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Delt Manager Mini Guide

Manager Talent Review Cycle

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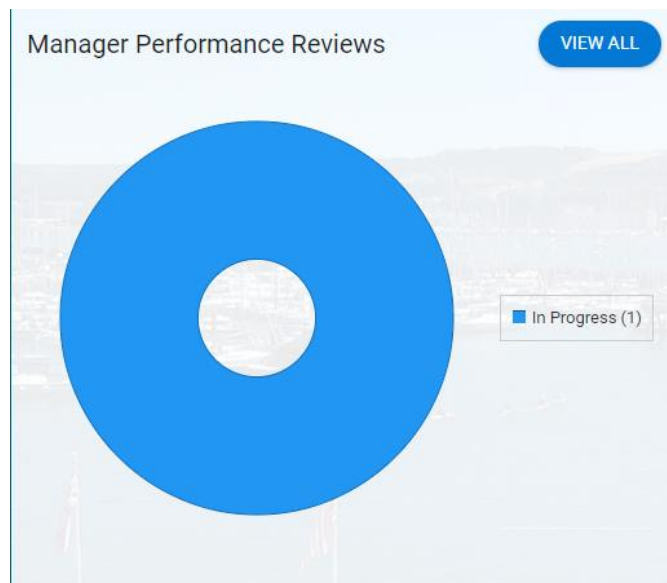
Manager Talent

The My Team Reviews Tab on the Manager Dashboard contains widgets that allow a manager to view and manage their teams Talent Profile, Reviews, and Objectives.

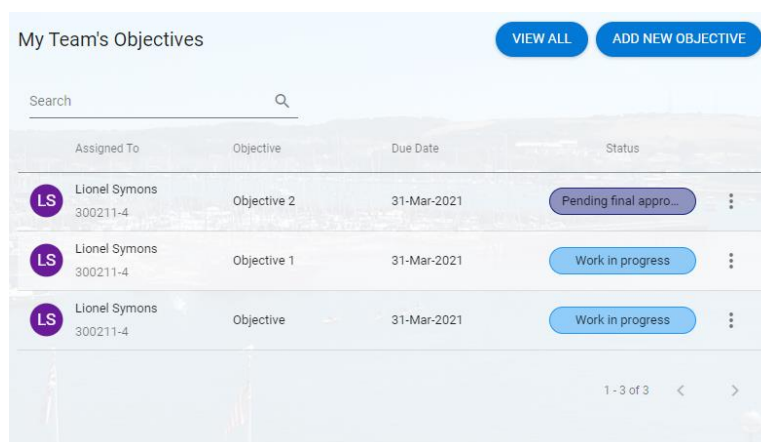
My Team Reviews Tab




Review Widgets – What do they do?

The Manager Performance Reviews widget is found on the My Team Reviews Tab of the Manager Dashboard. This shows a graph of review cycles and which stage they are currently at. This widget can be used to view employee reviews in more detail.



The My Team's Objectives widget is found on the My Team Objectives Tab. This widget shows a list of all objectives for your team, stating who the objective is assigned to, the objective name, due date, and current status. This widget can be used to view and edit existing objectives, and to also add a new objective to an employee review cycle.


 A screenshot of the 'My Team's Objectives' widget. It has a search bar at the top left and two buttons at the top right: 'VIEW ALL' and 'ADD NEW OBJECTIVE'. Below the search bar is a table with the following columns: 'Assigned To', 'Objective', 'Due Date', and 'Status'. The table contains three rows of data. At the bottom right of the table, there is a pagination indicator '1 - 3 of 3' with left and right arrow icons.

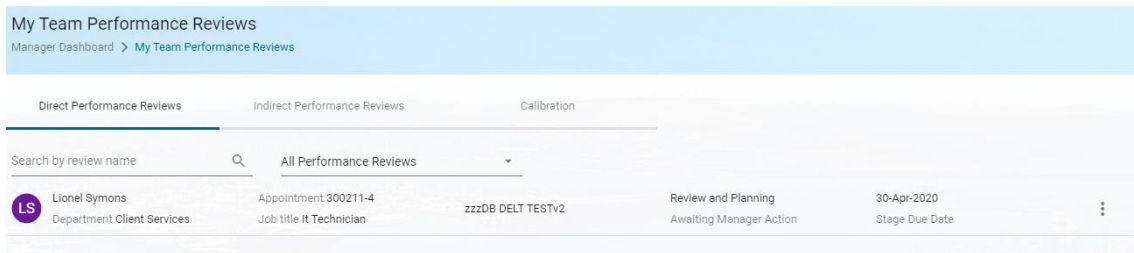
Assigned To	Objective	Due Date	Status
 Lionel Symons 300211-4	Objective 2	31-Mar-2021	Pending final appro...
 Lionel Symons 300211-4	Objective 1	31-Mar-2021	Work in progress
 Lionel Symons 300211-4	Objective	31-Mar-2021	Work in progress

Team Review Cycles

How to Access, Complete and Approve an Employee's Review Cycle

Review Cycles can be viewed within the Manager Performance Reviews widget on the My Team Reviews tab.

1. To see a list of reviews, select 'VIEW ALL' from the widget.
2. All Review Cycles for your team will be listed, to find a review for a specific employee you can use the search function to filter the results. You can also filter by All, Current, and Awaiting Sign Off by using the drop-down menu. This screen will display the employee details, Review Name, what stage and status the review is currently at, and the due date of this stage.

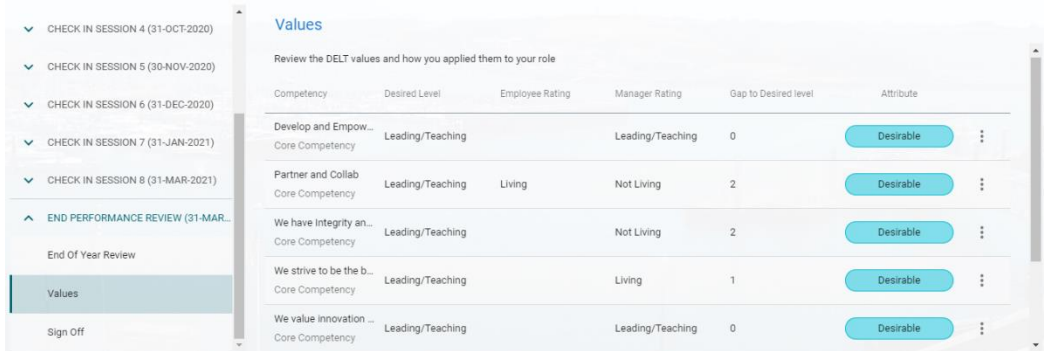


3. To launch a review, click the ellipses and select 'launch'. You can then navigate between stages of review on the left side of the screen. The Review and Planning and End Performance Review stages are tied to the Performance Management Review cycle, and the Check In Sessions represent monthly 1:1 meetings.
 - Once within a Review Cycle you can view the comments which have been added by the employee. These sections cannot be edited by the manager.
 - There will be areas for manager comment, these sections should be completed before clicking 'SAVE' on the bottom right of the screen.



- The Objective Setting section will show all the employee's objectives that are tied to the Review Cycle. Here you can see the objective detail, add new objectives, or edit existing objectives. More information on employee objectives can be seen on page 4.

- The Values section is intended to be used to review the Delt values and how they have been applied to the role. To enter information against each value you can click the ellipsis and select 'open'. Here you can add the rating you believe the employee has achieved during the year from the Manager Rating drop down on the left. You will also be able to view the Employee Rating here, and the relevance they assigned to the value. Once the detail is complete, select 'SAVE' on the bottom right. This should be done for each of the values.



Competency	Desired Level	Employee Rating	Manager Rating	Gap to Desired level	Attribute
Develop and Empow... Core Competency	Leading/Teaching		Leading/Teaching	0	Desirable
Partner and Collab... Core Competency	Leading/Teaching	Living	Not Living	2	Desirable
We have integrity an... Core Competency	Leading/Teaching		Not Living	2	Desirable
We strive to be the b... Core Competency	Leading/Teaching		Living	1	Desirable
We value innovation ... Core Competency	Leading/Teaching		Leading/Teaching	0	Desirable

- Once each section is complete and the employee has signed off the Review Cycle the manager can do a final sign off where you must also enter the final rating. Once this has been completed select the green 'SIGN OFF' button on the bottom right. You will then be prompted to enter your password.

Team Objective Setting

Objective Status

Team Objectives can be viewed from either within the Review Cycle, or they can be seen on the Objectives widget on the My Team's Objectives tab on the Manager Dashboard.

The widget and the Review Cycle will display a status against each objective. These statuses are:

- **Draft** – The objective has been named, and assigned to a Review Cycle, but no additional information has been added such as the Description or Priority.
- **Work in Progress** – The objective has been given a description and is currently active.
- **Pending Final Approval** – The employee believes they have completed the objective and has submitted it for final approval. The manager should access this objective and either approve or send it back to the employee.
- **Complete** – The objective has been marked as complete by the manager; no further work is expected against this objective.
- **Final Approval Denied** – The objective was sent back to the employee after they had submitted it for final approval, there is further work expected against this objective.

- **Cancelled** – The objective has been cancelled, it has not been completed, but no further work is expected against this objective.

Objective Setting

Objective	Assigned To	Objective Details	Aligned To	Priority	Due Date	Status
Objective 6	Lionel Symons 300211-4	Assigned By Lion... Cycle DELT Object...		High	31-Mar-2021	Cancelled
Objective 4	Lionel Symons 300211-4	Assigned By Lion... Cycle DELT Object...			31-Mar-2021	Work in progr...
Objective 3	Lionel Symons 300211-4	Assigned By Regg... Cycle DELT Object...			31-Mar-2021	Draft
Objective 2	Lionel Symons 300211-4	Assigned By Regg... Cycle DELT Object...		Medium	31-Mar-2021	Complete
Objective 1	Lionel Symons 300211-4	Assigned By Lion... Cycle DELT Object...		High	31-Mar-2021	Pending final ...
Objective	Lionel Symons 300211-4	Assigned By Lion... Cycle DELT Object...		Medium	31-Mar-2021	Final approva...

How to Add/Edit an Objective for an Employee

Objectives can be added/edited from the My Team Objectives tab on the Manager Dashboard, or from within the Review Cycle on the Objective Setting Tab.

To **add** an objective:

1. Select 'ADD NEW OBJECTIVE'
2. Enter Objective Title. The Objective Cycle, Objective Type, Start Date and End Date will auto-populate based on the Review Cycle.
3. To assign this objective to a member of your team select the appropriate individuals from the 'Available' section and use the arrow '>' to move them to 'Assigned'.
 - This will create a base objective for all employees who are moved into the 'Assigned' Column. Individual detail must be added by editing the objective.
 - To assign an objective to all team members scroll to the bottom of the employee list, here there is text which says, 'Select All'. Click this and all employees will be highlighted.
4. Once the appropriate team members have been assigned the objective select 'SAVE' on the bottom right.

Create new Objective

Manager Dashboard > My Team Performance Reviews > zzzDB DELT TESTV2 (Lionel Symons - 300211-4) > Create new Objective

Objective title*
Example Objective

Objective cycle*
DELT Objective 20/21 (01-Apr-2020 - ...

Objective type*
Annual Objective

Enter the title of this objective

What cycle should this be in

What type of objective is this

Start Date*
01-Apr-2020

End Date*
31-Mar-2021

When will this objective start

When will this objective end

Available

Assigned

Lionel Symons - IT Technician (300211-4)

access PeopleXO

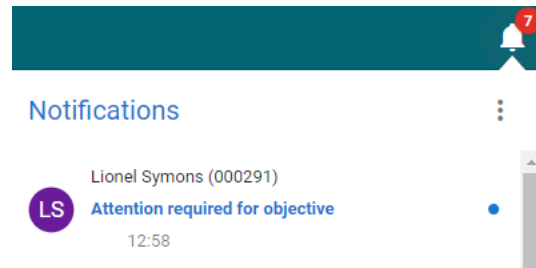
SAVE

To Edit an Objective:

1. Navigate to either the My Team's Objective widget on the My Team Objectives tab, or the Objective Setting section of the Review Cycle.
2. Click the ellipses next to the objective you would like to edit and select either 'View Objective' or 'Edit Objective'. This will open a new screen with 4 tabs.
 - **Objective Information** – This is where a description can be added to the objective, and the objective priority should be set. You can also edit the Title, Start Date, and End Date here. There is also an option to set the Objective Current Status. Please note: this does not update the overall status of the objective as outlined above.
 - **SMART Objective** – These fields are not mandatory to complete; this tab can be ignored.
 - **Comments** – Comments against the objective can be added, viewed, and edited here. To do this select 'VIEW/ADD' on the top right. This will now list the comments with ellipses that can be used to edit or delete an existing comment. Select 'ADD COMMENT' on the top right to add a new comment to this objective.
 - **Milestones** – Milestones can be used to break down the main objective into smaller sections. These can have different due dates, and the status of the individual milestones can be tracked. To add a milestone select 'ADD' on the top right. Here you can enter the Title, Due Date, Completion Date, and Status. The milestones can be edited or deleted by clicking the ellipses.
3. Once all of the appropriate detail has been added to an objective select 'SAVE' on the bottom right. The employee will also be able to access the objective information, edit, or add comments.

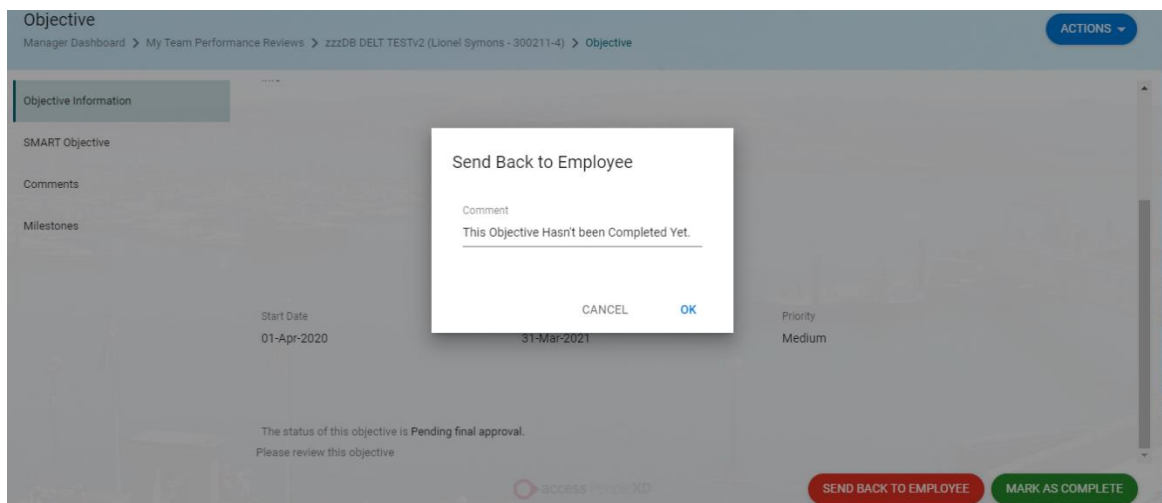
How to Approve/Reject an Objective

When an employee believes they have finished the work against an objective they can submit this for final approval. This will update the objective status to 'Pending Final Approval'. The employee is also able to 'nudge' the manager to let them know that there is an objective awaiting action. If this is done, a notification will be displayed on the notification bell.



To manage approval on an objective:

1. Navigate to either the My Team's Objective widget on the My Team Objectives tab, or the Objective Setting section of the Review Cycle.
2. Click the ellipses next to the objective you would like to edit and select either 'View Objective' or 'Edit Objective'.
3. If the objective is pending final approval the fields will be locked for editing, and on the bottom right there will be options to either 'SEND BACK TO EMPLOYEE' or 'MARK AS COMPLETE'.
 - You can still view or add any comments from the Comments tab, and you can view progress towards milestones on the Milestones tab, however these cannot be added at this stage.
 - If the objective has not been completed satisfactorily, please select 'SEND BACK TO EMPLOYEE'
 - If the objective has been completed, please select 'MARK AS COMPLETE'
4. Whichever option is selected by the manager, a comment box will appear for detail to be entered.



- If the objective is marked as complete, the status of the objective will update to Complete, and no further action will be expected against this objective.



➤ If the objective is sent back to the employee, the status will update to Final Approval Denied, and the employee can view the comments in the comment tab to see what additional work is required. The employee will be able to resubmit this objective in the future in the same way.

