

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 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. Click **Get Started**.
3. The employee's goals are displayed in the same format as the employee view.



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)
5. Scroll down to review all goals entered.
6. 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.

Goals

Goals/Expectations and Development

Anticipated Outcome/Description

Due Date: (empty)

Status: (empty)

Send Back

To: X: [Name] (Role) - Set Review Controls

Reason: [Text area for reason]

Submit Cancel