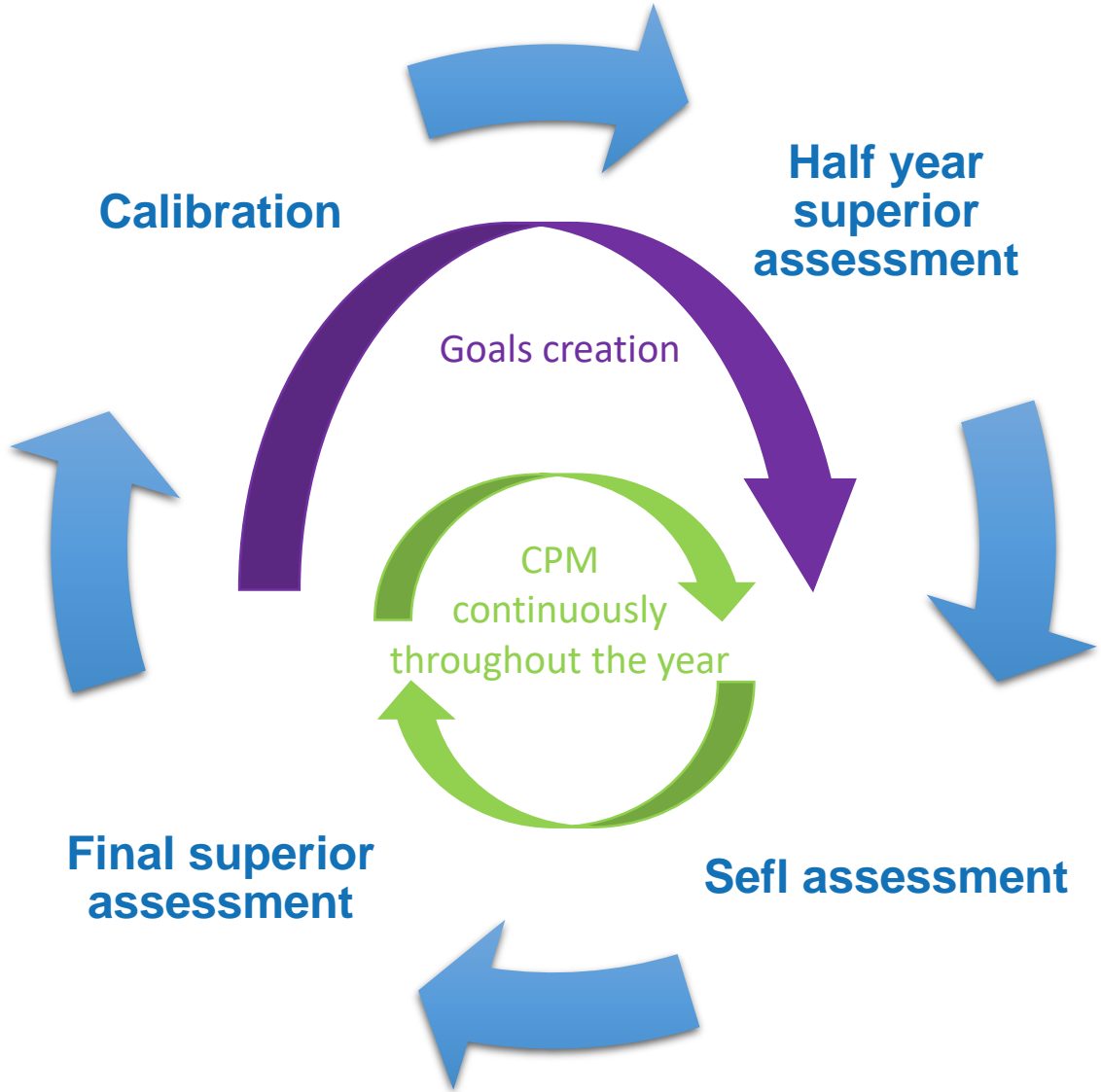




GOAL ASSESSMENT PROCESS





Performance assessment process

Assessment phase	Period	Step owner	Form	Goals created/edited
1. Half year superior assessment	1. 6. – 30. 6.	Superior	System + 1:1 meeting	Yes/Yes
2. Self assessment	15. 9. – 15. 10.	Employee	System	No/Yes
3. Final superior assessment (+ setting new goals)	15. 10. – 15. 11.	Superior	System + 1:1 meeting	Yes (for next period)/Yes
4. Employee confirmation	until 15. 12.	Employee	System	No/No
5. Calibration	1. 1. – 28. 2.	HRBP	Meeting of HRBP and superiors	No/No
6. Superior confirmation	until 15. 3.	Superior	System	No/No



PERFORMANCE ASSESSMENT AND ASSESSMENT FORM

Performance assessment – Main page

The screenshot shows the 'Performance' main page. On the left is a 'My Forms' sidebar with categories: All Forms, In Progress, En Route, Completed, Create Folder, and Unfiled. The 'In Progress' section is expanded, and 'Inbox' is selected. The main area features a filter panel with dropdowns for Template, Current Step, Group, All or Reports Only, Subject, Division, Department, Location, Cost Center, Business Unit, Legal Entity, Pure HR, IsContingent, and Vendor. Below the filters is a table of forms. A callout points to the 'Performance' dropdown in the top navigation bar. Another callout points to the 'Inbox' option in the sidebar. A third callout points to a form in the table.

Select **Performance** in the combo box.

Inbox – here you can find all active forms that require your attention. Other active employee forms waiting for processing by others are in the **En Route** section.

Click on forms to open them and see the assessment.

See your team's forms, what step they are currently in, when they are due, and other information.

Title	Subject	Current Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date
<input type="checkbox"/> 2023 Performance for Ben Brook	Ben Brook	Half year superior as...	01/23/2024	06/30/2023	01/22/2024	03/15/2024	03/15/2024

Assessment form – Headers

Logo image. Home Page link. Performance

Search for actions or people

Reviews Team Overview

Back to: Inbox

2023 Performance for Ben Brook

Ben Brook

Overall Score Incomplete Items 0

Route Map Introduction User Information 2023 Goals 2023 Development Goals Core Competencies Role Specific Competencies Summary

Route Map

1 Due 06/30/2024 Half year superior assessment

2 Self assessment

3 Final superior assessment

4 Employee confirmation

5 Calibration

6 Superior confirmation

7 Completed

Introduction

Performance management establishes shared understanding of what is to be achieved and provides an approach to managing, leading and developing employees that will ensure it is achieved. Performance management encompasses activities such as joint goal setting, continuous progress review and frequent communication, feedback and coaching for improved performance, implementation of employee development programmes and rewarding achievements. As a manager, you adopt performance management practices that will facilitate continuous review and ongoing development of your team members in order to deliver departmental and company goals.

User Information

Last Name	Brook	First Name	Ben
Department	Warehouse & Logistics (10002977)	Job Code	Accounting Specialist (21000335)
Superior	Anna Fialová		

Tile showing number of incomplete items in the assessment.

Use these options to move between individual section of the assessment form.

Here you can see the ranking of team members according to the overall score.

The steps of the assessment process in the assessment forms (symbol „i“ provide more information about each step).



GOAL ASSESSMENT FORM

Assessment form – Goals (performance)

You can edit / delete goals

2021 Goals

+ Create a New Goal

Do roka dodávat 50 000 výrobků ročně
50 000 dodávaných výrobků na konci roku



Not Started

Rate your team members for individual goals using 1-5 scale (by hovering over each point, you can see each rating's word description, a more detailed description is available from the question mark symbol). In case there is nothing to evaluate in current period, use „unable to rate“.

* Rating ?

○ ○ ○ ○ ○ ○ Unable to rate

Superiors Comments

B *I* U | | | Size

Achievements Goal Details

There are no Achievements.

Place for comments.


Fields marked by asterisk must be filled out

Assessment form – Development goals


2021 Development Goals

+ Create a New Goal

Development goals should reflect needs of individuals required to fulfil performance goals or to achieve career growth (taking over new responsibilities, horizontal/vertical growth, etc.). They are important for personal and professional growth that supports a quality of fulfilment performance goals in the future.








Být dobrým prezentérem v anglickém jazyce  

12 zrealizovaných anglických prezentací za rok

* Rating 

 Select a rating...

Superiors Comments

B *I* U |  |  |  |  |  |  | Size 

The next section of the assessment form is the **Development goals** – the purpose of this section is identical to the previous section **Goals** (performance)

Not Started

Achievements

Learning Activities

Goal Details

There are no Achievements.

Development goals should reflect needs of individuals required to fulfil performance goals or to achieve career growth (taking over new responsibilities, horizontal/vertical growth, etc.)



COMPETENCY ASSESSMENT FORM

Assessment form – competencies

Core Competencies

Flexibility / Innovation

She/he has the ability to adapt to changes in the environment on a personal and workload basis, remaining professionally focused on assignments and goals without emotional reaction and task disruption.

She/he comes up with new ideas which contribute to company culture, development of business, technology or she/he helps to simplify the processes. She/he encourages positive changes.

* Rating ⓘ

○ ○ ○ ○ ○ ○ ○ Select a rating...

Flexibility / Innovation Behavior Statements

Show behavior descriptions

Actively comes with new ideas and is able to propose alternative solutions.

She/he can suit to new conditions.

The changes solves rationally and in tranquility.

Ratings from Others

There are no Ratings from Others.

Under each competency's name is its description. Below that are written examples of typical behaviours connected with the competency. Rating scale of competency is the same as goals rating scale.

Responsibility / Integrity

Demonstrating responsible, reliable and trustworthy behaviour in all aspects of work, accepting personal responsibility in relation to work and other colleagues.

She/he has the ability to behave in an honest, fair, and ethical manner. Showing consistency in words and action: Having strong moral principles.

* Rating ⓘ

○ ○ ○ ○ ○ ○ ○ Select a rating...

Ratings from Others

There are no Ratings from Others.

All competencies (both specific and core, for superiors and subordinates) are derived from the company mission



ASSESSMENT FORM FINAL PHASES OF ASSESSMENT

Assessment form – Employee view

2021 Goals

Do roka dodávat 50 000 výrobků ročně

50 000 dodávaných výrobků na konci roku

* Rating Select a rating...

Employees Comments

Achievements Goal Details

There are no Achievements.

Not Started

Ratings from Others
There are no Ratings from Others.



Employees can see their assessment form with individual goals/competencies throughout the assessment process. They can edit statuses or add comments. They complete self assessment once per year. The self assessment step is similar to the superior's assessment.



The employee can see superior's comments. However, they cannot see the ratings.

Assessment form – Final assessment by superior I


2021 Development Goals + Create a New Goal

Development goals should reflect needs of individuals required to fulfil performance goals or to achieve career growth (taking over new responsibilities, horizontal/vertical growth, etc.). They are important for personal and professional growth that supports a quality of fulfilment performance goals in the future.

Být dobrým prezentérem v anglickém jazyce  
12 zrealizovaných anglických prezentací za rok




* Rating 
 Needs Improvement

Superiors Comments



Not Started

Ratings from Others


 Rating 
 2.0 - Needs Improvement

Achievements Learning Activities Goal Details

There are no Achievements.

Section Comments on Development Goals

* Superiors Comments




Employees Comments
Potrebuj v'c praxe.

This is how superior sees ratings and comments from team members

Assessment form – Final assessment by superior II

Summary

Overall Form Rating:  Exceeds Requirements

Superior's Comments

Calculated Form Rating: 3.9/5.0

Here, during the final assessment, you have to choose the overall evaluation for the employee.

At the end of the assessment form, you will see the calculated rating based on ratings of individual goals/competencies

The final rating uses ratings of individual goals and competencies. **The final rating uses the following weighing of individual sections – goals = 70% (50% performance, 20% development); competencies = 30 %**

Assessment form – Calibration and HRBP view

2020 Goals

The section is for evaluating goals.

Goal example

Metric example...

Achievements

Goal Details

There are no Achievements.

Not Started

In the calibration step, HRBP sees the name of the goal, comments, and achievements linked from the **Continuous assessment**. They cannot see the ratings of individual items.

Section Comments on Goals Achievement

Superiors Comments

Comment example....

Employees Comments

Employees comments example...

Superiors will be invited to attend a calibration meeting with their HRBP. The goal of calibration is to moderate managers' view of ratings. As a result, ratings may be changed.

Summary

Overall Form Rating: ②

●●●●○ Exceeds Requirements

Calculated Form Rating:

3.9/5.0

HRBP sees the employee's overall rating and the **Calculated Form Rating** calculated by the system based on individual item's ratings.

Cancel

Save and Close

Next step

Assessment form – Confirmation by employee/superior

Confirmation

Employee: Zato Nemůžu has not confirmed yet

Employees Comments

B I U | | | | | | | | | | | | | | | | Size ▾ |

Manager: Tomáš Marný has not confirmed yet

Cancel Save and Close **Confirm**

The final steps in the assessment process are the confirmation by the employee and their superior. Click **Confirm** to finish.

Confirmation

Employee: Zato Nemůžu 04/16/2020

Manager: Tomáš Marný has not confirmed yet

Superiors Comments

B I U | | | | | | | | | | | | | | | | Size ▾ |

Cancel Save and Close **Confirm**

This phase represents a formal confirmation/closing of the assessment form for the given period. No changes are possible.