The 9 Box
User Guide

Starbucks Talent Management System

Need Technical Support?
Contact successfactors@starbucks.com

Need Process Support?
Contact your PRO generalist

STARBUCKS®

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System Navigation

Log On

1. Open your browser and navigate to https://performancemanager4.successfactors.com/login .

2. Enter **Starbucks** in the **Company Id:** field.

3. Enter your case-sensitive Username and Password.

4. Click **Log in.**

Forgot Your Password?

1. Open your browser and navigate to https://performancemanager4.successfactors.com/login .

2. Click the Forgot Your Password? link.

3. Enter **Starbucks** in the **Company Id:** field.

4. Enter your Username in the **Username:** field.

5. Click **Submit.**

Navigation Basics

1. Upon logging in, the **Home** page displays. This page provides access to all the activities and processes in the system, and gives an overview of your To-Dos. To access **Home** from anywhere in the application, select **Home** from the drop-down menu ⬇ at the upper left-hand side of the screen.

2. Use the module drop-down ⬇ menu to go different parts of the system. Select a module from the list to move. Partners may select the following modules:

   - Home

   - Goals

   - Performance

   - Company Info

   - Partner Profile

   - Managers may access additional modules based upon their role.

3. Click the arrow ⬇ next to your name on the upper right-hand side of the screen to access the **Options** menu and to **Logout** of the system.

4. Use People Search 🔍 to locate other partners. Search uses predictive text that allows partial entries to assist with locating an individual. Search is accessible from any location within the system.

The Browser Back Button

NOTE: Please refrain from using the Back Button.

The Starbucks Talent Management System is designed to keep your personal data confidential. To do this, the website does not allow the use of the Back Button. If you click the Back Button, you may lose data and may need to log back into the system.
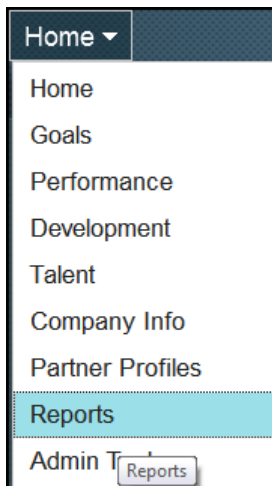
The 9 Box Report

The 9 Box Report plots partner performance trend and potential ratings graphically, and can be used during OPP Talent Review sessions. This enables managers and generalists to spot trends, exceptions and help determine the actions that should be taken in the organization with specific partners.

What Happens When The 9 Box Report Is Generated:

- **Partner Performance Trend** and **Potential ratings** are plotted on the 9 Box Report.
- The **Job Title** filter allows you to display one level of leadership at a time.
- The employee's **Quick Card** ▦▾ provides easy-access to view the **Partner Profile** and **Talent Assessment**.
- Talent flags can be added or removed by clicking the corresponding check boxes ☐ displayed on the matrix.
- You can **Print**, **PDF** or **Export** the report.
- A comprehensive **Legend** appears at the bottom of page clarifies the icons used in the matrix.
- All **Unrated** partners appear in the **Unrated** bucket at the bottom of the 9 Box Report.

Run A 9 Box Report

1. From the **Home** page, click **Reports** from the drop-down in the upper left-hand corner.

2. Click **9 Box**.

3. Expand the ⊞ **Filter Options** to filter results for the team and organization area.

4. Select **Succession Management and Matrix Reporting Permissions** option

5. Select values in the **Division**, **Department, Work Location** and **Job Title** filters. One value must be selected in each filter.

The **Job Title** filter allows you to control the level of the organization is displayed on the 9 box. Use this to keep director level Talent Assessments from mixing with VPs

6. Select the option of **All Partners** from the **User Type.**

7. Set the **Date Range** to **10/1/2012**- **9/30/2013**

8. Click **Generate Report**. You may need to run the report several times to fine-tune it.

9. Select the check boxes ☐ of the Talent Flags to show on the report.

> **Note:** Managers can only generate a 9-Box for their team. When discussing talent as a group, it is best for the generalist or senior most leader of the organization to generate the report so that all partners in the organization appear in a single report.

Use Job Title Custom Select Filter

1. **Click Custom Select**

2. Click [✕ Clear list] to remove the default values.

3. Click the **Job Titles** to include in the report.

4. Click [⬇ Add to list] to add the **Job Titles** to the Custom Select filter.

5. Click [➡ Finish].

6. Click [Generate Report].

Print A 9 Box Report

1. Locate the print options for the 9 Box Report and click one of the following links:
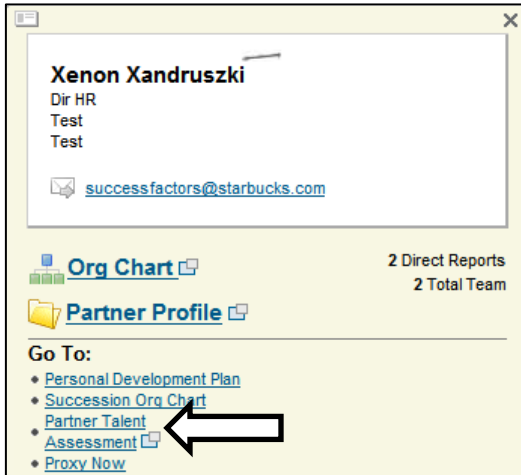

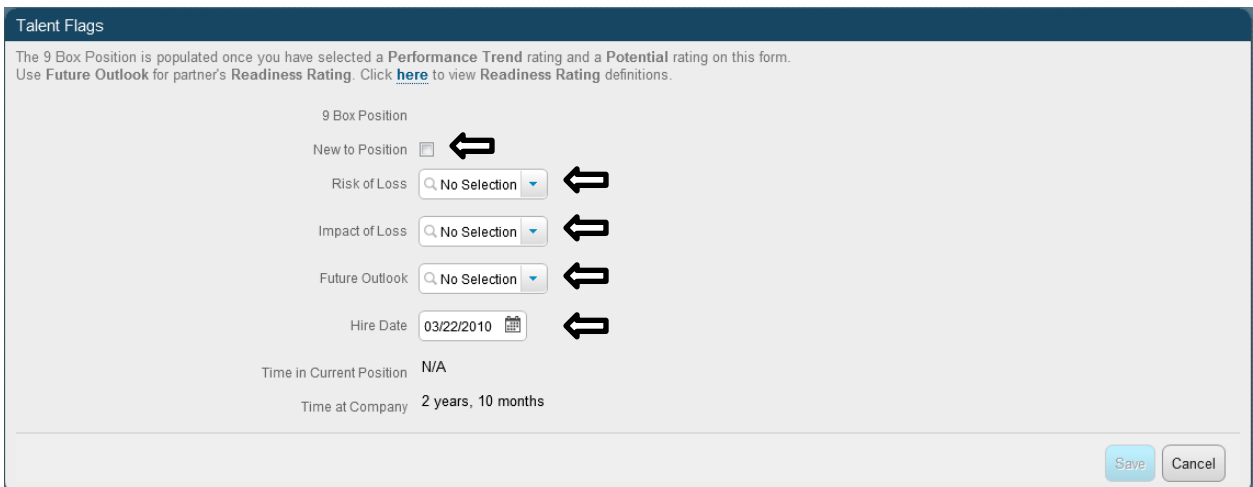|	
Print	This option sends the 9 Box to the printer without creating a file.
PDF Print	This option creates a PDF of the 9 Box that can be saved offline.
Export	This option exports the 9 Box to Excel. The file has a **Report** tab and a **Partner** tab • **Report Tab** displays the 9 Box and text-based Talent Flags and Legend included • **Partner Tab** converts the 9 Box into a spreadsheet for additional analysis

Updating 9 Box Ratings – From The 9 Box During The Talent Review Session

1. Click the partner's Quick Card 🖼️▾
2. Click **Partner Talent Assessment.**

Complete The Talent Flag Section

1. Click **Edit.**
2. Respond to the items in the **Talent Flags** section
3. Click **Save.**

Note: 9-Box Position is calculated **after** you rate a partner's **Performance Trend** and **Potential.**

Set This Year's Performance Trend Rating

1. Click **Edit.**
2. Click the **Green Plus Sign** ⊕ to add a Performance Trend rating for the year.
3. Select an option from the **Rating Label** drop-down, and verify the **Start Date** and **End Date** are correct.
4. Click **Save.**

Set This Year's Performance Trend Rating

1. Click **Edit.**

2. Click the **Green Plus Sign** to add a Potential rating for the year.

3. Select an option from the **Rating Label** drop-down, and verify the **Start Date** and **End Date** are correct.

4. Click **Save**.

Refresh the Talent Assessment

1. Click **Talent Assessment** at the top of the page and select **Talent Assessment**

2. The 9 Box Position calculated and displays.

Incomplete Talent Assessments

Incomplete Talent Assessments are easy to find. Partners who have not been rated or who are not completely rated are found in the **Unrated** section of the 9 Box.

If you feel that you are done with Talent Assessment ratings and find that some partners remain in the Unrated section of the 9 Box, revisit the partner's Talent Assessment and verify that the Talent Flags, Performance Trend and Potential sections are completely filled out.