

How to Complete the 2014 Performance Assessment Goal Setting Template

In 2014, Milo (our global learning and performance management platform) will be used for the new Performance Assessment process across the organisation. Using this template will enable you to copy and paste your text into Milo when it becomes available.

Goal number

This template allows for up to 10 goals, but we recommend 4-6 goals. If you have more than 10 goals please copy this document.

Goal Title

Provide a succinct description of the goal. (Please note there is a 255 character limit.)

Goal Type

Identify the goal type.

Performance Goal Type: Performance goals are an agreement between you and your manager or you and Pearson on what will be accomplished. Performance goals and the results of your activities will be part of your performance review and will impact your performance rating.

Learning Goal Type: Learning goals are in-role development goals that are important to consider; they can support your performance goals by building capability or acquiring knowledge. The outcomes of learning goals do not have any influence on your overall performance review; these goals are meant to be developmental in nature.

Start Date/End Date

All dates must have a start and end date in 2014 to be included in the 2014 performance cycle. The default setting in Milo is January 1, 2014 - December 31, 2014.

Description

Provide a fuller description of the goal that outlines the measures you will take to achieve it. Consider using the SMART model (Specific, Measurable, Attainable, Relevant, and Time-bound).

(Please note there is a 5000 character limit.)

Visibility

You can choose who is able to see your goals once they are entered and submitted. The default setting is Management Chain + Direct Reports. Other options include:

- All- everyone in the organization can see your goal
- Management Chain – you, your line manager, and managers above them can see your goal
- Management Chain + Direct Reports – the people that report to you and your management chain
- Direct Reports Only- you and the people who report to you will see your goal
- Assignee only- only you will see this goal

Alignment

Goal alignment guides goal setting in the same direction so that every individual and team work purposefully toward meaningful contribution. If alignment is being used by your part of the business, you can select one of your manager's goals to align your goal to in Milo.

Title of goal to align to

If Alignment is being used, you can enter the title of the goal you are aligning to here.

2014 Performance Assessment Goal-setting Template

Audience: Employee

Use this template to document your goals for 2014. When it is time to enter your goals into Milo, copy and paste your text into the matching fields on Milo.

*Indicates the information is mandatory.

Goal number	1
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
Alignment	Complete in Milo if directed by manager.
Title of Goal to Align To (Complete if directed by manager)	

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*Indicates the information is mandatory.

Goal number	2
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
Alignment	Complete in Milo if directed by manager.
Title of Goal to Align To (Complete if directed by manager)	

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*Indicates the information is mandatory.

Goal number	3
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
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Goal number	4
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
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Goal number	5
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
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Title of Goal to Align To (Complete if directed by manager)	

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Goal number	6
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
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Title of Goal to Align To (Complete if directed by manager)	

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*Indicates the information is mandatory.

Goal number	7
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
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*Indicates the information is mandatory.

Goal number	8
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
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*Indicates the information is mandatory.

Goal number	9
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
Alignment	Complete in Milo if directed by manager.
Title of Goal to Align To (Complete if directed by manager)	

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*Indicates the information is mandatory.

Goal number	10
*Goal Title (enter a title)	
*Identify Goal Type (Performance or Learning)	
*Start Date	
*End Date	
Description (Describe the goal in more detail.)	
Visibility (To change default, select another option.) <ul style="list-style-type: none"> • All • Management Chain (upwards visibility) • Management Chain + Direct Reports (up-and-down visibility) • Direct Reports Only (limited visibility) • Assignee only (private) 	
Alignment	Complete in Milo if directed by manager.
Title of Goal to Align To (Complete if directed by manager)	