



# SuccessConnect

INTERNAL – SAP AND CUSTOMERS ONLY

## **HOL103 – Latest Goal Management**

Explore the latest version of Goal Management

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<b>Administrator Tasks</b>	
Convert a GMv12 Goal Plan template to the latest version of Goal Management	<ul style="list-style-type: none"> <li>a) Run conversion tool</li> <li>b) Update status field</li> <li>c) Set maximum length for text and textarea</li> <li>d) Review optional fields (tasks, subgoal)</li> </ul>
Configure Dynamic Teams integration	<ul style="list-style-type: none"> <li>e) Enable Linking to Performance Goals</li> <li>f) Modify Status Settings</li> </ul>
<b>Manager Tasks</b>	
Manager actions	<ul style="list-style-type: none"> <li>a) Copy goals from a goal plan</li> <li>b) Change a goal plan status</li> <li>c) Cascade an existing goal</li> <li>d) Assign a Team Goal with MLT</li> <li>e) Edit a goal (add comment)</li> </ul>
<b>End User Tasks</b>	<ul style="list-style-type: none"> <li>f) Take action on an overdue goal</li> <li>g) Create a goal from library</li> <li>h) Add a CPM activity</li> <li>i) Link a Team OKR to a performance goal</li> <li>j) Add Capabilities to an existing development goal</li> </ul>

## ADMINISTRATOR TASKS



### Administrator Tasks in Goal Management

In this activity, you will be completing some activities to set up Goal Management as an administrator. A template needs to be converted to the latest version of Goal Management and then this template made available. Some changes will be required to ensure full compatibility.

As an additional task, the organization would like to integrate goal management with the new Dynamic Teams feature and allow employees to link Objectives and Key Results to their own Performance Goals.

### LAB ACTIVITY #1 – Convert a GMv12 Goal Plan template to the latest version of Goal Management

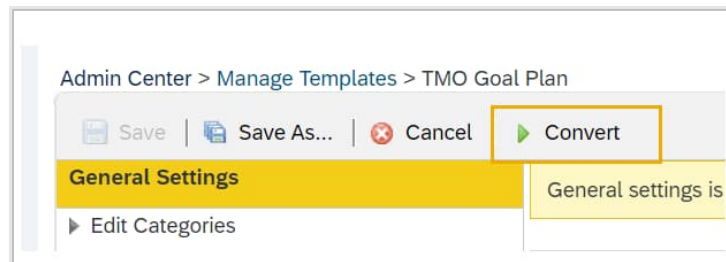
In this activity, you will be running the conversion tool for one of the remaining templates, still on GMv12 version.

**NOTE:** The instance already has 2 Goal Plan templates available for Latest Goal Management that will be used for this Hands On Lab. One of the templates was uploaded from SuccessStore, and the other template was imported from the back end, once the upgrade to Latest Goal Management was completed. Only those templates that existed prior to the upgrade to Latest Goal Management and that we intend to continue using should be converted. For more information, you can check [Converting Existing Goal Plan Templates](#)

1. Navigate to *Manage Templates* using Action Search.
2. Select the Goal Plan tab and open the **TMO Goal Plan** template.

Welcome   Performance Review <b>Goal Plan</b> 360 Multi Rater   Development   Recruiting Management					
This is your list of Goal Plan templates. <a href="#">More</a>					
<input checked="" type="checkbox"/> Show Active Templates Only <a href="#">Add A New Template</a> <span>Items per page: 10</span> <span>Page 1 of 1</span>					
Template Name	Default	Active	Updated On	Date Range	Sort Order
2023 Sales Department KPI ...	<input type="radio"/>	<input checked="" type="checkbox"/>	08/08/2023	01/01/2023 - 12/31/2023	↑ ↓
2023 HOL103 Goal Plan	<input checked="" type="radio"/>	<input type="checkbox"/>	08/08/2023	01/01/2023 - 12/31/2023	↑ ↓
2022 Basic Goal Plan	<input type="radio"/>	<input checked="" type="checkbox"/>	08/08/2023	01/01/2022 - 12/31/2022	↑ ↓
<b>TMO Goal Plan</b>	<input type="radio"/>	<input checked="" type="checkbox"/>	07/08/2022	01/01/2020 - 12/31/2021	↑ ↓
2019 Basic Goal Plan with ...	<input type="radio"/>	<input checked="" type="checkbox"/>	08/03/2020	01/01/2019 - 12/31/2119	↑ ↓
2019 Goal Plan for KTE As ...	<input type="radio"/>	<input checked="" type="checkbox"/>	08/03/2020	01/01/2019 - 12/31/2019	↑ ↓
2019 Goal Plan for Sales ...	<input type="radio"/>	<input checked="" type="checkbox"/>	08/03/2020	01/01/2019 - 12/31/2019	↑ ↓

3. Select **Convert** to run the conversion tool.



4. In the Step 1 – Introduction. Scroll down at the end of the instructions and select the **Get Started** button.

**Before you get started, keep the following in mind:**

**Before Conversion**  
We'll validate whether the goal data and configuration of the selected template can be converted without any changes. If changes are needed, we'll guide you accordingly. You can confirm the changes and exit the process any time before conversion.

**Conversion**  
The conversion cannot be stopped or undone. Converting a template takes from a few minutes to several hours depending on the configuration and the amount of data in it. During the conversion, you can continue to perform other tasks and return to check the status on the Manage Templates page.

**After Conversion**  
Your template is converted and available for use in Latest Goal Management. The converted template retains the original ID and name so that it can integrate with other modules properly. For backup and reference purposes, the original template is copied with a new ID and renamed as "[Original Name] Backup" in the read-only mode.

5. In the Step 2 – Verify that 2a. *Validate General Settings* and 2b. *Validate Fields* are successful.

### 2a. Validate General Settings


☒ **Success:** Based on our analysis of your template, all general settings are supported in Latest Goal Management.

### 2b. Validate Fields

☒ **Success:** Based on our analysis of your template, all fields are supported in Latest Goal Management.


6. In the same Step 2 – Verify that **2c. Validate Field Properties** includes a note and sets limit of characters for some of the fields. These limits can be decreased but not increased, as an optional step. Now, the *text / textarea / comment* field types will have **a maximum number of characters set**.

## 2c. Validate Field Properties


 **Note:** We've set new limits for the following fields. Choose the **Edit** icon to adjust them within their respective maximum values if necessary. Make sure that you choose the **Save** icon to save your changes.

Field Name	Field Type	Previous Limit	New Limit
control-category-element	text	Not Set	500 characters 
Name	textarea	Not Set	500 characters 
Metric	textarea	Not Set	1000 characters 
Comments	comment	Not Set	1000 characters 

7. Make the following changes:

- control-category-element*. **Do not change it**, this field does not display in the UI and it is merely to allow permission control for the goal category assignment.
- Name*. Select the  icon located on the right side and set the new limit from 500 to **256** characters. Choose the Save icon.

Name	textarea	Not Set	<input type="text" value="256"/> 
------	----------	---------	---

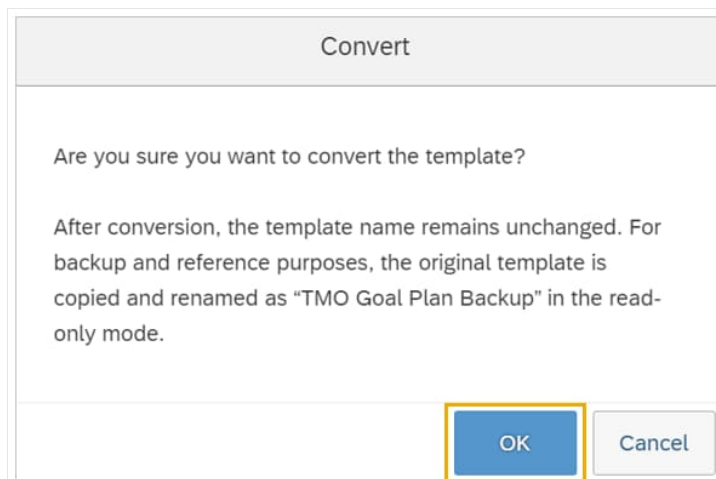
- Metric* and *Comments*: Change both from 1000 to **500** characters. Select the  icon located on the right side, set the new value to **500** and choose the Save icon every time.

Field Name	Field Type	Previous Limit	New Limit
control-category-element	text	Not Set	500 characters 
Name	textarea	Not Set	256 characters 
Metric	textarea	Not Set	500 characters 
Comments	comment	Not Set	<input type="text" value="500"/> 

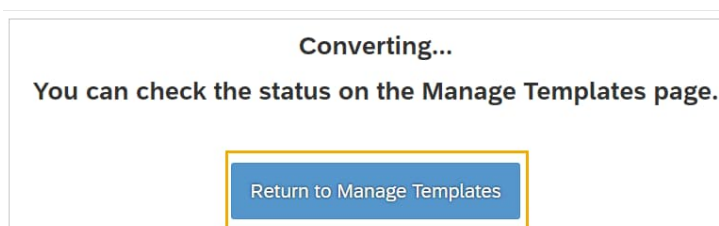
8. Select the **Convert** button to start converting the template.


<input type="button" value="Convert"/>	<input type="button" value="Save and Finish Later"/>	<input type="button" value="Cancel"/>
--	--	---------------------------------------

9. In the confirmation message displayed, select **OK**.

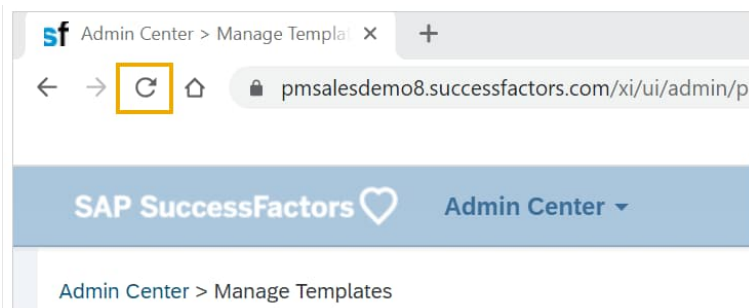


10. Return to Manage Templates.



11. Reload the page, selecting this icon  at the top of the browser. It will update the status of the Goal Plan to **converted**.

**NOTE:** You may need to refresh a few times until the conversion is successful.



12. Verify the Goal Plan template has been converted and there is a backup template created (read-only).

Welcome	Performance Review	Goal Plan	360 Multi Rater
This is your list of Goal Plan templates. <a href="#">More</a>			
<input checked="" type="checkbox"/> Show Active Templates Only			
<a href="#">Add A New Template</a>			
Template Name ?	Default ?	Active ?	
2023 Sales Department KPI ...	<input type="radio"/>	<input checked="" type="checkbox"/>	
2023 HOL103 Goal Plan	<input checked="" type="radio"/>	<input type="checkbox"/>	
TMO Goal Plan ✓	<input type="radio"/>	<input checked="" type="checkbox"/>	
2022 Basic Goal Plan ↑	<input type="radio"/>	<input checked="" type="checkbox"/>	
TMO Goal Plan Backup	<input type="radio"/>	<input checked="" type="checkbox"/>	
2019 Basic Goal Plan with ... ↑	<input type="radio"/>	<input checked="" type="checkbox"/>	
2019 Goal Plan for KTE As ... ↑	<input type="radio"/>	<input checked="" type="checkbox"/>	



In this activity, you have successfully converted a Goal Plan template for compatibility with the latest version of Goal Management and made some changes.

## LAB ACTIVITY #2 – Modify the Goal Plan template

In this activity, you will make some changes to the template converted to Latest Goal Management. Background colors for the Status field are no longer supported and all backgrounds are now white. Text that was previously set to white to stand out against a colored background is now invisible against the new white background. You will modify the text color of several status field values to correct this.

**NOTE:** The background in the style attribute is not supported in Latest Goal Management.

The text color is supported. The color configuration only supports HEX and the color name. Other configurations, such as RGB, are not supported.

1. In *Manage Templates*, open the **TMO Goal Plan** template. Expand the *Edit Fields* section.

Admin Center > Manage Templates > TMO Goal Plan

Save | Save As... | Cancel

**General Settings**

▶ Edit Categories

▶ Edit Fields

Gene

2. Select the **Status** field and you will notice that some of the text in the Dropdown Options seems empty. This is due to the background and text color configuration from the legacy GMv12 template. You will now make the appropriate changes to make them visible in Latest Goal Management.

Dropdown Options:	Not Started	A	Bin	Up	Down	?
		A	Bin	Up	Down	
		A	Bin	Up	Down	
		A	Bin	Up	Down	
	Postponed	A	Bin	Up	Down	
	Cancelled	A	Bin	Up	Down	

3. First, **delete the following Dropdown Options** as they won't be needed:
- **Not Started** (1<sup>st</sup> dropdown option). Select the bin icon located on the right.

Dropdown Options:	Not Started	A	Bin	Up	Down	?
-------------------	-------------	---	-----	----	------	---

- **Cancelled** (last dropdown option). Select the bin icon located on the right.

Cancelled	A	Bin	Up	Down
-----------	---	-----	----	------

4. Change the label of *Postponed* to *On Hold*. You can double click over *Postponed* and type *On Hold* directly.

Postponed	A	Bin	Up	Down
-----------	---	-----	----	------

On Hold	A	Bin	Up	Down
---------	---	-----	----	------

5. Select the arrow (Up) to place *On Hold* above one step, to make sure that this is not the last dropdown option.

On Hold	A	Bin	Up	Down
---------	---	-----	----	------

The dropdown options should look like this.

Dropdown Options:		A	Bin	Up	Down	?
		A	Bin	Up	Down	
	On Hold	A	Bin	Up	Down	
		A	Bin	Up	Down	


**NOTE:** As a best practice recommendation, the last dropdown option should be the *Completed* status, that's why we placed *On Hold* one position above. In a later activity, we will be completing a goal from the Home Page which should be linked to the last dropdown option of the status field.

6. Select **Save** to save the changes in the template.

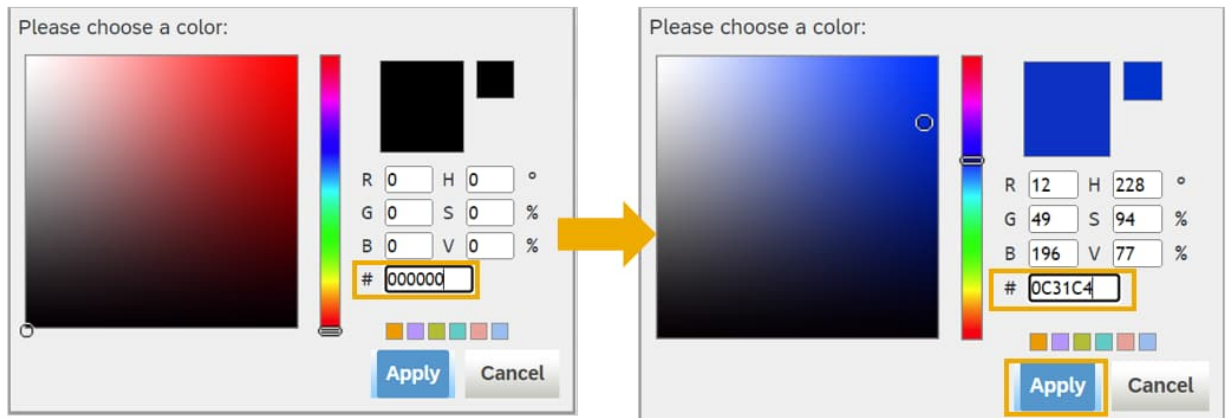
Admin Center > Manage Templates > TMO Goal Plan

Save	Save As...	Cancel
General Settings		
▶ Edit Categories		
▼ Edit Fields		

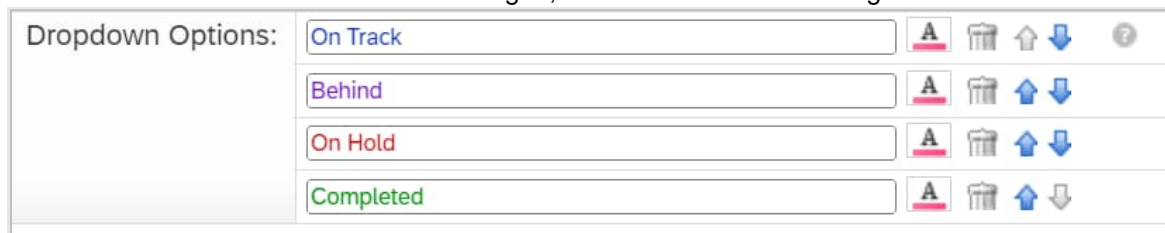


- Expand *Edit Fields* and select the **Status** field again. You will now set the text status to the colors of your choice (or using the example with the HEX codes in the next step).
- Select  on each status to pick a color from the palette and select Apply. Or alternatively, you can use the following HEX color codes (make sure to select Apply every time to save it):  
**NOTE:** Replace the existing HEX color (#) with the color code corresponding to each status. Select *Apply* to save your changes (you can also type the letters in lowercase if preferred):

- On Track: **0C31C4**
- Behind: **7110CC**
- On Hold: **CD0909**
- Completed: **089911**



- Once all the status colors have been changed, it should look like this image below:



- Choose Save to save the changes in your goal plan template.



You have successfully modified the converted goal plan template for full compatibility with the latest version of Goal Management.

## LAB ACTIVITY #3 – Enable Linking to Performance Goals in Dynamic Teams

In this activity, you will be enabling Dynamic Teams integration with Goal Management to allow employees to link Objectives and Key Results (OKRs) to their own Performance Goals.

- Navigate to *Configure Dynamic Teams* using Action Search.
- Verify the **Enable Objectives and Key Results** is already turned on. Leave it as-is.

[Admin Center](#) / Configure Dynamic Teams

## Dynamic Teams Configuration

### Feature Settings

☒ Enable Sourcing with Opportunity Marketplace ?

### Objectives and Key Results Settings

☒ Enable Objectives and Key Results ?

☐ Enable Linking to Performance Goals ?

3. Select the switch on the option **Enable Linking to Performance Goals** to turn on the integration.

### Objectives and Key Results Settings

☒ Enable Objectives and Key Results ?

☐ Enable Linking to Performance Goals ?













### Objectives and Key Results Settings

☒ Enable Objectives and Key Results ?

☒ Enable Linking to Performance Goals ?

4. In the **Status Settings**, change these labels. There is no Save button, just change the label and click away and the changes will be saved.
- *Off Track* to **Behind**
  - *Paused* to **On Hold**

### Status Settings

Status Label	Status Color
Not Started	 
On Track	 
Behind	 
Completed	 
On Hold	 
Cancelled	 



You have successfully turned on the integration between Dynamic Teams and Goal Management to link Performance Goals to Objectives and Key Results (OKRs).

## MANAGER TASKS



### Manager Activities in the Goal Plan

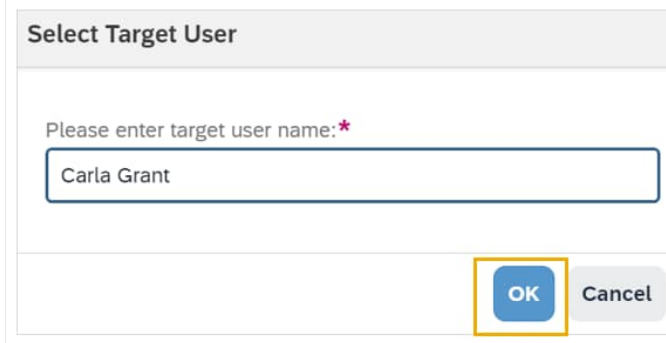
In these series of activities, you will be completing some actions as a manager in the organization.

### LAB ACTIVITY #4 – Change Goal Plan Status for a Direct Report

1. Use *Proxy Now* to proxy as a manager (**Carla Grant**).

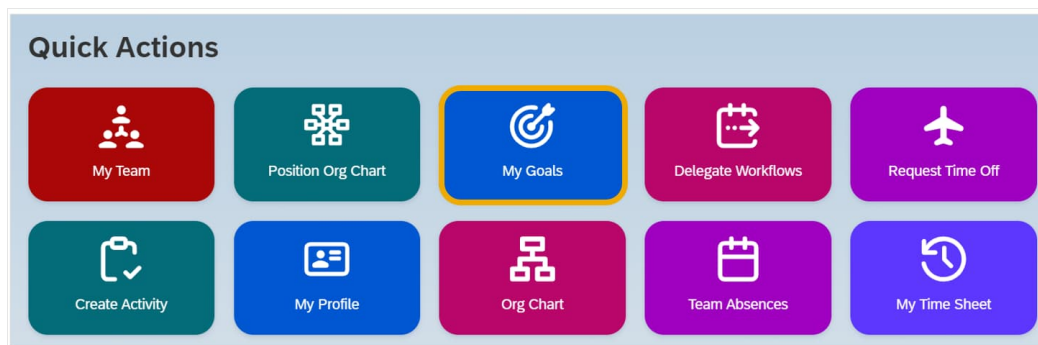
The screenshot shows a user interface for proxying as a manager. At the top, there is a header bar with a search icon, a checkmark icon with a red '10' badge, a speech bubble icon, a book icon, a bell icon, and a profile picture of a woman. Below the header, a dropdown menu is open, showing 'Emily Clark (admin)' and a 'Proxy Now' button with a person icon. Below this, a 'Select Target User' section is visible. It contains a text input field with the placeholder 'Please enter target user name: \*' and the text 'carla grant'. Below the input field, a list of users is displayed, with 'Carla Grant (cgrant)' highlighted. Her title is 'VP, Sales, San Mateo, Sales'.

2. Select Carla Grant and confirm by choosing **OK** to start Proxy.

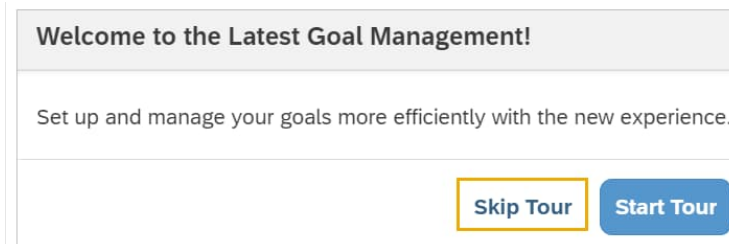


A dialog box titled "Select Target User". It contains a text input field with the placeholder text "Please enter target user name: \*" and the name "Carla Grant" entered. Below the input field are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a yellow border.

3. In the Home Page, select **My Goals** under the Quick Actions section.



4. If you see a **Welcome to the Latest Goal Management!** popup dialog, select **Skip Tour** to close it and continue to the next step.



A popup dialog box titled "Welcome to the Latest Goal Management!". It contains the text "Set up and manage your goals more efficiently with the new experience." Below the text are two buttons: "Skip Tour" and "Start Tour". The "Skip Tour" button is highlighted with a yellow border.

5. In the People Selector, choose **Marcus Hoff** under the *Direct Reports* category.

### People Selector

Carla Grant  
VP, Sales

#### Manager

Alexander Thomp...  
President

#### Direct Reports

Brenda Davis  
Administrative As...

Marcus Hoff  
Sales Director, NE

- Select the **2023 HOL103 Goal Plan** from the list of templates.

Performance Goal
Development Goal

## 2023 Sales Department KPIs

Jan 1, 2023 - Dec 31, 2023

Introduction

This Goal Plan contains a Metric Look

Select Goal Plan

2023 Sales Department KPIs
2023 HOL103 Goal Plan

- Lock the Goal Plan to prevent Marcus Hoff from creating new goals. You can select the dropdown available on the State to change status from *Goal Setting* to *Goal Evaluation*.

Performance Goal
Development Goal

## 2023 HOL103 Goal Plan

Jan 1, 2023 - Dec 31, 2023 State: Goal Setting

Introduction

Goal Setting
Goal Evaluation

Create Goal
Cascade to Me

- Verify that, once the status is changed to Goal Evaluation, the *Create Goal* button is hidden.

Performance Goal    Development Goal

## 2023 HOL103 Goal Plan

Jan 1, 2023 - Dec 31, 2023    State: Goal Evaluation

Introduction

Cascade to Me

- Select **Carla Grant** on the People Selector to navigate back to your own goal plan.

**People Selector**

Search

Carla Grant  
VP, Sales



The goal plan has been locked by the manager to prevent creation of new goals in the employee's goal plan.

## LAB ACTIVITY #5 – Copy Goals to your Goal Plan

- As Carla Grant, select the **2023 HOL103 Goal Plan** goal plan from the list of templates.

Performance Goal    Development Goal

## 2023 Sales Department KPIs

Jan 1, 2023 - Dec 31, 2023

Introduction

This Goal Plan contains a Metric Look

Create Goal

Select Goal Plan

- 2023 Sales Department KPIs
- 2023 HOL103 Goal Plan

- Choose the *Create Goal* button to expand the available options.

Create Goal

- Select *Copy from Goal Plan*.

Performance Goal    Development Goal

## 2023 HOL103 Goal Plan

Jan 1, 2023 - Dec 31, 2023    State: Goal Setting

[Introduction](#)

Create Goal ▼    Cascade Goal    ...

- Create New
- Create from Library
- Copy from Goal Plan

4. In the **1. Select Goals** step, choose **TMO Goal Plan** from the list of templates.

### 1. Select Goals

Select up to 10 personal goals.

Goal Plan: 2023 Sales Department KPIs ▼

- 2023 Sales Department KPIs
- 2023 HOL103 Goal Plan
- TMO Goal Plan Backup
- TMO Goal Plan

5. A total of 3 goals will display:

### 1. Select Goals

Select up to 10 personal goals.

Goal Plan: TMO Goal Plan ▼

- ☒ Identify skill gaps and implement training by end of the year
- ☒ Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for curre...
- ☒ Increase number of new accounts 10% by end of the year

6. Select all 3 goals and choose the **Next** button that will appear.

### 1. Select Goals

Select up to 10 personal goals.

Goal Plan: TMO Goal Plan ▼




- ☒ Identify skill gaps and implement training by end of the year
- ☒ Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for curre...
- ☒ Increase number of new accounts 10% by end of the year

Next

7. In the **2. Edit Goals** step, select **Next**.

## 2. Edit Goals

Make changes to the selected goals as needed or instructed.

Identify skill gaps and implement training by end of the year	
Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for current year	
Increase number of new accounts 10% by end of the year	

Next

8. Select *Copy* on the last step (**3. Copy**).

## 3. Copy

Preview and copy goals.

**Goals (3 Selected)**

Identify skill gaps and implement training by end of the year
Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for current year
Increase number of new accounts 10% by end of the year

Copy

9. The goals will be copied over to the **2023 HOL103 Goal Plan**.

Performance GoalDevelopment Goal

## 2023 HOL103 Goal Plan

Jan 1, 2023 - Dec 31, 2023State: Goal Settings

3 Goals ⓘ

0

Not Started

3

On Track

0

Behind

0

Postponed

0

Completed

ⓘ Introduction

▼ Financial

Identify skill gaps and implement training by end of the year

Personal • Due Date: Dec 31, 2023

% Complete20%

On Track ▼

Increase number of new accounts 10% by end of the year

Personal • Due Date: Dec 31, 2023

% Complete50%

On Track ▼





The goals have been successfully copied over to the current year's goal plan from another goal plan template.

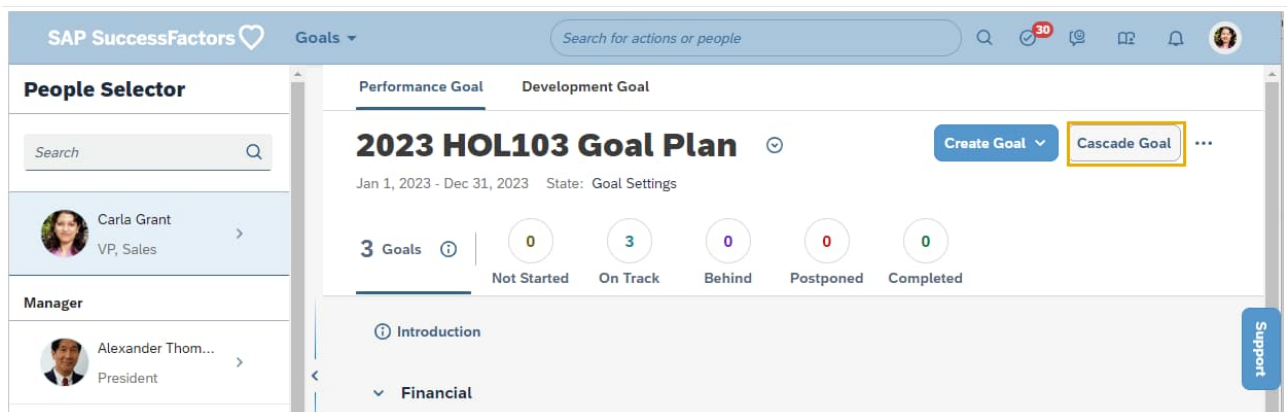
## LAB ACTIVITY #6 – Cascade Goals to your Direct Reports

In this activity, the manager (Carla Grant) will select two of their personal goals to cascade to some of their direct reports.

**NOTE:** Notice that in Step 2, you will be selecting the Cascade Goal button on the top right menu. Goals can also be cascaded individually, by selecting the Cascade Goal option available within the Goal card. However, we will be selecting the Cascade Goal main button to select multiple goals to cascade.

To avoid possible performance issues, the total number of goals created at one time should be limited to a maximum of 40. In this activity, we will be cascading 2 goals to 3 direct reports (6 goals created), which does not have an impact on performance.

1. Continue from the previous activity as **Carla Grant**, and make sure the **2023 HOL103 Goal Plan** is seen.
2. Select the *Cascade Goal* button.



3. In the **1. Select Goals** step, choose the following goals:
  - Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for current year.
  - Increase number of new accounts 10% by end of the year.

### 1. Select Goals

Select one or more goals.

☐ Select All

☐ Identify skill gaps and implement training by end of the year

☒ Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for curre...

☒ Increase number of new accounts 10% by end of the year

Next

4. Select **Next**.

### 1. Select Goals

Select one or more goals.

☐ Select All

☐ Identify skill gaps and implement training by end of the year

☒ Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for curre...

☒ Increase number of new accounts 10% by end of the year

Next

5. In the **2. Select Recipients** step, notice that *From My Team* tab is already selected by default and displays Carla Grant's team.

### 2. Select Recipients

Select one or more recipients from your team or via search. Only recipients with correct permissions can be selected.

From My Team

Via Search

6. Select **Brenda Davis**, **Richard Maxx** and **Sid Morton**, from your direct reports. Notice that Marcus Hoff cannot be selected. This is due to the Goal Plan Status changed in Activity #4 where no new goals can be created in their goal plan during Goal Evaluation.

### 2. Select Recipients


Select one or more recipients from your team or via search. Only recipients with correct permissions can be selected.


From My Team


Via Search


My Team (3 selected)

☐ Direct Reports

☒  **Brenda Davis** Administrative Assistant

☐  **Marcus Hoff** Sales Director, NE

☒  **Richard Maxx** Sales Director, NC

☒  **Sid Morton** Sales Director, SC

7. Scroll down a little bit and locate the **Next** button. Select it to move to the next step.

My Team (3 selected)

☐ Direct Reports

☒ **Brenda Davis** Administrative Assistant

☐ **Marcus Hoff** Sales Director, NE

☒ **Richard Maxx** Sales Director, NC >

☒ **Sid Morton** Sales Director, SC >

☐ Matrix Reports

☐ **Thomas Clark** Sales Manager, SC


**Next**


8. In the **3. Edit Goals** step, make the following changes (select the pencil icon and Next when changes are done):
- Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for current year = Change the customer satisfaction rating to **3.75**.

Select the pencil icon to start editing the goal:

**3. Edit Goals**

Skip this step if you don't have any changes to make to the selected goals.

Maintain a customer satisfaction rating for sales representative performance of at least 3.5 on 1-5 scale for current year 

Increase number of new accounts 10% by end of the year 

**Next**

On the Name field, change 3.5 to **3.75**:

**3. Edit Goals**

Skip this step if you don't have any changes to make to the selected goals.

[< Back](#)

Name: \*

tative performance of at least 3.75 on 1-5 scale for current year

377 characters left

Visibility: \*

Public

Scroll down a bit to locate the **Next** button and save your changes on the goal before it's cascaded:

Milestones: ?

Milestone Description	Due Date
No Data	


Add Row


**Next**

- Increase number of new accounts 10% by end of the year = Change the Increase rate to **15%**.  
Select the pencil icon to start editing the next goal:

### 3. Edit Goals

Skip this step if you don't have any changes to make to the selected goals.

Maintain a customer satisfaction rating for sales representative performance of at least 3.75 on 1-5 scale for current year 

Increase number of new accounts 10% by end of the year 

**Next**

On the Name field, change 10% to **15%**:

### 3. Edit Goals

Skip this step if you don't have any changes to make to the selected goals.

[< Back](#)

Name: \*

Increase number of new accounts **15%** by end of the year

446 characters left

Visibility: \*

Scroll down a bit to locate the **Next** button and save your changes on the goal before it's cascaded:

Milestones: ?

Milestone Description	Due Date
No Data	



Add Row

**Next**

9. Back to the **3. Edit Goals** step, select **Next** to move forward.

### 3. Edit Goals

Skip this step if you don't have any changes to make to the selected goals.

Maintain a customer satisfaction rating for sales representative performance of at least 3.75 on 1-5 scale for current year	
Increase number of new accounts 15% by end of the year	

Next

10. In the final step **4. Cascade**, select the **Cascade** button.




### 4. Cascade

Preview and cascade goals.

**Goals (2 Selected)**

Maintain a customer satisfaction rating for sales representative performance of at least 3.75 on 1-5 scale for current year
Increase number of new accounts 15% by end of the year

**Recipients (3 Selected)**

	<b>Brenda Davis</b> Administrative Assistant
	<b>Richard Maxx</b> Sales Director, NC
	<b>Sid Morton</b> Sales Director, SC

Cascade


11. A toast message “6 goals were created through cascading” will display in the Goal Plan for a few seconds.


**NOTE:** This message displays for a few seconds and sometimes, it is easy to miss. Do not worry if you miss it during this step. You will check in step 13 how the Goal Alignment section shows the employees that received this goal.


Performance Goal
Development Goal


## 2023 HOL103 Goal Plan


Jan 1, 2023 - Dec 31, 2023    State: Goal Settings


3 Goals 

0 

3 

0 

0 

0 


Not Started    On Track    Behind    Postponed    Completed

**Financial**

Identify skill gaps and implement training by end of the year ...

Personal • Due Date: Dec 31, 2023


**% Complete** 20%

On Track 

Increase number of new accounts 10% by end of the year ...

Personal • Due Date: Dec 31, 2023

**% Complete** 50%

On Track 

**Customer**

Maintain a customer representative performance or at least 3.5 on ...

6 goals created through cascading.

12. Continue as Carla Grant, and select the **Increase number of new accounts 10% by end of the year** goal card from your goal plan.

Performance Goal Development Goal

## 2023 HOL103 Goal Plan

Jan 1, 2023 - Dec 31, 2023 State: Goal Settings

3 Goals

Not Started 0 On Track 3 Behind 0 Postponed 0 Completed 0

Introduction

Financial

Identify skill gaps and implement training by end of the year  
Personal • Due Date: Dec 31, 2023  
% Complete 20%  
On Track

Increase number of new accounts 10% by end of the year  
Personal • Due Date: Dec 31, 2023  
% Complete 50%  
On Track

13. Locate the **Goal Alignment** section, and you can see the employees that received the goal.

2023 HOL103 Goal Plan / Financial / Goal Details

## Increase number of new accounts 10% by end of the year

(Public)  
Updated: Aug 9, 2023

On Track 50%  
Status % Complete

Milestones Manage Milestones

No milestones yet  
Take a moment to add your first milestone.

More Info

Metric: # of new accounts  
Weight: 5%  
Start Date: 2023-01-01  
Due Date: 2023-12-31

Goal Alignment

Aligned Down:

Three employee avatars are shown aligned down to the goal.

14. Select one of the employee's pictures and you will navigate to their goal details, within their goal plan.

Goal Alignment

Aligned Down:

Three employee avatars are shown, with a hand icon pointing to one of them.

15. Notice that the goal name details include **15%** instead of 10%. This is the correct Goal Name that was determined during the Cascade Goal steps.  
Also, the *Goal Alignment* section now displays the picture of Carla Grant and states *Aligned Up*, which identifies where the goal comes from.

The screenshot shows the 'Goal Details' page for the goal 'Increase number of new accounts 15% by end of the year'. The goal is public, updated on Aug 9, 2023, and is 'On Track' with 50% completion. The 'Milestones' section shows 'No milestones yet'. The 'More Info' section lists the metric as '# of new accounts', weight as '5%', start date as '2023-01-01', and due date as '2023-12-31'. The 'Goal Alignment' section shows 'Aligned Up' with a profile picture of Carla Grant.

16. Select Carla Grant from the *People Selector* to navigate back to their goal plan.

The screenshot shows the 'People Selector' on the left, with a search bar and a list of people. Carla Grant, VP, Sales, is highlighted. The main area shows the 'Goal Details' page for the goal 'Increase number of new accounts 15% by end of the year', which is public, updated on Aug 9, 2023, and is 'On Track' with 50% completion.



The manager has cascaded goals to their direct reports starting from their own personal goal.

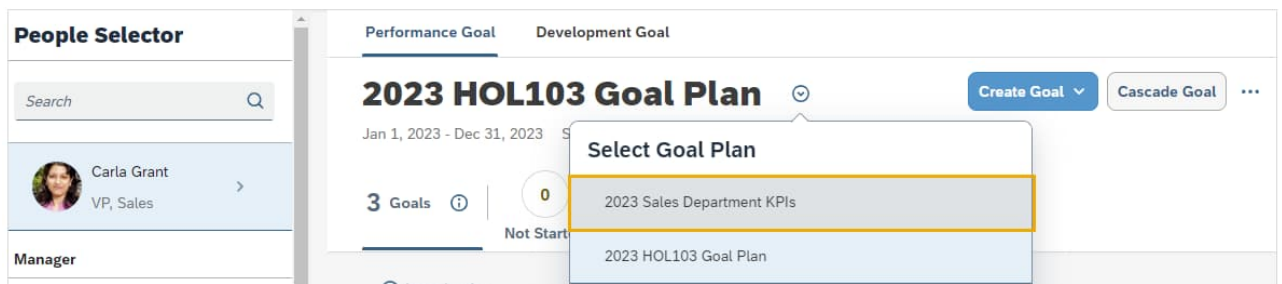
## LAB ACTIVITY #7 – Create and Assign a Team Goal

In this activity, Carla Grant will be accessing Manage Team Goals, to create and assign a team goal to some of their direct reports.

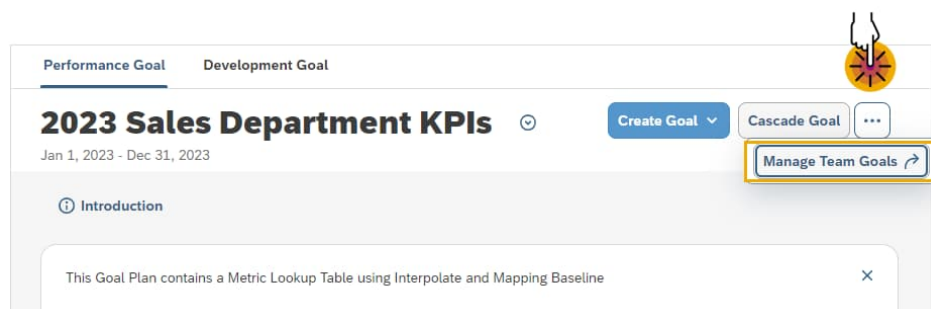
**NOTE:** Similar to the Cascade Goal button vs Cascade Goal from the Goal card, you will see an option in Manage Team Goals to select a main Assign Goal button on the top right (which would allow you to select several team goals to be assigned) or you can choose the assign goal option in the Goal card to assign individually.

Since we only have one team goal, we will be selecting the option to assign goal on the Goal card directly. If you were selecting the main Assign Goal button, there would be an additional step at the beginning to select which goals should be assigned.

1. As Carla Grant, select the Goal Plan template **2023 Sales Department KPIs**.



2. Select *Manage Team Goals*. You will need to select the “...” button first to display the button as seen in the image below.



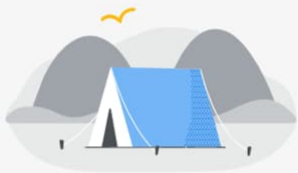
3. Select **Create Now** or the **Create Goal** button.



2023 Sales Department KPIs / Manage Team Goals

## Manage Team Goals

[Create Goal](#) [Assign Goal](#)



Take a moment to create your first team goal.

[Create Now](#)

- Add the following details (ignore the other fields and leave them as-is).
  - Goal Name: Achieve Q4 Team Targets
  - Metric: Q4 Total Revenue in USD
  - Start Date: Oct 1, 2023
  - % Complete: 60%
  - Actual Achievement: 106050 USD. Verify **a Goal Rating of 3.07 is generated** based on Actual Achievement vs Target Level (achievement).

Target Baseline:

100000

Actual Achievement: \*

106050

Goal Rating:

3.07

- Select **Save** and close the popup window that confirms a new goal was created.

Target Baseline:

100000

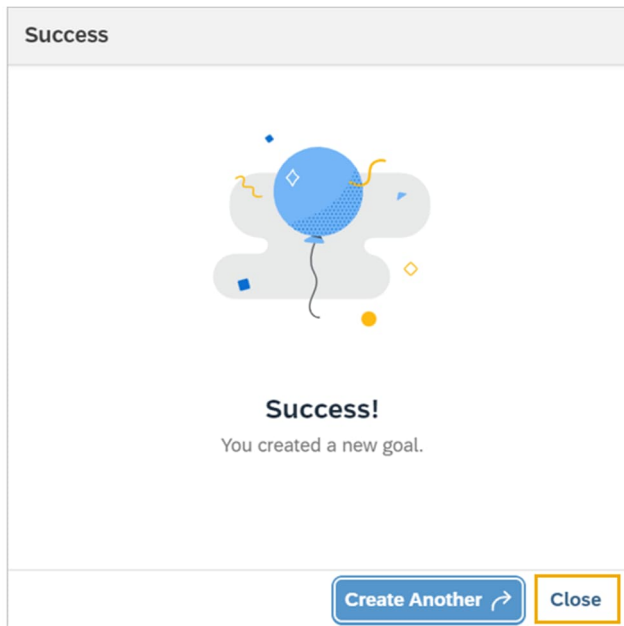
Actual Achievement: \*

106050

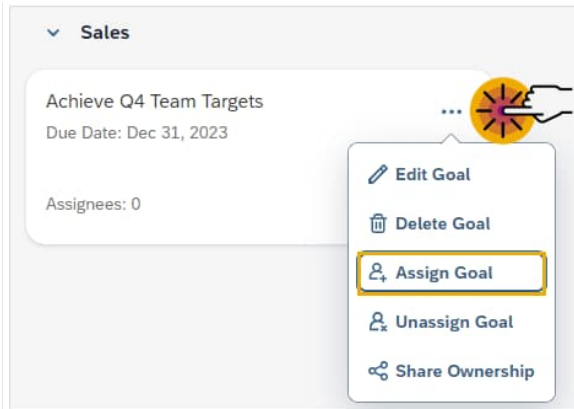
Goal Rating:

3.07

[Save](#) [Cancel](#)



6. In this step, you will assign the team goal. Select **Assign Goal** from the goal card details. This option would assign a team goal individually.



7. In **1. Select Assignees** step, select the checkbox beside Direct Reports, to select all your **6 direct reports**.


**NOTE:** In this case, Marcus Hoff **can be selected**, and a goal will be created in their goal plan, regardless of the restriction seen in Activity #4. The reason behind it is that Team Goals do not follow the permissions set in the goal plan template, including Goal Plan states. Team Goals follow the permissions set in Role-Based Permission.

## 1. Select Assignees


Select one or more assignees from your team or via search. Only assignees with correct permissions can be selected.


From My Team Via Search


My Team (6 selected)


☐  **Carla Grant** VP, Sales ?


☒ Direct Reports

☒  **Brenda Davis** Administrative Assistant

☒  **Marcus Hoff** Sales Director, NE >


☒  **Richard Maxx** Sales Director, NC >

☒  **Sid Morton** Sales Director, SC >


☐  **Matrix Reports**


8. Scroll down to locate the **Next** button and select it to continue to the next step.


My Team (6 selected)


☐  **Carla Grant** VP, Sales ?

☒ Direct Reports


☒  **Brenda Davis** Administrative Assistant

☒  **Marcus Hoff** Sales Director, NE >

☒  **Richard Maxx** Sales Director, NC >

☒  **Sid Morton** Sales Director, SC >

☐ Matrix Reports

☐  **Thomas Clark** Sales Manager, SC

**Next**

9. On the **2. Edit Goals** step, select **Next**.

## 2. Edit Goals

Skip this step if you don't have any changes to make to the selected goals.

Achieve Q4 Team Targets ✎

**Next**

10. On the **3. Assign** step, select **Assign**.

### 3. Assign

Preview and assign team goals.

**Goals (1 Selected)**


---

Achieve Q4 Team Targets


---

**Assignees (6 Selected)**


---

 **Brenda Davis** Administrative Assistant


---

 **Marcus Hoff** Sales Director, NE

---

 **Richard Maxx** Sales Director, NC

---

 **Sid Merton** Sales Director, SC

---

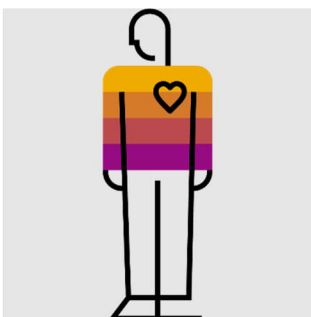
**Assign**

11. Verify the Team Goal was assigned to your direct reports. The goal card will display their pictures.



The manager has created a Team Goal including an achievement metric lookup with a goal rating generated to be transferred to the performance evaluation and assigned it to some of their direct reports.

## EMPLOYEE TASKS

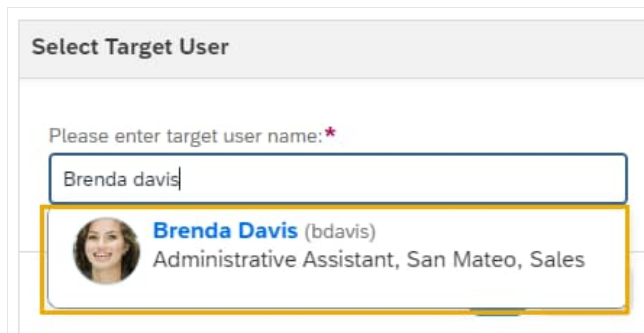


### Employee Activities in the Goal Plan

In these series of activities, you will be completing some actions as an employee.

## LAB ACTIVITY #8 – Manage your Performance Goals.

1. Select Proxy Now, to proxy as **Brenda Davis**.



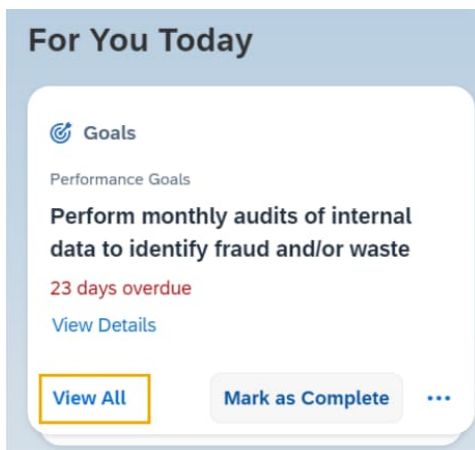
Select Target User

Please enter target user name: \*

Brenda davis

**Brenda Davis** (bdavis)  
Administrative Assistant, San Mateo, Sales

2. In the Home Page, check the For You Today section. Verify a Goals engagement card displays. Select **View All**.



**For You Today**

**Goals**

Performance Goals

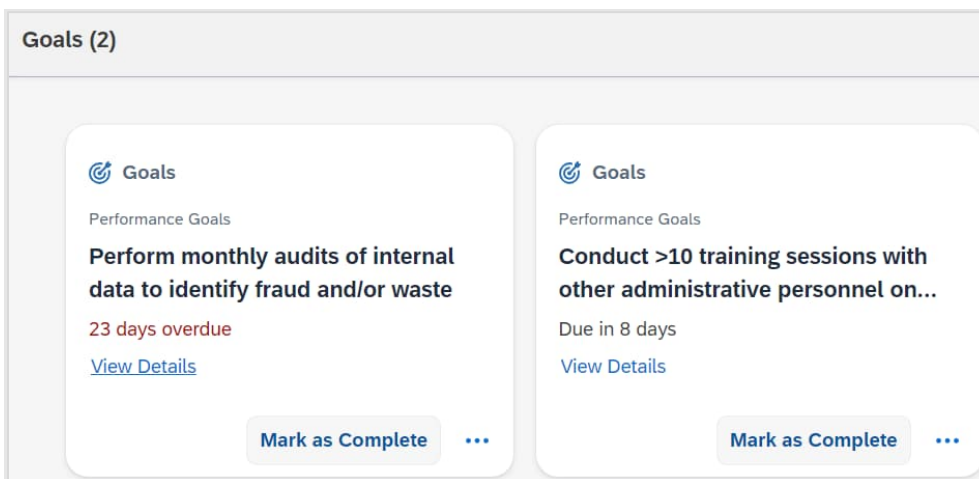
**Perform monthly audits of internal data to identify fraud and/or waste**

23 days overdue

[View Details](#)

**View All** Mark as Complete ...

3. Verify there is a goal that is overdue, and a performance goal with a Due date due soon.



**Goals (2)**

**Goals**

Performance Goals

**Perform monthly audits of internal data to identify fraud and/or waste**

23 days overdue

[View Details](#)

Mark as Complete ...

**Goals**

Performance Goals

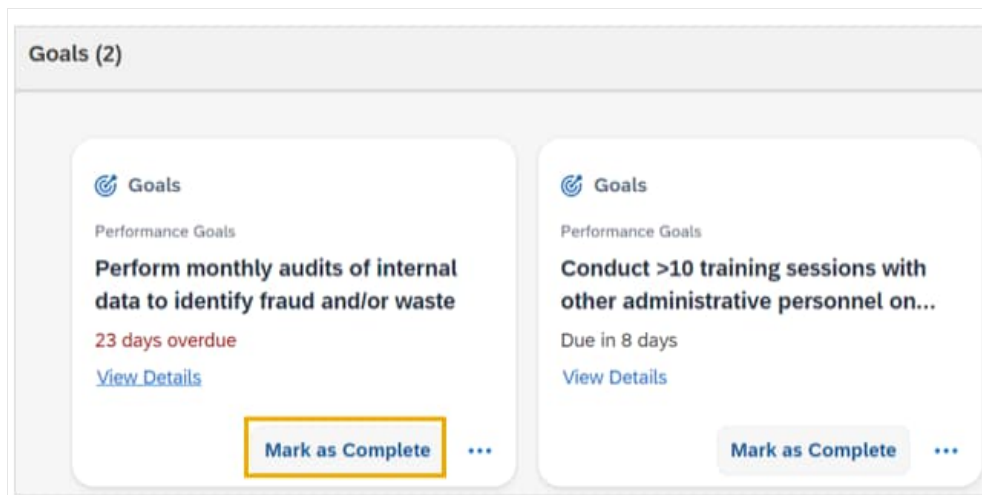
**Conduct >10 training sessions with other administrative personnel on...**

Due in 8 days

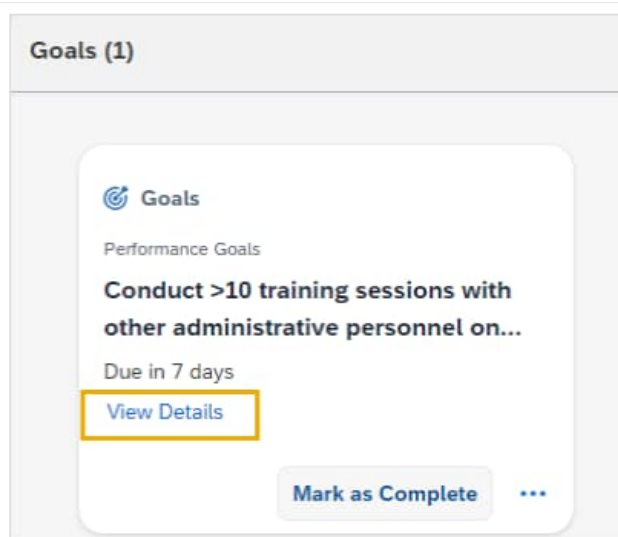
[View Details](#)

Mark as Complete ...

4. For the overdue goal, select **Mark as Complete**.



5. For the goal *Conduct >10 training sessions with other administrative personnel on new skills*, select *View Details*.




6. In the **Milestones** section, verify there are 4 Milestones, two of them with 2 sessions. This means a total of 8 sessions conducted, which means the goal is not yet achieved.

**Conduct >10 training sessions with other administrative personnel on new skills** (Public)


Updated: Jun 23, 2023


8 Days Due in | **Behind** Status | 50 % Complete

 **Milestones (4)** [Manage Milestones](#)

Milestone Description	Due Date
EMEA Training Delivery (2 sessions)	2023-01-31
APJ Training Delivery	2023-02-28
North America Training Delivery (2 sessions)	2023-03-31
LATAM Training Delivery	2023-04-15

7. Continue to scroll down to the **Linked Activities** section. Select **+ Create Activity** to create a new activity in Continuous Performance Management and add it in the next 1:1 discussion with your manager.

 **Linked Activities** [+ Create Activity](#)



**No activities yet**  
Take a moment to create your first activity.

8. Add the following details, and select **Save** when finished:
- Activity Name: Schedule additional training.
  - Status: High

**Create Activity**

Activity Name: \*

Schedule additional training

Status:

High

Goal:

Conduct >10 training sessions with other administrative personnel on new skills

**Save** Cancel

9. When saving, you will see a popup message to confirm activity was created. Select *Close*.

**Success**

You have successfully saved your activity.

**Add Another** **Close**

10. The activity is now visible in the **Linked Activities** section.

**Linked Activities (1)** [+ Create Activity](#)

Schedule additional training


High · Created: today


11. Scroll down to **Comments** and add a new comment to reply to your manager's comment (you need to click beside the picture, and you will see a comment box that displays):




▼ **Comments (1)**

Leave a Comment






1000 characters left



**Carla Grant:** Hi Brenda,  
Do you need my support on this goal?  
I see the due date is approaching and the targets have not been achieved yet. Thanks!


Created: today


12. Add the following comment: *Yes please! I have some ideas.*

Select  to send the comment and make sure it is recorded.


▼ **Comments (1)**

Leave a Comment





971 characters left



**Carla Grant:** Hi Brenda,  
Do you need my support on this goal?  
I see the due date is approaching and the targets have not been achieved yet. Thanks!

Created: Aug 17, 2023

13. Scroll up and select the *2023 HOL103 Goal Plan* link at the top of the page to navigate back to the main page.

[2023 HOL103 Goal Plan](#) / Internal Business Processes / Goal Details

## Conduct >10 training sessions with other administrative personnel on new skills (Public)

Updated: Aug 9, 2023

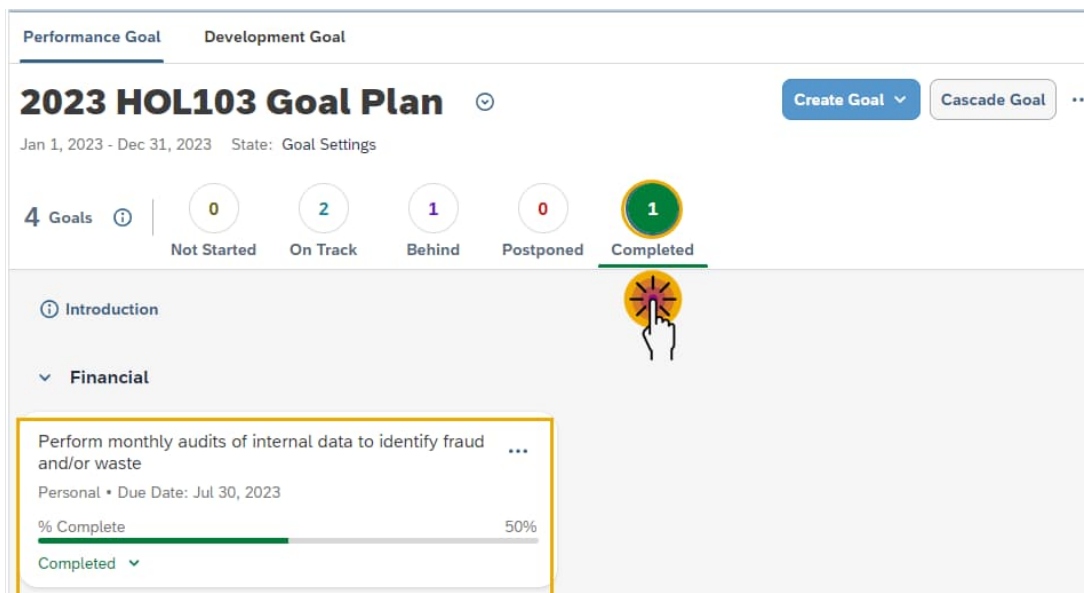
7 Days  
Due in

Behind ▾  
Status

50 %  
% Complete

[Edit Goal](#)
[Cascade Goal](#)

14. Verify the goal that was overdue and marked as complete on the home page has the status updated to **Completed** based on the action done in the engagement card. You can select from the statutes on the header and select **Completed** to filter the goals based on this status.



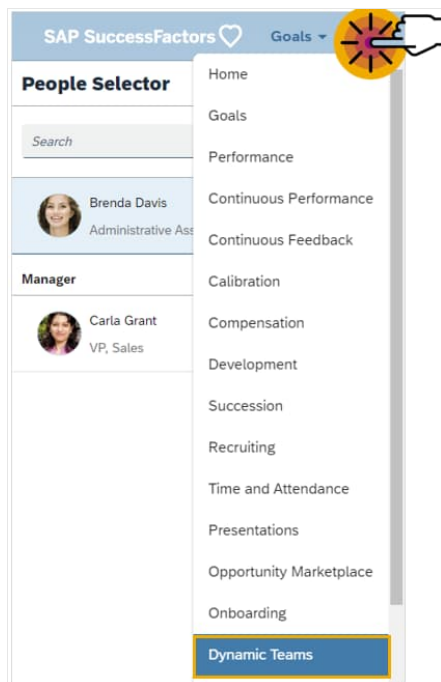
Several activities were completed as an Employee in their own goal plan to act on an overdue goal, a goal with a due date approaching, and create an activity in Continuous Performance Management for 1:1 discussion with the manager. A threaded comment has also been included to respond to the manager's feedback on a goal.

## LAB ACTIVITY #9 – Link one of your Objective and Key Results (OKR) to some of your Performance Goals

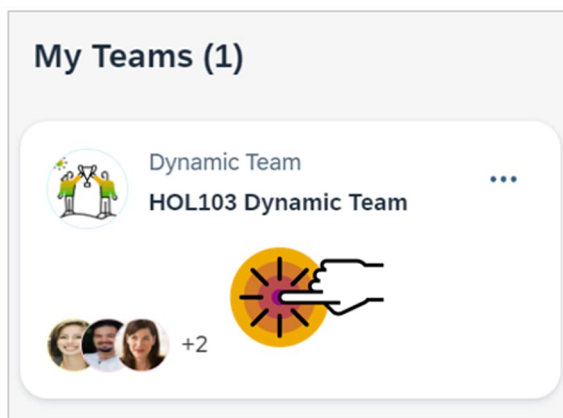
In this activity, you will navigate to Dynamic Teams to verify that **Brenda Davis** is a team member accountable for an OKR to reduce the carbon footprint in the organization, and an active contributor to some of the key results identified in the overall objective. You will be linking the OKR to some of your Performance Goals.

**NOTE:** In the following step, you need to access Dynamic Teams from the Home menu as shown. There is no standard action in Action Search to navigate to Dynamic Teams (as an end user).

1. Navigate to *Dynamic Teams* from the Home menu.



2. Select the **HOL103 Dynamic Team** to drill down into the details.



3. You may see a popup dialog with a Welcome message in Dynamic Teams. You can close it to continue.
4. In the Team Objectives, you will see *Reduce carbon footprint in the organization*, which has 4 key results. You can select the expand/collapse icon (>) next to the goal name to display the key results.



5. Select the action menu icon (...) that displays more actions, located to the right of the Overall Score of the objective.

Dynamic Teams / Team Details

**HOL103 Dynamic Team** ⓘ  
Created by: Brenda Davis ⓘ

Team OKRs Team Members

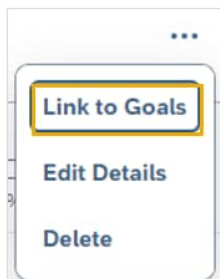
Team Objectives (1) + ⓘ

▼ **Reduce carbon footprint in the organization** ⓘ  
4 Key Results Jan 1, 2023 - Dec 31, 2023

**On Track** ▾ **59%**  
Status Overall Score

+1 <b>Supply chain and shipping infrastructure 100% zero waste</b> Due: Dec 31, 2023	55 / 100 % waste Current/Target	55% DOS 70%
+1 <b>Pay 100% carbon offset for calculated carbon dioxide emissions</b> Due: Sep 30, 2023	80 / 100 % carbon offset Current/Target	80% DOS 70%
+1 <b>25% of material is compostable</b> Due: Dec 31, 2023	8.5 / 25 % of composta... Current/Target	34% DOS 65%

6. Select *Link to Goals*.



7. A column Linked Goals List will be displayed. Select *the* + icon to add goals to be linked to OKRs.

**Link to Goals** Close

**Linked Goals List** +

You haven't linked any goals to this key result.

8. Select the **2023 HOL103 Goal Plan** template from the Goal Plan drop down.

**Link Goals**

Goal Plan:

2019 Basic Goal Plan with Group Goals 2.0

2019 Basic Goal Plan with Group Goals 2.0

2019 Goal Plan for KTE Associates

2019 Goal Plan for Sales Associates

2022 Basic Goal Plan

2023 HOL103 Goal Plan

2023 Sales Department KPIs

TMO Goal Plan

TMO Goal Plan Backup

9. The list of all the goals will be displayed. Select two goals of your choice.

**Link Goals**

Goal Plan:

2023 HOL103 Goal Plan

Selected (2)

**Goals List**

☐ Conduct >10 training sessions with other administrative personnel on new skills

☐ Increase number of new accounts 15% by end of the year

☒ Maintain a customer satisfaction rating for sales representative performance of at least 3.75 on 1-5 scale for current year

☒ Perform monthly audits of internal data to identify fraud and/or waste

10. Choose *Link*

**Link** Cancel

11. The Linked Goals List will now display these goals.

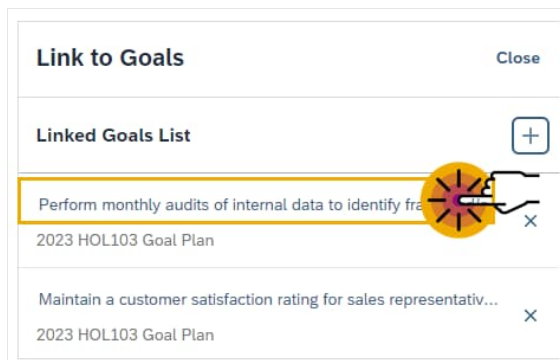
**Link to Goals** Close

**Linked Goals List** +

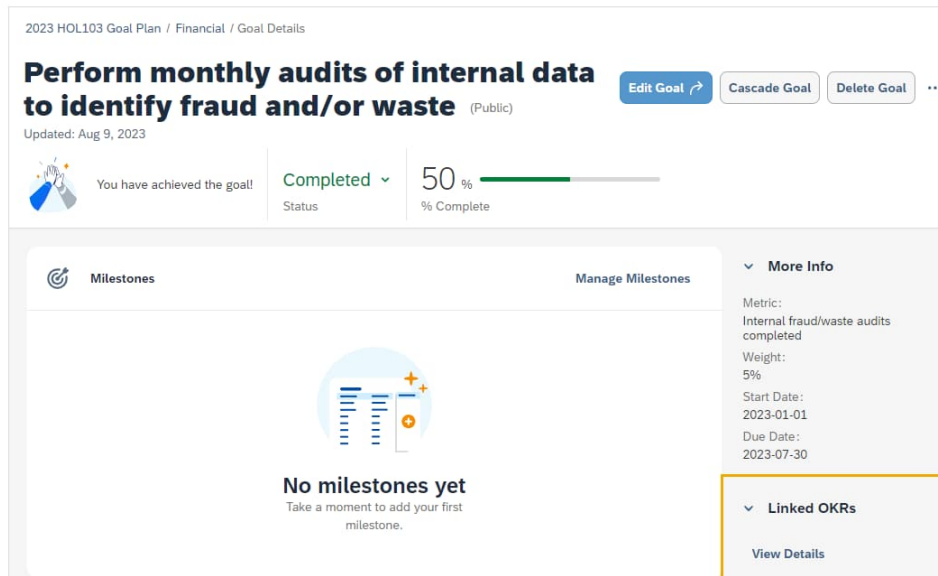
Perform monthly audits of internal data to identify fraud and/o...  
2023 HOL103 Goal Plan

Maintain a customer satisfaction rating for sales representativ...  
2023 HOL103 Goal Plan

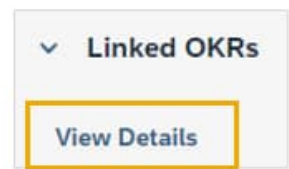
12. Select the goal name for one of your goals to navigate to the Goal details.



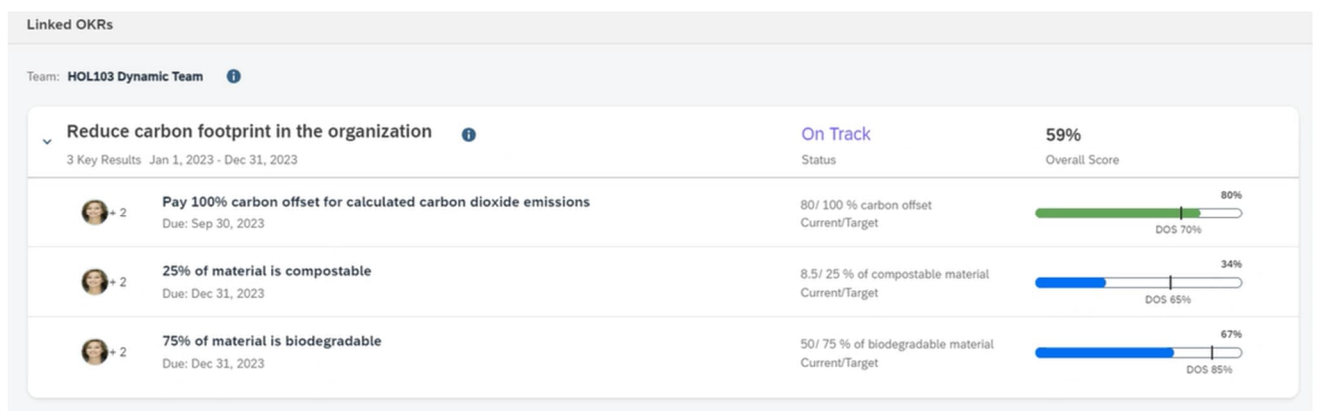
13. Verify there is a new **Linked OKRs** section.



14. Select **View Details**.



15. Verify all the **Key Results** where Brenda is a contributor are visible.





In this activity, the employee has successfully linked an OKR from the Dynamic Team that they are a member to some of their performance goals.

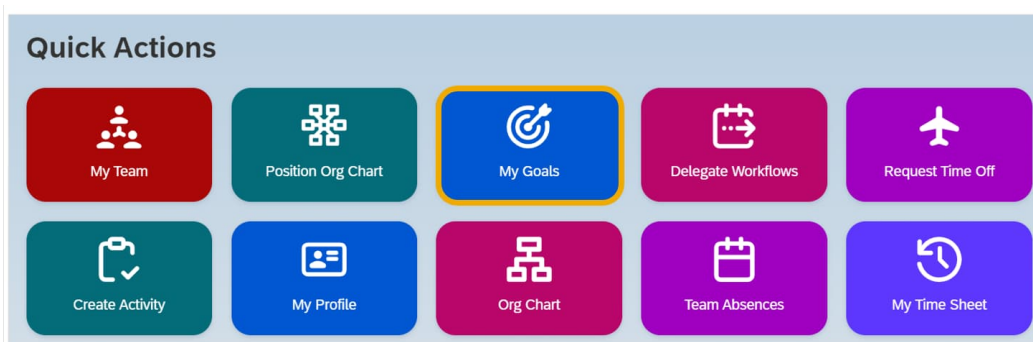
## LAB ACTIVITY #10 – Add Capabilities to an existing Development Goal

In this activity, you will navigate back as Carla Grant, to navigate to their Development Plan. You will edit one of the development goals to select additional competencies to be linked to.

1. Select Proxy Now, to proxy as **Carla Grant**.

The screenshot shows a user interface for proxying as another user. At the top, it says "Emily Clark (admin) on behalf of Brenda Davis (bdavis)". Below this, there are two buttons: "Become Self" and "Proxy Now". The "Proxy Now" button is highlighted with a yellow border. Below the buttons is a section titled "Select Target User". It contains a text input field with the placeholder "Please enter target user name: \*" and the text "Carla Grant" entered. Below the input field, there is a list of users. The first user, "Carla Grant (cgrant)", is highlighted with a yellow border. Her details are "VP, Sales, San Mateo, Sales".

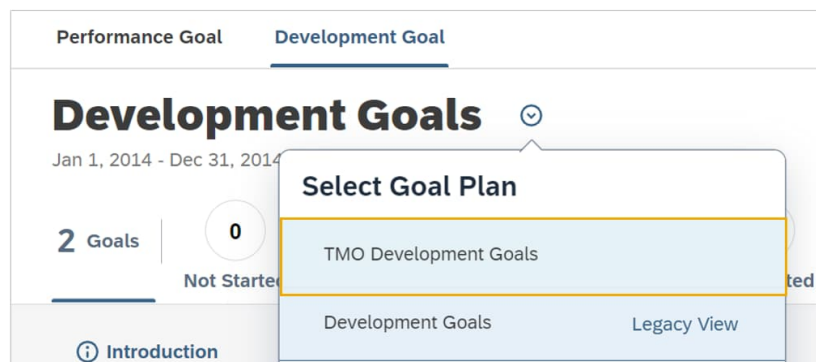
2. Navigate to **My Goals** from the Home Page Quick Actions.



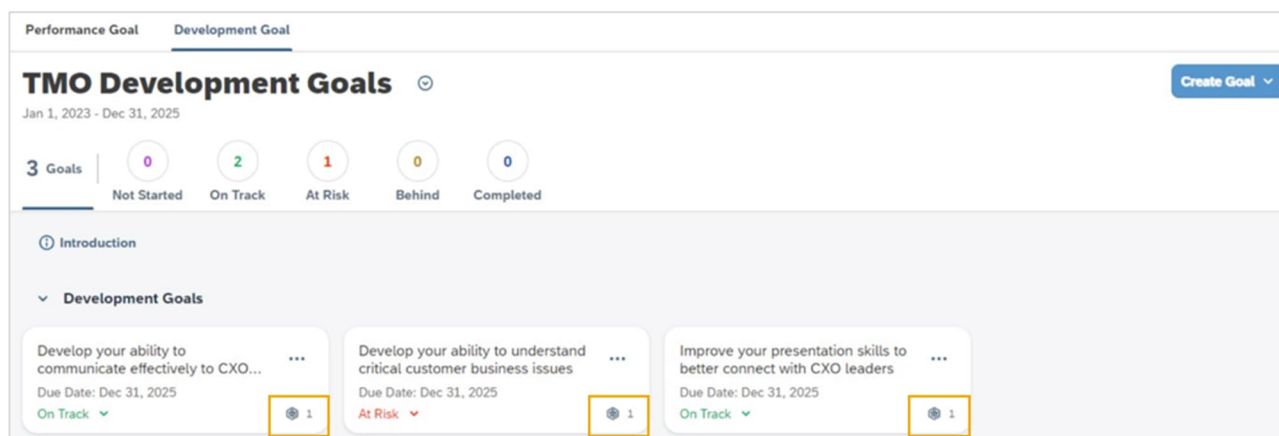
3. Select **Development Goal**.



4. Select **TMO Development Goals** from the dropdown list.

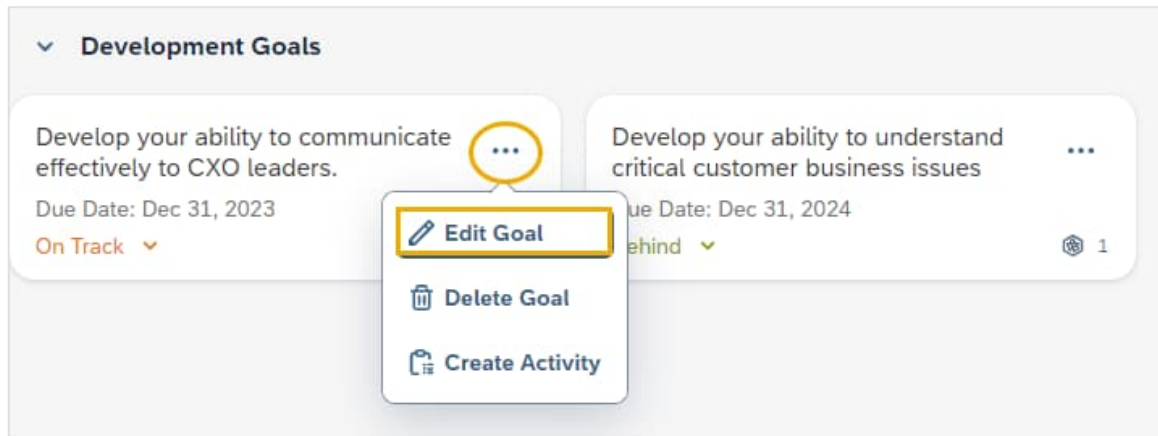


5. Notice there are already 3 development goals created, and each goal is linked to a competency. You can see an icon and number in each goal.




6. Locate the **Develop your ability to communicate effectively to CXO leaders** and select the option to **Edit Goal**.





7. Scroll down to locate the **Competencies** field and notice that *Communication* is the competency associated to the Development Goal.

Status:  
On Track ▼

Competencies:  
Communication x 


Purpose:  
Current role ▼

8. Select the option located on the right to browse for additional competencies.

Competencies:  
Communication x 

9. In the *Search Capabilities* box, type **Management**.


Add Capabilities

Management x  Show Filters

- > SuccessFactors
- > SuccessFactors 2.0
- > SuccessFactors 2.1 Competency Library

10. Select the magnifying glass to start your search.


**Add Capabilities**

Management x  Show Filters

- > SuccessFactors
- > SuccessFactors 2.0
- > SuccessFactors 2.1 Competency Library

11. You will see 2 competencies on the results that include the word “Management.” Select both.

**Add Capabilities**


Management x  Show Filters

Search Results (2) Clear

- ☒ People Management
- ☒ Strategic Thinking/Management

12. Select **Add** to complete the action and Add Capabilities into your development goal.


**Add Capabilities**

Management x  Show Filters

Search Results (2) Clear

- ☒ People Management
- ☒ Strategic Thinking/Management


Details



Click the name of a capability to view its details.

Selected Items (2) Clear all

People Management x Strategic Thinking/Management x

 Add Cancel

13. Choose Save to save the changes in your development goal.

Competencies:

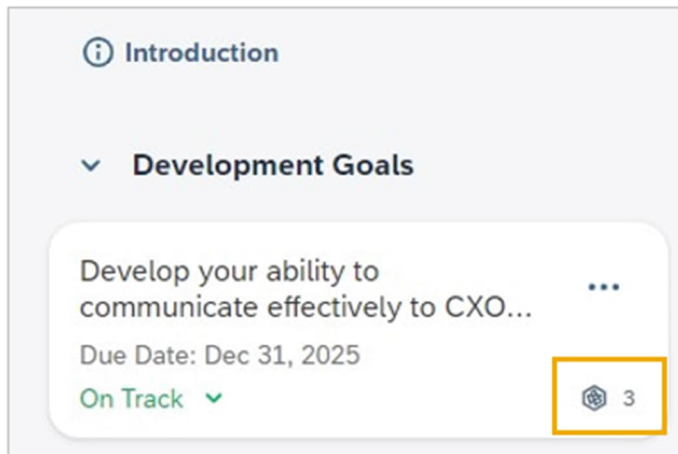
Communication x People Management x Strategic Thinking/Management x 

Purpose:

Current role

 Save Cancel

14. The development goal now displays 3 competencies in the goal card.



In this activity, the manager has successfully added two new competencies to be linked to one of their development goals.

This Hands On Lab has allowed you to discover the Latest Goal Management version and its capabilities, as well as performing several actions as an Administrator, Manager and Employee. [www.sap.com](https://www.sap.com).

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