



Manager Goal Setting in Bamboo Guide



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Driving Success at TEG

TEG is a place where employees can do their best work. Our Goal Setting Framework aims to connect employees to broader business goals whilst giving employees an opportunity to align their skills, experience, and ambitions to their role.

Embedding Goal Setting into Ways of Working

As Leaders, we hope that you all embrace TEG's Goal Setting Framework to align individual goals with our strategy. To do this, we will utilise Bamboo for streamlined outcomes and feedback, which will enhance team performance and contribute to TEG's success.

- Goals can be standards or expectations set around behaviour's or tasks
- Goals should have clear measurable outcomes so that they can be measured
- Goals should be reviewed on an ongoing basis and should form part of Managers 1:1 WIPs and Team WIPs
- Feedback can be captured in the comment section against each goal and documents can be shared using the attach function.
- Continuous feedback is important for individual development and the Goal Setting function on bamboo creates a good framework for this alongside your usual WIP meetings



How does Goal Setting Work?



There will be a diverse range of goals, categorized into three main types:

- **Company Goals:** Compulsory Goals set by TEG for Employees and People Leaders, such as regulatory and compliance, aligning to TEG's overarching broader business goals.
- **Individual Goals:** Five to seven mandatory *SMART* Goals set by Managers, aligning with position requirements, Team and Division Goals, company objectives and TEG's broader business goals.
- **Growth Goals:** Discretionary, (however encouraged) individually tailored development objectives created by the employee and endorsed by the Manager, aligning with position, personal growth, development, and TEG overarching broader business goals.

Company Goal

As a People Leader the below is our expectation of you for FY25 your performance will be measured against this. At the end of this session you will be asked to upload this into Bamboo along with your other goals.

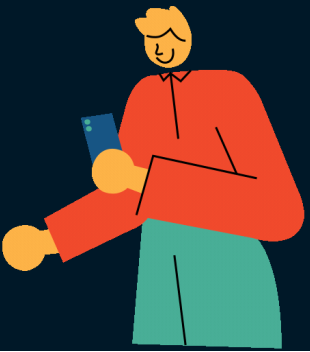
Due Date: 30/06/25

Goal Title: Company Goal - Leadership

Description: As a Leader, ensure a safe, respectful, and inclusive workplace.

Measures:

- Provide clear direction and role clarity to Workers.
- Lead with Company Values, Policies, Training, and Information Programs in mind.
- Communicate regularly with workers, provide timely updates that might bring context to Worker's roles.
- Provide support as and when required to Workers.
- Empower your employees to do their job well.
- Provide feedback regularly to recognise accomplishment and create awareness for development areas.
- Do everything reasonable to ensure the health and safety of workers while they are carrying out activities related to their work and others who may be affected by the carrying out of work.



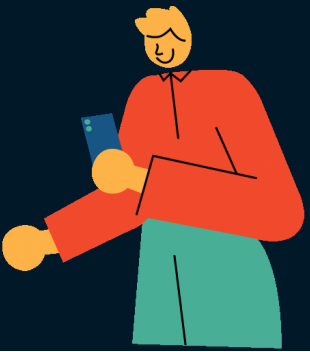
Individual Goals - Creating SMART Goals

When creating *Individual Goals* for your employees, ensure that each of them are *SMART* Goals.

S	Specific	Make your goal specific and narrow for more effective planning	
M	Measurable	Make sure your goal and progress are measurable	
A	Achievable	Make sure you can reasonably accomplish your goal within a certain time frame	
R	Relevant	Your goal should align with your values and long-term objectives	
T	Time-based	Set a realistic but ambitious end date to clarify task prioritization and increase motivation	

Example:

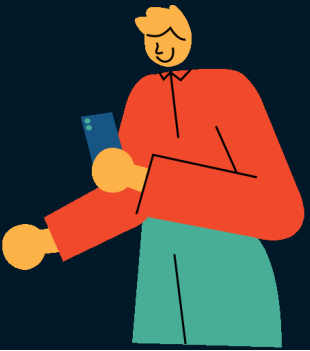
1. Establish trust through ongoing WIP sessions, aiming for a 90% completion within a year.
2. Reduce reputational and financial risks by 20% in one financial year through proactive mitigation strategies.
3. Successfully complete projects within scope, budget, and timeline, aiming for a 95% completion rate in six months.
4. Increase engagement by X% through targeted campaigns, resulting in higher ticket sales within three months.



Growth Goals - Career Development Plan

Career development planning discussions provide an opportunity for employees to shape their career and articulate what support they need to increase their knowledge, skills and experience for their current job/role to meet their Growth goals.

- Employees will need to drive these discussions with you.
- They should come to the discussion prepared with their Proposed Growth Goals outlined in our Career Development Plan Template.
- As People Leaders you should empower, support and provide feedback to employees who drive their own Growth Goals. People and Culture can support you during this process. Other growth opportunities could include secondments, stretch assignments, projects and much more.



How to log into Bamboo

Bamboo is our HR System that helps us onboard you & manage your employment journey with us.

Bamboo is linked to SSO. (Single Sign On) To protect our Company data at TEG.

You can login here: <https://teg.bamboohr.com/> OR Access the app on your mobile – head to Apple Apps or your Google Wallet.

Use your work email address and your laptop password to use Bamboo.

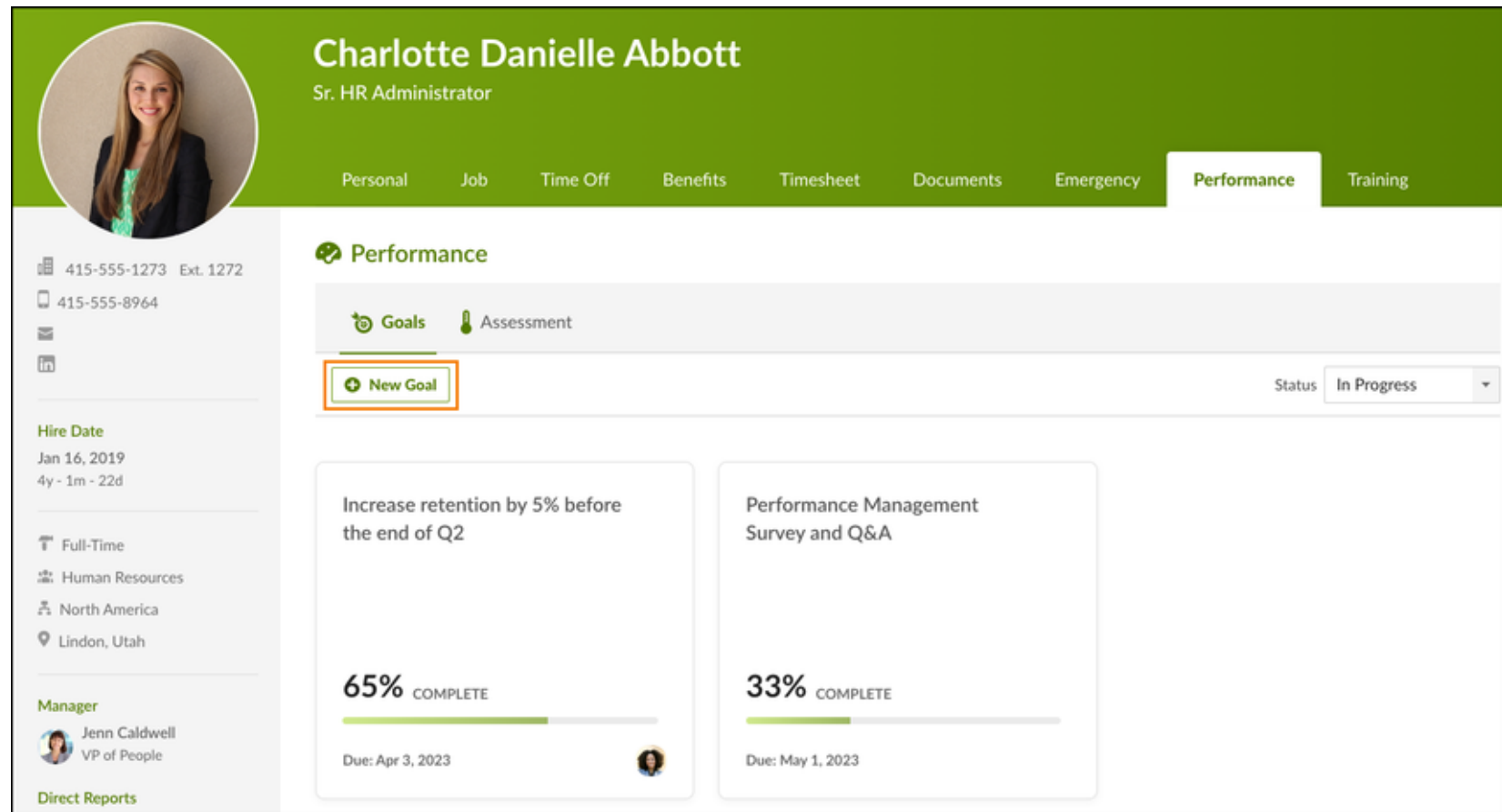
If you need a hand accessing Bamboo, please email peopleandculture@teg.com.au



Creating a New Goal in Bamboo

Lets create your Goals in Bamboo!

- Head to your Personal Profile in Bamboo
- On the Performance tab, click *+ New Goal* under the Goals subtab



The screenshot displays the Bamboo HR interface for a user named Charlotte Danielle Abbott, Sr. HR Administrator. The interface is divided into several sections:

- Header:** A green bar at the top contains the user's name and title, followed by navigation tabs: Personal, Job, Time Off, Benefits, Timesheet, Documents, Emergency, **Performance** (selected), and Training.
- Left Sidebar:** Contains contact information (415-555-1273 Ext. 1272, 415-555-8964), a LinkedIn icon, and employee details: Hire Date (Jan 16, 2019, 4y - 1m - 22d), Full-Time status, Human Resources department, North America region, and Lindon, Utah location. Below this is the Manager section, showing Jenn Caldwell, VP of People.
- Performance Section:** Features a 'Performance' header with 'Goals' and 'Assessment' subtabs. The 'Goals' subtab is active, and a '+ New Goal' button is highlighted with an orange box. A status dropdown menu is set to 'In Progress'.
- Goal Cards:** Two goal cards are displayed below the 'New Goal' button:
 - Goal 1:** 'Increase retention by 5% before the end of Q2'. It shows a progress bar at 65% COMPLETE and is due on Apr 3, 2023.
 - Goal 2:** 'Performance Management Survey and Q&A'. It shows a progress bar at 33% COMPLETE and is due on May 1, 2023.

1. **Goal Objective:** Use this field to name your goal or come up with a goal objective. **Note:** For reporting purposes, ensure the type of Goal name is listed before the Goal Objective for e.g. Company Goal - Leadership.
2. **Due Date:** Set it a due date for your goal. This will be required before saving your goal.
3. **Short Description:** Use this space to describe your goal.
4. **Use Milestones:** Toggling on this option will allow you to add milestones for tracking key steps or results toward reaching the goal. You can add up to 10 milestones.
5. **Attach File(s):** You can upload supporting documents and files to your goals by selecting Choose Files.
6. **Align with Another Goal:** See "Align Goals" slide
7. **Share your goal:** See "Share A Goal" slide

Please note that the Goals subtab automatically shows any goals that are in progress. To change the view to completed or closed goals, click on the Status dropdown menu and change your selection.



Create New Goal

Ready for a new goal? Great, let's get started!

Goal Objective * 1

What are you trying to achieve with this goal?

Due Date * 2

mm/dd/yyyy

Short Description 3

Optional Description

☒ Use Milestones 4

When a milestone is updated, it will be weighted evenly to the overall goal percentage.

1

Milestone, Sub-Goal or Key Result



2

Milestone, Sub-Goal or Key Result



3

Milestone, Sub-Goal or Key Result



[+ Create Another Milestone](#)

Attach File(s) 5

[Choose File\(s\)](#)



No files selected

Align with Another Goal 6

-Goal Alignment-

7



Save

Cancel

Viewing Goal Details

- On the Goals subtab, goal cards are in order based on the due date. Each goal card shows the goal name, with whom the goal was shared, the due date, and the progress tracker.
- To view more goal details, hover over a goal card and click on the double arrow icon in the top right corner. Upon click, you will be able to view the goal description, progress tracker, due date, milestones (if applicable), comments, and any attachments.
- Managers can only see Goals and Performance Data for those employees in their downward reporting as per Bamboo Org Chart.

The screenshot displays the 'Goals' subtab in the BambooHR interface. At the top, there are three tabs: 'Goals' (selected), 'Feedback', and 'Assessment'. Below the tabs is a '+ New Goal' button and a 'Status' dropdown menu set to 'In Progress'. The main area shows two goal cards. The first card, 'Increase retention by 5% before the end of Q2', is 65% complete and has a due date of Apr 3, 2023. The second card, 'Performance Management Survey and Q&A', is 33% complete and has a due date of May 1, 2023. A double arrow icon in the top right corner of the second card is highlighted with an orange box, indicating it can be clicked to view more details. Each card also features a progress bar and a small profile picture of the person associated with the goal.

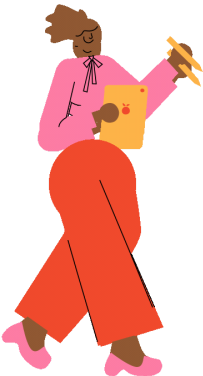
Goal Name	Progress	Due Date
Increase retention by 5% before the end of Q2	65% COMPLETE	Due: Apr 3, 2023
Performance Management Survey and Q&A	33% COMPLETE	Due: May 1, 2023



To edit the goal information or add/remove attachments, click on the three-dot icon and click *Edit* from the dropdown menu.

If you need to delete a goal, click on the same icon and click *Delete*.

The option of closing a goal is also available in the dropdown menu.



Performance

Goals

Feedback

Assessment

New Goal

StatusIn Progress

Created: Mar 7, 2023 - Due: May 1, 2023

Performance Management Survey and Q&A

After implementing our new performance management process, we want to survey staff to get their impressions, and hold a Q&A session with questions by the end of the quarter.

33% COMPLETE

Edit

Close

Delete

Milestones

☒ Send an email notification 2 days before due date

☐ Gather and input survey answers

☐ Complete analysis report

Performance Management QA.xlsx

Comments

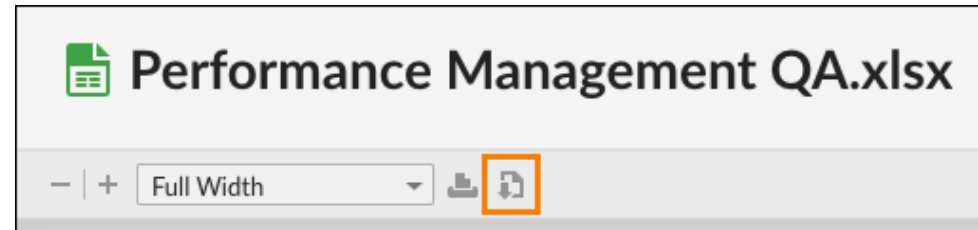
Add Comment

Downloading Attachments

To download an attachment, click on the file name to view it.

If it is a PDF or .xlsx file, you can simply click the download icon that pops up on the preview screen in the top left corner.

To download .jpeg or .png files, right-click and select Save to download the file.



Sharing a Goal

Often, goals are a shared effort. Therefore, sharing your goals in collaboration with coworkers allows you to unify efforts and complete your goals faster and better.

Share this goal

Who has access

Charlotte Abbott

Ashley Adams

Add People

Tony Fonseca

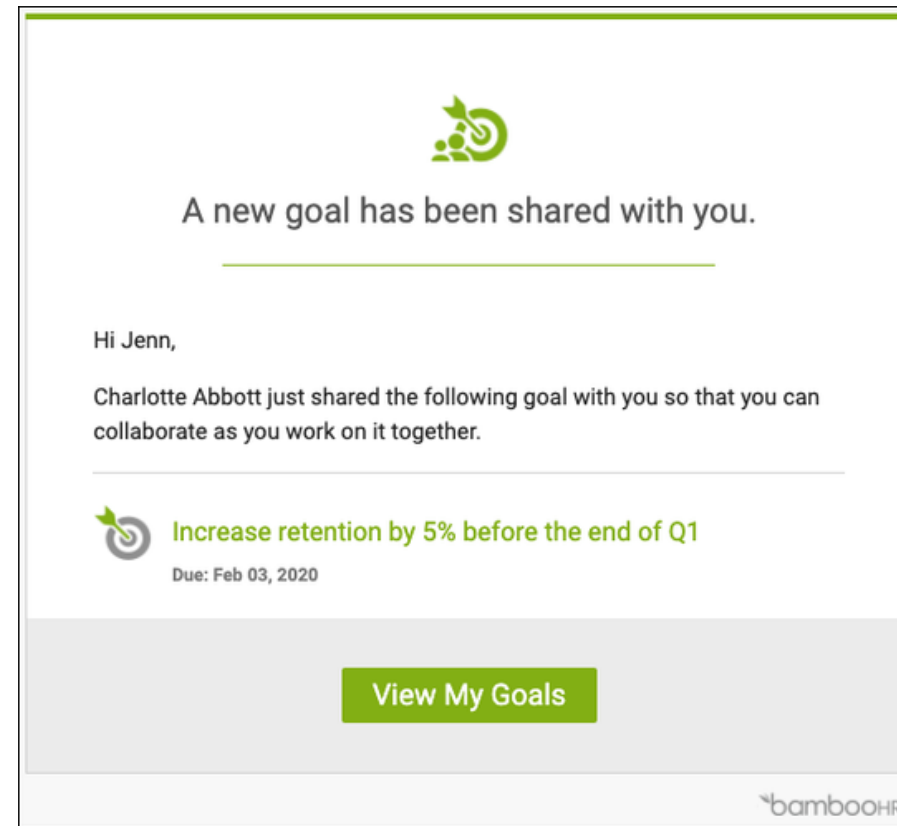
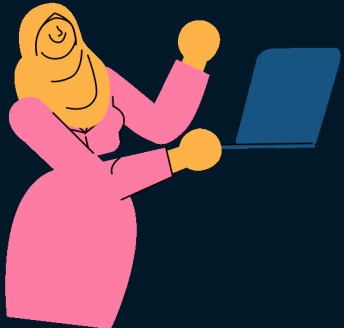
Add

Cancel

Once you share a goal with another employee, they will receive all email notifications regarding the goal (see next page)



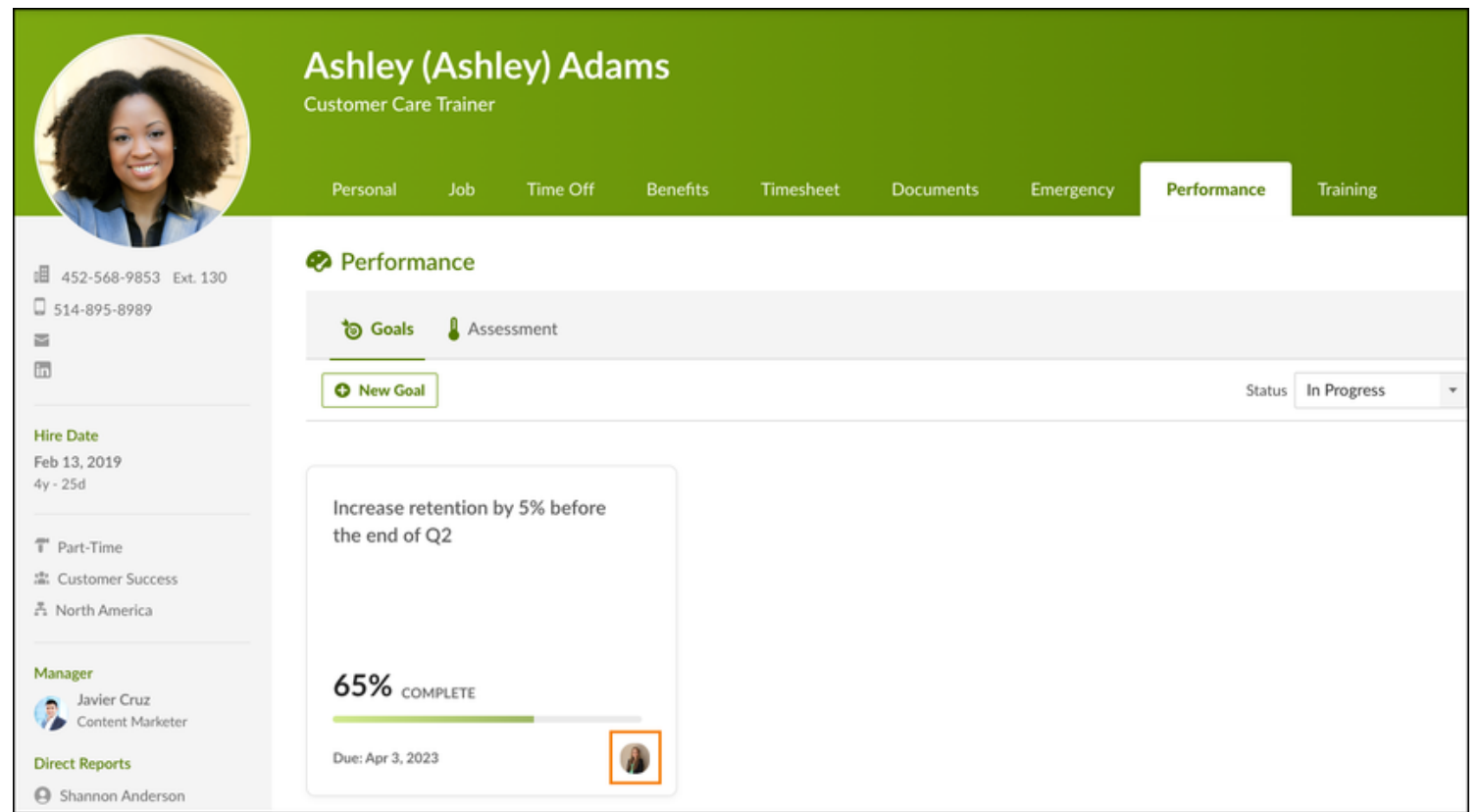
Sharing a Goal Continued



Click Edit and then click on the people icon ("Share Goal") to share a goal with other employees who also have access to Goals. You can only share a goal with a specific employee,* not a group of employees. Once you share a goal with the employee, they will receive the above email notification. Your goal becomes one of their goals and will show up on their Goals tab under Performance.

Also, it will show up in their Goals/Training/Benefits widget on Home.

Sharing a Goal Continued



The screenshot displays a user profile for Ashley (Ashley) Adams, a Customer Care Trainer. The profile includes contact information (452-568-9853 Ext. 130, 514-895-8989), hire date (Feb 13, 2019), and job details (Part-Time, Customer Success, North America). The Performance tab is active, showing a goal to "Increase retention by 5% before the end of Q2" which is 65% complete. The goal is due on Apr 3, 2023. The goal is shared with Ashley, as indicated by the small profile picture icon in the bottom right corner of the goal card.

Ashley (Ashley) Adams
Customer Care Trainer

Personal Job Time Off Benefits Timesheet Documents Emergency **Performance** Training

452-568-9853 Ext. 130
514-895-8989

Hire Date
Feb 13, 2019
4y - 25d

Part-Time
Customer Success
North America

Manager
Javier Cruz
Content Marketer

Direct Reports
Shannon Anderson

Performance

Goals Assessment

New Goal Status In Progress

Increase retention by 5% before the end of Q2

65% COMPLETE

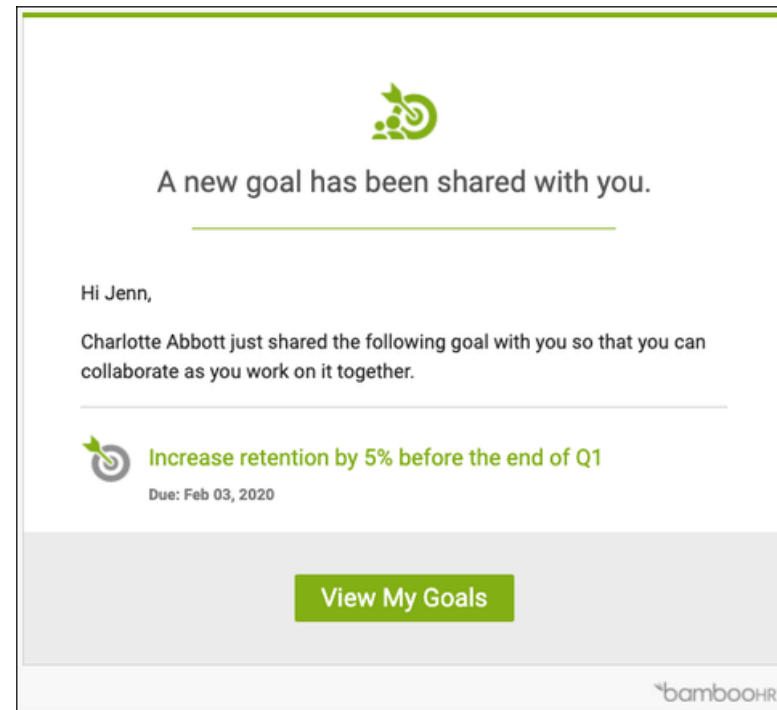
Due: Apr 3, 2023

Notice that the goal is now shared with Ashley and shows up on their Goals tab. When sharing goal, the employee will have the same access to the goal as the employee who created the goal. This access includes the following capabilities:

1. View the goal on their Goals tab.
2. Edit the goal (name, description, progress tracker, due date, attachments).
3. Share the goal or remove others from the goal.
4. Delete the goal.
5. Close the goal.



Notifications

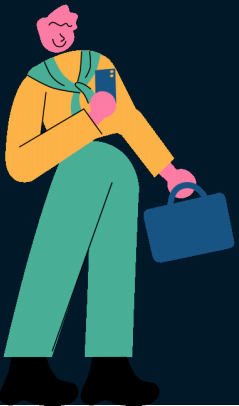


Along with the above notification, both employees and Managers will receive a wide variety of automated email notifications from Bamboo, including:

- Monthly email reminders for employees to check their goals
- Email alerts for manager comments on employee goals.
- Immediate notifications when goals are shared or removed.
- Email updates on any changes in an employee's goals, such as additions or progress adjustments by managers.
- Reminders for upcoming or due goals



Aligning Goals



 **Create New Goal**

Ready for a new goal? Great, let's get started!

Goal Objective *

Submit analysis report

Due Date *

05/01/2023



Short Description

Optional Description

☐

 Use Milestones

Attach File(s)

Choose File(s)

 No files selected

Align with Another Goal

-Goal Alignment-

Increase retention by 5% before the end of Q2

Performance Management Survey and Q&A



When a Manager is creating or editing a goal for one of their employees, they will see the option of "Goal Alignment." Clicking Goal Alignment will show all of the manager's goals, and they can pick which of their goals aligns with an employee's goal. Each goal can only align with one other goal.

Reporting

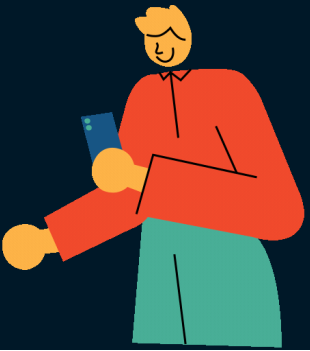
Further to receiving timely notifications, at any time a Goals Status report via Bamboo can be pulled to view employees' goal progress and the status of each goal. The report includes the following information about each goal: Goal name, due date, progress, last comment, additional comments, and details.

To view the Goals Status Report, Go to Bamboo > Reports tab > Standard Reports > “Goals Status” under the Performance and Culture heading.



Things to keep in mind when creating and updating Goals in Bamboo

- All Company policies, including the EEO and Respectful Workplace Behaviour Policy, continue to apply when creating and updating goals via Bamboo. Please ensure that the language used is always workplace appropriate.
- All *Individual Goals* should be SMART Goals
- In-person, timely and relevant feedback is crucial as the tone and message can be misinterpreted in writing; as goal setting shifts to a system, discussing individual performance face-to-face is essential, and any concerns should be addressed by consulting P&C for guidance on management.
- **Feedback should not be put in the system without a discussion first.**



Giving Feedback - The Situational Behaviour Impact (SBI) Model

The Situational Behavior Impact Model is an effective way to ensure your comments hold meaning for team members as it helps you explicitly describe each component of the feedback you're providing:

1. The situation in which the event happened
2. The behavior that was observed
3. The manner in which this impacted a person, project, or circumstance

Here's what this can look like in practice:

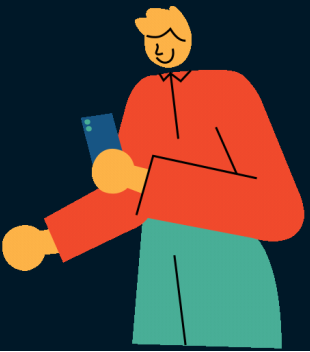
Feedback without the SBI model:

"Lin's excellent communication skills aid her team in success."

Feedback using the SBI model:

"When Lin regularly clarifies expectations for the timeline of deliverables to the team throughout the project, she creates accountability for individual members and encourages them to meet deadlines, which helps ensure on-time project completion."

The focus of your feedback shouldn't be about good versus bad...but rather about opportunities for development.



Performance Reviews

- At the end of the financial year Managers will sit down with their employees to check in and do a wrap up of their goals for the financial year
- The performance review process will be conducted via Bamboo HR which will facilitate both employee review and reflection alongside manager and provide a more formal opportunity to provide feedback and wrap up the year

Please note: The Goal Setting framework will be used for the FY25 performance review. This years performance review process (FY24) will focus on your performance in your role and alignment to the Values.



Next Steps:

- Collaborate with your employees to facilitate the creation of their goals Individual and Growth Goals.
- Coordinate with your Manager to finalise your own goals.
- You have until 30 June 2024 to have all your Goals and your employees Goals finalised in Bamboo

For more information, first watch the Create a Goal (bamboohr.com) video and if you have further questions, reach out to us!

TEG HR

peopleandculture@teg.com.au

