

The following pages will provide instructions on how to complete performance evaluations for your associates.

Some associates will have completed a self-evaluation, the process described in the following pages applies to all of your associates regardless of whether or not they completed a self-evaluation.

### Logging In

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. From here you can view the status of your associates' evaluations.

Click on an associate's name under "To Do" to begin their evaluations.

**1** Via: <https://essex.okta.com/>

**Buzz Link**

**2**

Home ▾ Search for people Brad Pitt (99997) SAP SuccessFactors

To Do ▾ Sort by Date | Type

- Due Now (1)
- Due Later (1)

OCT 29 Manager Evaluation 1 of 3 Completed

To Do: Pati LaBelle (Upcoming: Warren Beatty)

Completed: Roseanne Barr (Sep 8, 2017)

My Goals ▾ 2017 Performance Goals

My Team 3 TEAM MEMBERS Add/remove tiles

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# Manager Evaluation: Navigation Tool Bar

## Navigation Tool Bar

3) The **Navigation Tool Bar** will remain at the top of your screen as you complete your associate's evaluation. You can click on the boxes for further information:

**Final Score** - This score will auto populate as you complete the evaluation. You can click on the box for a snapshot of the scores.

**Incomplete Items**— Lets you know how many items you still need to complete.

**Stack Ranker**— This gives you a high level view of your team. It "ranks" your team, based on overall score, so you can see how your associates compare to one another.

**Supporting Information**— Other managers and associates can submit feedback about your associate's performance.

**Gap Analysis** — This applies to those associates who completed a self-evaluation. It allows you to see where your score differs from their score.

Category	Count
Expectation of Employment	1
Attention to Detail	1
Communication Skills	1
Critical Functions	0
Administration/Other Duties	2
Community Operations	2
Customer Service/Market Knowledge	2
Fiscal Management	2

Rank	Associate	Score
1	Patti LaBelle	3.86
2	Roseanne Barr	3.15
--	Warren Beatty	unrated

Jump to: Notes (4)

Achieved 95% on QMR  
07/12/2007

Overall Form Rating: 3.86  
Adjusted Calculated Form Rating: 3.86

Section	Rating	Weight
Expectation of Employment	3.86	20.0%
Accountability	4.0	
Appearance	4.0	
Attendance	3.0	

5 items rated higher than Patti		9 items rated lower than Patti	
Expectation of Employment (5)	Gap	Expectation of Employment (2)	Gap
Accountability	+1.0	Attention to Detail	N/A
Appearance	+1.0	Communication Skills	N/A
Initiative	+1.0	Critical Functions (5)	Gap



**Tip:** Please see the "How to Use the Feedback Tool in Success Factors" Job Aid for information on soliciting feedback on your associate.

## Workflow

4) The **Route Map**, also known as the **Workflow**, provides a step by step guide to completing the evaluation. Each step **MUST** be completed before you can advance to the next step in the process.



### Tip

If your associate has completed a self-evaluation, make sure to review it **BEFORE** you enter in your ratings and comments.

If you want your associate to provide more details (e.g. more notes to the comments sections, detailed examples, etc.), you have the ability to send the evaluation back so they can make the changes.

To do this, click the

Send to Previous Step

button at the bottom of the eval.



### 1—Self-Evaluation:

Associates complete a self-evaluation in this step. This is your opportunity to showcase your performance during the evaluation period by scoring and commenting in each section or competency.

### 2— Manager Evaluation:

Managers complete the official evaluation of the associate in this step.

### 3— Review:

2nd Level Manager reviews and approves the evaluation.

### 4 — Manager Signature:

Managers should schedule their one-on-one meeting with their associate in this step; once the meeting takes place, electronically sign the form. Ensure the associate also electroni-

### 5 — Associate Signature:

Associates should electronically sign the form to acknowledge receipt and review of the performance. evaluation.

## Rating Scale

5) The **Rating Scale** provides a structured and standardized approach to measure performance.

The Success Factors evaluation provides a summary version of the **1—5 Rating Scale**, but further details are described here and in the Performance Evaluation Manager Handbooks located on Buzz.

### Introduction

This evaluation consists of five sections: Critical Functions, Expectations of Employment, Individual Performance Goals, Describing Your Long Term Goals, and Performance Summary. The following rating scale provides a structured and standardized approach to measure performance.

1. **Unsuccessful/Unacceptable Performance:** Performance fails to meet minimum expectations for this role, and immediate and sustained improvement is required.
2. **Partially Successful Performance/Needs Improvement:** Performance does not consistently meet or occasionally falls below what is required of the position; improvement in specific areas is required.
3. **Fully Successful/Effective Performance:** Performance consistently meets the critical requirements of the position, continually achieves preset goals and performs with distinction.
4. **Superior/Highly Effective Performance:** Performance is continually and consistently superior and regularly goes beyond what is expected.
5. **Distinguished Performance and role Model Status:** Clearly and consistently demonstrates extraordinary and exceptional accomplishment in all major areas of responsibility.

## Rating Scale 1-5

[Less](#)

1. **Unsuccessful/Unacceptable Performance:** Performance fails to meet minimum expectations for this role, and immediate and sustained improvement is required.
2. **Partially Successful Performance/Needs Improvement:** Performance does not consistently meet or occasionally falls below what is required of the position; improvement in specific areas is required.
3. **Fully Successful/Effective Performance:** Performance consistently meets the critical requirements of the position, continually achieves preset goals and performs with distinction.
4. **Superior/Highly Effective Performance:** Performance is continually and consistently superior and regularly goes beyond what is expected.
5. **Distinguished Performance and role Model Status:** Clearly and consistently demonstrates extraordinary and exceptional accomplishment in all major areas of responsibility.

There are three main sections (A, B, C) that you must complete for your associate's evaluation.

## Critical Functions—Section A

6) The first section to complete is the **Critical Functions** section.

If your associate has completed a self-evaluation, you will be able to see their ratings and comments as you write your own.

Please note that your rating, as the manager, will be the official rating on the evaluation.

Please make sure to include notes in the comments section for each critical function/competency as this will help your associate to understand the reasons for their score.

## Critical Functions (50.0%)

Critical Functions list abilities (knowledge, skills, traits) needed to perform the functions of a specific role. The relative importance of each differs by position. The purpose of this section is to evaluate individual performance compared to company expectations as it relates to every team members role.

### Administration/Other Duties

- Adapts to change and follows instruction
- Receives constructive criticism in a professional manner
- Completes error free, high quality reports in a timely manner
- Proficient in computer applications and usage as it relates to property management
- Completes all company required training in a timely manner

\* Rating   
☆☆☆☆☆ unrated

\* Managers Comments

**B** *I* U |  |  |  |  |  |  | Size 

**Important:** Provide specific examples to support your rating.

If your associate completed a self-evaluation, you will see their score and comments here. If no self-evaluation was completed, this section will be blank.

### Ratings from Others



Rating 



3.0 - Fully Successful/Effective Performance

### Subjects Comments

I am open to feedback and always willing to learn. For instance, my manager recommended some ideas that would help me improve my sales skills. I incorporated those ideas into my work and took additional training classes. By making these changes, I was able to increase my closing ratio by 40%.

\* Rating 



### Performance Rating Scale

1.0 Unsuccessful/Unacceptable Performance: Performance fails to meet minimum expectations for this role, and immediate and sustained improvement is required.

2.0 Partially Successful Performance/Needs Improvement: Performance does not consistently meet or occasionally falls below what is required of the position; improvement in specific areas is required.

3.0 Fully Successful/Effective Performance: Performance consistently meets the critical requirements of the position, continually achieves preset goals and performs with distinction.

4.0 Superior/Highly Effective Performance:

Clicking the question mark icon will provide detailed information on the rating scale.

## Expectations of Employment— Section B

7) The second section to complete is the **Expectations of Employment** section. This section lists behavioral competencies required of all associates regardless of their position.

The competencies are:

- Accountability
- Appearance
- Attendance
- Attention to Detail
- Communication Skills
- Initiative
- Reliability
- Safety
- Teamwork

At the end of this section, there will be one overall comment box. Please use this to provide specific examples that support your ratings for the Expectations of Employment section.

### Expectation of Employment (20.0%)

The purpose of this section is to evaluate performance alignment in the behavioral competencies required of all Essex team members irrespective of their position. Essex team members are expected to demonstrate proficiency in these competencies as they relate to their role.

#### Accountability

Accepts work assignments and takes ownership of shortcomings and commits to corrective actions. Identifies and overcomes roadblocks or setbacks early to deliver results.

\* Rating ?

★★★★☆ Superior/Highly Effective Performance

Ratings from Others

Rating ?  
★★★★☆  
3.0 - Fully Successful/Effective Performance

#### Appearance

**DO NOT RATE HIGHER THAN A 3 -**



Maintains a professional appearance at all times. Compliant with E-Apparel policy and wears name tag/ID badge during work hours.

\* Rating ?

★★★★☆ Superior/Highly Effective Performance

Ratings from Others

Rating ?  
★★★★☆  
3.0 - Fully Successful/Effective Performance

#### Attendance

**DO NOT RATE HIGHER THAN A 3 -**

Comes to work on time and takes necessary breaks and meal periods. Uses timekeeping system effectively.

\* Rating ?

★★★★☆ Fully Successful/Effective Performance

Ratings from Others

Rating ?  
★★★★☆  
3.0 - Fully Successful/Effective Performance

#### Section Comments:

\* Managers Comments

**B I U** | | | | |

**Important: Provide specific examples to support your ratings in this section.**

Subjects Comments

I am open to feedback and always willing to learn. For instance, my manager recommended some ideas that would help me improve my sales skills. I incorporated those ideas into my work and took additional training classes. By making these changes, I was able to increase my closing ratio by 40%.

If your associate completed a self-evaluation, you will see their score and comments here. If no self-evaluation was completed, this section will be blank.



**Tip:** There are three behavioral competencies that should **NOT** be rated higher than a 3: Appearance, Attendance, and Safety.

## Performance Summary—Section C

8) The final section to complete is the **Performance Summary**.

This section allows you one final chance to include comments about your associate’s performance.

Things to include in your comments:

- Highlight accomplishments
- Address deficiencies
- Note areas for improvement/development

Once you **finalize the form**, it will be routed directly to your Area Manager/Regional Manager or 2nd Level Manager for review.

**Please Note:** You will NOT be able to sign the form at this time. This step occurs later in the process when you meet with your associate to review the evaluation.

Performance Summary

The Manager’s ratings are the “ratings of record” and will be permanently stored on the form upon completion of the evaluation process

Overall Form Rating: 3.86 - **Your rating is the official score.** Adjusted Calculated Form Rating: 3.86 -

Name	Rating	Weight
Expectation of Employment	3.86	20.0% of total score

Section Comments:

Managers Comments

**Please include an overall summary of your associate’s performance.**

Subjects Comments

I am open to feedback and always willing to learn. For instance, my manager recommended some ideas that would help me improve my sales skills. I incorporated those ideas into my work and took additional training classes. By making these changes, I was able to increase my closing ratio by 40%.

Signatures

Once the review is completed you will be able to electronically sign the form. Your electronic signature will be stored in this section of the form

2nd Level Manager: *Angelina Jolie has not signed yet*

Manager: *Brad Pitt has not signed yet*

Associate: *Patti LaBelle has not signed yet*

Cancel Save and Close Send to Previous Step **Finalize Form**

**If your associate completed a self-evaluation, you will see their comments here. If no self-evaluation was completed, this section will be blank.**

Once you click the “Finalize Form” button, a confirmation page will appear. You can leave an additional comment, but this comment will **NOT** apply to the evaluation. This comment, if you choose to make one, will be emailed to your Area Manager/Regional Manager/2nd Level Manager.

Once you click the “Finalize Form” button on the pop up box, an email notification will be sent to your manager to inform them that the evaluation is in their queue and ready to be reviewed.