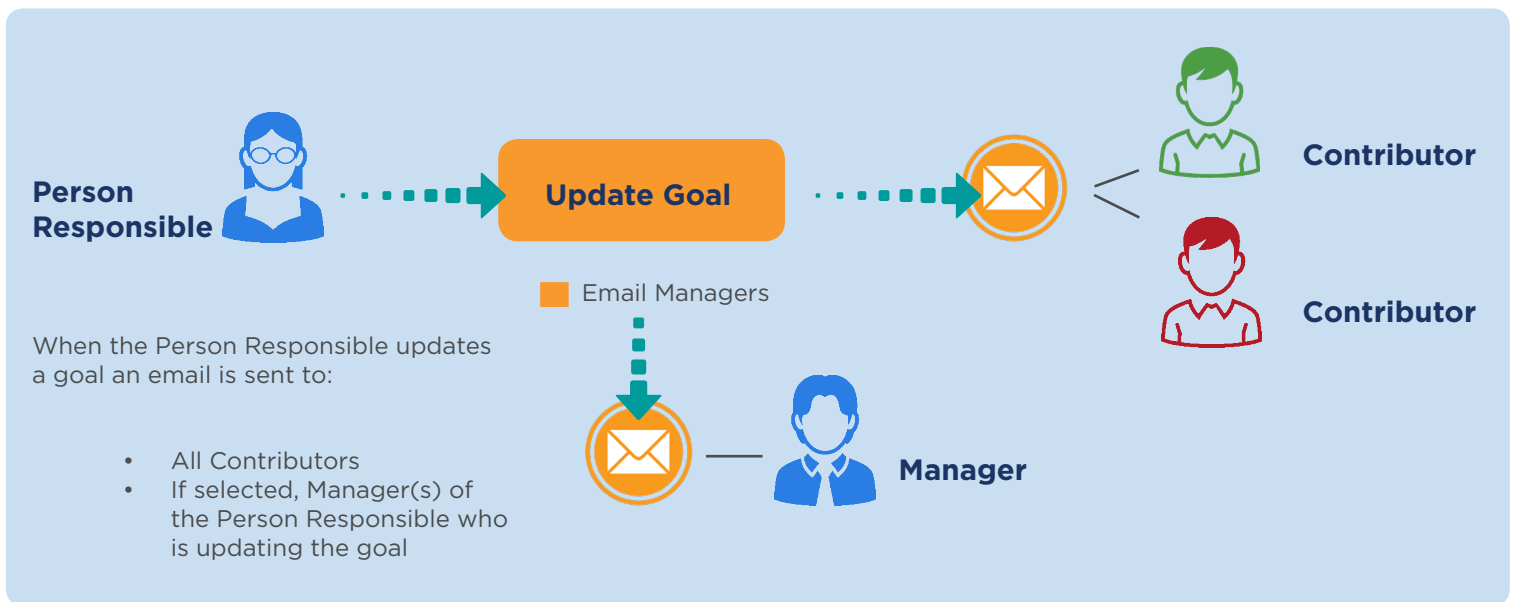
# Updating Goals

After you set your goals it's important to make sure everyone is accountable for achieving them.

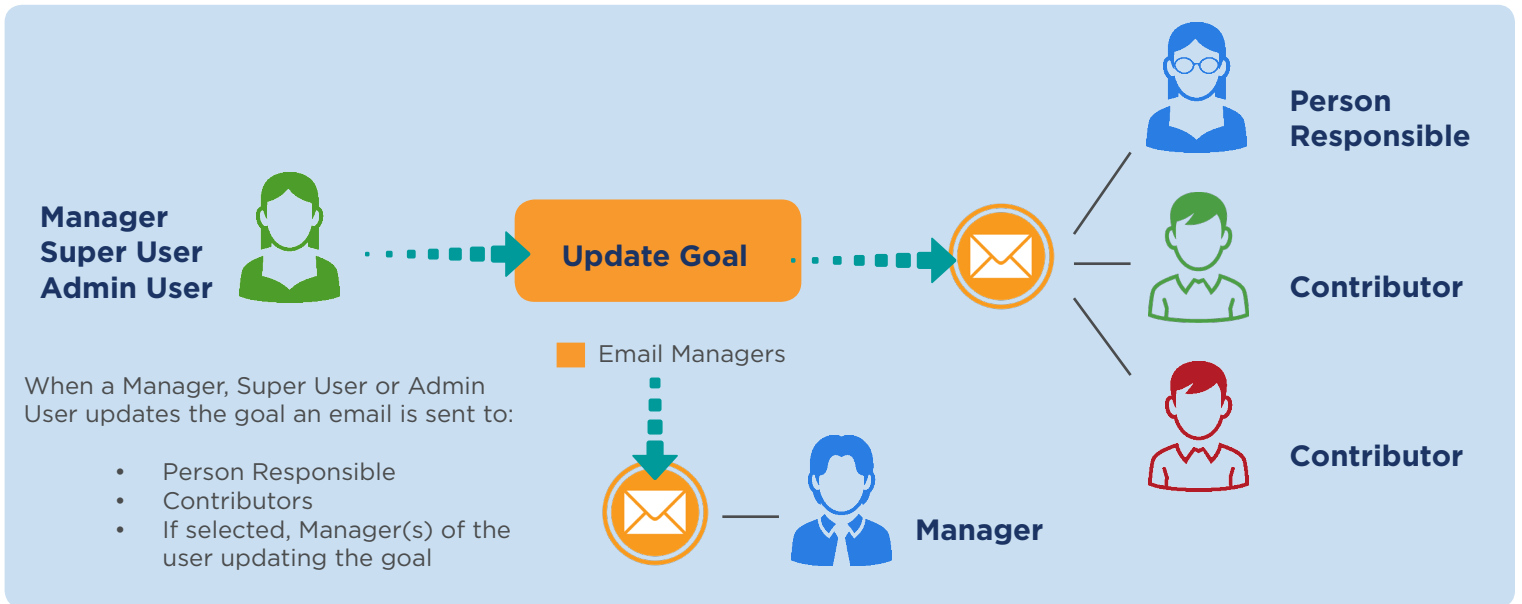
This can be challenging unless you document progress and results for each goal on a frequent basis. Frequently communicating your results helps you, your team members, and your manager stay on the same page.

In updating goals, there are a few things to consider such as:

- Is there an update to the goal details such as the title, target, etc.?
- Is there an update to the Current Result?
- Is there an update to the % Complete (this is manual if goal is To Be Completed)
- Are there any comments needed?



# Updating Goals



## Goals and Check-Ins

In order to make updating goals a simple and frequent process, we integrated goal update into the Check-In feature. When your employee completes a Check-In, they also have the ability to select the goals they need to update.

The employee can update both goals where they are assigned as the Person Responsible and also goals where they are assigned as a Contributor. The update is included in the Check-In email sent to the manager and separate emails are sent to any other contributors.

## Reporting

In Goals, we offer multiple filter and reporting options. We also offer a Cascading Report View including statistics.

Search, Filter, and Export from:

- Company Goals
- Department Goals
- All Goals
- Report View

