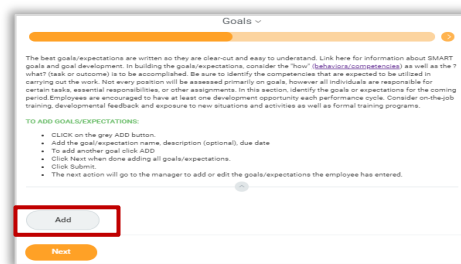## KICK-OFF GOALS/EXPECTATIONS AND DEVELOPMENT ACTIVITIES

The performance management process provides managers and employees a framework for engaging in regular communication throughout the year about goals/expectations, performance, and employee development. The process is meant to be flexible and interactive, and begins with establishing clear expectations which is the foundation of successful performance. The Kick-off of the annual process begins with Goal/Expectation Setting.

Review Employee's Initial Goals

From the Workday homepage:

1. Navigate to your **Inbox**. Select the goal submission task from your direct report: **Set Content: Kick-off Goals / Expectations and Development Activities:** employee name.

2. Select **Go to Guided Editor**.
   Note: Do *not* select Go to Summary Editor. To begin again, click **Close** and re-select the **Inbox** item.

3. The employee's goals are displayed in the same format as the employee view. From the **Guided Editor** the manager can also add new goals, edit and delete goals directly. The manager can send the goal submission back to the employee for revision later in this process.

4. Review the following goal information:
   a. **Goals/Expectations and Development***: Enter the goal or expectation action(s) answering "what is being accomplished"
   b. **Anticipated Outcome/Description**: Enter a description of the expected outcome (optional)
   c. **Due Date**: Completion date for the goal (optional)

   **Status**: Select one: Not Started, In Progress, Completed, or Delayed/Cancelled (optional)
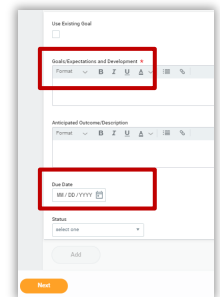
5. To add more goals:
   a. Scroll to bottom of your goal entry
   b. Click **Add**

6. Once you have completed entry of <u>all</u> goals, click **Next**.
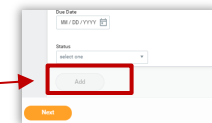
7. Scroll down to review all goals entered.
   a. To use the system guide to edit goals: Select [Guide Me]
   b. To delete a goal: Click **Delete** ✕
   c. To directly edit a goal: Click **Edit** 🖉
      - Modify the information as needed
      - Click **Save** ✓ or **Undo** ↩ to exit without saving changes
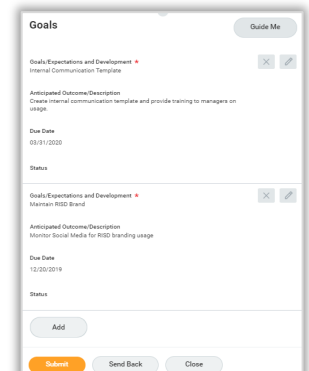
8. Select one of the following:
   - **Submit**: Save and approve employee goals as submitted
   - **Send Back**: Use if you have made any changes to the employee's submission or need the employee to edit their submission.
      a. Enter a **Reason** (required)
      b. Click **Submit** to return the submission to the employee for review or editing.
   - **Close**: Exit review employee goals, the task will remain in the **Inbox**
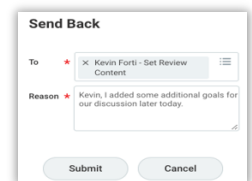
Review Employee Edits of Initial Goals

Once the employee has edited or reviewed the goals they will submit the task to the manager for final approval

1. From the **Inbox**, select the Kick-off Goals/Expectations task for the employee.

2. Select **Continue Where I Left Off.**

3. Manager can **Add** goals or select **Next**.
    Note: remember to scroll to select *Add.*

4. Follow steps 4 through 7 from **Review Employee's Initial Goals** on page 1 of this job aid.

5. Select one of the following:

    -   **Submit**: Save and approve employee goals as submitted
    -   **Save for Later**: Save your work in progress and exit editing employee goals.
    -   **Close**: Exit review employee goals, the task will remain in your **Inbox**

6. Upon Submitting, the manager will receive a To-Do reminding you to schedule a meeting with your employee.

    a. Record the date of the goal setting meeting in the comments following the meeting with your employee
    b. Submit the To-Do as completed
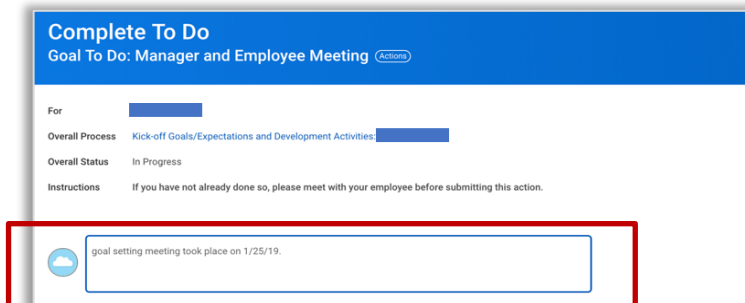
7. Upon Manager submission, the goal setting process is complete. A green check mark indicates the end of the process steps.