

Add Goal to Employees (Cascade Existing Goals)

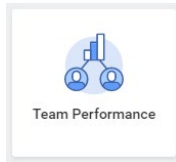
Overview

Add Goal to Employees allows you to cascade goals that support the Corporate Strategy and CoorsTek's annual company goals to any employees who report up to you. This function is an efficient way to add goal(s) to multiple employees before the goal setting template is launched.

Who Can Do This: Manager, Management Chain, HRBP

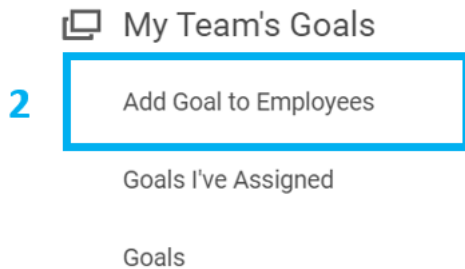
Things to Know:

- This job aid provides guidance in cascading goals that have been cascaded to you. If you want to create and cascade a new goal, please refer to the [Add Goal to Employees \(Cascade New Goals\)](#) job aid.
- You can assign goals to an individual employee, multiple employees or to all members of a Supervisory Organization.
- You and your employees may add and edit goals at any time – even cascaded goals.
- Any goals cascaded after the goal setting template is launched will not automatically populate in the template.



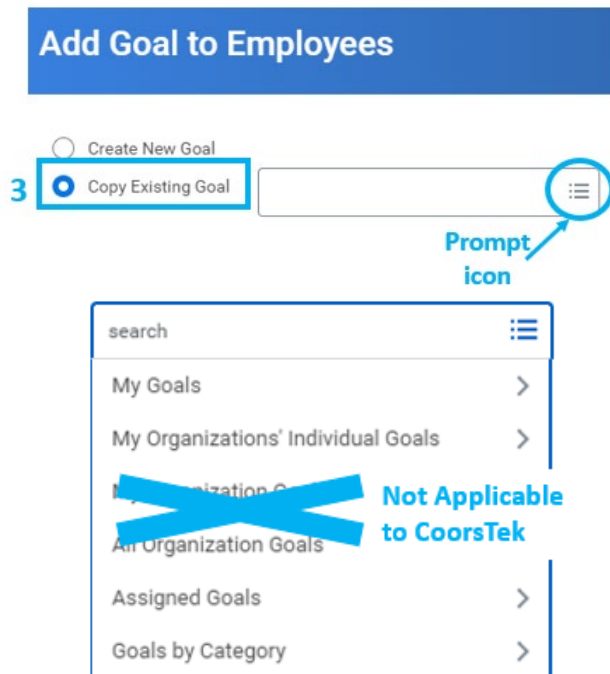
Step 1

Choose the Team Performance worklet.



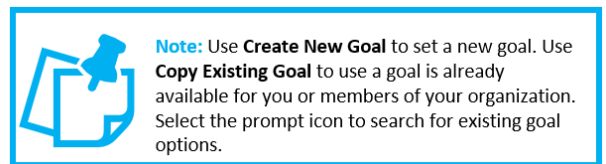
Step 2

Under the *My Team's Goals* menu, choose **Add Goal to Employees** to cascade goals to members of your organization



Step 3

Select radio button to **Copy Existing Goal**.



My Goals – any non-archived goals that are assigned to you.

My Organizations' Individual Goals – any non-archived goals that are assigned to any employees in your entire supervisory organization.

Assigned Goals – any goals that you have previously assigned to an employee in your organization.

Goals by Category – drill down by goal category to any goal that has been assigned to employees in your organization

Copy Existing Goal

Search

Check the box(es) of the goals you want to cascade

← My Goals

4

- Create a safety culture in Benton that results in a TCR rate of 0.77 or less, a near miss to injury ratio of 14% or greater, along with no Cardinal Rule violations
- Deliver favorable results on the Benton Balanced Scorecard (BSC) through achievement of Yield and Productivity savings of \$825k, and a plant customer return rate of less than 0.65%
- Deliver on the continued execution of the CORE model through demonstrated improvement to a score of 4 or better as measured by the CORE assessment tool
- Obtain RCRA/DOT certification for hazardous waste awareness training to ensure proper management of hazardous waste at the facility

Create New Goal

Copy Existing Goal

Search

- × Deliver favorable results on the Benton Balanced Scorecard (BSC) through achievement of Yield and Productivity savings of \$825k, and a plant customer return rate of less than 0.65%
- × Deliver on the continued execution of the CORE model through demonstrated improvement to a score of 4 or better as measured by the CORE assessment tool

Step 4

Based on the option selected in step 3, you will see a list of available goals to select. You can select *multiple goals* at once by checking the box by each goal you wish to cascade.

Your selected goals will populate in the drop-down box.

Assign To

5

Employees

Organizations

Prompt Icon

Search by Employees:

- My Team >
- Workers by Manager >
- Workers by Manager Hierarchy >
- Workers by Supervisory Organization >
- Workers by Supervisory Organization Hierarchy >

Search

Search by Organizations:

- My Organizations >
- Supervisory Organization by >
- M >
- Sup >
- Manag >
- >
- All Custom Organizations by Type >

Search

Step 5

In the Assign To field, you can choose either Employees or Organizations to assign the goal.

Use the prompt icon to search for available employees or organizations.

Search by Employees options:

My Team – select from your direct reports
Workers by Manager* – select an employee by searching manager hierarchy
Workers by Manager Hierarchy – Do not recommend searching by this method
Workers by Supervisory Organization - select an employee by searching through supervisory organizations
Workers by Supervisory Organization Hierarchy* - Do not recommend searching by this method

* these options will return all available managers in CoorsTek but you will only have availability to select employees in your organization.

Search by Organizations options:

My Organizations – assigns to all direct reports in your organization.

We do not recommend searching by any other available methods in the organization dropdown.

Assign To

Employees

Organizations

6 Include Subordinate Organizations **Be cautious when using!**



Note: If you assign goals by organization, every member of the Organization will receive the goal. This could re-cascade the same goal so please use caution when using. Additionally, if you include subordinate organizations, it will assign the goal to every individual within the selected management hierarchy.

7

OK

Cancel

Step 6

If you want to assign to **all** employees in your management hierarchy, **select Include Subordinate Organizations**.

Step 7

Click **OK**

8 Assign To 10

9 **Edit existing goal details and description as needed**

Goal

Description

Category **Edit category if needed**

Due Date **Edit due date if needed (must be in current year)**

Editable **Must leave "Editable" checked**

10 **Add** **Select if you want to "add" a new goal for the employee(s) selected**

11

Submit

Save for Later

Cancel



Note: Select **Submit** if you are ready to cascade the goal(s). The employee(s) will receive a notification of the goals assigned. Select **Save for Later** if you aren't finished creating the goal. This will save a task in your inbox to complete later. Select **Cancel** if you want to void the process. This will not cascade to any employees and will lose any in process work.

Step 8

This is the total number of employees you have selected for the goal cascade. The number is a hyperlink that will open to show this list of employees.

Step 9

The goal details from the goal you copied will populate. You can edit/update any of the fields below as needed.

Goal - enter specific details about what is to be achieved

Description – optional field to add additional details for goal

Category – edit if needed. Category is required. Choose only 1 category per goal.

Due Date – edit due date for completion of the goal. Due date **MUST** fall within the current year for performance or it will not populate in mid-year or annual review templates.

Editable – always check "editable" so you have the option to modify the goal if needed.

Step 10

Choose **Add** if you want to create a new goal for this group. **CAUTION:** This will add the new goal to the same employee(s) currently selected (see Step 8).


Step 11

Click **Submit**, **Save for Later**, or **Cancel**

FAQ's

What happens next? Each employee to whom you assigned goals will receive a notification that goal(s) have been cascaded.

How can employees view and edit their goals? Employees can view and update their goals in the Talent and Performance worklet.

How will I know when an employee updates their goals? When your direct report adds or updates a goal, you will receive a notification. If you would like to track the changes made, encourage your employees to record details of the change using the activity stream icon. 

Why can't I uncheck "Editable" when adding a goal to employee(s)? The ability to assign non-editable goals is restricted to the administrator.

How do cascaded goals support the Corporate Strategy? Goals are cascaded to employees after the CEOs and ELT communicate the CoorsTek goals for the year. Cascaded goals will be in goal categories that are relevant to that employee's function, which helps contribute to meeting the organization's goals.