

Add Goal to Employees (Cascade New Goals)

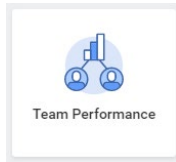
Overview

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

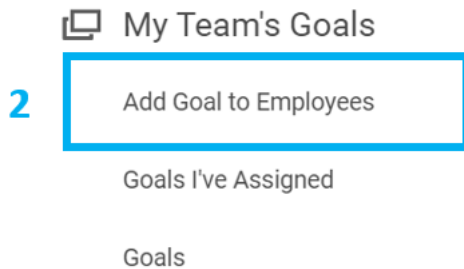
Things to Know:

- You can cascade goals that have been cascaded to you, but this job aid focuses on creating and cascading new goals. Please refer to the [Add Goal to Employees \(Cascade Existing Goals\)](#) 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.



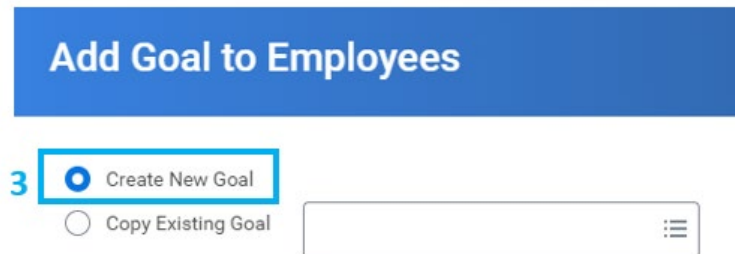
Step 1

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 **Create New Goal**.

Assign To

4 Employees

Prompt Icon



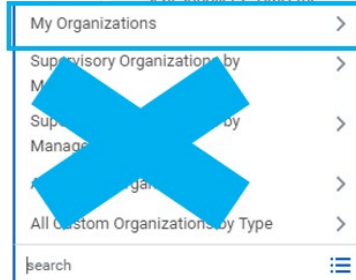
Organizations

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 >
- Manag >
- Sup >
- Manag >
- All Custom Organizations by Type >
- Search



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.

Assign To

Employees

Organizations

x Sally Supervisor ...

5 Include Subordinate Organizations

Be cautious when using!

6

Step 4

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

Step 5

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

Step 6

Click **OK**

Step 7
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 8
Complete the goal field by typing new goal. If you chose **Copy Existing Goal**, edit the goal wording as needed.

Goal - enter specific details about what is to be achieved
Description – optional field to add additional details for goal
Category – select a category for this goal. Category is required. Choose only 1 category per goal.
Due Date – enter a due date for the 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 9
Choose **Add** to add another goal. CAUTION: This will add the new goal to the same employee(s) currently selected.

Step 10
Click **Submit** and goal will be cascaded to employee(s) you selected.

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.