

Goal Management - Supervisor

Contents

1 Goal Management : Performance and Development

2 Creation of Goals : the SMART method

3 Goal Management in ColasWay

People Selector

Switching from Performance to Development Goals

Select Goal Plan

Cascade Goal

Create Goal

4 Goal Details

5 Act on a Goal

6 Individual Development Plan

7 Focus on Skills to Improve

8 First Performance Review Campaign : Include Employee Goals

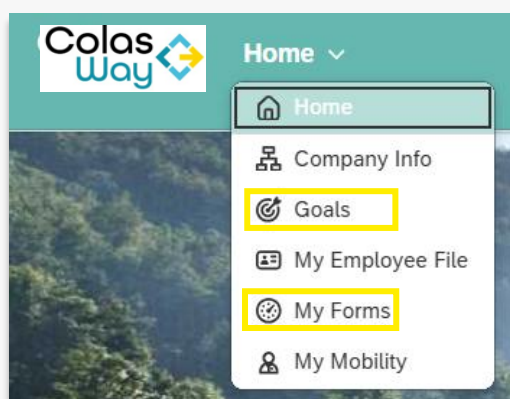
9 Calculating the evaluation in the Performance Review Form

1 Goal Management : Performance and Development

The Goal Management module allows Supervisors to **manage the Performance and Development Goals of their Employees throughout the year.**

Regarding Performance, the performance goals set during the Performance Review may **change due to a change of situation or professional context** (example: the end or start of a project).

- Goal Management during the Performance Review Campaign : Via the form (Drop down menu > My Forms).
- Goal Management outside the Performance Review Campaign : Via the Goal Management module (Drop down menu > Goals) for the Performance Goals plan throughout the year.



Performance Goals

Development Goals

Regarding Development, the **Development** functionality allows to **fill in development actions for Employees** :

- Individual Development Plan : **annual plan linked to the Annual Performance Review Form**. It is accessible and modifiable by both Employees and Supervisors. This development plan lists the **development actions** planned for the year.

Any change during the year by the Supervisor must be discussed with the Employee. This discussion is essential for setting or modifying the goals (specific, measurable, attainable, relevant and time-bound).



The Employee can consult their goals via the Goal Management module. They ensure that they are correctly entered and remind their Supervisor if necessary.

During the Performance Review Campaign, they self-assess the achievement of their goals for the current year.

2 Creation of Goals : the SMART method



When creating new goals, you can use **the goal creation aid** to follow **the SMART model**.

S

Specific

Goals should be clear and indicate what you expect. **Be specific** and define what you are going to do. **Use action verbs**, such as direct, organize, coordinate, lead, develop, plan, etc.

M

Mesurable

If you can't quantify it, you can't manage it. **Choose goals with measurable progress** and **set concrete criteria** by which you can measure success.

A

Achievable

The goals must be within your reach. If the goals you set are far beyond your ability, you cannot commit to them. The goals must be a big enough effort for you to believe that you can achieve them and that it requires a real commitment on your part.

R

Realistic

Goals should be relevant. Make sure that each goal is consistent with your other goals and aligns with the goals of the company, your Supervisor or your department.

T

Time-bound

Set a timeframe for the goal. Choosing a deadline for your goal clearly defines the target to be reached. Without a time limit, there is no incentive to get started.

3 Goal Management in ColasWay

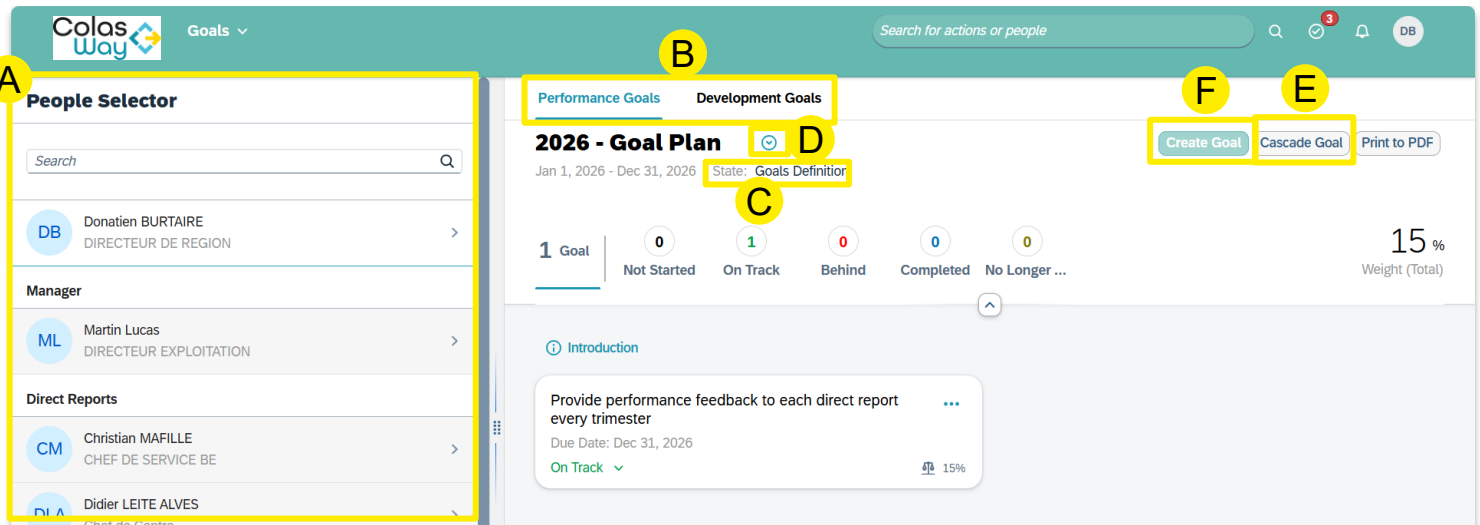
As a Supervisor, you can [view the goals set for your Employees](#) throughout the year.

You can [add, edit, cascade and delete goals](#) on the current year's Goal Plan only. Any modification will trigger an e-mail notification to the employee.

During the Performance Review campaign, the [permissions will be adapted according to the stage of the form](#). For example, in the [Preparation and Face-to-face review steps](#), you will be able to add goals for the current and upcoming year, while in [Employee Signature step](#), you will not be able to change anything.



As the Goal Management module is linked to the Performance Review, any modifications in the Goal Plan will be visible in the Performance Review form and vice versa.



A People Selector

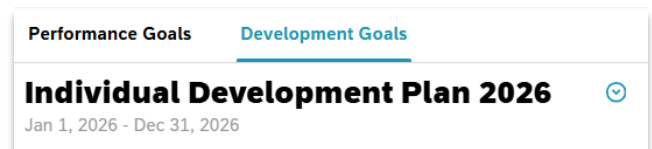
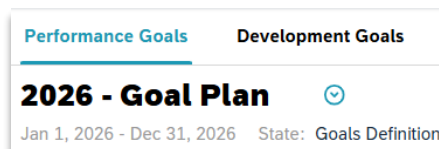
From this option it is possible to [select the Goal Plan of an Employee](#).

- For a Supervisor, their Direct Reports are listed on the left in the [People Selector](#).
- For HR, it is possible to search by the Employee's name using the Search bar on the left.
- Employees cannot access the contents of their Supervisor's Goal Plan.



B Switching from Performance to Development Goals

It is possible to switch between Performance Goal and Development Goal by clicking on the dedicated tab on top of the page.



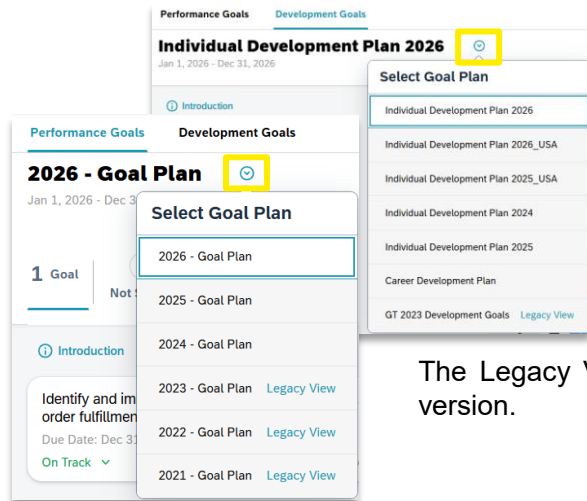
C State of the Goal Plan



The [State](#) of the goal plan can be seen below the Goal Plan name. It mirrors the Goal Plan stage (which remains constant outside the Annual Performance Review campaign and changes during the campaign based on the Employee form step).

This state is only visible for the Performance Goals.

D Select Goal Plan

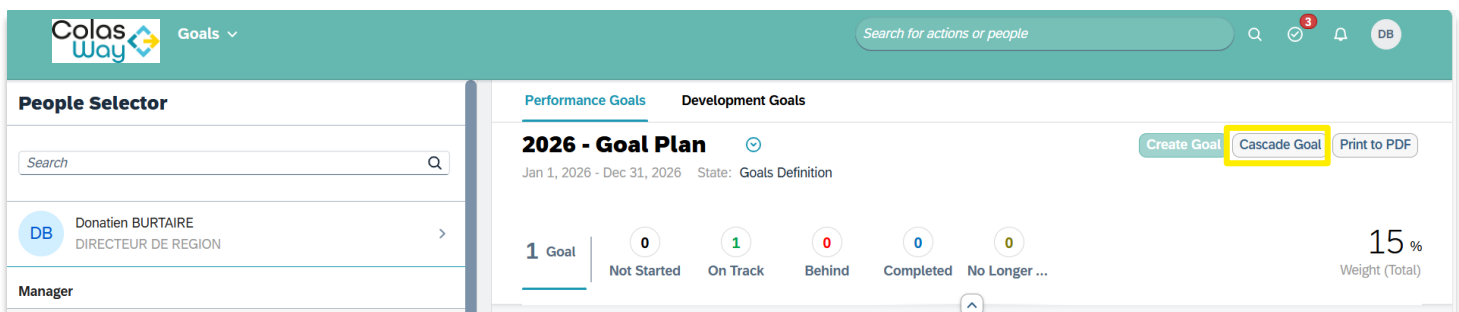


Select Goal Plan: you can open other Goal Plans through the arrow icon next to the Goal Plan name. Only the last 3 Goal Plans are available in locked mode. Indeed, you can only act upon Performance Goals of the current year. The current year's Goal Plan will be locked after the Performance Review Campaign.

The Legacy View concerns Goal Plans that have not been upgraded to the newest version.

E Cascade Goal

A Supervisor can cascade on or several of their goals that has been assigned to them to their Employees. Only Performance Goals can be cascaded.

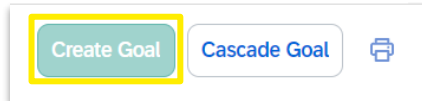


Once the goals have been cascaded, they will become new personal goals for the Employee(s) who have received them.

This feature allows the same goal to be assigned to several Direct Reports at the same time.

- 1- Select the goal you want to cascade.
- 2- Select the Direct Report(s) on which you want to cascade the goal.
- 3- Edit the Goal if necessary.
- 4- Click on Cascade.

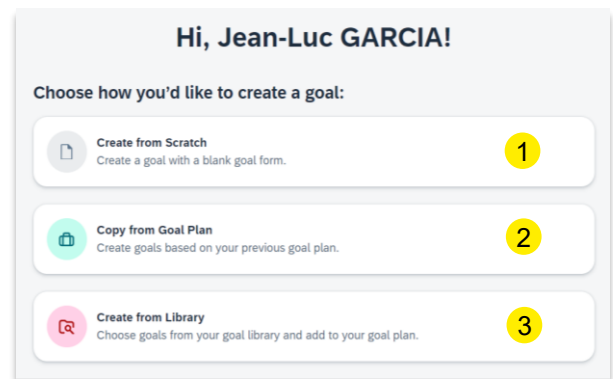
F Create Goal



Click on **Create Goal** to create a new goal for yourself or for a Direct Report (if you are in the Employee's Goal Plan).

3 options are available and will be detailed on the following pages of the documents.

Once the goals are created, they are visible as tiles (**a goal per tile**).



1



Create from Scratch

Create a goal with a blank goal form.

Create Performance Goal

Goal Name: *

Take the lead on a communication plan 462 characters left

Description and measurement: *

Take the lead on the communication for one of the countries of the roll out 2024. 919 characters left

Weight: *

25 %

Start Date: *

1 Jan 2024

Due Date: *

31 Dec 2024

Employee's comment :

Fill in the various fields.

2

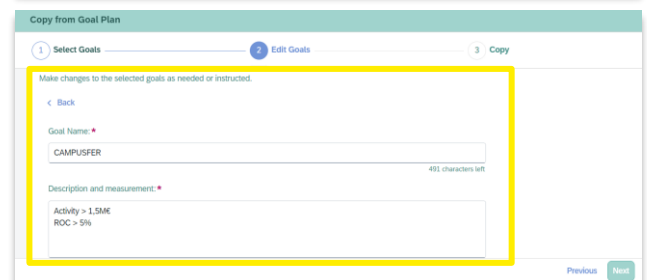
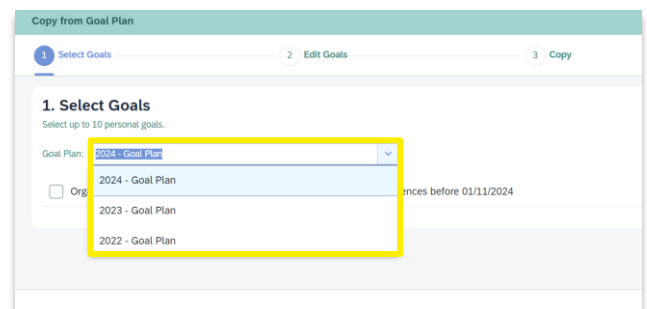


Copy from Goal Plan

Create goals based on your previous goal plan.

3 goal plans can be consulted (goal plans for years N, N-1 and N-2). The Supervisor can position himself on one of the employee's goal plans and **retrieve goals already set in previous years to copy them into the goal plan for the current or next year.**

This feature allows the Supervisor to add goals to the employee without having to create a new one that is identical.



Previous

Copy

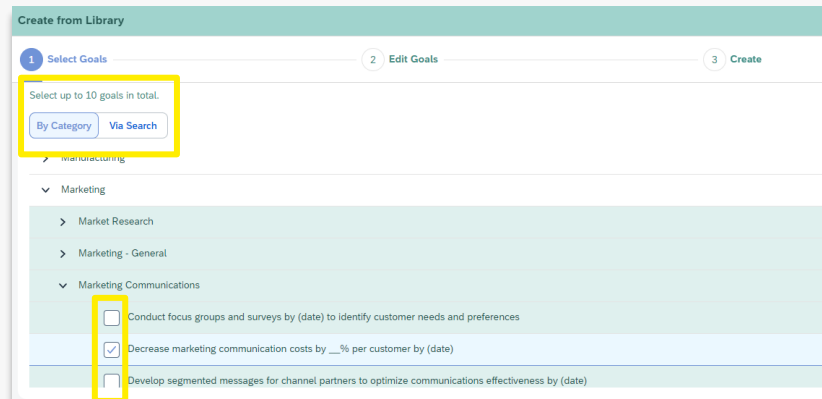
Cancel

3

**Créer à partir de la bibliothèque**

Sélectionnez des objectifs dans votre bibliothèque d'objectifs et ajoutez-les à votre plan d'objectifs.

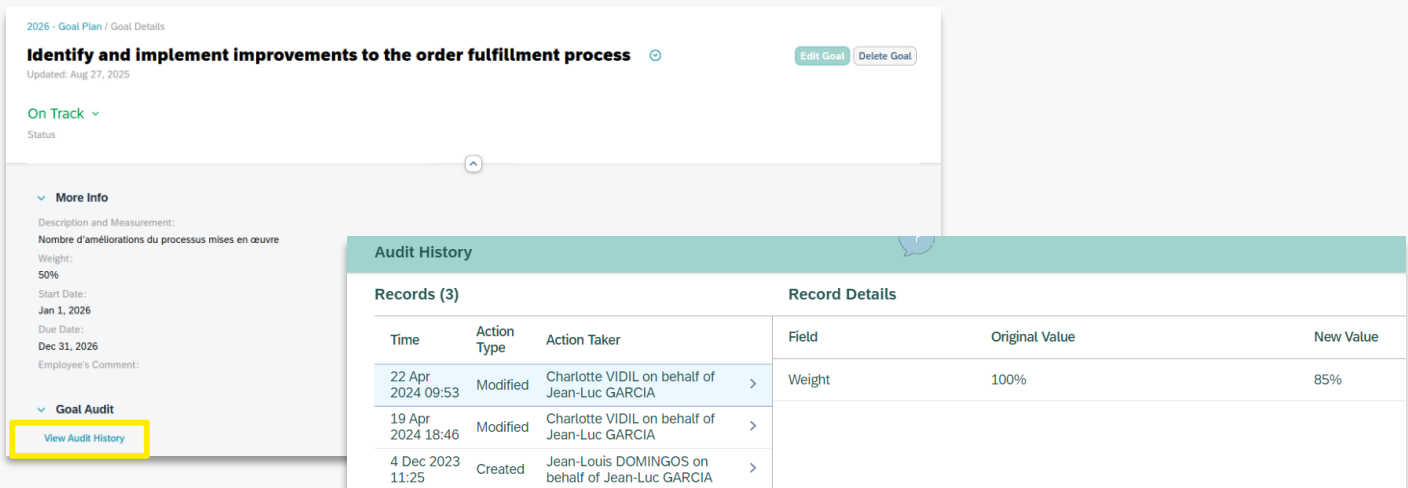
A goal can be selected from the goal library. Once a goal is selected (either by Category or by Search), it can be edited to be more personalized.



4 Goal Details

The detailed view of the development goal allows to view [the description](#), [the weight](#), [the comments](#) and [the dates](#) of the goal. It also shows the [history of the actions](#) performed for that goal (creation, modification) in the View Audit History tab.

Simply click on the goal to view its details.



Records (3)			Record Details		
Time	Action Type	Action Taker	Field	Original Value	New Value
22 Apr 2024 09:53	Modified	Charlotte VIDIL on behalf of Jean-Luc GARCIA	Weight	100%	85%
19 Apr 2024 18:46	Modified	Charlotte VIDIL on behalf of Jean-Luc GARCIA			
4 Dec 2023 11:25	Created	Jean-Louis DOMINGOS on behalf of Jean-Luc GARCIA			

5 Act on a Goal

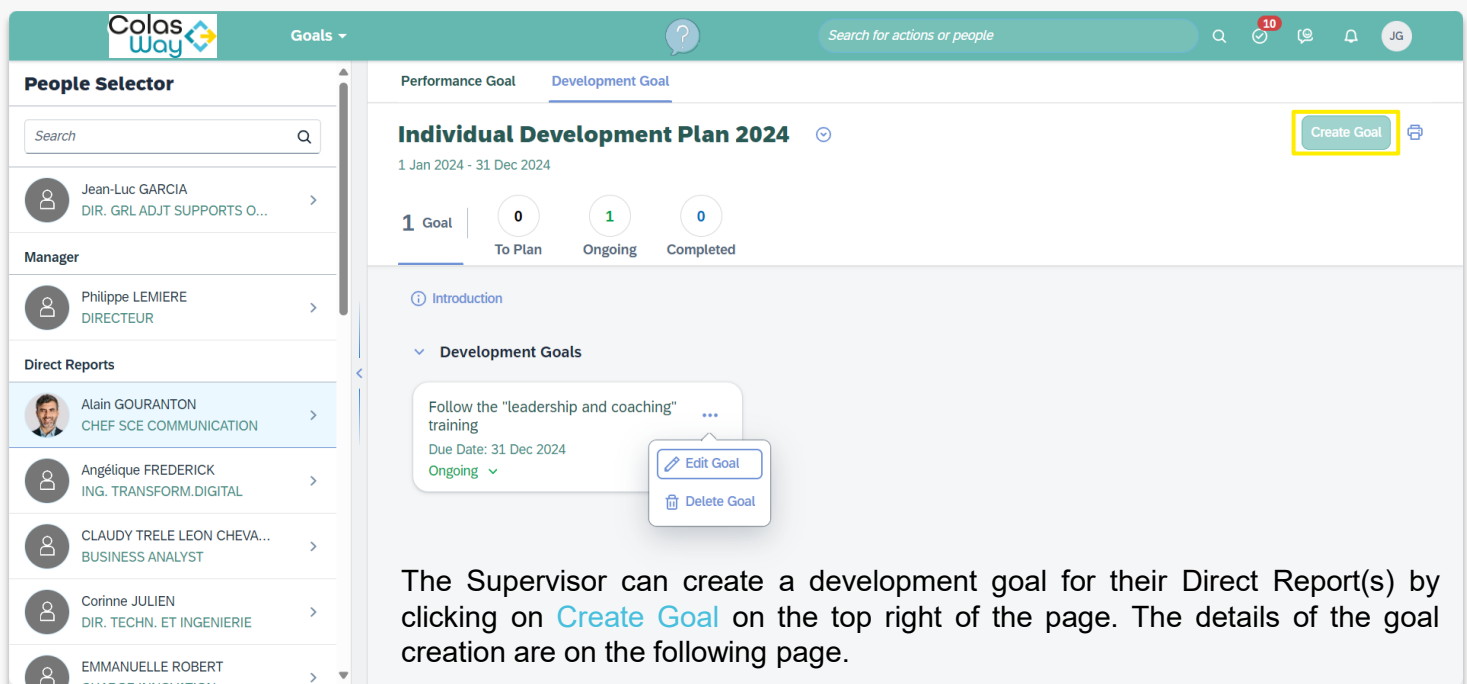
It is possible to [Edit](#) or [Delete](#) a goal.

It is possible to delete several goals at the same time or to delete a goal individually.

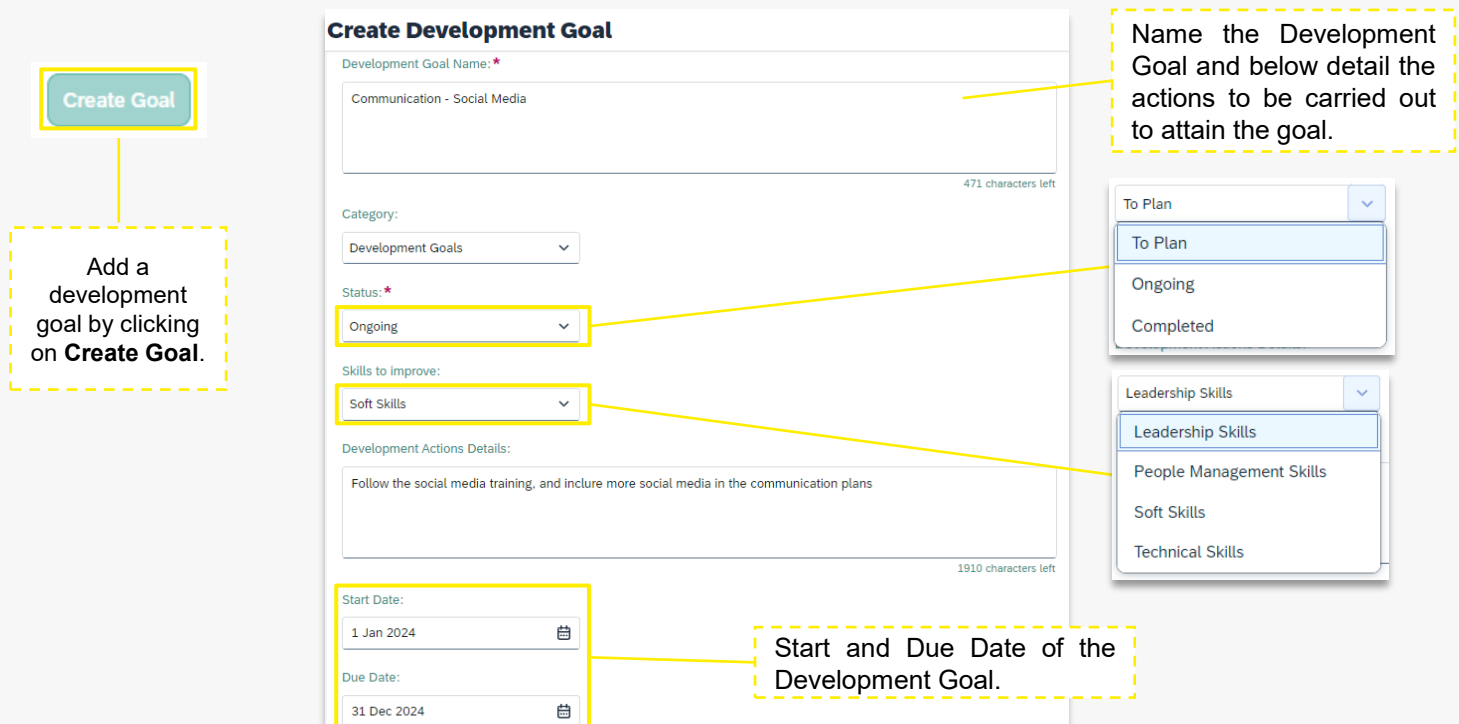
[Edit Goal](#)
[Delete Goal](#)

6 Individual Development Plan

The Individual Development Plan is an [annual plan linked to the Annual Performance Review Form](#). It can be accessed and modified by Employee and Supervisor. This development plan lists the [development](#) or [training actions](#) planned for the year.



The Supervisor can create a development goal for their Direct Report(s) by clicking on [Create Goal](#) on the top right of the page. The details of the goal creation are on the following page.



Create Development Goal

Development Goal Name: *

Communication - Social Media

471 characters left

Category:

Development Goals

Status: *

Ongoing

Skills to improve:

Soft Skills

Development Actions Details:

Follow the social media training, and include more social media in the communication plans

1910 characters left

Start Date:

1 Jan 2024

Due Date:

31 Dec 2024

Name the Development Goal and below detail the actions to be carried out to attain the goal.

To Plan

To Plan

Ongoing

Completed

Leadership Skills

Leadership Skills

People Management Skills

Soft Skills

Technical Skills

Add a development goal by clicking on **Create Goal**.

Start and Due Date of the Development Goal.

7 Focus on skills to improve

Leadership Skills

Leadership Skills

People Management Skills

Soft Skills

Technical Skills

Leadership Skills

- Ability to motivate and unite others towards a common goal and bring out the best in each person in the service of that goal.
- Mix of charisma and natural authority.
- Not necessarily linked to daily tasks or company hierarchy.

People Management Skills

- Day-to-day management with a sense of hierarchy.
- Involves listening to employees, setting objectives, having a relationship with some degree of proximity.
- Ensures personal and team objectives are met.
- Support in the employee's day-to-day tasks.

Soft Skills

- Behavioral competencies related to interpersonal skills/ behavioral know-how.
- Examples: creativity, flexibility, curiosity, active listening...).

Technical Skills

- Knowledge or ability related to a precise task in a specific field, linked to technical know-how.
- Examples: certifications, mastering Excel, driving a tractor-trailer, mastering a sales technique, a work methodology...

8 First Performance Review Campaign Include Employee Goals



If this is the Employee's first Performance Review Campaign, **the Objectives for the previous year must be included by the Supervisor as follows :**

Step 1



As the Supervisor, you enter the goals of your employees in ColasWay via the Goal Management module. You can do this at any time of the year without waiting for the Performance Review campaign to start.

As a reminder, the Goal Management module is linked to the Performance Review, so any additions or modifications to the goal plans will be reflected in the Performance Review form and vice versa.

Step 2



The Employee can **consult his goals via the Goal Management module.** He ensures that they are correctly entered and reminds his Supervisor if necessary.

During the Performance Review Campaign, they **self-assess the achievement of their goals for the past year.**

9 Calculating the evaluation in the Performance Review Form



The goals are one of the components of the final score given in the Performance Review. **The system calculates the score according to the weighting of each goal and the weighting of each of the main parts of the Performance Review being assessed** (competencies, goals and management & leadership). The final score is given by the Supervisor who can draw on the indicative score calculated by the system.



Job skills



Goals



Leadership Essentials

⊘ ☆☆☆☆☆
Select a rating

If not relevant for the Employee or if the Supervisor does not want to assess an item, they can select the "Not applicable" item

⊘ ☆☆☆☆☆
Select a rating

⊘ ☆☆☆☆☆
Select a rating

⊘ ★★☆☆☆

⊘ ★★☆☆☆

⊘ ★★☆☆☆

Automatic Overall Indicative Evaluation

Manual Evaluation by the Supervisor



If this is your first Performance Review Campaign, the Objectives for the previous year must be included by the Supervisor.