

Objectives – Employee Guide

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Uploaded Objectives

Objectives will be uploaded for the following employees:

- General Managers
- Area Managers, Operations Managers, Operations Directors and Directors of Operations - Managed Estate
- Regional Managers, Operations Managers, Operations Directors and Business Unit Directors - L&T Core and Development
- Regional Managers, Operations Managers and Business Unit Director - Craft Union Estate

These will be uploaded centrally into the system after the appraisal window and will be listed under ‘Goals and Objectives’ in your plan. Example below;

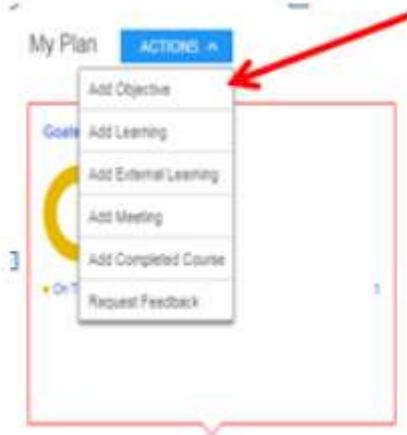
NAME	PROGRESS	ACTIONS
Complaints Resolved Target FY19 Address Complaints Resolved Target FY19 of 100%	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE
RHO Target FY19 Address RHO Target FY19 of 1	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE
Labour Budget FY19 - The Watro Arms Address Labour Budget FY19 of 17%	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE
Late Issues Target FY19 Address Late Items Target FY19 of under 0%	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE
MSF Target FY19 Address MSF Target FY19 of 95%	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE
Profit Budget FY19 - The Watro Arms Address Profit Budget FY19 of £75330	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE
Safe & Legal Target FY19 Address Safe & Legal Target FY19 of 90%	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE
Sales Budget FY19 - The Watro Arms Address Sales Budget FY19 of £350000	Progress 0%	01/02/2019 03/04/2019 MARK COMPLETE

You should not make any amendments to these objective details, if you do these will be overridden at year end. Any previous comments you or your line manager have made to your objective will be kept.

You still have the option to add any additional objectives, please refer to the ‘How to add an objective’ section.

How to Add an Objective

To add your objectives, go to your plan by clicking on the menu icon and then 'Me'.



You will now be in your plan. Select 'Actions' and then 'Add Objective' from the drop-down menu.

This will then open a pop-up box, you will then need to add the title for the objective you wish to create.

In the description box you should add your detail and justification regarding explicit aims and success measures. You can copy and paste from word, add images and get creative here!

You then need to select a 'Category'; there is a drop-down button which gives you the option to select Business Objective.

Next you'll need to select the 'start' and 'due' date of the objective. These dates need to fall within the financial year. It is important that these dates are set within the financial year otherwise the objective will not pull through to your appraisal at year end.

This screenshot shows the 'Add goal' form. The 'Start Date' field is highlighted with a red arrow and contains the date 27/07/2021. The 'Due Date' field is also highlighted with a red arrow. Other fields include 'Title', 'Description', 'Category' (Business Objective), 'Visible to' (My manager and above), and 'Exclude from Review' (No).

This screenshot shows the 'Add goal' form with red circles around the 'Visible to' dropdown (set to 'My manager and above') and the 'Exclude from Review' radio buttons (set to 'No').

For objectives to be pulled through to your appraisal you should leave the 'visible to' and 'exclude reviews' to the default position. If, however you have an objective that is personal to you then you can change the visible to 'only

assignee/objective owner'

Once you are happy with your content click 'Save'. Please note that once you have created an objective you **are unable** delete it.

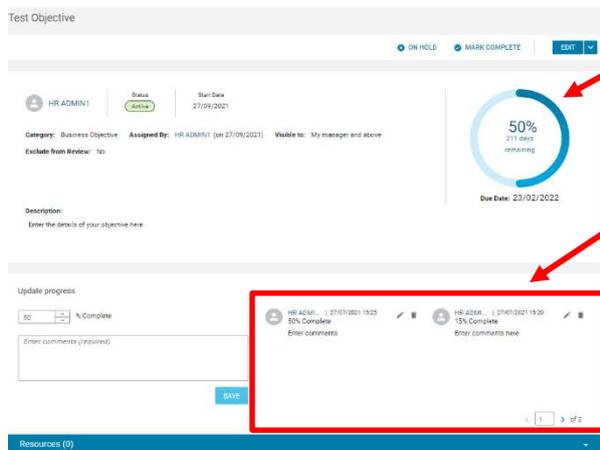
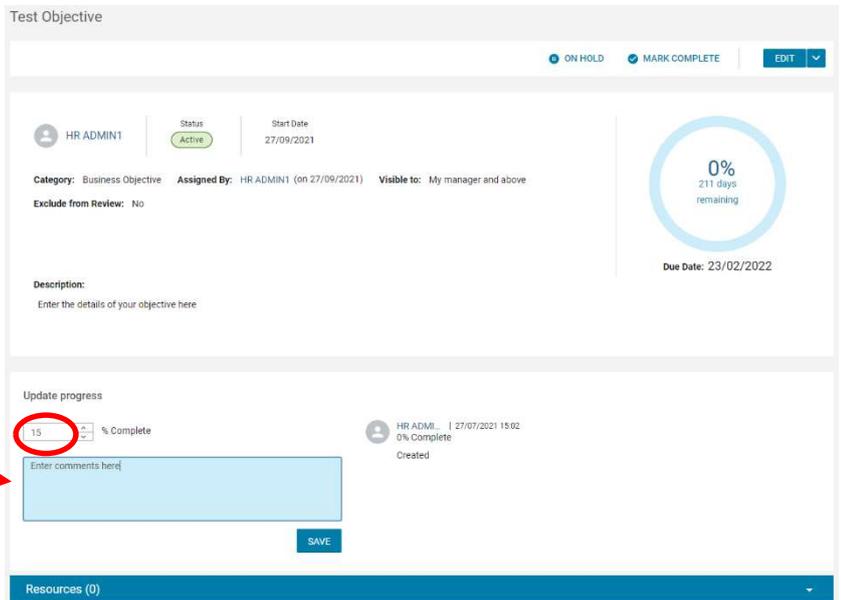
This screenshot shows the 'Add goal' form with a red arrow pointing to the 'Save' button at the bottom right.

This screenshot shows the 'Test Objective' page. The 'EDIT' button is circled in red. The objective is titled 'Test Objective', is 'Active', and has a start date of 27/09/2021. It is assigned to HR ADMIN1 and has a due date of 23/02/2022. A progress indicator shows 0% completion with 211 days remaining. The 'Update progress' section shows a progress bar at 0% and a 'SAVE' button.

You will now be able to see your objective details. If you click on edit you will be able to amend your objective.

Updating Your Objective –Comments and Progress % Bar

To update your progress, enter the value in the ‘% complete’ box and in the free-type field add your progress comments and click save. Please note there is a 500 character limit on comments; you will be able to go into more detail in your end of year appraisal. There will be a green box to confirm that your update has been saved.



Your update will now show to the right of the ‘update progress’ section and you will notice the % circle has also been updated. If you need to edit or delete your comments you can use the pen or bin icon. The more updates you complete you will need to use the arrow buttons to toggle through your previous comments.

When you return to your plan you can see that the progress bar has now been updated.

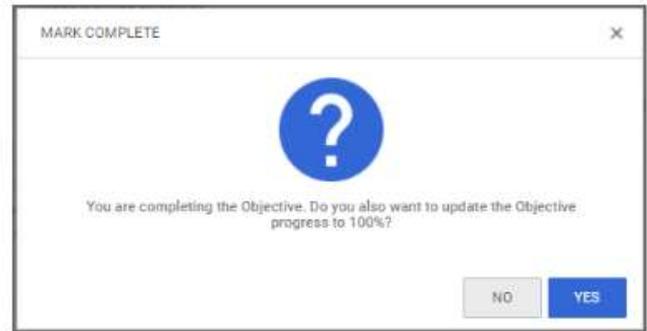


Updating Your Objective–Marking as Completed/ No Longer Required

If you update your progress to 100% on an objective, this will automatically mark it as complete. You can also mark your objective complete by clicking the 'Mark Complete' button next to the objective in your Plan. You can use this at any time if the objective is no longer applicable for example if you have moved role.

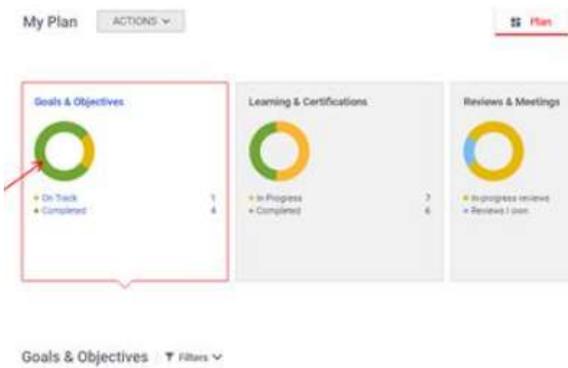


When you click on 'Mark Complete' a new pop-up appears asking if you want to mark as 100%. If you are marking this objective complete because you are moving role then select No. If you are marking it complete because it is finished, then click Yes. Click the cross if you do not want to mark it as complete. Once you have marked an objective as completed you will no longer be able to make comments on the objective.



If you have accidentally marked your objective as completed your objective will no longer show. You can find the object by clicking on the completed section (green) part of the ring in your plan.

Then you can undo this by clicking on the drop down next to archive and selecting Re-activate



Once you have reached 100% progress then the objective is complete and will no longer show in this section. To review your completed objectives, you can do so by clicking on the green part of the goals and objectives ring.