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Instructions for managing associate's goals:

1) To begin, go to Essex Okta SSO dashboard > Click on the 'SuccessFactors' icon.

   Alternatively, a direct link is also provided on Buzz.

2) After you log in, you will be directed to your home page.

   ◊ Click on the **drop down arrow** next to **Home**

   ◊ Select **Goals**

3) On the Goals page:

   ◊ Click on the **drop down arrow** next to your **name.** This will bring up a list of your direct reports.

   ◊ Select an associate from under **Reports.**

1 Via: https://

Buzz Link

2

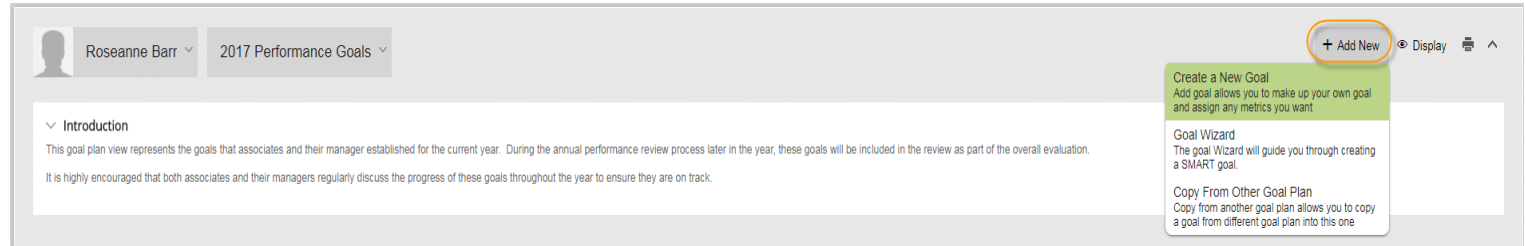

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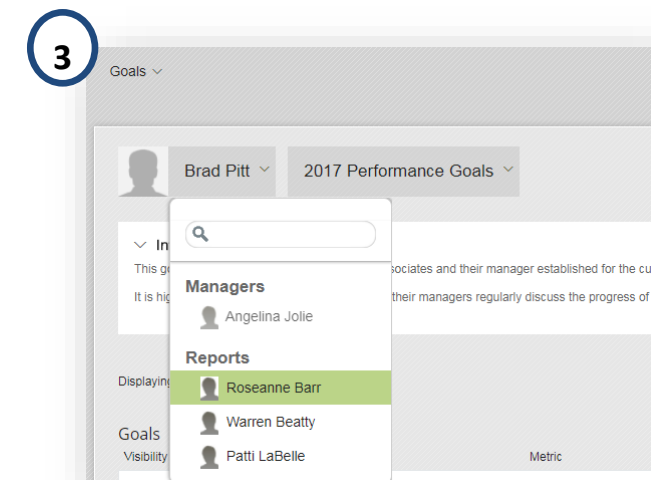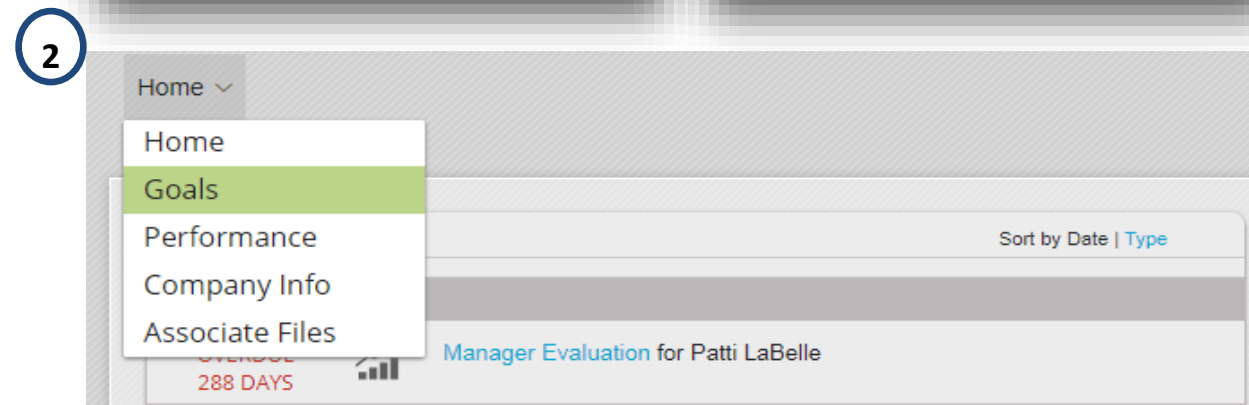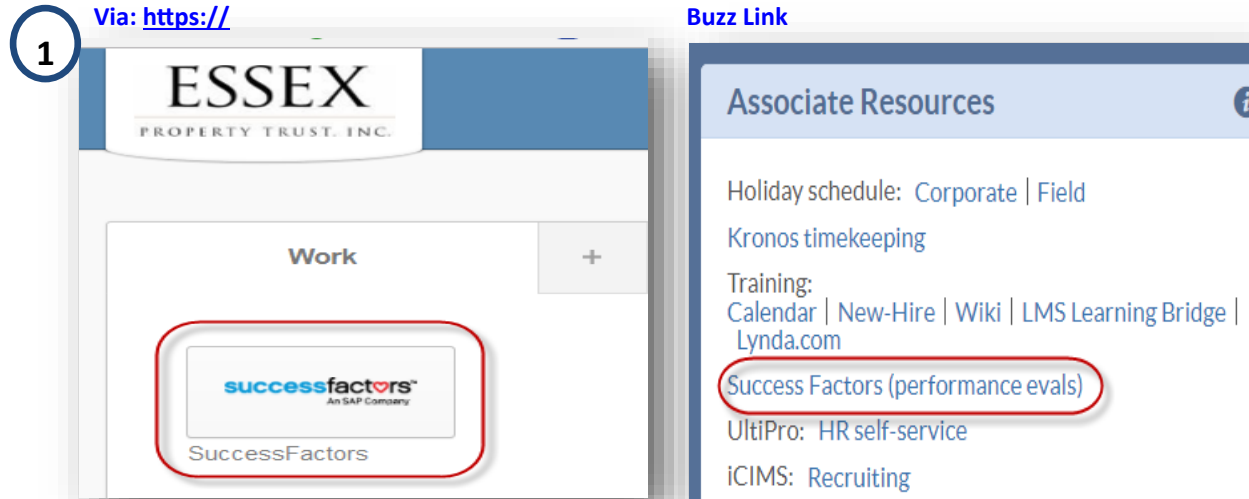
4) Click "+ Add New"

5) Select from the appropriate choices:

- Create a New Goal
- Goal Wizard
- Copy From Other Goal Plan

6) Follow the screen instructions for each selection.

Note: A goal library is available via the "Create a New Goal" option where you can see example goals that you can assign and edit as appropriate to the employee's based on their position.

Roseanne Barr | 2017 Performance Goals

+ Add New · ⊙ Display · 🖶 · ⌃

Create a New Goal
Add goal allows you to make up your own goal and assign any metrics you want.

Goal Wizard
The goal Wizard will guide you through creating a SMART goal.

Copy From Other Goal Plan
Copy from another goal plan allows you to copy a goal from different goal plan into this one

∨ Introduction

This goal plan view represents the goals that associates and their manager established for the current year. During the annual performance review process later in the year, these goals will be included in the review as part of the overall evaluation.

It is highly encouraged that both associates and their managers regularly discuss the progress of these goals throughout the year to ensure they are on track.

To access the Goal Library: Select "**Create a New Goal**" > "**Library Goal**" > Select appropriate choices > Click on "**Add Selected**" > Edit the goals as you see appropriate

1 — Create a New Goal

Choose what type of goal to add.

+ Personal Goal
Personal Goals allow you to make up your own goal and assign any metrics you want.

+ Library Goal
Library Goals are selected from an organized library with suggested metrics.

Cancel

2 — Select Goal from the Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

> Corporate
> Operation

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

> Corporate
∨ Operation
  > Area Manager I
  ∨ Assistant Manager
    ☐ Actively participate in rate setting for new leases and renewals ensuring we are maximizing rental income. — Pricing
    ☐ Actively pursue delinquent RUBS account and maintain overall balance under $500. — Utility Collections
    ☐ Assist Community Manager and Maintenance Supervisor in maintaining cost per turn within budget & ensure make ready days are 7 days or less or as defined by RPM (for renovation properties). — Turnover Costs and Make Ready Days
    ☐ Assist in managing expenses closely and within budget, communicate any overages in advance, actively pursue expense savings. — Expenses
    ☐ Assist in pursuing additional opportunities through other income audits. — Revenue
    ☐ Complete month-end process to include reporting and follow up as needed — Month-end
    ☐ Continue to develop property management skillset to prepare for growth opportunities. Utilize courses through Lynda, LMS, and internal and external resources. — Self-Development
    ☐ Ensure proper charges are being applied upon move out. — Net Turn Over Collection
    ☐ Maintain delinquency under 0.25% (of Scheduled Rent) or reduce 10% over prior year. — Delinquency Reduction
    ☐ Participate in renewal process and actively follow-up with residents to secure high-growth renewal percentage. — Renewals
    ☐ Strive to maintain customer satisfaction at or above 4 stars. (Kingsley, Yelp, Google, etc...) — Binary Fountain
    ☐ Utilize Essex Rewards to recognize associates, assist Community Manager to develop an action plan based — Employee Engagement

Cancel · Back · Add Selected

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3 — Edit Goal

Edit your goal below.

Fields marked with * are required.

* Goal Name*: Achieve a 90% reduction in number of complaints from customers who were not satisfied with how long it took for them to receive assistance by (date)

spell check... legal scan...

* Metric: Customer complaint rates

spell check... legal scan...

* Start Date: 01/01/2017
* Due Date: 12/31/2017
% Complete: 0.0 %
Status: Not Started
Weight: 40 %

GOAL 1

Status: Not Started ▾

Status ▾
Not Started
On Track
Behind
Completed
Postponed
Cancelled

Weight: ____ %

% Complete: 0.0 %
Status: Not Started ▾
Weight: 60 %

GOAL 2

Note: All fields marked with a red * are required.

You are required to assign a **minimum of 2 goals** for each associate. Please ensure that the total weight for all goals equals **100%** for the goal plan.

For example: 2 Goals were assign to the associate.

1. Goal 1: Weight = 40%

2. Goal 2: Weight = 60%

3. Total Goal weight combined= 100%

How to Edit Goals

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To edit goals: Follow instructions from page 1 (Step 1-3) and continue with the following steps:

4) Click "action" and then "edit goal".

- The Edit Goal box pops up. You can change the completion rate and status here.

- Do **NOT** change start or due dates.

5) In the "% completed field" enter percentage (i.e. 50%, 75%, etc)

Click "status" and choose an option from the drop down menu.

- Click **Save Changes.**

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