

TOTARA PERFORM: **ADDING GOALS**

*This is a transcript of a video
on the Totara Academy*



SETTING CLEAR GOALS FOR YOURSELF OR YOUR TEAM ENSURES EVERYONE FEELS FOCUSED AND CLEAR ON THEIR OVERALL OBJECTIVES.

In this video, we'll look at how to create a new goal framework and scale as well as how to assign goals to individual users and audiences.

We're going to focus on adding company goals, which are created centrally and are then assigned to groups of users. It's also possible for users and their managers to create unique personal goals which are only visible to them, but we won't look at those in this video.

As a Site Administrator, you're able to create new goal frameworks and scales by opening the quick-access menu then selecting **Goals**.

On the **Manage goals** page you'll see any goal frameworks and scales that have been set up in your system. Goal frameworks include a scale to define the criteria by which a goal can be measured, so that's the best place to start.

A default scale exists in the system and includes three values.

If the default goal scale is not detailed enough for your organisation you can create a new scale.

Give the scale a name and the scale values, with each value on a new line. The values should be added from the most to least complete.

I'll save my changes and then I can further edit the scale.

You can select the default value that is assigned to a user. Click Update to save the new default value.

The scale allows you to define whether a goal is considered as complete by a user. If you wish to have

more than one scale that was marked as complete you could do this by selecting the cog and then by ticking the **Consider Complete** box.

Whilst editing the scale you're also able to add a numerical scale value and ID number which could be helpful when generating reports.

Once you're happy that you've set up your scale correctly, select **Save changes** and your scale will be ready for selection on the **Manage goals** page.

A goal framework allows you to add goals and define their hierarchy by adding relationships between them.

To start, select **Add new goal framework**.

Add a **Name**, an **ID number** that can be useful for distinguishing frameworks and a **Description** of the framework.

The **Description** will display on the **Manage goals** page above the table of goals.

If you've set up a scale as I have then you can select it and connect it here. You can add one scale per framework.

Once you've saved your changes, your new framework will display on the manage goals page. At the moment, no goals are in the framework.

To add goals, select the framework and then either add new goals individually by selecting the **Add new goal** button, or by choosing **Add** from the bulk actions dropdown menu.



You need to add your goals first before you can define other information about them, such as parent / child relationships between goals. So for now we'll focus on adding a selection of goals to the framework.

I'm going to bulk enter several goals with each goal on a new line and then issue a target date of April 2023. The sales team will have until this date to complete the goals.

I'll save my changes and add some new child goals by selecting a parent goal.

As I save my changes I can see that the child goals have been added to the framework.

Now that I've set up a framework I can assign it to individuals or groups of users.

To add a goal to a group of users, select the framework and the goal you wish to assign.

From this page, you can add the goal to any positions, organisations, or audiences that have been set up.

To add the goal to an audience select **Add audience(s)** and then select the audience you wish to add the goal to and save your changes.

Another way to add goals to an audience is to navigate to **Audiences** from the quick-access menu and then choose the audience you'd like to assign goals to.

Select the **Goals** tab and then **Add goal**.

You can then choose the goal framework you'd like to add and add the goals you require.

I'll save my changes and the goals will be automatically added to the audience members. Note that even after you've assigned your goals to users, you can still edit the goals themselves.

Managers can add goals for their team members by selecting their team member from **Team** in the main menu and selecting Goals for a team member.

The manager can then decide whether to add a **Company goal** or **Personal goal**. Remember, company goals are those that we just created, while **Personal goals** are unique goals entered for individual staff members that aren't visible to other users.

In this video we've looked at how to create a goal scale to monitor employees' progress on goals, create a goal framework and assign goals to audiences and individuals. Why not try setting up your own goals today?

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