SAP SuccessFactors

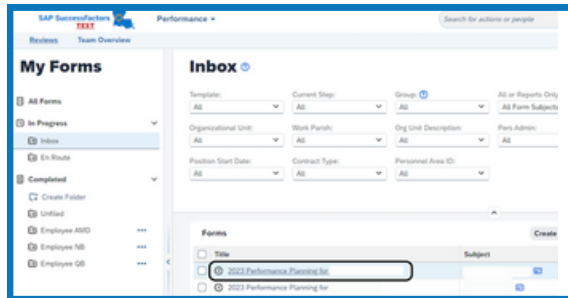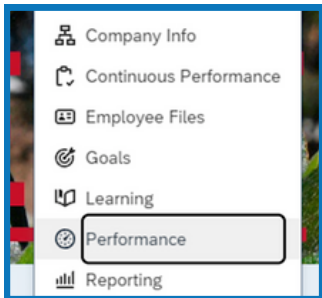# How to Complete a CPM Planning Form

Performance Planning is an opportunity for supervisors and employees to work together to establish goals and to develop a pathway for employee success. Performance Planning is a multi-step process that starts at the beginning of the performance year.

1 SELECT EMPLOYEE'S FORM

- Click on "Performance" in the Home menu.
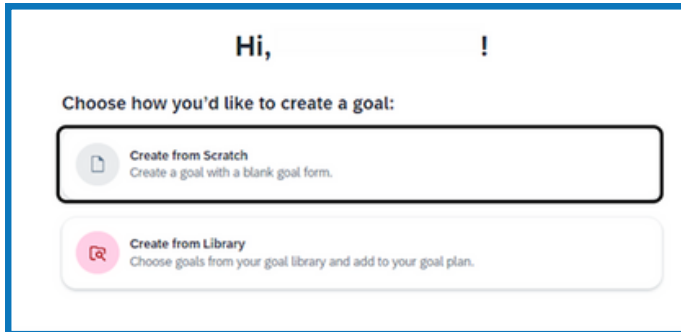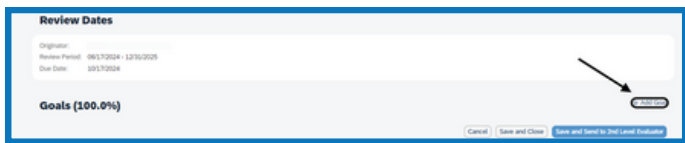- Click on link for the employee's form for whom you want to create a goal.

> Anytime during the form creation, you can "Save and Close" to keep your work without moving it to the next step.

2 ADD GOALS

- Click on "Goals" or scroll down to the Goals section of the form.
- Click "+" to add a goal. Click "Create a New Goal."
- Select method for creating a goal. See "Creating Goals Quick Guide" for more information.
- You must add a minimum of 3 goals - two performance based and one behavior based goals.
- The Weight must total 100%.

Create Performance Goal

Goal Name*:

How will it be measured?:

Start Date: *
Jun 17, 2024

Due Date: *
Dec 31, 2025

Weight: *
0 %

Type:
Department

Category: *
Performance

3 REVIEW

- Review Planning Form.
- Check for incomplete items.
- Revise as necessary.

4 SEND TO 2ND LEVEL EVALUATOR

- When you are finished reviewing the form, click "Save and send to 2nd Level Evaluator."
- A confirmation screen opens. You must select "Save and Send to 2nd Level Evaluator" again for the form to move to the next step in the Route Map.

Cancel | Save and Close | Save and Send to 2nd Level Evaluator

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