

# OBJECTIVE SETTING

COMMUNICATE • COLLABORATE • COMMIT



User Manual

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## Part I

# Introduction

Objective Setting is a powerful tool that is used to facilitate communication of strategies down to its operational granularity. It encourages collaboration from both vertical and horizontal relationship of teams and individuals in the organization to work together towards common direction. By writing yearly objectives, it signifies that functional teams are ready to deliver their commitment to business and organizational success.

In our effort to make the process effective, efficient and convenient for you, we are introducing myCompass, a performance management tool to guide you in setting your objectives for the year. It specifically provides you the following capabilities for you to manage and monitor your performance:

- Fields are designed based on writing a SMART objective;
- Opportunity to align your objectives with your manager's;
- If you have staff, you can create and assign objectives to them as part of their deliverables for the year;
- There is workflow to ensure that objectives set are properly approved/accepted; and
- You can update your progress for each objective anytime, which will be visible to your immediate superior, and to your staff if you have any.

## USER ACCESS

Regular and probationary employees from President & CEO level down to staff level (S I) will use myCompass for their objective setting. Access is automatically given upon deployment.

## ADMINISTRATION

If you have any concern about how to create clear and aligned objectives or how to navigate myCompass, please send it to:

[HRSupport@eei.com.ph](mailto:HRSupport@eei.com.ph)

## Part II

# Navigating myCompass

## HOW TO LOG-IN

You can access myCompass through EEI 360 platform via internet connection. Just follow these steps:

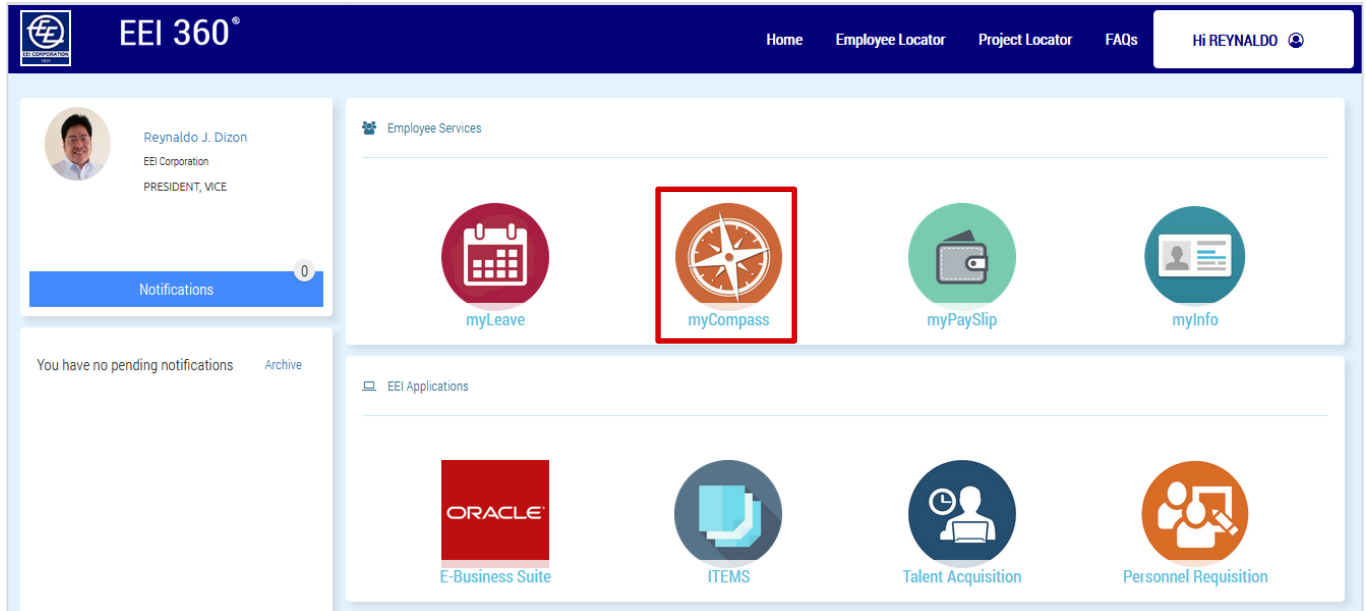
1. Open your browser.
2. Go to EEI 360 using this url:

<https://griffin.eei.com.ph/eei360/>

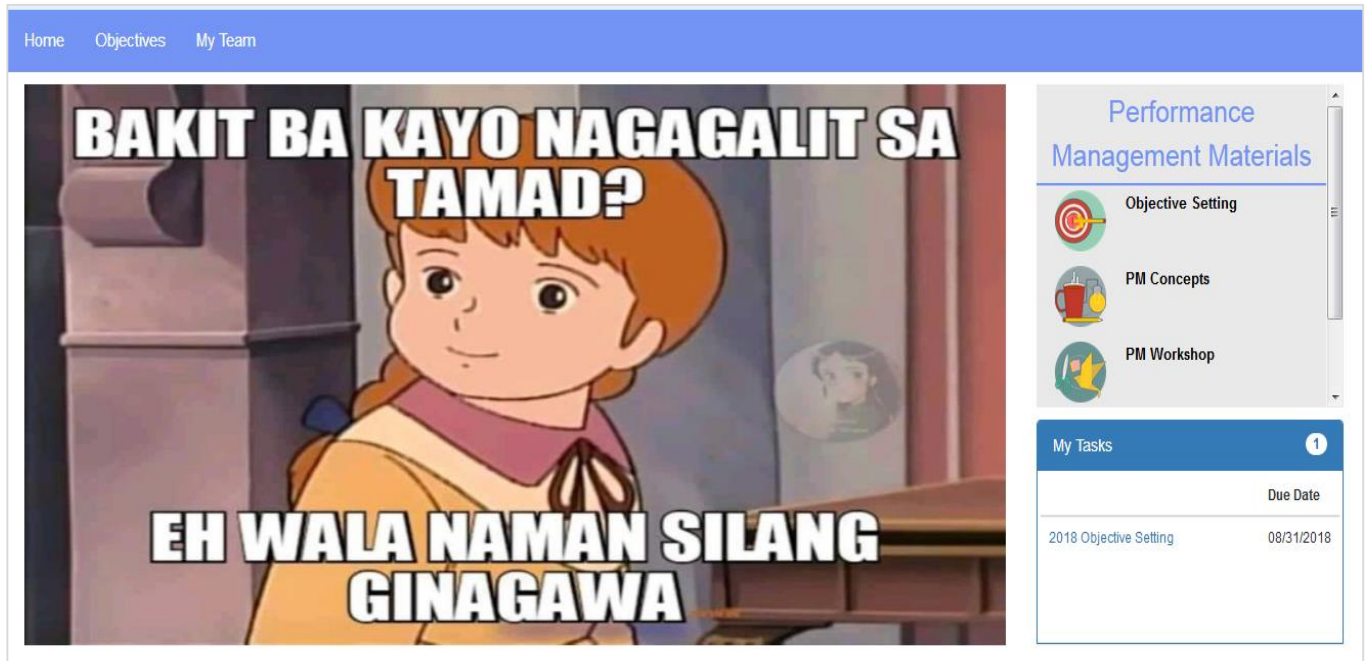
3. Sign in to your account using your Person No. and password.

The screenshot shows a login and account activation interface. On the left, under the heading "Sign In to your Account", there are three input fields: a dropdown menu for "EEI Corporation", a text field for "94920", and a password field with masked characters. Below these fields are a "Remember me" checkbox and a blue "Sign In" button. A "Forgot Password" link is located below the button. On the right, under the heading "Activate your Account", there is instructional text for eLeave users and non-eLeave users. Below the text is a blue "Activate account" button. At the bottom of the right section, there is a note: "To register an email-address, kindly approach Knowledge and Change Management(KCM) Department".

4. Once you are in EEI 360 homepage, go to My Page and click the myCompass icon under Employee Services.

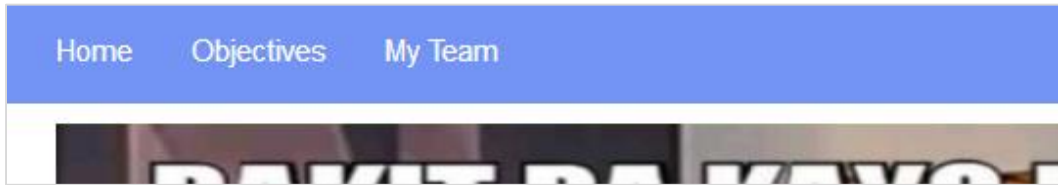


5. You will then be directed to myCompass homepage.

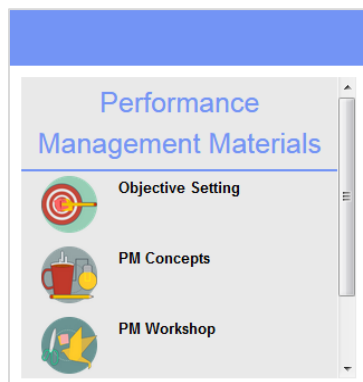


## myCompass Homepage

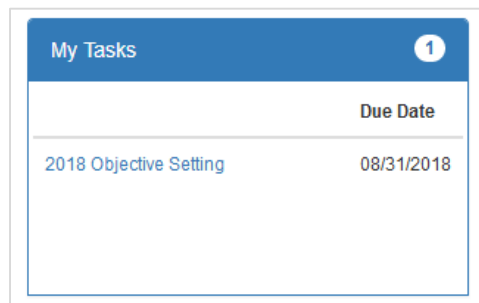
1. In myCompass Homepage, you will see the following tabs: Home, Objectives, and My Team, if you have staff under you.



2. At the right-hand side of your screen, you can locate some Performance Management Materials that you can use when you do your objective setting.



3. Below PMS Materials is My Tasks. You can view here pending tasks that need your action. For example, setting of objectives that is due on 31 August 2018, or approval of your staff's objectives.



My Tasks <span>1</span>	
	Due Date
<a href="#">2018 Objective Setting</a>	08/31/2018

## Part III

## Using the System

## HOW TO CREATE OBJECTIVES

1. There are several ways to get to Objective Setting window. You can either click the link from your email notice, or you can directly log in to EEI 360 and click myCompass icon.
2. From myCompass homepage, you can either click Objectives tab from menu bar or click the link in My Tasks.



3. From your Objective Setting window, click Create button.



### Objective Setting

You may proceed to create or update your Objectives by clicking the Create button or align your objectives with your Manager by clicking My Manager's Objectives.

**+ Create**

Search Search here... My Task All KRA All Status All

Details

To enable checkbox(es), make sure you have added your Lead, Lag and dates must within the range of your objectives.

My Objectives My Manager's Objectives

Specific Objective	Target Date	KRA	Weight	Status	Progress	Options
No data available in table						
Total			0.00%			

Showing 0 to 0 of 0 entries First Previous Next Last

4. A pop-up window will display for you to populate the SMART-designed fields. Fields marked with asterisk are required to fill in.

### Add Objective

**My Task \***  
2018 Objective Setting

**Specific Objective \***

**Start Date \*** **Target Date \***

**Key Result Area \***  
Select Key Result Area

**Weight \***  
0.00 %

**Share**  Allow direct reports to see and align with this objective

Lead +	Start Date	Due Date	Options
Lag +	Target	Start Date	Due Date Options
Attachments +	File		
Comments +			

✓ ABC Save as Draft Cancel

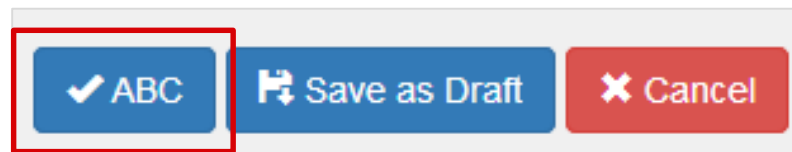
5. Here are some quick guide on how to fill in each field:

Field	Description
Specific Objective	Write a clear description of objective to understand its value and meaning for the business and organization.
Start Date and Target Date	The inclusive dates for which the objective will be completed.
Key Result Area	You can choose if the nature of your objective is for Business, Customer, Process or People.
Weight	The total weight of all your objectives should not be more than 100%. Otherwise, the system will not accept the last objective you will save.
Share	If you have staff and you need them to know and align with your objective, you can tick the checkbox. Once your objective is approved by your superior, your staff can view your objective from their window.
Lead	You can enumerate the actions (performance drivers) that will lead to the achievement of your objectives. You can save as many Lead targets as necessary.
Lag	You can enumerate the target outputs (success measures) of your initiatives here. You can save as many Lag targets as necessary; just ensure that your Lag targets have corresponding Lead targets and vice versa.
Attachments	You can attach documents as reference how you came up with targets or you can use it later for updating of your objectives.
Comments	All workflows related to your objective will be saved in this portion including when you sent the objective for approval, when it was approved/rejected, and so on. You can also use this portion for critical incident when updating your objectives.

6. There are also available tooltips that you can use for further guide in your objective setting exercise.

The screenshot shows a form titled "My Task" with a dropdown menu for "Select My Task". Below it is a "Specific Objective" field with a tooltip that reads: "Your objective should be valuable and meaningful for the business and organization. A specific objective requires to be clear and unambiguous rather than a generic statement." At the bottom of the form are "Start Date" and "Target Date" fields.

7. At the bottom of the pop-up window, there is a spellcheck button available whenever you need it.



8. When you are done with your objective setting, you can initially save it as draft. Once you have completed 3-5 meaningful objectives that totals to 100%, you can either send the objective one-by-one or all at the same time.

To send the objectives one-by-one for approval, click the specific objective you want to submit. Scroll it down to the buttons below and click Send an Approval Request.

## Performance Management System

The screenshot displays a table of objectives categorized into 'Lead' and 'Lag'. The 'Lead' section includes objectives like 'Promote employees to participate in quality program, recreation & sport activities.' and 'Provide recognition programs.' The 'Lag' section includes 'Improved HR Customer Satisfaction Surveys scores' and 'Reduced number of labor cases filed against EEI against last year.' Each objective has columns for 'Start Date' and 'Due Date', and an 'Options' column with icons for edit, delete, and refresh. At the bottom, there are three buttons: 'Send an Approval Request' (highlighted with a red box), 'Next', and 'Close'.

Lead +	Start Date	Due Date	Options
Promote employees to participate in quality program, recreation & sport activities.	01/01/2018	12/31/2018	
Provide recognition programs.	01/01/2018	03/30/2018	
Institutionalize communication meeting with all level employees.	01/01/2018	08/31/2018	
Establish proactive approach for management and union relations.	01/01/2018	07/31/2018	

Lag +	Target	Start Date	Due Date	Options
Improved HR Customer Satisfaction Surveys scores	10%	01/01/2018	12/31/2018	
Reduced number of labor cases filed against EEI against last year.	20%	01/01/2018	12/31/2018	
Reduced gap in ER related items in 2018 EOS.	5%	01/01/2018	12/31/2018	
Increased PST Level from 8 to 10.	10	01/01/2018	12/31/2018	

Attachments + File

Comments +

[Send an Approval Request](#) [Next](#) [Close](#)

To send all objectives at the same time, tick the checkboxes and click Send an Approval Request.

The screenshot shows the 'Details' page with a table of objectives. The table has columns for 'Specific Objective', 'Target Date', 'KRA', 'Weight', 'Status', 'Progress', and 'Options'. Three objectives are listed, each with a checked checkbox in the first column. The 'Send an Approval Request' button is highlighted with a red box at the bottom left. The page also includes a 'Total' row and pagination controls.

Specific Objective	Target Date	KRA	Weight	Status	Progress	Options
<input checked="" type="checkbox"/> To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	People	40.00%	Draft		
<input checked="" type="checkbox"/> To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	People	30.00%	Draft		
<input checked="" type="checkbox"/> To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	People	30.00%	Draft		
Total			100.00%			

Showing 1 to 3 of 3 entries

[Send an Approval Request](#) First Previous 1 Next Last

9. The system will verify if the objective/s you sent for approval is assigned to you or your staff.

**Assign Objective**

Please select whom these objectives should be assigned to.

**Assign To**     Yourself     Your Team

Submit
Cancel

If assigned to yourself, the workflow will go to your superior for approval. If assigned to your team, another field will appear to indicate whose staff you are going to assign the objective to. Then the workflow will be sent to your staff for acceptance.

- The window will return to Objective Setting with system message that your objectives are sent for approval. You cannot edit your objectives while they are pending for approval.

Request for approval has been sent to ROBERTO JOSE LARIEGO CASTILLO.
×

+ Create

Search

My Task All

KRA All

Status All

**Details**

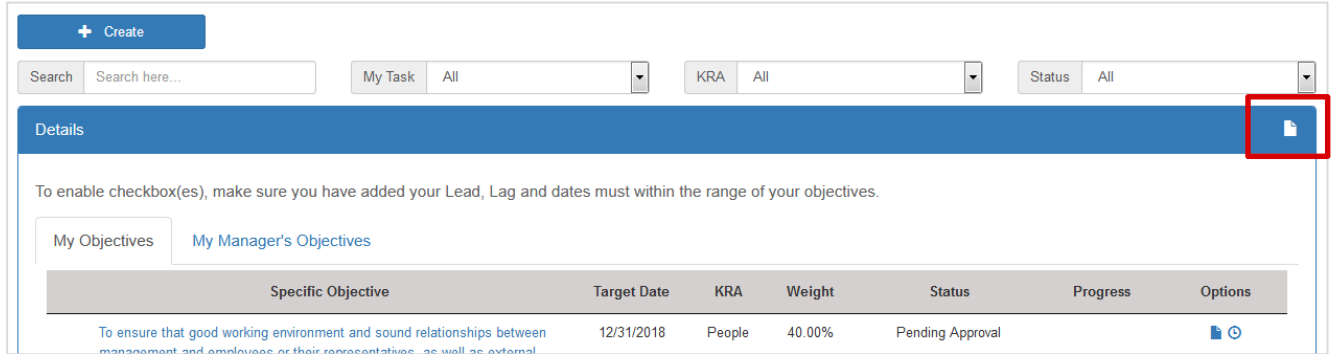
To enable checkbox(es), make sure you have added your Lead, Lag and dates must within the range of your objectives.

My Objectives

My Manager's Objectives

Specific Objective	Target Date	KRA	Weight	Status	Progress	Options
To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	People	40.00%	Pending Approval		
To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	People	30.00%	Pending Approval		
To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	People	30.00%	Pending Approval		

- While we encourage paperless objective setting exercise, you can still download and print a copy only when extremely necessary. You can click the PDF icon from the header of your objectives.



## HOW TO CREATE ALIGNED OBJECTIVES

- When aligning objectives, it is a pre-requisite that your manager set his approved objectives first before your turn.
- To create an aligned objective, go to My Manager's Objectives tab and view the details of his/her objectives for understanding.

### Objective Setting

You may proceed to create or update your Objectives by clicking the Create button or align your objectives with your Manager by clicking My Manager's Objectives.

[+ Create](#)

Search  My Task  KRA  Status

Details

To enable checkbox(es), make sure you have added your Lead, Lag and dates must within the range of your objectives.

My Objectives **My Manager's Objectives**

	Specific Objective	Target Date	KRA	Weight	Status	Progress	Options
<input type="checkbox"/>	To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	People	40.00%	Draft		<a href="#">✎</a> <a href="#">✕</a> <a href="#">📄</a> <a href="#">🕒</a>
<input type="checkbox"/>	To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	People	30.00%	Draft		<a href="#">✎</a> <a href="#">✕</a> <a href="#">📄</a> <a href="#">🕒</a>
<input type="checkbox"/>	To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	People	30.00%	Draft		<a href="#">✎</a> <a href="#">✕</a> <a href="#">📄</a> <a href="#">🕒</a>
Total				100.00%			

Showing 1 to 3 of 3 entries First Previous **1** Next Last

3. Tick the checkbox of objective you want to align with and click Create Aligned Objective.

### Objective Setting

You may proceed to create or update your Objectives by clicking the Create button or align your objectives with your Manager by clicking My Manager's Objectives.

[+ Create](#)

Search  My Task  KRA  Status

Details

To enable checkbox(es), make sure you have added your Lead, Lag and dates must within the range of your objectives.

My Objectives **My Manager's Objectives**

	Specific Objective	Target Date	KRA	Weight	Progress
<input type="checkbox"/>	To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	KRA04	40%	0%
<input checked="" type="checkbox"/>	To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	KRA04	30%	0%
<input type="checkbox"/>	To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	KRA04	30%	0%
Total				100%	

[↩ Create Aligned Objective](#)

4. You can now proceed populating the details of your objective.

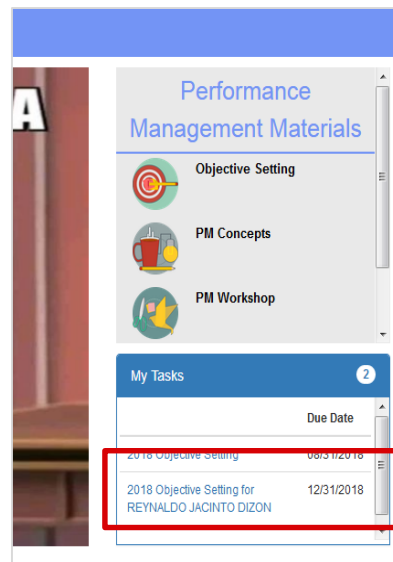
## HOW TO APPROVE OBJECTIVES

1. If you have staff, you will be notified through email that there are objectives pending for your approval. From the email notice, you can click the link to get to myCompass.
2. Aside from email, you can also click the link from your general tasks in EEI 360, link from My Tasks inside myCompass, or directly click My Team inside myCompass.

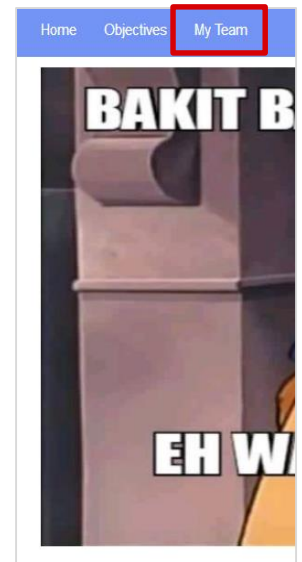
General Tasks



My Tasks

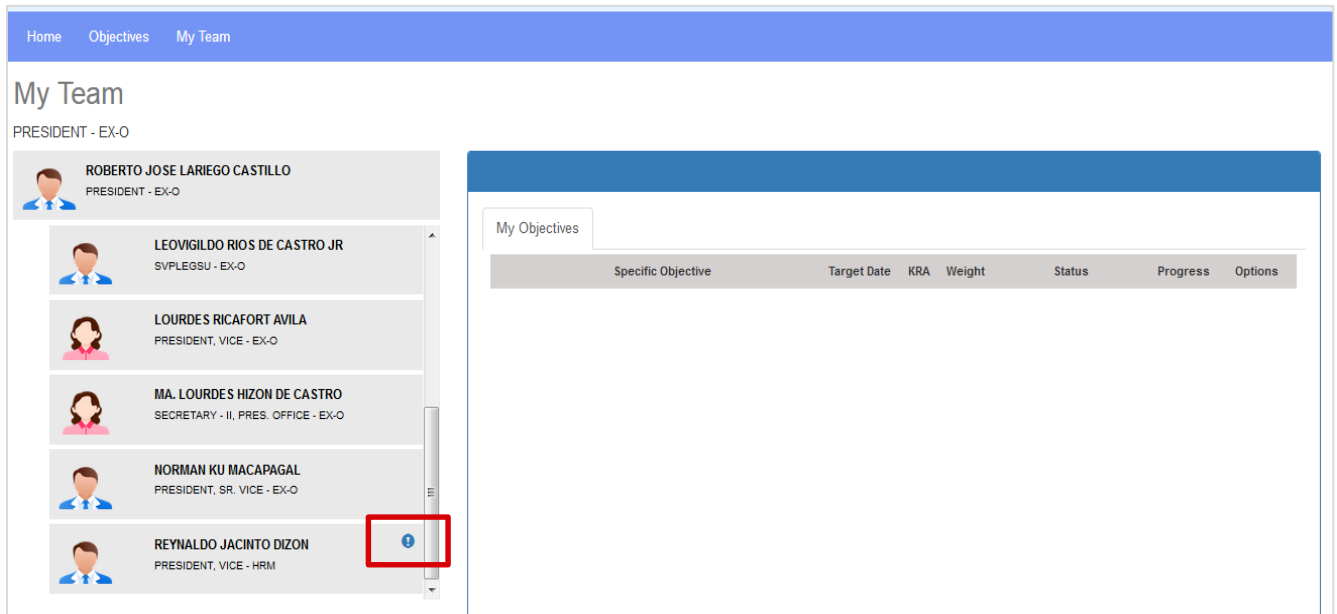


My Team

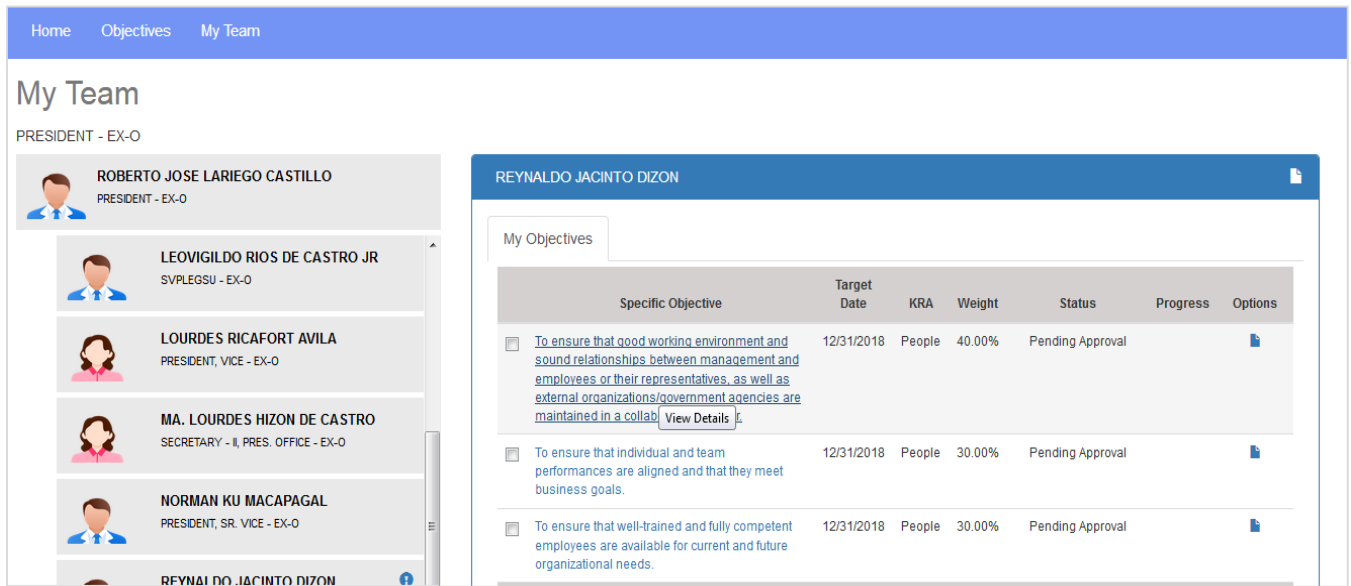


3. Once you are in My Team, you can look for the name of your staff with pending task signified by exclamation point.

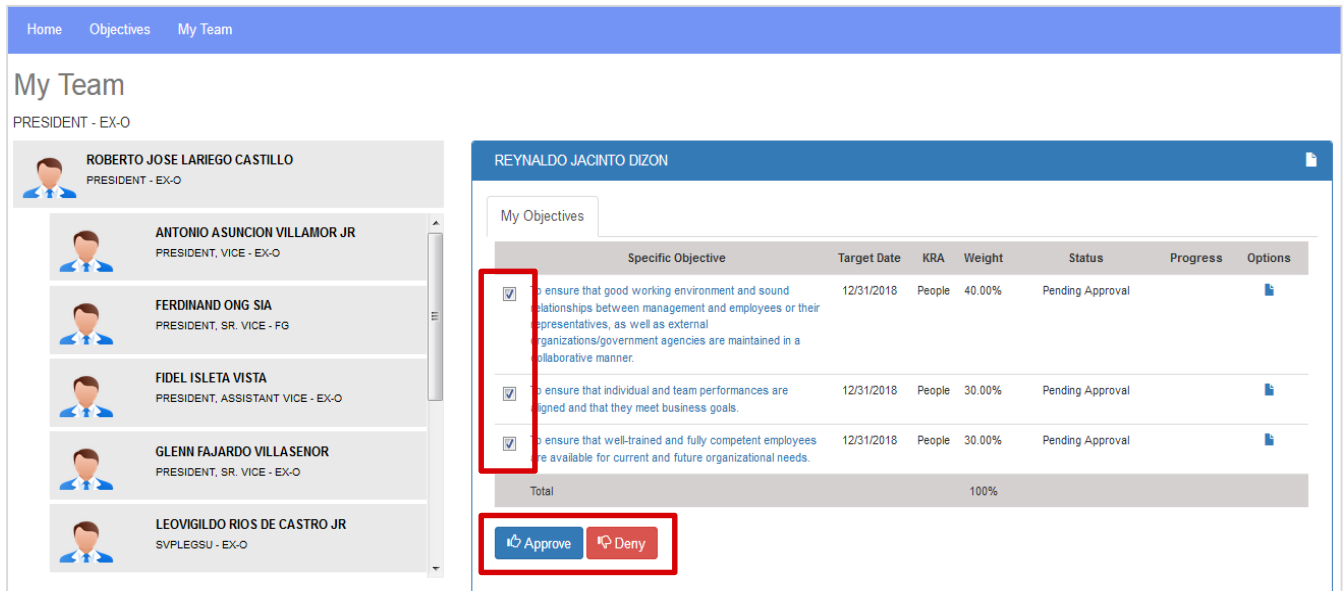




4. Once you clicked the name of your staff, it will display his/her objectives. You can review the details of the objectives by clicking the link before approving them.



5. You can approve the objectives one-by-one or all in one go.



- A notice will be sent to the staff both in email and in EEI 360 once objectives are approved. These objectives then will be the official performance measures for staff concerned for the current year.
- If in case you have to deny the objective, say for adjustment of targets or inclusive dates, a pop-up window will appear to put in your reason for such.

The screenshot shows a 'Comment' pop-up window. It features a blue header with the text 'Comment'. Below the header is a text input field labeled 'Reason \*'. At the bottom of the window, there are three buttons: 'ABC' (with a checkmark icon), 'Proceed' (with a right-pointing arrow icon), and 'Cancel' (with an X icon).

- Any cancellation or addition of objectives later has to pass through the same process of review and approval.

9. Similar process applies if you assign an objective to your staff for acceptance. It will only be official if the staff accepted the objective.

myCompass is just a tool. It was not designed to diminish the importance of performance conversation between the manager and the staff.

## HOW TO UPDATE OBJECTIVES

1. You can view and update the progress of your objectives and targets anytime in myCompass. Note that you can only update the progress of approved objectives.
2. To update the progress, go to your Objective Setting window.

### Objective Setting

You may proceed to create or update your Objectives by clicking the Create button or align your objectives with your Manager by clicking My Manager's Objectives.

+ Create

Search

Search here...

My Task
All
▼

KRA
All
▼

Status
All
▼

Details
📄

To enable checkbox(es), make sure you have added your Lead, Lag and dates must within the range of your objectives.

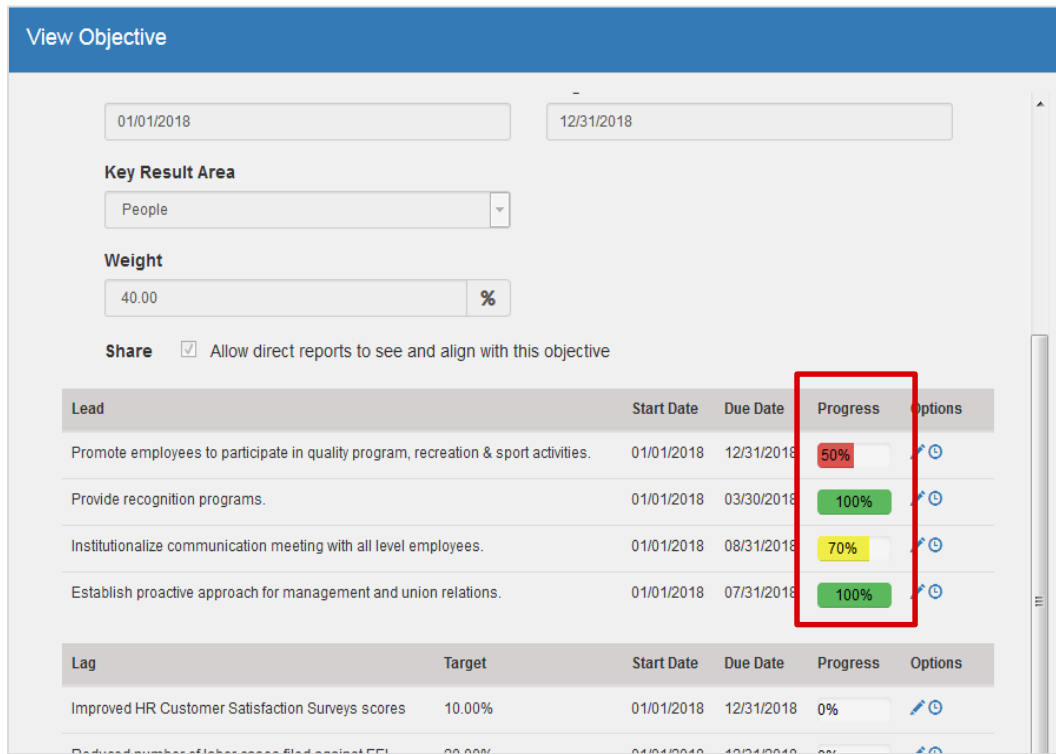
My Objectives

My Manager's Objectives

Specific Objective	Target Date	KRA	Weight	Status	Progress	Options
To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	People	40.00%	In Progress	0% <div style="width: 100px; height: 10px; background: linear-gradient(to right, #0070c0 0%, #ccc 0%);"></div>	📄 ⌂
To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	People	30.00%	In Progress	0% <div style="width: 100px; height: 10px; background: linear-gradient(to right, #0070c0 0%, #ccc 0%);"></div>	📄 ⌂
To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	People	30.00%	In Progress	0% <div style="width: 100px; height: 10px; background: linear-gradient(to right, #0070c0 0%, #ccc 0%);"></div>	📄 ⌂
<b>Total</b>			100.00%			

Showing 1 to 3 of 3 entries First Previous 1 Next Last

- Choose the objective you want to update and put in the progress. Don't forget to save your work.



- You can do this for all your objectives.
- When you see the summary, the total progress per objective is based on simple averaging.

### Objective Setting

You may proceed to create or update your Objectives by clicking the Create button or align your objectives with your Manager by clicking My Manager's Objectives.

[+ Create](#)

Search  My Task All KRA All Status All

**Details**

To enable checkbox(es), make sure you have added your Lead, Lag and dates must within the range of your objectives.

My Objectives My Manager's Objectives

Specific Objective	Target Date	KRA	Weight	Status	Progress	Options
To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	People	40.00%	In Progress	<div style="width: 40%;"><div style="width: 40%;"></div></div> 40%	
To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	People	30.00%	In Progress	<div style="width: 42.5%;"><div style="width: 42.5%;"></div></div> 42.5%	
To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	People	30.00%	In Progress	<div style="width: 27.78%;"><div style="width: 27.78%;"></div></div> 27.78%	
<b>Total</b>			100.00%			

Showing 1 to 3 of 3 entries First Previous 1 Next Last

6. Your updates will also be visible to your superior through My Team, and to your staff through My Manager's Objectives.

### Superior's Window

Home Objectives **My Team**

### My Team

PRESIDENT - EX-O

**ROBERTO JOSE LARIEGO CASTILLO**  
PRESIDENT - EX-O

**LEOVIGILDO RIOS DE CASTRO JR**  
SVPLEGSU - EX-O

**LOURDES RICAFORT AVILA**  
PRESIDENT, VICE - EX-O

**MA. LOURDES HIZON DE CASTRO**  
SECRETARY - II, PRES. OFFICE - EX-O

**NORMAN KU MACAPAGAL**  
PRESIDENT, SR. VICE - EX-O

**REYNALDO JACINTO DIZON**  
PRESIDENT, VICE - HRM

**REYNALDO JACINTO DIZON**

My Objectives

Specific Objective	Target Date	KRA	Weight	Status	Progress	Options
To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	People	40.00%	In Progress	<div style="width: 40%;"><div style="width: 40%;"></div></div> 40%	
To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	People	30.00%	In Progress	<div style="width: 42.5%;"><div style="width: 42.5%;"></div></div> 42.5%	
To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	People	30.00%	In Progress	<div style="width: 27.78%;"><div style="width: 27.78%;"></div></div> 27.78%	
<b>Total</b>			100%			

Staff's Window

### Objective Setting

You may proceed to create or update your Objectives by clicking the Create button or align your objectives with your Manager by clicking My Manager's Objectives.

[+ Create](#)

Search  My Task  KRA  Status

Details

To enable checkbox(es), make sure you have added your Lead, Lag and dates must within the range of your objectives.

My Objectives  My Manager's Objectives

Specific Objective	Target Date	KRA	Weight	Progress
<input type="checkbox"/> To ensure that good working environment and sound relationships between management and employees or their representatives, as well as external organizations/government agencies are maintained in a collaborative manner.	12/31/2018	People	40%	40%
<input type="checkbox"/> To ensure that individual and team performances are aligned and that they meet business goals.	12/31/2018	People	30%	42.5%
<input type="checkbox"/> To ensure that well-trained and fully competent employees are available for current and future organizational needs.	12/31/2018	People	30%	27.78%
<b>Total</b>			100%	

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