## Revision History

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Legal Disclaimer

This Program First/iSuccess initiative from HCL ('Company') consisting of Performance management, career management, rewards management, talent management and learning management,

1. May not address every question or every possible circumstance with respect to every employee situation

2. Should be always read in conjunction with applicable laws of the jurisdiction, and the respective employment contract (and other applicable employment policies and procedures) pursuant to which an employee has been hired. In case of any conflict between this document on one side and any applicable laws of the jurisdiction or employment contract on the other side, the applicable laws of the jurisdiction or the applicable employment contract, will prevail. Provided that to the extent there are no such conflicts, Program First/iSuccess will apply to every employee working for HCL.

3. Nothing in this Program First/iSuccess is designed to interfere with, restrain, or prevent an employee from exercising statutory rights, wages, hours of work, collective bargaining or other terms and conditions of employment, which are protected under law. HCL employees have the right to engage in or refrain from such activities.

4. In the process of implementation of Program First/iSuccess, Company may receive different types of information about the employee, including: 1) the information the employee chooses to share (such as locational preference, target roles, etc.); 2) Information others share about the employee (peers, managers and others); and 3) Other information the Company receives about the employee (including additional related data or metadata) such as when the employee looks at another employee timeline, post a referral or otherwise interact with the Program First/iSuccess platform. Personal information of any employee that HCL obtains or receives during this process will be held and used in accordance with applicable data privacy laws and HCL’s policy in this regard. It will be treated confidentially and shared internally with a limited number of people who have a need to know or who are responsible for dealing with its implementation. This may, in some cases, include persons in other countries (including India) where HCL does business or have a back office presence. The Company will store such information/data for as long as the employee is employed with HCL and/or the Company reasonably requires access to such information.

5. Notwithstanding anything contained herein, the Company is authorized to share the aforementioned data/information, in case the Company receives any specific direction/s for sharing any data or information regarding an employee from any governmental or judicial or quasi-judicial authority etc.
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**Goals**

Goals are targets/objectives that we have to achieve in a specific time frame. An act of setting Goals has 3 pronged advantages:

- Goals would vary depending on your project and role. While someone could have a Goal to reduce attrition; another could have a target to solution a new framework; or to reduce bug in certain application; or to address complaints effectively.

- While Goals are the ultimate end result, try and see if you can break them down into smaller milestones / deliverables to help you stay on track or course correct if required.
Types of Goals

- **Public**: The Goal information of a Public Goal will be visible to Upwards & Downwards hierarchy (Reporting Manager & Project Reporting Manager Hierarchy) mapped HR along with the peers (Peers are the group of individuals who reports to same RM)

- **Private**: The Goal name and description of a Private Goal will be visible to Upwards hierarchy (Reporting Manager & Project Reporting Manager Hierarchy) along with mapped HR.

HCL's Philosophy for Goals

It is suggested to have discussion with the Manager(s) about your SMART Goals at the beginning of the review period and at the trigger of project assignations during the review period. **Our review period will be 12 months (July to June).**

Goals created will be **Private** by default. Employees have the flexibility and can change the visibility to Public/Private taking into consideration the sensitivity towards Goals (For eg: working on an acquisition, new enhancement to the solution etc.)

We encourage continuous conversations. Employees and Managers should have at least one quick review after a project gets over or once a quarter whichever is earlier to ensure Goals are aligned, progress is on track and course correct if required. It is important to record discussions posting meetings and share status reports on a time to time basis. **After six months of the review period, these Goals will be basis of Feedback Exchange Review – so please ensure Goals are set on time, recorded and executed as per plan.**

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S.M.A.R.T Goals

S.M.A.R.T Goals are Specific, Measurable, Achievable, Relevant and Time-bound.

Examples of SMART Goals:
Below are some examples of S.M.A.R.T Goals:

- I will acquire three new clients for my business within two months by asking for referrals, launching a social media marketing campaign and networking with local businesses. This will allow me to grow my business and increase my revenue.
- Increase revenue for existing clients by 2X till Dec 31, 2014.
- Increase followers of our LinkedIn company page to xxx by the end of the 2nd quarter in 2015.

Examples of Ambiguous Goals:

The following are the examples of bad Goal Setting as the Goals are ambiguous and don’t explain anything.

- Achieve targets
- Hiring for HCL
- Consistency In Production
Where do I start?

**Step 1:** Finalize Goals with your Manager. While the weightages during review period may exceed 100% however at the time of Mid & Annual Review ensure the weightages add up to 100%.

**Step 2:** Login to iSuccess and access the Home Page and select Expectation Exchange from the Home drop down at the top left corner.

MyHCL >> HR Studio >> PERFORM >> iSuccess Expectation Exchange >> Home >> Expectation Exchange

![Fig1. Path (iSuccess)](image-url)
Step 3: Get familiar with the flow of this page:

- Notice the heading of the Goalsheet—“2016-17 Delivery & Enabling Worksheet for XYZ” in Expectation Exchange Sheet.
- Select appropriate Goalsheet from the “Switch Plan” dropdown. Switch Plan displays 6 Goalsheet basis on your entity:
  - 2016-2017 Delivery & Enabling Expectation Exchange Worksheet.
  - 2016-2017 Sales Expectation Exchange Worksheet.

**Copy Goals:**

You can access the previous year Goals by selecting the previous year Goalsheet and you can copy the previous mentioned Goals onto the current 2016-2017 Worksheet by using “Copy from Other Goal Plan” option.
Once you select the “Copy from Other Goal Plan” option, it will navigate you to another window. In order to copy the goals present in 2014-2015 or 2015-2016 Goalsheet, Follow the below mentioned steps:

**Procedure to Copy Goals:**

**Step 1:** Select the Goal Plan with the Goal(s) you want to copy. Click on “Next” option.

**Step 2:** Select the Goal you want to copy by ticking the checkbox. Click on “Copy” option. Selected Goal will get copied on the 2016-2017 Goalsheet.

- Display Options allows you to choose the fields you would like to view in the Goals listing below.
How to Create Goals?

**Step 1:** Click on “Add New” button on the top of the Expectation Exchange sheet. You will find two options “Create a New Goal” & “Copy from Others Goal Plan”. Click on the relevant option.

- By using “Create a New Goal” you can create goals by using either “Personal Goal” or by “Library Goal”.

**Step 2:** Fill in the fields (notice that some are mandatory):

- **Visibility:** You have the flexibility to change visibility of Goal as appropriate.
  The default setting is Private i.e. the Goal name and description can be viewed by those in upward hierarchy (Reporting Manager & Project Reporting Manager Hierarchy) along with mapped HR. You can change the visibility setting to Public to make it known to those in your downward hierarchy, upward hierarchy, Peers and mapped HR.

- **Category:** Your performance is viewed from multiple perspectives and your Goals are aligned accordingly.
  - **Financial Excellence:** Goals that have a financial or monetary impact to the business. Performance against these Goals indicates whether our balance sheet targets are met. Examples of related metrics could be % Gross Margin; % LoB Margin; % Project Margin etc.
  
  - **Delivery Excellence:** Goals associated with customer service delivery. Performance against these goals indicates whether our services are delivered with continuous improvement in sight. Examples of related metrics could be Business Maturity; Economic Utilization; Training Hours etc.

  - **People Excellence:** Goals associated with satisfaction of internal stakeholders. Performance against these goals indicates whether our people and teams are engaged, productive and actively learning. Examples of related metrics could be Top Talent Attrition %; Capability Building Self/Team

  - **Customer Excellence:** Goals associated with customer satisfaction. Performance against customer goals indicates, whether our services conform to agreed customer requirements resulting in
customer’s satisfaction with our work and strategic partnership. Examples of related metrics could be ACSAT; PCSAT; Customer Visit; Proposal Works etc.

- **Operational Excellence**: Goals associated with internal business processes. Performance against operational goals indicates whether our services conform to the defined schedule, quality and budgetary guidelines. Examples of related metrics could be Compliance; Collaboration etc.

- **Others**: Goals which do not get covered under any of the above mentioned categories. For example Case Studies/White Papers; Initiatives; GDC Mobilization etc.
  
  Make an appropriate choice based on how your Goals align with given categories.

- **Goal Name**: Point out the list of the Goal.

- **Goal Description**: Explain what needs to be accomplished.

- **Weight**: Assign appropriate weight to each Goal, based on the effort investment. This can be in relation to other goals during the period.

- **Work Area Level**: Specify the level at which you will take target against this goal. For example, if you are a Delivery Unit Head (DUH) select L4 org unit as the work area level. Similarly, if you manage project delivery select Project as the work area level.
  
  Make an appropriate selection out of the identified 6 work area levels - L1 org unit, L2 org unit, L3 org unit, L4 org unit, Customer, Project and Individual.

- **Work Area Code**: Mention the code of the work area you manage/are assigned to. This should be obviously in line with the work area level selection. For example, if you are the DUH for following L4 org unit ERS-SEG-Microsoft-CS the corresponding L4 code - 54014740 should be mentioned.
* Please refer to the below mentioned information in order to better understand how to fill the Work Area Code in correspondence to Work Area Level.

**L1 org unit:** You will be able to locate your L1 org unit work area level in Employee Self Service (ESS). Please visit:

**MyHCL >> My Career >> Employee Self Service (ESS)**

- You can also locate you L1 org unit under the “Personal Information” Portlet in iSuccess.
  
  iSuccess >> My Employee File >> Public Profile >> Employee Information >> Personal Information

**L2 org unit:** You will be able to locate your L2 org unit work area level in Employee Self Service (ESS). Please visit:

**MyHCL >> My Career >> Employee Self Service (ESS)**

**L3 org unit:** You will be able to locate your L3 org unit work area level in Employee Self Service (ESS). Please visit:

**MyHCL >> My Career >> Employee Self Service (ESS)**

**L4 org unit:** You will be able to locate your L4 org unit work area level in Employee Self Service (ESS). Please visit:

**MyHCL >> My Career >> Employee Self Service (ESS)**

- You can also locate you L1 org unit under the “Personal Information” Portlet in iSuccess.
  
  iSuccess >> My Employee File >> Public Profile >> Employee Information >> Personal Information
Fig5. Employee Self Service (ESS)

**Customer:** You will be able to locate your customer name and customer code under the “Project Experience” portlet in the iSuccess.

**iSuccess >> Employee Information >> Project Experience**

**Project:** You will be able to locate your Project name and Project code under the “Project Experience” portlet in the iSuccess.

**iSuccess >> My Employee File >> Public Profile >> Employee Information >> Project Experience**

Fig6. Employee Information

**Individual:** You need to provide the individual code assigned to you.

- **Start Date and Due Date:** The time period in which you set your Goals.
- **Status**: Update the status to showcase your progress towards the Goal. Select from following status options – Not Started, On Track, Lagging and Complete.

- **Sub-Goal/Milestone**: You can split a Goal into multiple sub Goals or logical milestones. Provide a brief description, start and end dates and status for each of them. This is a non-mandatory field.

- **% Complete**: Mention how much has been accomplished. Represent completion in percentage terms.

- **Target**: Identify a target or expected outcome for each Goal. Typically, a numeric value.

- **Target Description**: Describe the expected outcome.

- **Actual**: Identify the achievement versus expected outcome/target. Typically, in numeric terms.

- **Key Results Achieved**: Describe the results achieved versus a target.

- **Probability of Success**: Express the likelihood of achieving a Goal. You can select High, Medium or Low as probability of success. However, by default it is set as high.

- **Unit of Measurement**: Identify a yardstick or standard of measurement. Depending on the Goal you can select Rating, Numeric, Percentage, Hours, days, Currency-INR, Currency-USD as unit of measurement.

- **Comments**: This is a free text input field. Use it to record your comments, action plan or pointers for discussion.
Legal Scan: The Legal Scan library is the content of the Legal Scan tool, which checks for potentially improper or discriminatory language in comment sections of forms. Legal Scan works much like a spell-checker. Legal Scan automatically reviews the selected text and displays any words that are potentially improper.

Spell Check: Spell Check checks the spelling of words in a text document. All grammatical errors can be easily captured by using spell check.

If you want to add a similar Goal, click on the edit button, make the changes and use the save as new button (left hand bottom corner). The new Goal will get added to the existing list and the original Goal would remain.

**If you have copied Goals from the previous 2014-2015, 2015-2016 Goalsheet, You will find two options in the Goal edit window.

1. You can make changes to the existing Goal and save them by using “Save Changes” option.
2. You can create a “Save As” version of the same goal by using the “Save as New” option. Save as new option helps you to create a new copy of the goal in the existing Goalsheet.

Fig8. Copy goals from previous Goal Sheet
Goals Library

When you click on “Create a new Goal” button, you have an option to choose Goals from Goals Library (list of commonly used Goals).

**Personal Goals** - Personal Goals allow you to make your own Goals and assign any metrics you want.

Library Goals are selected from an organized library with suggested metrics. Goals Library allows you to select multiple Goals in one go.
Commonly Used Template

Select from the Goals Library - Commonly Used Templates; you can also select a ready Role Based Goal Template from the frequently used templates range. You can add or drop a Goal from the selected Goals Template as per need.

 Cascade Goals: Cascade Goal means sharing one Employee’s Goals with another, such as Manager can share his/her Goal with the Direct/Project Reportee. User will have an option to cascade a Goal to their team members or as appropriate.

- Select the Goal that needs to be cascaded and click on “Cascade Selected” button.

- You may use this as a starting point and edit as required. When setting Goals for the period, Goals can be aligned by cascading them.
Fig11. Cascade Goals

Unlock Goal Plans: Expectation Exchange Form will be unlocked throughout the review period.
Goal Features

In the Goals list, notice the action button on the extreme right which can be used to edit Goals, View goal in detail, Link to another Employee’s Goal, Goal alignment spotlight, add goal to outlook & delete goal.

**Step 1:** Select the Goal that needs to be deleted and click on “Delete Goal” button by using the action button. Selected Goal will be deleted from the Goal sheet.

**Log/Audit History:** User will have an option to view all the possible changes made by Reporting Manager/Project Reporting Manager in the Expectation Exchange Form by using audit history. Notice the button on the extreme right, by clicking the icon user will be able to view the audit history.
Link to another employee’s Goal: you can link your goals with other employees in your hierarchy.

Goal Alignment Spotlight

Goal Alignment Spotlight gives an overall picture in terms of Goal Alignment i.e. how one Goal can be aligned to one or more employee. It provides the status of overall Goal and will be reflected as ‘On track/Lagging/Complete’ and it also provides the progress status of individual/all Goals.
Add to Outlook:
This Feature helps in making a list of Goals that you would like to discuss on with your Manager and it also integrate the same with the Outlook. As soon as you highlight the below display option in the screenshot, it will automatically create a meeting appointment with that selected Goal which you need to discuss with your Manager.

Using the “Add to Outlook” you can quickly:
- You can select goals which need to be discussed with your manager.
- A Quick meeting appointment can be created at any point of time.
Validation/Non-Validation:

Validation of Goals is used by your Reporting Manager/Project Reporting Manager to signoff your Goals selected for the year. The Reporting manager/Project Reporting Manager has to click on “Validate Goals”, once validated by the respective Reporting Manager/Project Reporting Manager, the state of the form changes from Non-Validate to Validate.

This feature also help employees to keep a check on their Expectation Exchange Form whether they are validated or not and if not validated then they can follow up easily for the same with their respective Reporting manager/Project Reporting Manager. If in future the Goals get modified and needs to be revalidated, get in touch with your HR mapped in the Employee Profile to enable the option again.

Note: It is advised to have the Expectation Exchange Form validated by your respective Reporting Manager/Project Reporting manager for effective continuous Feedback.

![Fig17. Validated/Not Validated](image)

Weightage of Goals: Goals added in the Expectation Exchange form move into the Feedback Exchange form. Employees will be able to save Goals even if this criterion is not met in the planning stage. However, the Feedback Exchange form will not get created in such instances and also if the total weight is not equal to 100%.
Status Report

The Status Report tab enables users to provide/Managers to seek and view Status Reports on progress toward Goals. Select the amount of effort spent on a scale of 5, add comments if any. These changes can be made only by the employee. You can send this report to your Manager as required.

From the Status Report tab users can:

- Update Goals with current status.
- Click Comment to add notes.
- Update My Other Accomplishments section with other activities.
- Open right panel to see extra information useful for updating status.
- Click Save to save your work and come back later.

Click Send Status Update when you’re ready to send Status Report to others.

![Status Report](image)

Fig18. Status Report

Execution Map

The Execution Map provides an at-a-glance overview of progress on Goals that are aligned across the organization. The information displayed here comes from the Status Reports that are submitted for these Goals. Managers can use the Execution Map along with the built-in Status Report to instantly see all the
pieces of the puzzle, such as who is working on what and the current status of each task, so they can quickly determine if the overall Goal is on track or in trouble.

It is used to view the alignment of Goals across the organization based on cascading function. It shows up as a Map, with all the links between the Goals. From here the Manager can ask for status update against a Goal.

![Fig19. Execution Map](image)

### Meeting Agenda

The **Meeting Agenda** tool allows you to create a list of important Goals and print or send it in advance of an upcoming meeting. It helps in making a list of Goals that you would like to discuss on with your Manager.

Using the **Meeting Agenda** you can quickly:

- Add Goals to the **Meeting Agenda**.
- Filter the list of your **Meeting Agenda** Goals by Date Submitted, Effort Spent, and Probability of Success. Remove Goals from the agenda one by one (you can add them back through the filter)
Fig20. Meeting Agenda
FREQUENTLY ASKED QUESTIONS

1. What is iSuccess Expectation Exchange Process?

iSuccess Expectation Exchange Process helps your organization to ensure that all of your employees are aligned and working on the things that matter most so your company can bridge the strategy and execution gap and stay on the path to success.

2. What are advantages of iSuccess Expectation Exchange Process as an Employee?

iSuccess – Expectation Exchange is a Goal setting and review process. The inputs from the Expectation Exchange form flows directly into your Feedback Exchange Form.

As an employee here’s how you benefit from the process:

- Helps you and your Manager/Project Reporting Manager (PRM) align individual Goals and create line of sight with organizational or project or functional Goals.
- Deliver meaningful reviews to help ensure Employee Engagement and Retention.
- Helps you to seek and receive continuous feedback.
- Develop Employees and help Managers provide meaningful feedback and coaching
- Cultivate leaders and clearly identify not just high performers—but potential future leaders.
- Helps identify key outcomes expected from a job.
- Helps you decide how you want to focus your resources and spend your time.
- Creates mutual understanding between Employee and Manager regarding performance expectations.

3. Who are the key stakeholders in this process and what are their roles?

a. Employee:

- Create SMART (Specific, Measurable, Attainable, Relevant and Time-bound) Goals.
- Discuss and record Goals and targets with Project Reporting Manager depending on the job you are mapped too.
- Record Achievements
b. Project Manager/Reporting Manager:
   - Discuss any Goal related concerns with employee.

c. Project Reporting Manager:
   - Provide timely clarity on expectations.
   - Review Goals and targets.
   - Help employee identify course correction needs.

4. How does this process impact my Mid-year/ Annual Performance Review?
   The Goals set in iSuccess Expectation Exchange Form would flow directly into Feedback Exchange during Mid-Year/ Annual Performance Review for evaluation. This would enable your appraiser to carry out a more comprehensive Feedback Exchange review and developmental discussion with reference data from across the Feedback Exchange review period.

5. How should I (Employee) get any job mapping or job description related queries addressed?
   Please have a first level discussion with your Project/Reporting Manager to gain better clarity on the expectations from your job and reconfirm your ask. In-case of any further clarifications, your Project Manager/ Reporting Manager will get in touch with Career COE to take this further.

6. How should I (Project Manager/ Reporting Manager) get any job mapping or job description related queries addressed?
   You need to raise a Smart Service Desk (SSD) through following path:
   MyHCL >> SSD >> Application Issue, Process & Data Issue >> (Business Group) - HR >> (Business Process) - Program FIRST- Performance Management >> (Business Sub- Process) – “Select relevant Sub- Process”

7. Is Project Reporting Manager always same as the Project Manager?
   Most often, Project Reporting Manager is the designated Project Manager of the project. However, in certain large projects, a lead may be the actual work supervisor (allocates and reviews your
work). Therefore, (s)he could be mapped as Project Reporting Manager for project based evaluation.

8. The Project Reporting Manager reflected on my form is inappropriate. How could I get this corrected?

Project Reporting Manager can be updated/changed through Project Reporting Manager (PRM) tab available in Employee Self Service (ESS).

MyHCL >> My Profile (ESS) >> My information- Employment >> Project Reporting Manager

**If you are an Axon employee, please go to Touch Point and select Project Reporting Manager under quick links.

9. If I am working on multiple projects then how can I update my Project Reporting Manager (PRM)?

Project Reporting Manager can be updated through Employee Self Service (ESS). You can update maximum 2 Project Reporting Manager (PRM) in Employee Self Service (ESS).

MyHCL >> My Profile (ESS) >> My information- Employment >> Project Reporting Manager

![Fig21. ESS](image)

10. From where I can access Expectation Exchange in iSuccess?

MyHCL >> HR Studio>> PERFORM>> iSuccess Expectation Exchange

The iSuccess Home page is where users access all the activities and processes in the system, along with an overview of the status of performance activities/to do list.

The “Expectation Exchange” tile displays the user’s current Goals and allows easy access to the Goal tool by selecting any of the Goal names in the tile.
11. Who defines the Goals?

The Onus and Ownership of Goal Setting rests with the Employee (Initiator). Project and Job details associated with the employee are sourced from Resource Assignation System (RAS) and respective Goals/Responsibilities associated with it are sourced from the C-DEX portal on MyHCL.com. Thereafter, initiate a dialogue with your manager to finalize your Goals and targets for the current assignment.

12. What is Goal Plan?

Goal Plans are online worksheets used by the Employee and Manager to create Performance, Goals in one central place and track progress on them throughout the year.

13. What is role of Manager and Employee in Goal Plan?

Manager responsibilities include:

- Working collaboratively with each direct report to identify performance expectations for the upcoming review period.

- Cascading Goals to team, to ensure Employees’ Goals align to achieve role, team, and organizational Goals.

- Actively monitoring Goals, to ensure effective communication of progress up and down the organization.
Responsibilities of employees include:

- Creating SMART Goals that align with achieving role, team, and organizational Goals.
- Collaborating with Manager to regularly update progress on Goals.
- Focusing current job performance on achieving performance Goals and pursuing development Goals.

14. What is the Goal Plan Template?

A Goal Plan template is used to define the categories and fields for your Goal Plans. You can switch to various templates by using the Switch plan dropdown available at the right side of the Expectation Exchange Worksheet.

Fig23. Goal Plan Template

15. What are the categories can be used to organize the Goals on the Goal Plan Template?

Goals can be organized into Goal categories (Financial, Customer, Operational etc.)

Categories:

- Financial Excellence: Goals that have a financial or monetary impact to the business. Performance against these goals indicates, whether our balance sheet targets are met. Examples of related metrics could be % Gross Margin; % LoB Margin; % Project Margin etc.
- **Delivery Excellence**: Goals associated with customer service delivery. Performance against these goals indicates whether our services are delivered with continuous improvement in sight. Examples of related metrics could be Business Maturity; Economic Utilization; Training Hours etc.

- **People Excellence**: Goals associated with satisfaction of internal stakeholders. Performance against these goals indicates whether our people and teams are engaged, productive and actively learning. Examples of related metrics could be Top Talent Attrition %; Capability Building Self/Team

- **Customer Excellence**: Goals associated with customer satisfaction. Performance against customer goals indicates, whether our services conform to agreed customer requirements resulting in customer’s satisfaction with our work and strategic partnership. Examples of related metrics could be ACSAT; PCSAT; Customer Visit; Proposal Works etc.

- **Operational Excellence**: Goals associated with internal business processes. Performance against operational goals indicates, whether our services conform to the defined schedule, quality and budgetary guidelines. Examples of related metrics could be Compliance; Collaboration etc.

- **Others**: Goals which do not get covered under any of the above mentioned categories. For example Case Studies/White Papers; Initiatives; GDC Mobilization etc.

**16. What are the Fields that can be used to organize the Goals on the Goal Plan Template?**

Each Goal in Success Factors is defined by its fields. These may be as simple as the **visibility**, **Category**, **Goal Name**, **Goal Description**, **Weight**, **Work Area Level**, **Work Area Code**, **Metric**, **Unit of Measurement**, **Status**, **Target Description**, **Target**, **Actual**, **Key Result Achieved**, **Start Date**, **Due Date**, **%complete**, **Subgoal/Milestones**, **Probability of success** and **Comments**.

- **Visibility**: You have the flexibility to change visibility of Goal as appropriate.

  The default setting is Private i.e. the Goal name and description can be viewed by those in upward
hierarchy (Capability Development Manager & Project Reporting Manager Hierarchy) along with mapped HR.

You can change the visibility setting to Public to make it known to those in your downward hierarchy too.

- **Category:** Your performance is viewed from multiple perspectives and your Goals are aligned accordingly.

  - **Financial Excellence:** Goals that have a financial or monetary impact to the business. Performance against these goals indicates whether our balance sheet targets are met. Examples of related metrics could be % Gross Margin; % LoB Margin; % Project Margin etc.

  - **Delivery Excellence:** Goals associated with customer service delivery. Performance against these goals indicates whether our services are delivered with continuous improvement in sight. Examples of related metrics could be Business Maturity; Economic Utilization; Training Hours etc.

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  - **Others:** Goals which do not get covered under any of the above mentioned categories. For example Case Studies/White Papers; Initiatives; GDC Mobilization etc. Make an appropriate choice based on
how your goals align with given categories.

- **Goal Name**: Point out the list of the goal.

- **Goal Description**: Explain what needs to be accomplished.

- **Weight**: Assign appropriate weight to each Goal, based on the effort investment. This can be in relation to other Goals during the period.

- **Work Area Level**: Specify the level at which you will take target against this Goal. For example, if you are a Delivery Unit Head (DUH) select L4 org unit as the work area level. Similarly, if you manage project delivery select Project as the work area level. Make an appropriate selection out of the identified 6 work area levels - L1 org unit, L2 org unit, L3 org unit, L4 org unit, Customer, Project and Individual.

- **Work Area Code**: Mention the code of the work area you manage/are assigned to. This should be obviously in line with the work area level selection. For example, if you are the DUH for following L4 org unit ERS-SEG-Microsoft-CS the corresponding L4 code - 54014740 should be mentioned.

- **Start Date and Due Date**: The Time period in which you set your Goals.

- **Status**: Update the status to showcase your progress towards the goal. Select from following status options – Not Started, On Track, Lagging and Complete.

- **Sub-Goal/Milestone**: You can split a goal into multiple sub Goals or logical milestones. Provide a brief description, start and end dates and status for each of them. This is a non-mandatory field.

- **% Complete**: Mention how much has been accomplished. Represent completion in percentage
• **Target**: Identify a target or expected outcome for each Goal. Typically, a numeric value.

• **Target Description**: Describe the expected outcome.

• **Actual**: Identify the achievement versus expected outcome/target. Typically, in numeric terms.

• **Key Results Achieved**: Describe the results achieved versus a target.

• **Probability of Success**: Express the likelihood of achieving a Goal. You can select High, Medium or Low as probability of success. However, by default it is set as high.

• **Unit of Measurement**: Identify a yardstick or standard of measurement. Depending on the Goal you can select Rating, Numeric, Percentage, Hours, days, Currency-INR, Currency-USD as unit of measurement.

• **Comments**: This is a free text input field. Use it to record your comments, action plan or pointers for discussion.

17. **What are the ways in which Goals can be created?**
Goals can be created by using Cascade, Goal Library, Personal Goals options.

18. **How can I add and create new Goals in Goal Template Sheet?**
One can add new Goals by using option of “Create a new Goal” at rightmost corner in the Goal Template sheet.

On clicking the option “Create a new Goal” you will find two options:

• **Personal Goals**- Personal Goals allow you to make your own Goals and assign any metrics you want.

• **Library Goals**- Library Goals are selected from an organized library with suggested metrics.
Personal Goals- Personal Goals allow you to make your own Goals and assign any metrics you want.

Fig 24. Create New Goal/Copy from Other Goal Plan

19. What does Cascade Goal mean and how can it happen?

When setting Goals for the period, Goals can be aligned by cascading them.

The tool offers multiple configuration options for cascading.

- Cascade up
- Cascade down
- Cascade to somebody outside your hierarchy

Once a Goal is cascaded, Managers have visibility into progress toward your Goal’s status. You and your Project Manager/Project Reporting Manager (PRM) can Cascade Goals however you have an...
option to accept or reject the request.

Fig25. Cascade Goals

20. What are Public and Private Goals?

One of the first configuration decisions you will make during your Goal Management implementation is in regard to visibility of Goals across the organization. **There is a possibility to configure an option to allow a user to mark their Goals as Public or Private.**

Fig26. Public Goals/Private Goals

**Private Goals** are accessible to the employee and to the manager(s). The Goal name and
description of a Private Goal will be visible to Upwards hierarchy (Reporting Manager & Project Reporting Manager Hierarchy) along with mapped HR.

**Public Goals** are accessible to everyone with permission to access your Goal Plan. A Goal is specified as public or private at the time it is added to the Goal Plan. It can be changed by the employee at any time. The Goal information of a Public Goal will be visible to Upwards & Downwards hierarchy (Reporting Manager & Project Reporting Manager Hierarchy) peers along with mapped HR.

21. **What Summary Segment contains in the Goal Plane Template?**
Summary Segment contains the holistic picture of the Goals in the form of dashboard. You can see the overall progress summary in this section.

22. **Can I view the status and completion% of my Goals individually in order to attain them on time?**
Yes, Status and completion% can be viewed individually with respect to Goals against each goal. You can manually choose the current status and Completion% by using the dropdown option available in edit window of each goal.

![Edit Goal](image)

**Fig27. Goal Status**

23. **How can I align a Goal and what does it mean?**
Alignment of Goals is the ability to tie together two existing Goals that are related or interdependent between individuals. Once two Goals are linked, employees have visibility into progress toward the
Goal’s completion and can also be viewed using Goal Alignment Spotlight.

**Note:** Cascade Goal creates a new Goal and links it to the source Goal at the same time. Aligning creates a link between two already existing Goals.

**24. What is the role of Goal Alignment Spotlight?**

Goal Alignment Spotlight gives an overall picture in terms of Goal Alignment i.e. how one Goal can be aligned to one or more employee. It provides the status of overall Goal and will be reflected as ‘On track/ Lagging/Complete’ and it also provides the progress status of individual/all Goals.

**25. What is the role of Status Report in Expectation Exchange Form?**

The **Status Report** tab enables users to provide/managers to seek and view Status Reports on progress toward Goals.

From the Status Report tab users can:
- Update Goals with current status.
- Click Comment to add notes.
- Update My Other Accomplishments section with other activities.
- Open right panel to see extra information useful for updating status.
- Click Save to save your work and come back later.
Click Send Status Update when you’re ready to send status report to others.

**Fig29. Status Report**

26. **What is the role of Execution Map in Expectation Exchange Form?**

The **Execution Map** provides an at-a-glance overview of progress on Goals that are aligned across the organization. The information displayed here comes from the **Status Reports** that are submitted for these Goals.

Managers can use the Execution Map along with the built-in Status Report to instantly see all the pieces of the puzzle, such as who is working on what and the current status of each task, so they can quickly determine if the overall Goal is on track or in trouble.

**Fig30. Execution Map**
27. What is the role of Meeting Agenda in Expectation Exchange Form?

The **Meeting Agenda** tool allows you to create a list of important Goals and print or send it in advance of an upcoming meeting. Using the **Meeting Agenda** you can quickly:

- Add Goals to the **Meeting Agenda**. Filter the list of your **Meeting Agenda Goals** by Date Submitted, Effort Spent, and Probability of Success.

28. I am working on more than one project at a given point of time, how do I manage my Goals?

If you are aligned to more than one project then you can link your **Project specific Goals** with your **Project Reporting Manager (PRM)**, **Project Reporting manager (PRM)** can even cascade them.

29. What should be the total Weightage for Goals?

The total weightage for Goals should be distributed till 100%

30. How can I view detailed action history of any Goal?

You can view any kind of changes made by you or by your Manager by simply viewing the “Log/Audit History” in the Expectation Exchange Form.
31. What is the validation process for Goals in iSuccess? What does validation and non-validation means?

Once the Expectation Exchange Sheet is filled by the employee, it goes to their respective Reporting Manager (RM)/Project Reporting Manager (PRM) for validation. If the Reporting Manager (RM)/Project Reporting Manager (PRM) approves it then the state of the Expectation Exchange Sheet changes from non-validate to validate. Validate/Non-validate text appears at the extreme left side of the Expectation Exchange Sheet.

32. As a Manager/Project Reporting Manager (PRM) how do I validate the Expectation Exchange Form for my reportees?

In order to validate Expectation Exchange Sheet of your respective reportees, you just need to click on the radio button provided at the left side of the Expectation Exchange sheet. Once you will click on that button the Expectation Exchange Sheet will automatically get validated.

**Note:**
For further clarifications, Please raise an SSD through following path:

MyHCL >> SSD >> Application Issue, Process & Data Issue >> (Business Group) - HR >> (Business Process) - Program FIRST- Performance Management >> (Business Sub-Process) – “Select relevant Sub-Process”