

# Create and Assign SMART Goals

## Create and Assign SMART Goals

The objective is to demonstrate how a People Leader can create and assign a SMART Goal using the **Add Goals for Employee** task.

### Security Role

- Manager

## Contents

Create Goals .....	1
Acceptance Criteria .....	2

## Create Goals

1. From the **Search bar**, type **Add Goal to Employees**.
2. Select **Add Goal Employees** task from the list.
3. Select **Create New Goal**
4. Click in the **Employees** field, Select *My Team*.
5. Fill in the check box for the specific team member(s) to be assigned the goal.
6. Click **OK**.

### Add Goal to Employees

Create New Goal

Copy Existing Goal

### Assign To

Employees

Chase M Olson (80009434) ...

Justin J Burton (5875310) ...

Robert I Lake (80016637) ...

Organizations

OK

Cancel

7. From **Add Goal to Employees**, enter the title in the **Goal** field.
8. Add in **Description**, as needed.
9. Select *Annual Performance Goal* for the **Category** field.
10. Enter the goal weighting percentage in **Weight** field.
11. Enter a **Due Date**.
  - **NOTE:** Both the *Category* and *Due Date* fields must be filled in. This is required so the goal can be included in the performance review.
12. Check **Editable** box.
  - **NOTE:** Clicking Add will allow you to create additional goals to assign to the selected teammate(s).

## Create and Assign SMART Goals

**Add Goal to Employees**

Assign To 3

**Goal** \* Normal B I U A | : | |

Demonstrate how a people leader can create and assign a SMART goal to multiple team members at once.

**Description** Format B I U A | : | |

- Document the steps on how a people leader can create and assign creating and assigning a performance goal to more than one team member at the same time
- Explain fields which need to be filled out
- Emphasis on the importance of filling in both the Category field and the Due Date field. This will allow them to be included in the annual performance review.

**Category** X Annual Performance Goal ... |

**Weight** 25

**Due Date** 12/31/2023

**Editable**

Remove

Add

13. Click **Submit** to finalize the goal create process and assign to the selected teammate(s).

Submit Save for Later Cancel

### Acceptance Criteria

14. Verify that you have been successful in adding goals for the teammate(s)
15. Click the Menu icon > select My Team > click on one of the teammates to whom you assigned the goal.
16. From their profile, click Performance > confirm goal is displayed on the **Individual Goals** section.