

Follow-up Review - Manager

Overview

The Follow-up Review is required for all employees whose most recent annual evaluation rating indicated that improvement was needed. The follow-up evaluation provides you with the opportunity to evaluate your employee's progress towards meeting his/her goals this year and is a great way to discuss any tools and/or training that could help your employee reach his/her full potential.

Who Does This: Manager

Things to Know:

- This process occurs once per year. After the Follow-up Review process is launched and your employee completes the Self Evaluation, you will receive an Inbox task to complete the Manager Evaluation.
- You are required to add comments and ratings for each Goal. Ratings for each Goal will be averaged and visible as the calculated rating for this section.
- You are required to add comments and ratings for each Competency. Ratings for each Competency will be averaged and visible as the calculated rating for this section.
- You are required to add overall comments. The overall rating will calculate automatically as an average of the calculated ratings for the Goals section and the calculated ratings for the Competencies section.



Inbox
2 items **1**

Manager Evaluation: 2019 Follow-up Review: Eric Employee
1 day(s) ago - Effective 04/30/2019

Step

Choose the Inbox task **Manager Evaluation: Follow-up Review**.

Refresh **2**

Employee Feedback Received within Performance Period

Confidential	From	Question	Comment	Feedback Type	Requested By	Date
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3

Step 2

Review the embedded analytics (i.e. feedback received within the performance period).

Step 3

Click the X to hide the embedded analytics.

You can click the  to export the analytics to Excel.

Note: Embedded analytics will automatically open only if there is data available.

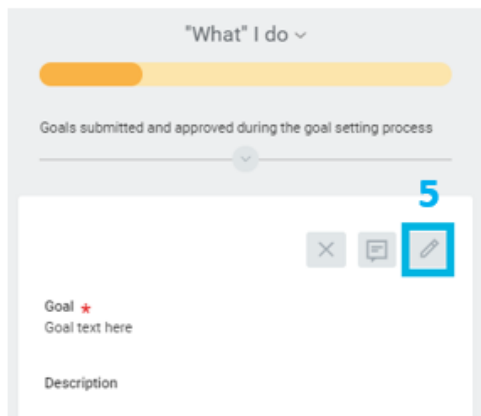
4

Go to Guided Editor
A simple step-by-step guide

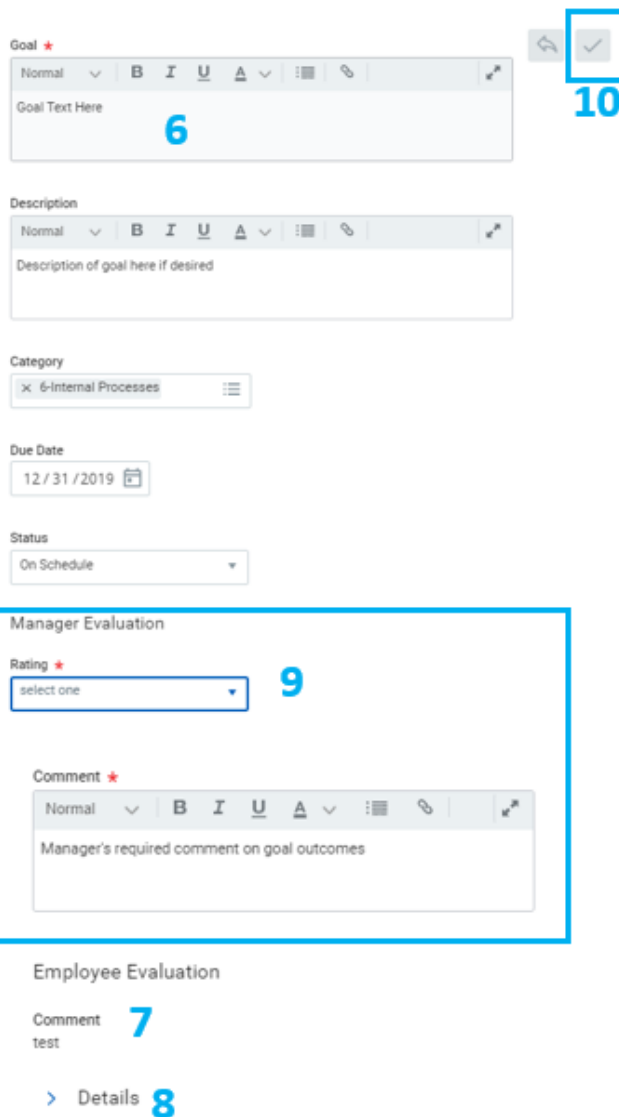
Go to Summary Editor
Edit everything on one page

Step 4

Choose **Go to Guided Editor**.



Step 5
Click the pencil icon to add commentary and a rating on your employee's goal.



Step 6
Review your employee's goal and edit as needed.

Step 7
Review your employee's comment.

Step 8
Click **Details** to display the original goal text and the activity stream icon.




Compare the original goal text under Details to the goal at the top of the section. If the goal has been revised, work with your employee to determine whether the changes to the goal are acceptable.

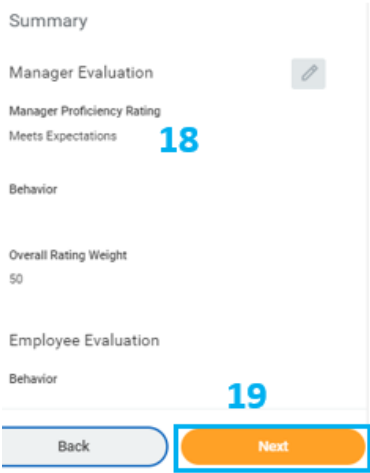

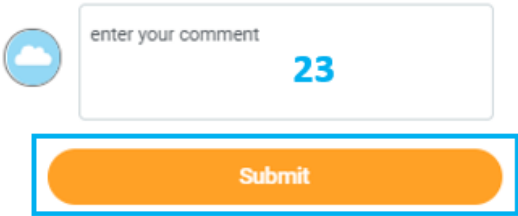
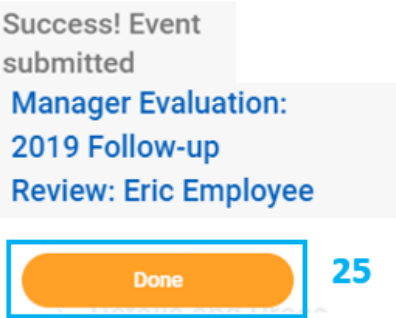
Step 9
Add comments and a rating based on your employee's goal outcomes.

Assign a rating for the Goal ("What" I do). Refer to the last page of this Job Aid for the definitions.

Step 10
Click the check mark icon near the top of the section to save your changes.

Step 11
Repeat steps 6 – 10 above to update remaining goals.

<p>Summary</p> <p>Overall Rating Weight 12 50</p> <p>Manager Evaluation</p> <p>Rating Meaningful Results</p> <p>13</p> <p>Next</p>	<p>Step 12 Review the summary section for Goals.</p> <p>Note: This section is not editable.</p> <p>Review your employee's Rating, which is calculated based on the average ratings you provided for each goal.</p> <p>Step 13 Click Next.</p>
<p>The "Way" I do it ▾</p> <p>The WAY we work is equally important as WHAT we accomplish. The following five competencies are used to measure the WAY we work.</p> <p><i>Note: This section is editable by manager only.</i></p> <p>Competency 14 </p> <p>Customer-Centric</p>	<p>Step 14 Click the pencil icon to review the description of each competency. </p>
<p>Description Puts our customers first. Number one priority is to provide an exceptional customer experience before, during, and after the sale of our product and expertise.</p> <p>Manager Evaluation</p> <p>Manager Proficiency Rating ★ select one 15</p> <p>Behavior (empty)</p> <p>Comment ★ Comments about your employee's demonstrated behaviors regarding this competency. 16</p>	<p>Step 15 Choose a rating based on your employee's behavior relative to the competency (the "Way" I do it) description.</p> <p>Refer to the last page of this Job Aid for the definitions of The Way.</p> <p>Step 16 Comment on your employee's related behaviors demonstrated including strengths and opportunities.</p> <p>Click the check mark icon near the top of the section to save your changes. </p>
<p>17</p> <p>Back Next</p>	<p>Repeat steps 14 – 16 above to edit remaining competencies.</p> <p>Step 17 Click Next.</p>

	<p>Step 18 Review the summary section for Competencies.</p> <p>Note: This section is not editable.</p> <p>Review your employee’s rating, which is based on the average ratings that you provided for each behavior.</p> <p>Step 19 Click Next</p>
	<p>Step 20 Review your employee’s overall rating category, which is based on the average ratings from the “what I do” and the “way I do it” sections. Note: This rating is not editable.</p> <p>Step 21 Review your employee’s overall comment and click the pencil icon to add a required overall manager comment.</p> <p>Step 22 Click Next.</p>
	<p>Step 23 Review the Annual Review. Add optional comments, which will be visible to HR</p> <p>Step 24 Click Submit.</p>
	<p>Step 25 Click Done.</p> <p>Your completed Manager Evaluation Follow-up Review will route to your manager for review and approval.</p> <p>After manager approval, the review will route to the Talent Manager and will be held until the performance discussion. It will then be routed back to you for the discussion.</p>

FAQs

What happens next? After you complete the performance discussion To Do item and submit the review, your employee will receive an Inbox task to acknowledge the completed Follow-up Review. If he/she adds final comments at that time, you will receive an additional Inbox task to review and acknowledge the comments.

Who can see the Follow-up Review? The Follow-up Review is visible by your employee, his/her management chain, and HR.

Where can I see the completed Follow-up Review? The review is visible to you in the Team Performance worklet and on your employee's Profile in the Performance Profile Group.

What if I need to edit the review after the performance discussion with my employee? Please contact your HR Business Partner for assistance.

Goal (“What” I Do) Definitions

Extraordinary Results – individual's performance exceeds most other employees in the same or similar positions

Meaningful Results – individual's performance would generally be expected from most competent, experienced employees

Room for Greater Results – individual's performance is characterized as “just getting by”

Competency (The “Way” I Do It) Definitions

Exceeds Expectations – consistently demonstrates levels of effort, quality of work, initiative, innovation, advocacy, and leadership that goes beyond what is expected

Meets Expectations – consistently meets expectations and performance is fully satisfactory

Not Meeting Expectations – fails to meet some significant behavioral expectations and improvement is required to fully meet the expectations of the position