

Setting Goals Through Inbox Task

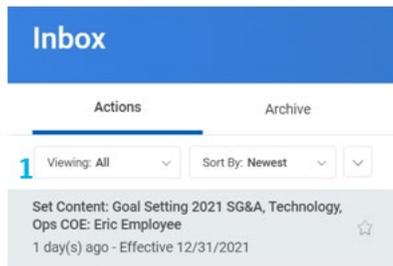
Overview

The formal Goal Setting process enables individuals to set goals on an annual basis to support CoorsTek's strategy.

Who Does This: Employee

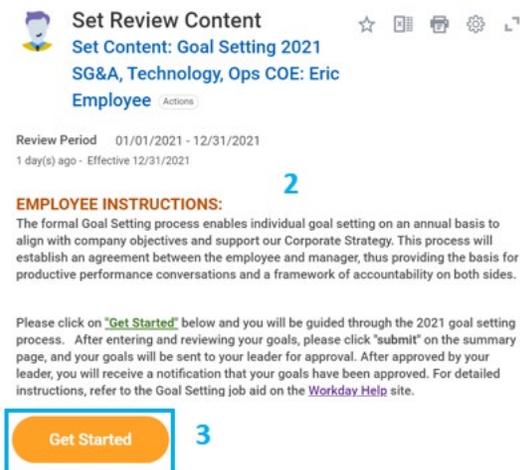
Things to Know:

- This process occurs once per year. You will receive an Inbox task after the formal Goal Setting process is launched. Newly hired employees will receive an inbox task after 30 days of employment.
- You are required to set a total of 5 goals, with 4 aligned to the strategy and the remaining goal to support your development and strengthen our team.
- You are required to enter a Due Date, Status, and Category for each goal.
- Once you submit your goal setting task, it will route to your leader for approval. You will receive a notification that your manager has approved. You can view and edit your goals in the Talent and Performance worklet.



Step 1

Choose the task **Set Content: Goal Setting** from your inbox.

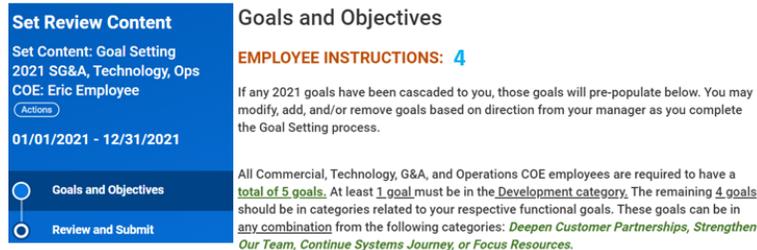


Step 2

Review the Employee Instructions help text.

Step 3

Click on **Get Started**.



Step 4

The Goals and Objectives section help text will provide details about the goal category requirements based on your function and job profile.

Please read this help text in detail so you understand the process to add goals as well as the required categories.

NOTE: This section is for employees creating their own goals through the goal setting task. If you have goals that have been cascaded from your supervisory chain, please click to skip to this [section](#).

Add

5

6

Goal

Description

Due Date

Category

Status

7

Add

8

Next

Save for Later



Note: If you do not have a goal category, goal status, due date, and 1 Development goal, you will receive an error when submitting. Please review your entries to make sure you have met these requirements.

Set Review Content

Set Content: Goal Setting
2021 SG&A, Technology, Ops
COE: Eric Employee

Actions

01/01/2021 - 12/31/2021

Goals and Objectives

Review and Submit

Goals and Objectives

Goal test

Description

Due Date 01/30/2021

Category CORE Model

Status Ahead of Schedule

Submit

Save for Later

9

Step 5

To enter your goals for the year, click on **Add**.

Step 6

Enter the details for your goal as follows:

- Goal – enter a short sentence or phrase that summarizes your goal (required)
- Description – enter 1 or 2 sentences about your goal (optional)
- Due Date – enter a due date in the current year (required)
- Category – enter category that aligns with your functional goals for the year. Choose only 1 category per goal (required)
- Status – enter current status of goal (required)

Step 7

Select **Add** to add your remaining goals for the year. Repeat Step 6 to enter goal details.

Step 8

At any time during the process, you can select **Save for Later** and the goal setting task will remain in your inbox with the updated details you have entered.

Once you have entered the required 5 goals for the year, select **Next**.

Step 9

The **Review and Submit** section provides an opportunity to review all the goals you created.

If you need to make a change to your goals, click on the **Goals and Objectives** header in the guided editor section.

Click **Submit** if you are ready to send your goals to your leader for review.

Click **Save for Later** if you are not ready to submit. The goal setting task will remain in your inbox with the updated details you have entered.

Success! Event submitted

Set Content: Goal Setting 2021 SG&A, Technology, Ops COE: Eric Employee [Actions](#)

Up Next

Approval by Manager

You will receive an on-screen message showing that your goals have been submitted and have routed to your manager for approval.

Note: This section is for employees who have goals cascaded from your supervisory organization. If you are creating your own goals, please click to navigate to this [section](#).

The screenshot shows a goal setting form with the following fields and annotations:

- Goal:** A text input field containing "CORE Test Goal" with a blue '5' to its left and a blue 'a' to its right.
- Description:** A text input field with a blue 'b' centered below it.
- Due Date:** A date picker field showing "12/31/2021" with a blue 'c' to its right.
- Category:** A dropdown menu showing "X CORE Model" with a blue 'd' to its right.
- Status:** A dropdown menu showing "select one" with a blue 'e' to its right.
- History:** A link labeled "> History" with a blue 'f' to its right.

Step 5

If your leader cascaded goals to you prior to the launch of your goal setting template, those goals will pre-populate in your template. You can edit the details of your cascaded goals:

- Goal –a short sentence or phrase that summarizes your goal (required)
- Description –1 or 2 sentences about your goal (optional)
- Due Date –due date in the current year (required)
- Category –category that aligns with your functional goals for the year. Choose only 1 category per goal (required)
- Status – enter current status of goal. Your cascaded goals will not have a status so you are required to enter a goal status before submitting
- History – click on the arrow to the left of this section to expand and see details of who cascaded this goal to you

The screenshot shows the "Add Existing" section of the goal setting form. A dropdown menu is open, listing the following options:

- All Valid Goals for Selection
- By Review
- By Status
- By Category
- Search

A blue circle highlights the "All Valid Goals for Selection" option, and a blue arrow points to the "Drop down menu" label below it.

Step 6

If your leader cascaded any goals to you after the launch of the goal setting template, you will have to pull those cascaded goals into your template.

Select the drop-down menu from **Add Existing**. Select **All Valid Goals for Selection**.

The screenshot shows a list of goals for selection. The "CORE Test Goal" is selected with a radio button. A blue circle highlights the radio button, and a blue arrow points to the "Radio button" label. Another blue circle highlights the three dots next to the "CORE Test Goal", and a blue arrow points to the "Click to expand and see details of cascaded goal" label.

Goal	Tommy Team Member
Efficiency Test Goal	Efficiency
On Time Delivery Test Goal	
Safety Test Goal	
Support location's 2020 CORE Block priorities plan	

Additional details for the selected goal:

- Goal: Efficiency Test Goal
- Category: Efficiency
- Due Date: 12/31/2021
- Created by: Lori Terrell
- Editable: Yes

Step 7

Select the radio button next to the goal you want to add to your template. You can also hover over the goal and will see three dots. Clicking on the dots will expand to see details of that cascaded goal.

Repeat steps 6-7 until you have added this year's cascaded goals to your template.

FAQs

What if I get an error when I try to submit? You may get an error message if you do not complete all of the required fields (*). You will also get an error if you do not meet all of the goal requirements prior to submitting. You must submit 5 goals, and one of those goals must be in the Development category.

What happens next? Your goal template will route to your manager for approval.

How will I know when my manager has approved my goals? You will receive a notification that your goals have been approved. You can also check the status of your Goal Setting in the Talent and Performance worklet under *My Performance and Feedback*.

How can I view and edit my goals? After the formal Goal Setting process is complete, you can view and update your goals in the Talent and Performance worklet. When you update a goal, your Manager will receive a notification. When editing a goal, use the activity stream icon to record details of the change. 

How do my individual goals support the Corporate Strategy? CoorsTek's annual strategic goals are cascaded through the organization. Your functional leader has aligned the goals of your function to support the corporate strategy. Every CoorsTek employee plays an important role in supporting the strategic goals!