How to cascade goals in SuccessFactors

This guide shows you how to cascade goals in SuccessFactors. You open your goal plan, copy a goal from a previous plan if needed, and assign the goal to team members. It also covers navigating the home page, checking your user context, and managing goal details and status.

Prerequisites

Before you begin, make sure you have the following:

- The SuccessFactors URL for your organization and a web browser.
- Access to **My Goals** from the Quick Actions on the home page.
- A goal in your goal plan that you want to assign to others.
- Team members listed under **My Team** to receive the cascaded goal.

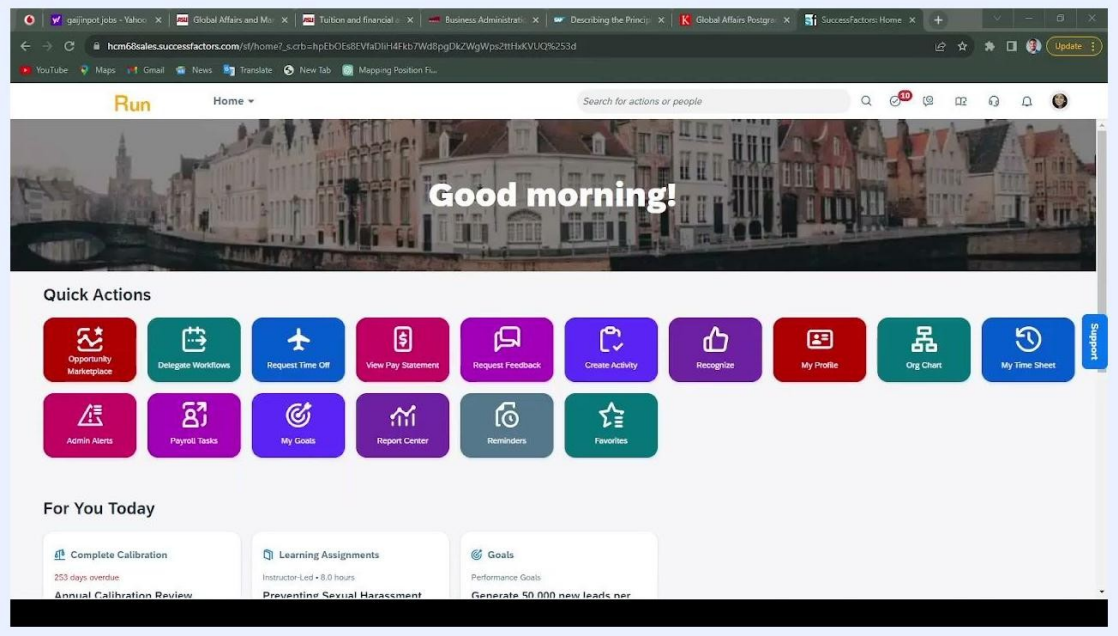
Steps

1. Open My Goals from the SuccessFactors home page

Open your browser and go to the SuccessFactors URL. The home page shows a greeting and a **Quick Actions** section. The top navigation bar includes a search bar, a notification bell, a help icon, and your user profile icon.

Quick Actions include Opportunity Marketplace, Delegate Workflows, Request Time Off, View Pay Statement, Request Feedback, Create Activity, Recognize, My Profile, Org Chart, My Time Sheet, Admin Alerts, Payroll Tasks, My Goals, Report Center, Reminders, and Favorites.

Select **My Goals**.



SuccessFactors home page with Quick Actions and the navigation bar visible

2. Review your goal plan

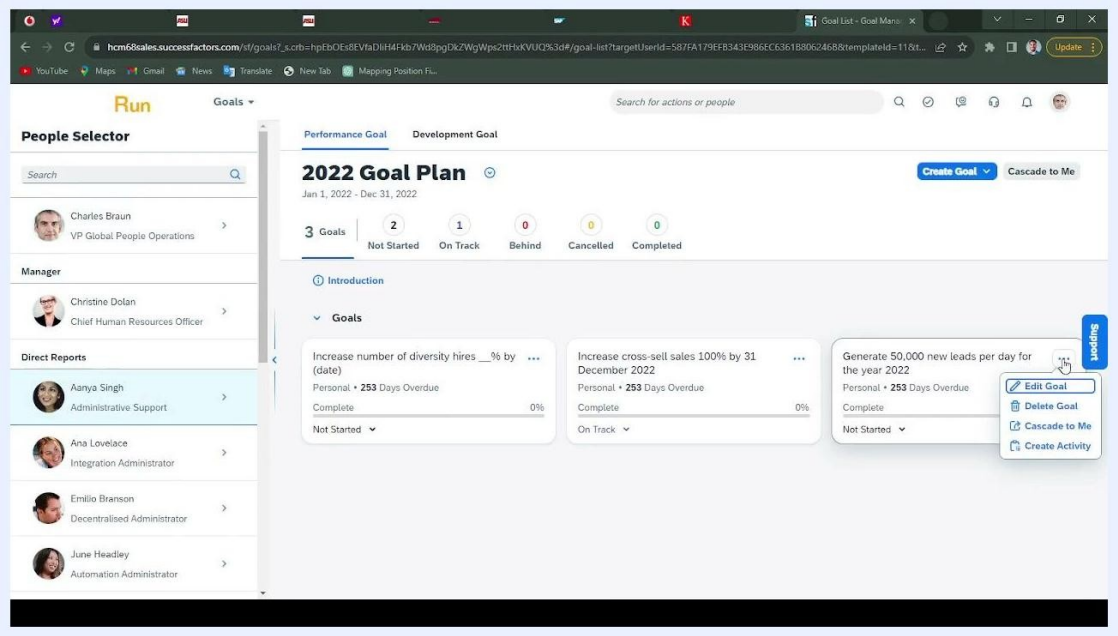
After you select **My Goals**, the **2021 Goal Plan** screen opens. The left sidebar contains a People Selector with search, manager, and direct reports.

The main panel shows the plan dates (Jan 1, 2021 - Dec 31, 2021) and the number of goals. It also shows status counts for Not Started, On Track, Behind, Cancelled, and Completed.

In this example, the plan lists two goals, both Not Started, 0% Complete, and 618 days overdue:

- "Increase number of diversity hires ___% by (date)"

- "Analyze production workflow bottlenecks and make process improvement..."



2021 Goal Plan screen with overdue goals and status indicators

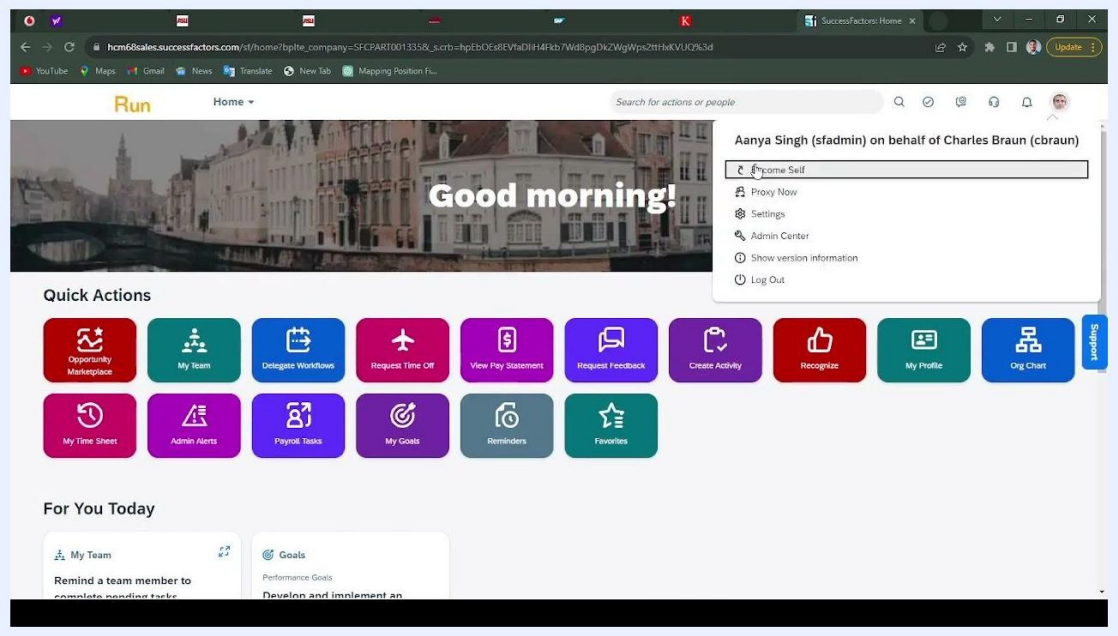
3. Check your user context in the account menu

Select the user profile icon in the upper right corner to open the account menu. The menu shows the current user context, for example "Aanya Singh (sfadmin) on behalf of Charles Braun (cbraun)."

The menu offers these options:

- **Become Self**
- **Proxy Now**
- **Settings**
- **Admin Center**
- **Show version information**
- **Log Out**

To return to your own account, select **Become Self**. The other options let you act as a proxy for another user, open settings, or log out.



User account menu open on the home dashboard, showing Become Self, Proxy Now, Settings, Admin Center, Show version information, and Log Out

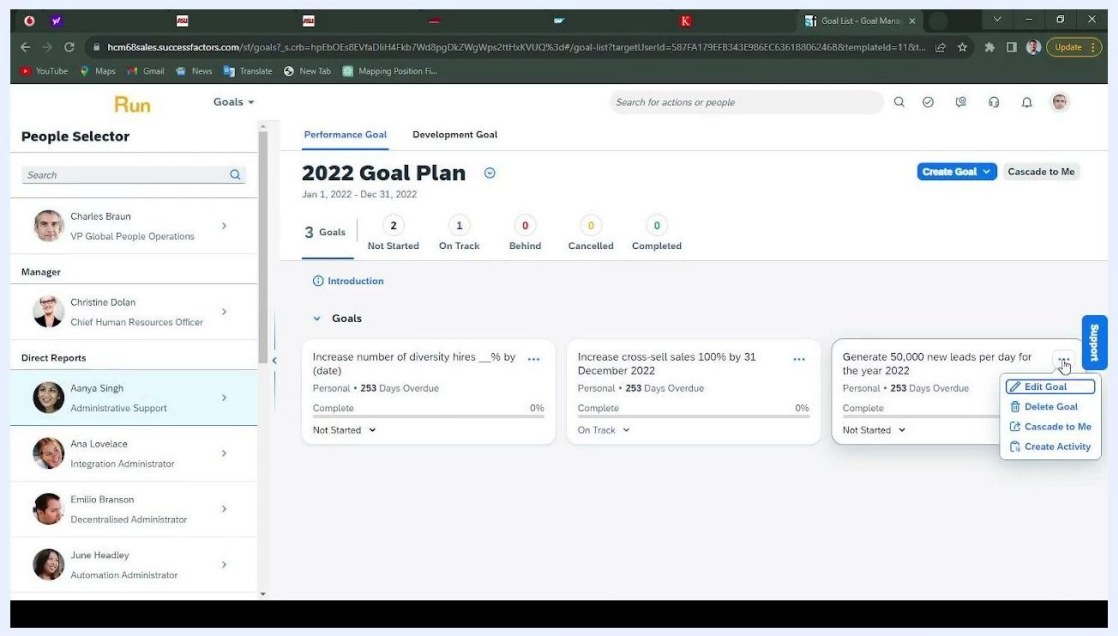
4. Switch to the 2022 Goal Plan

Select the **2022 Goal Plan** tab. The main panel updates to show the plan dates (Jan 1, 2022 - Dec 31, 2022) and three goals. Two are Not Started and one is On Track.

The goals in this example are:

- "Increase number of diversity hires ___% by (date)" (Not Started)
- "Increase cross-sell sales 100% by 31 December 2022" (On Track)
- "Generate 50,000 new leads per day for the year 2022" (Not Started)

Each goal shows 253 days overdue and 0% complete. Select the three-dot menu on a goal to see **Edit Goal**, **Delete Goal**, **Cascade to Me**, and **Create Activity**.

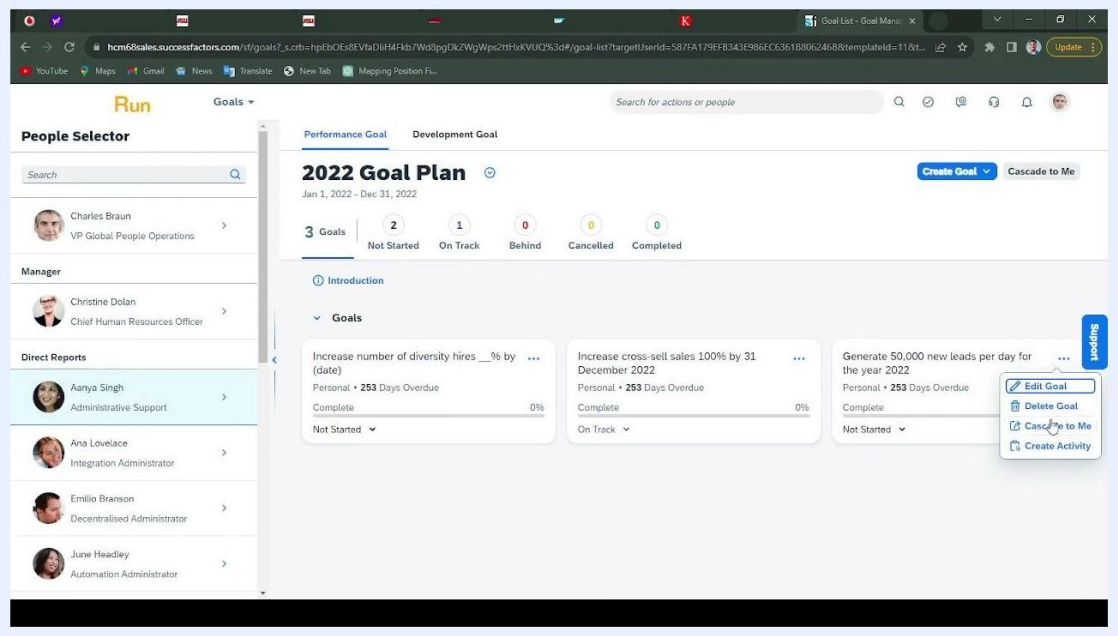


2022 Goal Plan with three goals and the goal options menu open

5. Edit a goal before you cascade it

To change a goal's details, select the three-dot menu next to the goal, for example "Generate 50,000 new leads per day for the year 2022." Then select **Edit Goal**.

The same menu also includes **Delete Goal**, **Cascade to Me**, and **Create Activity**.



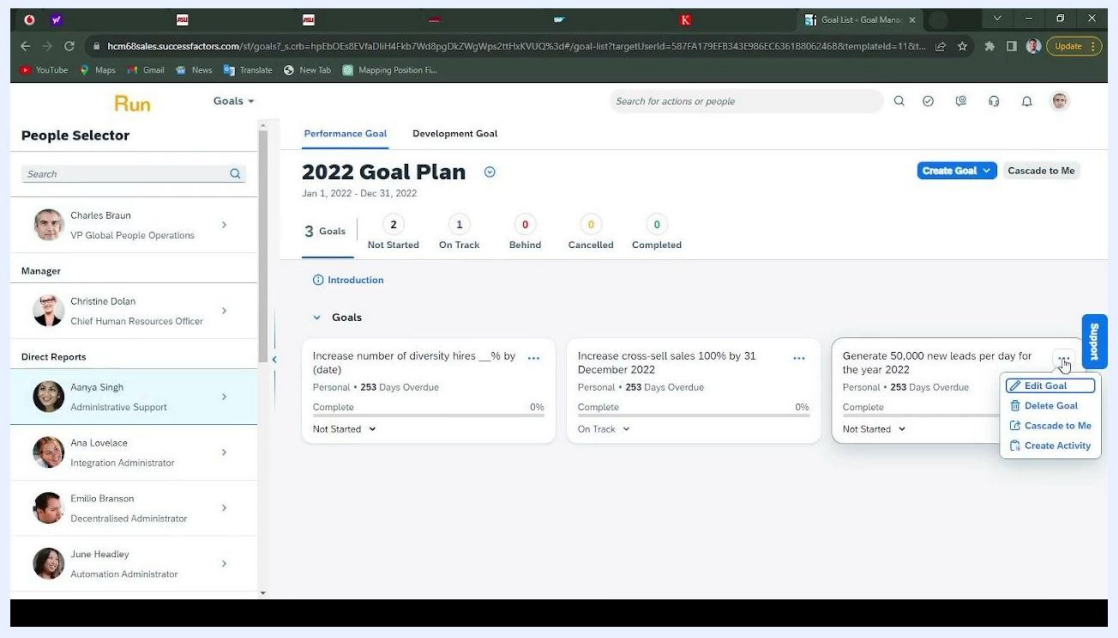
Goal options menu open for a specific goal

6. Update the goal status

Select the status dropdown for a goal, for example **Not Started**. Choose one of the following statuses:

- **Not Started**
- **On Track**
- **Behind**
- **Cancelled**
- **Completed**

The goal status updates to match your selection.



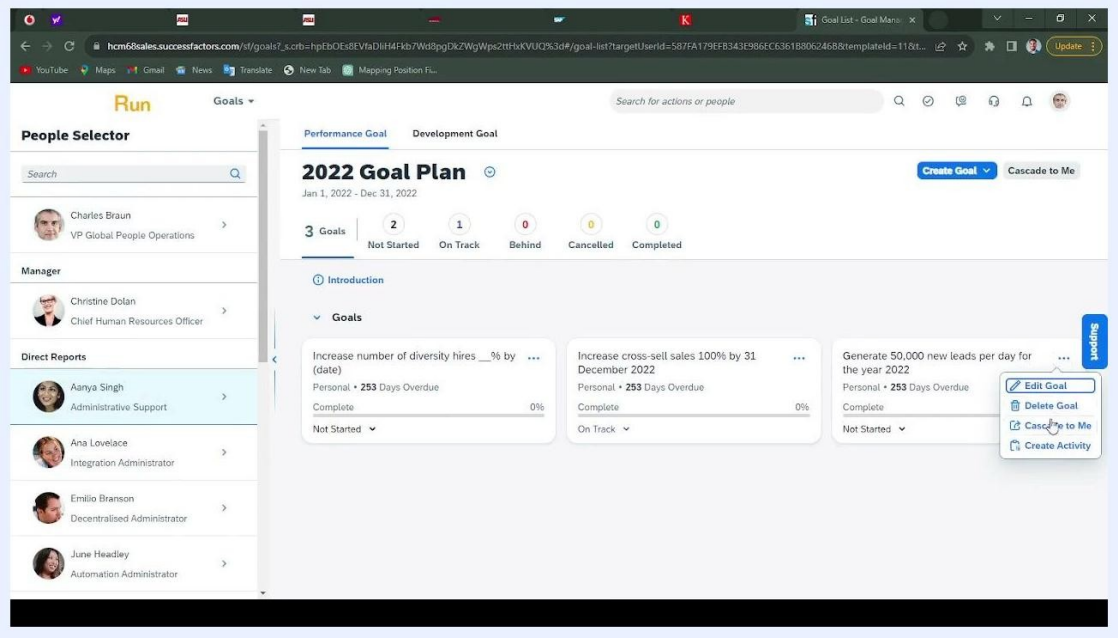
Goal status dropdown open with the status options visible

7. Create or copy a goal

To add a goal you can cascade later, select **Create Goal** in the upper right. Then choose one of these options:

- **Create New**
- **Create from Library**
- **Copy from Goal Plan**

Select the option that fits. You can add a new goal or copy an existing one.



Create Goal dropdown menu open with options to create or copy goals

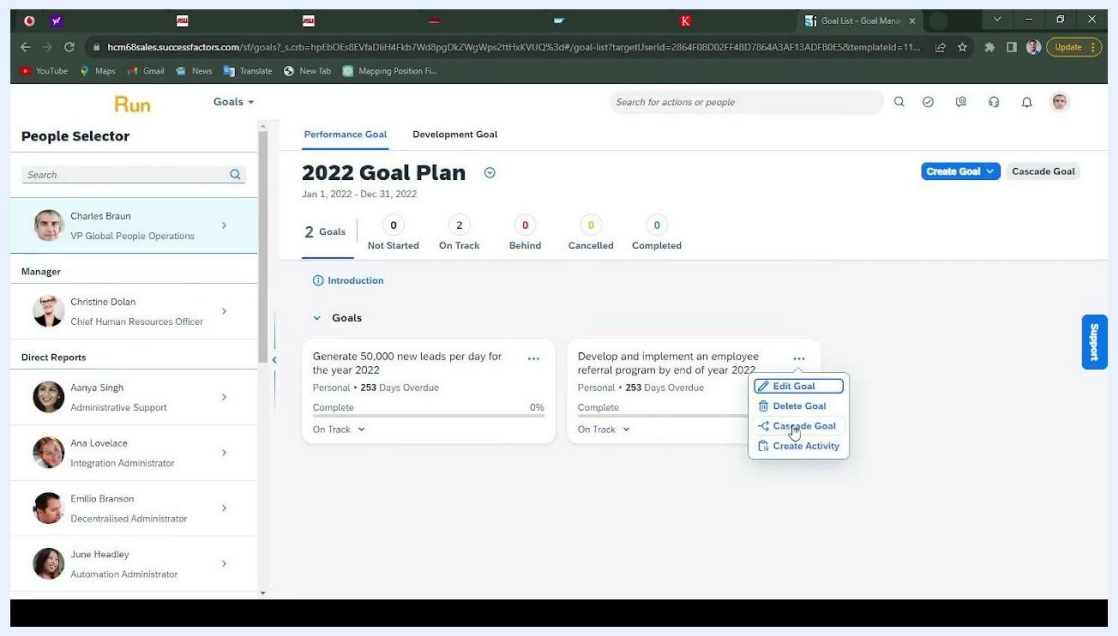
8. Copy a goal from a previous goal plan

Select **Create Goal**, then select **Copy from Goal Plan**. In the **Copy from Goal Plan** dialog, start with Step 1: Select Goals.

Use the **Goal Plan** dropdown to choose **2021 Goal Plan**. The available goals appear with checkboxes:

- "Analyze production workflow bottlenecks and make process improvement recommendations by (date)"
- "Develop and implement an employee referral program by end of year 2022"

Select the checkbox for "Develop and implement an employee referral program by end of year 2022."



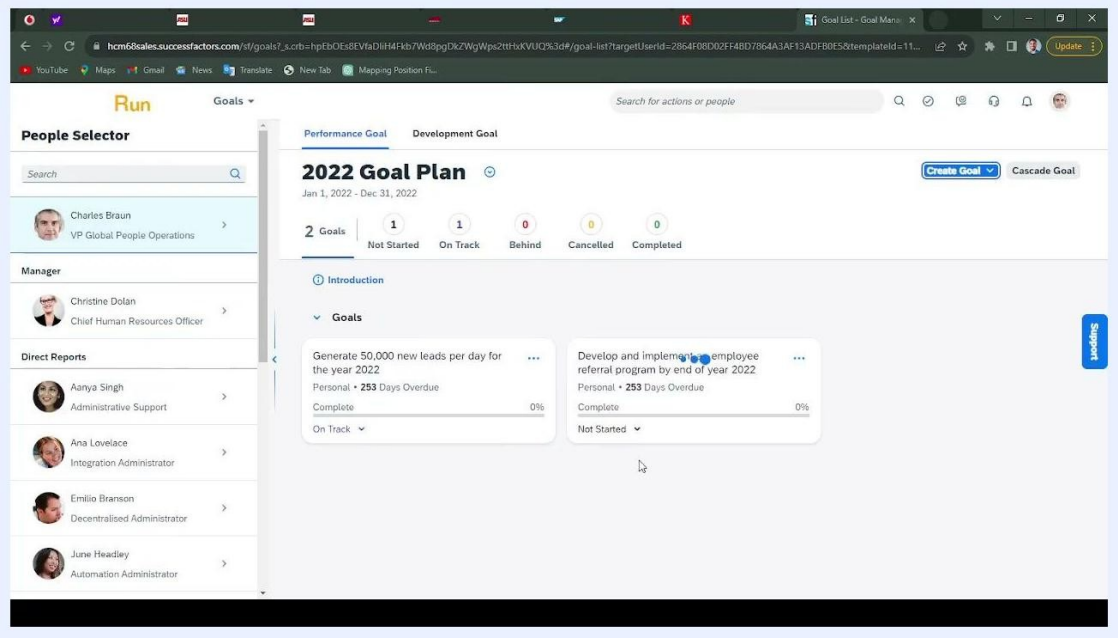
Copy from Goal Plan dialog with goals listed and one goal selected

9. Confirm the copied goal in the 2022 Goal Plan

Return to the **2022 Goal Plan** screen. It now lists two goals:

- "Generate 50,000 new leads per day for the year 2022" (On Track)
- "Develop and implement an employee referral program by end of year 2022" (Not Started)

Both goals show 253 days overdue and 0% complete.

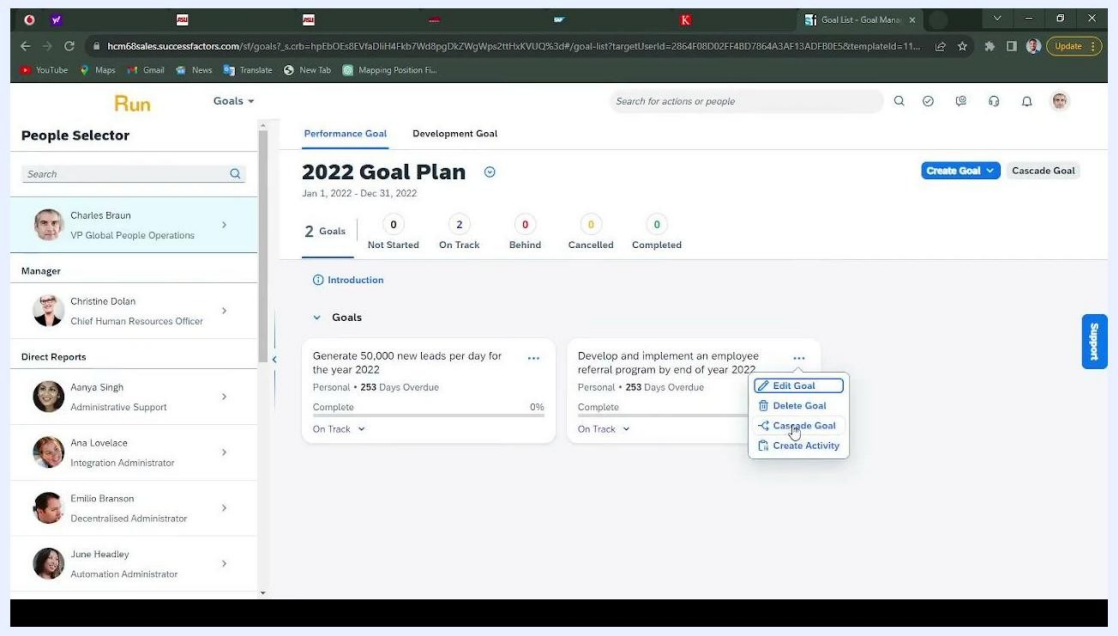


2022 Goal Plan screen with two goals listed

10. Open the Cascade Goal option for the goal

Select the three-dot menu next to "Develop and implement an employee referral program by end of year 2022." The menu shows **Edit Goal**, **Delete Goal**, **Cascade Goal**, and **Create Activity**.

Select **Cascade Goal** to assign this goal to others.

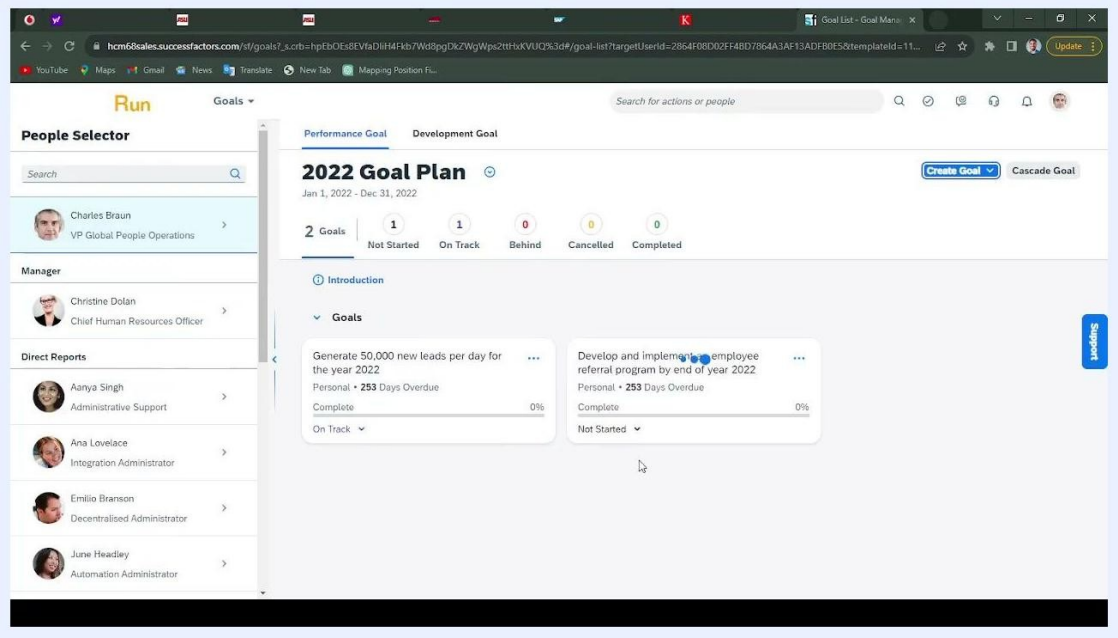


Goal options menu open with Cascade Goal available

11. Cascade the goal to team members

In the **Cascade Goal** dialog, start with Step 1: Select Recipients. Under **My Team**, select the checkboxes for the people who should receive the goal, for example Aanya Singh and Ana Lovelace.

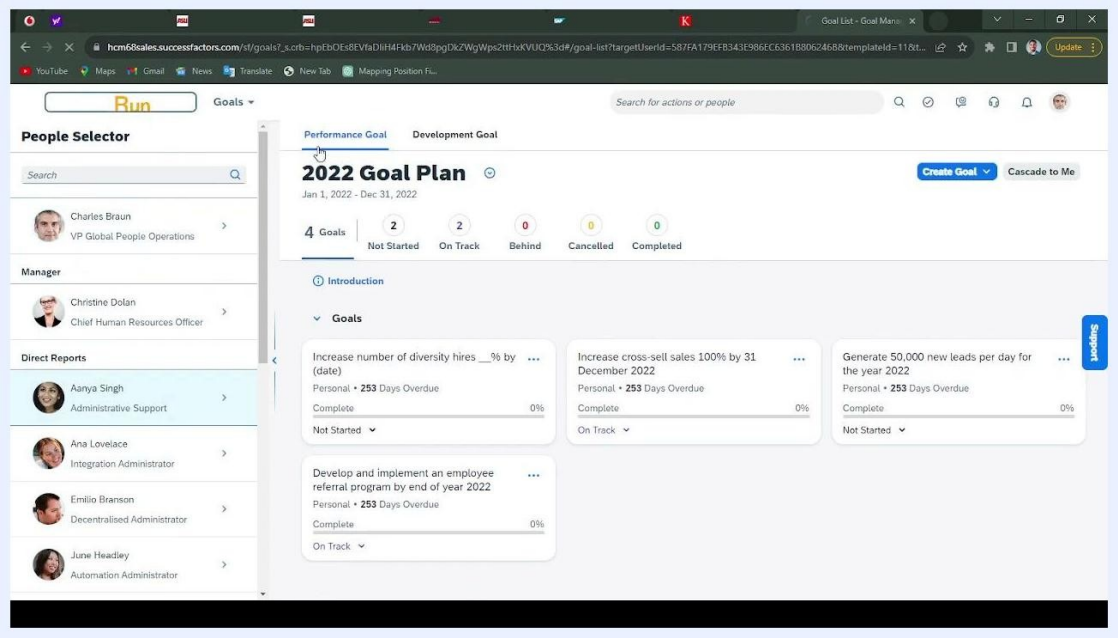
Confirm that the team members you selected are highlighted.



Cascade Goal dialog with team members selected as recipients

12. Switch between Performance and Development goals (optional)

Use the **Performance Goal** and **Development Goal** tabs at the top of the goal plan screen to switch between goal types. The current view is **Performance Goal**.



Performance Goal and Development Goal tabs at the top of the goal plan screen

Summary

You now know how to cascade goals in SuccessFactors. Open **My Goals**, select the right goal plan, and copy a goal from a previous plan if needed. Then open the goal's three-dot menu, select **Cascade Goal**, and choose recipients under **My Team**. You can also edit goals, update their status, and switch user context from the profile menu. These steps help you track and delegate objectives across your team.