



Tandem Perform 2.0

Guide to Setting and Monitoring Goals

Goal Setting Overview

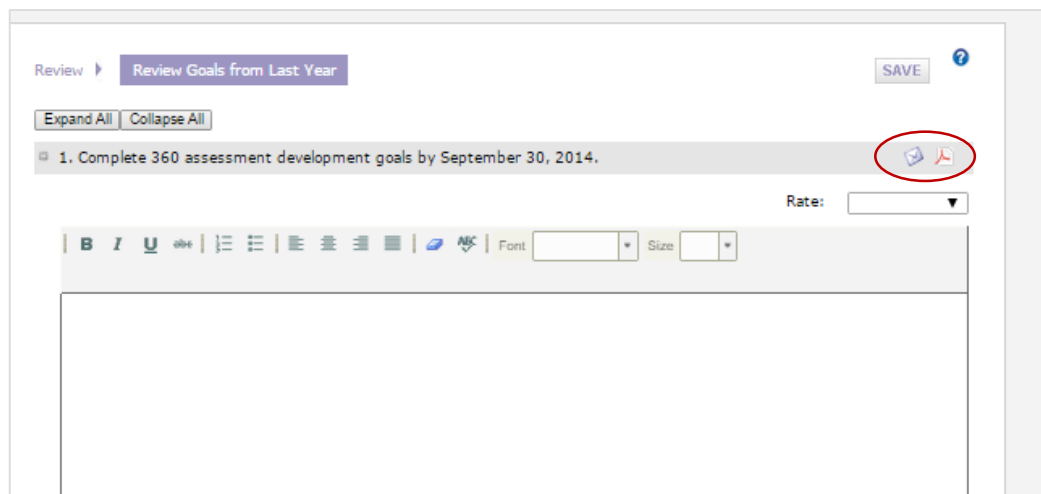
- Partnership between the supervisor and employee
- Dynamic process that continually assesses goal progress & achievement
- When do we set goals?
 - ✓ Informal: During the year when new priorities emerge for the business or personal professional development
 - ✓ Formal: Annually with the performance appraisal discussion
- When do we monitor goals?
 - ✓ Informal check in's are an easy and effective way to monitor progress
 - ✓ The leader's role is to learn what progress has been made, provide resources or remove obstacles to help the employee achieve the goal

At the Annual Review Period

Actions

Step 1: Supervisor Reviews Goals from Last Year

1. Click on pdf to review Goal Summary report for the goal.
2. Click on the 'envelope' icon to send an email to the person being assessed. This is often helpful to remind them to update their goals.
3. Click on the Rate box to select rating from drop down menu.
4. Write feedback on goal progress and achievement in the text box.



At the Annual Review Period

Actions

Step 2: Supervisor Adds Goals for Next Year

1. Write a SMART goal – up to 100 characters. (Not intended to be a theme with goals written in the specific text box).
2. 'Specific' is an optional section where you may provide additional descriptive detail or context as necessary.

Step 3: Supervisor Completes Review, Discusses with Employee and "Submits" review online

1. Discussion includes what the goals are, what needs to be done, and how their success is measured.

ABC Company

Welcome, Test Three [Log](#)

HOME MY ASSESSMENTS 1 GIVE FEEDBACK 3 MY GOALS GOAL FEEDBACK

Assessment for pam test Submit by Thu Mar 19, 2015

REVIEW	ORGANIZATIONAL VALUES	KEY CAPABILITIES	SUMMARY
Review Previous Assessments	Excellence (0/4)	Job Knowledge/Execution (0/2)	Overall Performance Rating
Review Goals from Last Year	Customer Centric (0/4)	Business Analysis (0/2)	Overall Summary (0/1)
	Respect, Trust, & Dignity (0/4)	Work Planning (0/2)	Goals for Following Fiscal Year, including Business and Development Goals
	Employee Growth & Well Being (0/4)	Quality Outcomes (0/2)	Employee Comments
	Organizational Values Feedback (0/1)	Key Capabilities Feedback (0/1)	

Summary > Goals for Following Fiscal Year, including Business and Development Goals

Suggest a Goal

Enter the name of the goal in the "Goal" field. It should be clear and brief. Use the Specific field below to clearly define what needs to be accomplished. Identify the specific reasons, purpose or benefits of accomplishing the goal.

Goal

Specific

Tips

- Goals that are proposed by the supervisor in the performance appraisal are automatically linked to the next performance assessment.
- Goals that are proposed by the supervisor in the performance appraisal are automatically shared with that supervisor so the supervisor may review and provide feedback to the employee.

At the Annual Review Period

Actions

Step 4: Employee Accesses Goals

1. Once the performance review is submitted, the goals are available for the employee to access
2. Click on the My Goals Tab to see list of goals

Edit: add detail and/or make changes to goal, actions, measures, time frame

Share Goal: click on person/email you would like to share your goal with. If the origin of the goal is from your supervisor in the performance evaluation, Tandem shares that goal with the supervisor for you.

Status Updates: provide status updates on goals

Report: print pdf

The screenshot shows a web interface with a navigation bar containing 'HOME', 'MY ASSESSMENTS', 'GIVE FEEDBACK', 'MY GOALS', and 'GOAL FEEDBACK'. Below the navigation bar is a search area with fields for 'ID:', 'Goal:', and 'Status:', along with a 'Search' button. A table of goals is displayed with columns: START, ID, GOAL, FINISH BY, STATUS, DATE, UPDATES, UPDATED, and ACTIONS. The table contains five rows of goal data. A red circle highlights the 'Add Goal' button in the top right corner. Another red circle highlights the 'Print Selected' button at the bottom left of the table. A third red circle highlights the action icons (search, share, print) for the goal 'Run the marathon in sor...'.

START	ID	GOAL	FINISH BY	STATUS	DATE	UPDATES	UPDATED	ACTIONS
09/19/2014	14051	Go to more meetings	12/31/2014	Planned	10/29/2014	0		[Action Icons]
09/02/2014	13663	Complete 360 assessment ... [+]	09/30/2014	Planned	09/02/2014	0		[Action Icons]
09/25/2013	4971	buy xmas presents before... [+]	09/25/2013	Proposed	09/25/2013	0	09/02/2014	[Action Icons]
09/25/2013	4970	Run the marathon in sor... [+]	09/25/2013	Proposed	09/25/2013	0	09/02/2014	[Action Icons]
06/17/2013	1457	goal 1	06/17/2013	Proposed	06/17/2013	0	09/02/2014	[Action Icons]

Page 1 1 to 5 of 5

Tips

- Search for a particular goal by ID, name or status
- May add a goal at anytime during the year
- Goals may be expanded by clicking on the plus sign
- Click in each box to indicate what goal summaries you want to print

At the Annual Review Period

Actions

Step 5: Employee Adds Details to the Goal using SMART framework

1. Employee changes the status to reflect the correct status of the goal. The goal status defaults to In Process.
2. Status Options:
 1. Proposed
 2. Planned
 3. In Process
 4. Cancelled
 5. Completed
3. A goal may NOT be deleted.

ABC Company

Welcome, pam test [Logout](#)

HOME MY ASSESSMENTS GIVE FEEDBACK **MY GOALS** GOAL FEEDBACK

Goal For **pam test**

Goal test

Status **In Process** Last Update March 18, 2015 Target Date

Specific Measurable Achievable Relevant Timely Summary

A goal should be measurable so that you have tangible evidence that you have accomplished it. The measures should answer the questions, "How will you know when it is accomplished? What are the outcomes or outputs associated with the goal?"

Close SAVE

B I U abc Font Size

Tips

- Goal reference on each page.
- Goal name and Specific text are displayed exactly as the supervisor entered them in the performance appraisal.
- Goal may NOT be changed.
- The other fields may be revised.
- Text box with formatting capability.
- If you copy & paste into TandemPerform, use the eraser (in the formatting bar) to ensure correct formatting on print out.

At the Annual Review Period

Actions

Step 6: Employee Identifies Measures (Measurable Tab) & Actions (Achievable Tab)

1. Identify the measures and for the goal and confirm they are correct with your supervisor.
2. Outline the plan of activities that need to be completed to achieve the goal.

The screenshot displays the 'Measurable' tab of a goal management system. At the top, the goal is identified as 'pam test' with a status of 'In Process', a last update of 'March 18, 2015', and a target date. Below this, a navigation bar includes tabs for 'Specific', 'Measurable' (which is highlighted in green), 'Achievable', 'Relevant', 'Timely', and 'Summary'. A yellow callout box provides guidance: 'A goal should be measurable so that you have tangible evidence that you have accomplished it. The measures should answer the questions, "How will you know when it is accomplished? What are the outcomes or outputs associated with the goal?"'. The main content area features a rich text editor with a toolbar containing bold, italic, underline, and other formatting options. At the bottom of the editor, a checkbox labeled 'Have you finished with this section?' is circled in red. Navigation buttons for 'Close', 'SAVE', 'SAVE / PREVIOUS SECTION', and 'SAVE / NEXT SECTION' are also visible.

Tips

- Consider both qualitative and quantitative measures when identifying what success looks like for the employee.
- You may mark the section complete as a way of keeping track of where you are in the SMART process.

At the Annual Review Period

Actions

Step 7: Employee Identifies Relevancy of the goal

1. Choose the category(s) that the goal is associated with. This provides context for how the goal relates to business objectives and/or skill and behavioral development. This information also provides important information for talent planning.
2. Identify the assessment the goal is based on as appropriate. Is it based on the annual review? A multi-rater assessment? Some goals may not be associated with an assessment; rather than may be added as they align with the department or organizational objectives.
3. Identify the evaluation where this goal will be reviewed. This link defaults to the next assessment unless you change it.
4. ** If employee has 2 jobs, be sure to choose correct assessment for the goal.**

The screenshot shows a web interface for 'MY GOALS'. At the top, there are navigation tabs: HOME, MY ASSESSMENTS, GIVE FEEDBACK, MY GOALS (active), and GOAL FEEDBACK. Below the tabs, the 'Goal For' field is set to 'pam test'. The 'Goal' field contains 'test'. The 'Status' is set to 'Planned', 'Last Update' is 'March 18, 2015', and 'Target Date' is empty. Below this, there are six tabs: Specific, Measurable, Achievable, Relevant (highlighted in green), Timely, and Summary. A yellow box contains instructions: 'Goals are written to help strengthen skills, knowledge or behaviors and/or align with business goals. In the left column, identify the applicable category(s) that relates to the goal. In the right column, identify if the goal is associated with a past assessment and if it should be assessed at the next performance assessment.' Below the instructions, there are two columns of options. The left column has four radio buttons: 'Business goal', 'Corporate values/ Behavioral development', 'New capabilities / Knowledge / Skills', and 'Mandatory / Compliance'. The right column has a radio button for 'Based on an assessment' and a dropdown menu. Below these is a checkbox for 'Evaluate on assessment'. At the bottom, there is a text area with a rich text editor toolbar and the prompt 'Please explain how your goal is relevant to the criteria selected:'. Red arrows point from the text in the 'Actions' section to the corresponding UI elements: from step 1 to the category radio buttons, from step 2 to the 'Based on an assessment' dropdown, and from step 3 to the 'Evaluate on assessment' checkbox.

Tips

- ** If an employee has more than 1 job**
1. Do NOT click the box that says Evaluate on Assessment
 2. Because the timing of the 2 evaluations may be different, wait until approx. one month before your next review and then identify the correct assessment to link the goal with.
 3. If you need help, contact your HR business partner to assist you.

At the Annual Review Period

Actions

Step 8: Employee Identifies Timeliness of Goal

1. Add the start and target date for goal completion.
2. Set the reminder type to receive reminders from TandemPerform to update the goal.

ABC Company Welcome, pam test

HOME MY ASSESSMENTS GIVE FEEDBACK MY GOALS GOAL FEEDBACK

Goal For **pam test**

Goal test

Status **Planned** Last Update March 18, 2015 Target Date

Specific Measurable Achievable Relevant **Timely** Summary

Establish the target date for the completion and the frequency of reminders that will help you to stay focused on achieving the goal. Be sure that the target date creates a practical sense of urgency.

Close SAVE

Date Added 03/18/2015

Start Day 3/18/2015

Target Date

Reminder Type

Have you finished with this section?

SAVE / PREVIOUS SECTION SAVE / NEXT SECTION

Tips

1. The reminder type defaults to monthly if you do not change it.
2. Automated goal reminders are independent of the weekly reminders you receive TandemPerform to complete performance assessments.

At the Annual Review Period

Actions

Step 9: Employee Views Summary of Goal

1. Review summary to ensure the information is correct.
2. Go to the appropriate tab to make any necessary changes.

The screenshot displays a web application interface for ABC Company. At the top, there is a navigation bar with links for HOME, MY ASSESSMENTS, GIVE FEEDBACK, MY GOALS (highlighted), and GOAL FEEDBACK. The user is logged in as 'pam test' and is viewing the 'MY GOALS' section. The main content area shows a goal summary for 'pam test'. The goal is 'test', with a status of 'Planned', last update of 'March 18, 2015', and no target date. Below the summary are six tabs: Specific, Measurable, Achievable, Relevant, Timely, and Summary (which is active). The 'Specific' tab is currently selected, showing a text input field with the value 'this is a test'. Other tabs are empty. At the bottom, there is a 'PREVIOUS SECTION' button.

Tips

- Summary includes all information entered on the SMART tabs.
- All updates during the year are captured on the summary page.

Share Goal for Feedback/Viewing

Sharing goals enables others to provide feedback on your goal progress and achievement. This is a way to gather targeted performance feedback from others in addition to your supervisor.

Actions

1. Click on the goal you are interested in. You have the option to:
 - View Goal: see what the employee has written. Easiest to review the Summary tab.
 - View Team: see who else is providing feedback- if others have provided feedback – then it will be on the summary page.
 - Status Updates: provide an update/feedback about the goal.
 - Print the summary report




ABC Company

Welcome, Test Three [Logout](#)

HOME MY ASSESSMENTS **1** GIVE FEEDBACK **2** MY GOALS **GOAL FEEDBACK**

ID: Request By: Status:

Goal:

REQUESTED BY	ID	GOAL	START	FINISH BY	STATUS	DATE	UPDATES	UPDATED	ACTIONS
pam test	19063	test	03/18/2015		Planned	03/18/2015	0		  

Page 1 1 to 1 of 1

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Tips

- Search for a particular goal by ID, person, goal name or status

During the Year

- Anytime there is a change in status to the goal (or adding a goal), it should prompt a conversation and update between the supervisor and employee
 - ✓ At a minimum, check in's should take place quarterly
- Goal Updates
 - ✓ When updating a goal, you have editing capability to change the update at any time
 - ✓ The employee cannot edit another person's update to the goal
- When you add a goal during the year, you will need to link it to the next assessment so that it may reviewed by your supervisor. Do this on the Relevant tab.
- When you add a goal during the year, you will need to Share it with your supervisor. Click on the Share goal icon (under actions) and enter your supervisor's email.