

In Workday, the annual goal-setting process is kicked off through the Self Evaluation: Goal Template process. Throughout the year, employees should add, edit and remove individual goals as needed. Consistent updating of goals provides ongoing direction for employees and information for managers to guide and coach goal achievement.

## GOAL FIELD DEFINITIONS & APPROVAL

Field	Description	Sends to Mgr for Approval when edited
* Required		
<b>Goal *</b>	<ul style="list-style-type: none"> <li>Goal Title - do not edit baseline compliance goal title</li> </ul>	●
<b>Description</b>	<ul style="list-style-type: none"> <li>Performance goal description</li> </ul>	
<b>Status</b>	<ul style="list-style-type: none"> <li>Track progress towards goal completion (Not Started, On Track, Completed, Behind/At Risk, Postponed/Canceled)</li> </ul>	Only when "postponed" or "cancelled"
<b>Supports</b>	<ul style="list-style-type: none"> <li>Allows linkage to a higher level organization goal</li> </ul>	
<b>Weight</b>	<ul style="list-style-type: none"> <li>Work with managers to define/adjust weighting of goal(s)                             <ul style="list-style-type: none"> <li>The more impactful an individual goal is with respect to the company's enterprise goals, the higher the weighting should be.</li> <li>Some roles may have a more highly weighted baseline goal, while others have more evenly distributed weightings.</li> </ul> </li> <li>All goals, including the baseline, must add up to 100 during goal setting</li> <li>If goals are added during year, update total weighting of existing goals to equal 100 if possible. Although not required, it will be enforced during end-of-year reviews.</li> </ul>	●
<b>Due Date</b>	<ul style="list-style-type: none"> <li>Do not edit baseline goal due date</li> <li>General guidance – use end of year</li> </ul>	●
<b>Associated Reviews</b>	<ul style="list-style-type: none"> <li>Goals entered during annual goal-setting process display "Goal Template"</li> <li>Goals added on an ad hoc basis will not display associated reviews</li> </ul>	
<b>Milestones</b>	<ul style="list-style-type: none"> <li>Specific action items to guide meeting individual goal</li> <li>Milestones are not required and can be added and/or edited throughout year.</li> </ul>	
<b>Activity Stream</b>	<ul style="list-style-type: none"> <li>Recommended method of adding status notes, comments or additional context to goals throughout year</li> <li>Facilitates flow of real-time and reportable goal feedback</li> <li>Chronologically displayed, date-stamped, and visible to both employee and leader</li> </ul>	Notifications sent only if tagged

## GOAL FREQUENTLY ASKED QUESTIONS

Question	Answer
<b>What are goal best practices to keep in mind?</b>	<ul style="list-style-type: none"> <li>The Baseline goal, which was auto-assigned via the goal setting template is intended to capture any tasks that are considered day-to-day role responsibilities or in your job description. Tasks that you are hired to do are baseline work. Add additional goals ONLY to capture special projects or other work that is outside of your typical job.</li> <li>IF you need to add goals above baseline goal, it's recommended to keep total goals to 5-7 maximum.</li> <li>Only document meaningful goals that are a significant portion of your job; in doing this, you should have percentages in large buckets (20% for example, not 2%).</li> <li>Weightings will vary for every employee. The intention is to maintain a shared vision between employee and leader, which comes from a prioritization/weighting discussion.</li> </ul>
<b>What should I consider when weighting my goals?</b>	<ul style="list-style-type: none"> <li>To communicate the relative importance of goals, employees agree to weights of each goal with their leader. Knowing relative weights helps you prioritize work and efforts on a day-to-day basis, as well as make decisions when faced with competing demands.</li> <li>When assigning weights to goals, it's important to ensure that they truly reflect organizational values and priorities. Getting agreement on weighting can sometimes be a challenge, but the ensuing discussion is always valuable.</li> <li>Weighting doesn't replace communication around priorities and regular review of goals. It's important to understand the goal priority or value to the organization and critical to have regular discussions to review progress and priority of goals.</li> </ul>
<b>What should my total goal weight equal?</b>	<ul style="list-style-type: none"> <li>Total goal weight should equal exactly 100 (not over or under). Adjust as needed in the edit goals option.</li> </ul>
<b>My goals are not editable. Why?</b>	<ul style="list-style-type: none"> <li>You must click EDIT to goals first.</li> <li><b>Option 1</b> – you created a goal that was never approved by your leader. To check, look for "Pending Approval" for that specific goal (you may need to click Edit first). If this is the case, contact your leader so they can approve in their WD inbox.</li> <li><b>Option 2</b> – your leader assigned a goal to you that they made NOT editable. Check with them to see if that was intended.</li> </ul>
<b>Can I delete goals?</b>	<ul style="list-style-type: none"> <li>Goals are able to be deleted IF you created them ad hoc (outside of the goal-setting template); <b>HOWEVER</b> it is recommended to archive them rather than delete. Archive allows for reference or restore if needed at a later date. See ARCHIVE GOALS below.</li> </ul>
<b>How do I update my goals during the year?</b>	<ul style="list-style-type: none"> <li>See UPDATE EXISTING GOAL below</li> </ul>
<b>How do I add progress notes to my goals?</b>	<ul style="list-style-type: none"> <li>See ACTIVITY STREAM below under Update Existing Goal</li> </ul>

## UPDATE EXISTING GOAL

The **Individual Goals** tab displays both baseline compliance goal and any other performance goals added during annual goal-setting process or throughout the year.



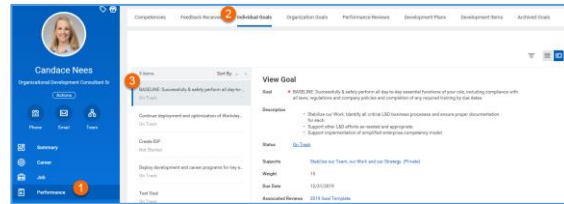
### THESE FIELDS EDITS ARE SENT TO LEADERS FOR REVIEW & APPROVAL

- Goal Title
- Status
- Weight
- Due Date

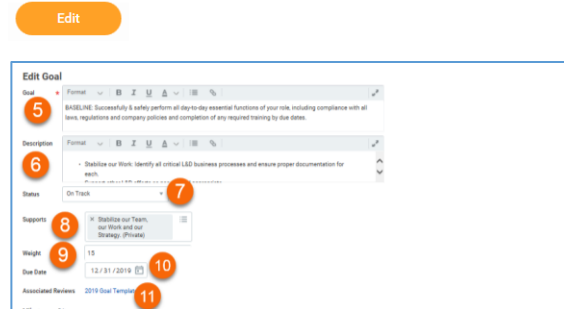
From Worker profile:

1. Click on **Performance** tab
2. Click **Individual Goals**
3. Click goal to review

**NOTE:** Goals are listed in alphabetical order but clicking **Sort By** or other filters allow different views



4. Click **Edit** to update
5. Update Goal Title - do not edit baseline compliance goal title
6. Update Description
7. Select Status from dropdown
8. Update Supports linkage if needed
9. Update Weight
10. Update Due Date
11. View Associated Reviews
12. Update/Add Milestones



Milestones: 2 items			
	Milestone	Due Date	Status
	Milestone 2	06/01/2019	On Track
	Milestone 1	06/01/2019	Completed

- Edit** existing milestones by clicking directly in each field. Update status as needed.
- Add** new milestone by clicking plus sign. Enter description of Milestone, Due Date and Status.

- Delete** existing milestones by clicking minus sign

## ADD ACTIVITY STREAM



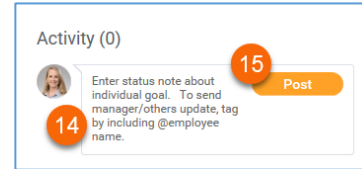
13. Click
14. Enter status note – use @employee name to notify others of status

**NOTE:** Goals with activity stream display a callout box with lines



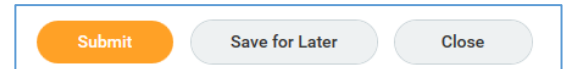
Click callout to view notes in chronological order

15. Click **Post**
16. Once all updates are made, click **Submit** to send to Manager OR **Save for Later** to continue editing at a later time (task appears in Workday inbox until further action is taken)



17. Click **Done**

**NOTE:** Goal updates route for manager approval



## ACTIVITY STREAM LEADER VIEW

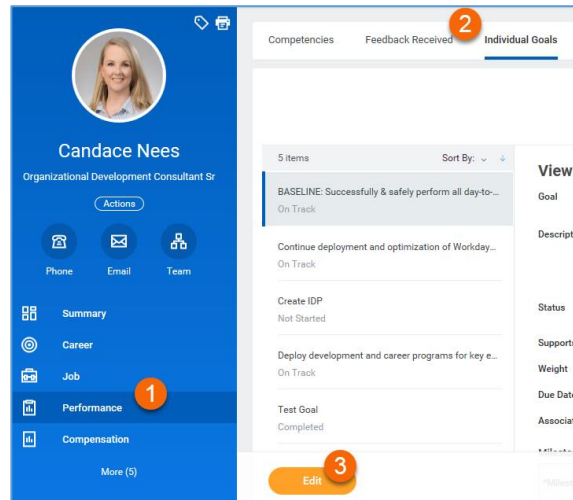
1. Navigate to individual employee and to individual goal. Click callout box to view stream.
2. Run My Team's Goals report (by typing into Workday search bar). All direct reports' goals are displayed, along with ability to click associated callout box. This makes it easier for leaders to review (or add) posts en masse and prepare for midyear and other conversations.

## ADD INDIVIDUAL PERFORMANCE GOAL(S)

Add separate performance goal(s) ONLY if they are beyond day-to-day role responsibilities. You may add up to ten total in addition to baseline.

From Worker profile:

1. Click on **Performance** tab
2. Click **Individual Goals**
3. Click **Edit**



4. Click **Add**
5. Enter Goal Title
6. Enter Description
7. Select Status from dropdown
8. Enter Supports linkage if needed
9. Enter Weight
10. Enter Due Date
11. View Associated Reviews

12. Add Milestones
  - a. Click plus sign
  - b. Enter description of Milestone, Due Date and Status.

Save for Later to continue editing at a later time (task appears in Workday inbox until further action is taken)

14. Click **Done**
15. If you have additional goals, repeat steps 3-15. You can only add ten goals for a total of eleven including the baseline.

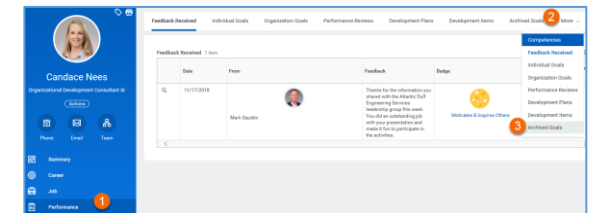
**NOTE:** Goal additions route for manager approval

## ARCHIVE GOAL

Goals, once created, should not be deleted from employee profile. They can be “archived” which removes them from ongoing review and allows for later review or restore.

From Worker profile:

1. Click on **Performance** tab
2. Click **More** dropdown
3. Click **Archived Goal**



4. Click **Archive Goal**
5. Select goal(s) to archive by checking box to left of each
6. Click **OK**

**NOTE:** Goal archive routes for manager approval