

At the beginning and throughout the year, employees should add, edit and archive/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



Notifications route to manager when employee adds, edits, or deletes an individual goal

Field <small>* Required</small>	Description
Goal *	<ul style="list-style-type: none"> Goal Title - do not edit baseline goal title
Description	<ul style="list-style-type: none"> Performance goal description
Status	<ul style="list-style-type: none"> Regularly update progress towards goal completion (Not Started, On Track, Completed, Behind/At Risk, Postponed/Canceled)
Supports	<ul style="list-style-type: none"> Allows linkage to higher-level organization goal
Weight	<ul style="list-style-type: none"> Work with managers to define/adjust weighting of goal(s) <ul style="list-style-type: none"> The more impactful an individual goal is with respect to organization goals, the higher the weighting should be. Some roles may have a more highly weighted baseline goal, while others have more evenly distributed weightings. All goals, including the baseline, must add up to 100 If goals are edited/added/deleted during year, update total weighting of existing goals to equal 100.
Due Date	<ul style="list-style-type: none"> Do not edit baseline goal due date General guidance – use end of year
Associated Reviews	<ul style="list-style-type: none"> Displays templates into which goal has been pulled
Milestones	<ul style="list-style-type: none"> Specific action items to guide meeting individual goal Milestones are not required and can be added and/or edited throughout year.
Activity Stream	<ul style="list-style-type: none"> Recommended method of adding status notes, comments or additional context to goals throughout year Facilitates flow of real-time and reportable goal feedback Chronologically displayed, date-stamped, and visible to both employee and manager

GOAL FREQUENTLY ASKED QUESTIONS

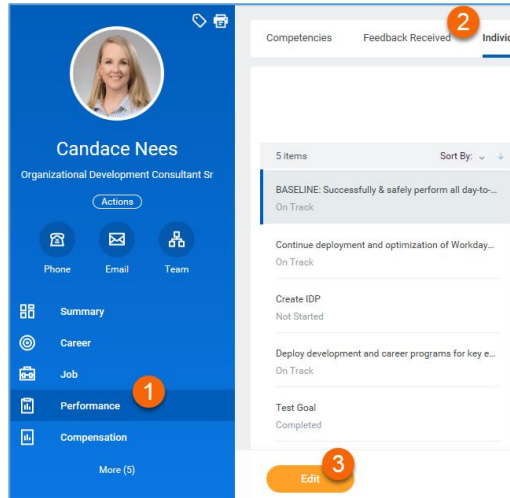
Question	Answer
What is goal best practice to keep in mind?	<ul style="list-style-type: none"> The baseline goal, which is auto assigned, is intended to capture your regular, routine work. Some employees, based on the nature of their job, may not have additional goals beyond the baseline goal. Only add goals that are above and beyond your typical job and that will require a relatively significant portion of your time and energy at work. IF you need to add goals above baseline goal, it's recommended to maintain five or fewer goals. 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%). Add additional specificity to a goal via milestones. Milestones can be statused individually. Weightings vary among employees. The intention is to maintain a shared vision between employee and manager, which comes from a prioritization/weighting discussion.
What should I consider when weighting my goals?	<ul style="list-style-type: none"> Workday enables weighting of goals which provides employees and leaders an opportunity to prioritize what drives the most value for Williams, as well as provide clarity when faced with competing demands. Ensure goal weights truly reflect organization values and priorities. Be clear on the goal priority or value to the organization and have regular discussions to review progress and priority of goals. Only goals with meaningful weights should be included in annual goals, thus helping to keep your total number of goals to a minimum. The more impactful an individual goal is with respect to the company's organization goals, the higher the weighting should be. Goal weights should add up to 100 percent throughout the year. Midyear and annual performance evaluations cannot be successfully submitted if goals do not equal 100.
My goals are not editable in my Individual Goals tab. Why?	<ul style="list-style-type: none"> You must click EDIT in lower left corner to edit/add goals. Option 1 – the midyear or annual process is currently open. During this time, goals are "locked" for editing from the employee through the individual goals tab. Once the midyear or annual process is complete, goals will again become editable via the individual goals tab. Option 2 – your manager assigned a goal to you that they made NOT editable. Check with them to see if that was intended.
Can I delete goals?	<ul style="list-style-type: none"> It is highly recommended to archive goals rather than delete. Archive allows for reference or restore if needed later. See ARCHIVE GOALS below. Goals can be deleted IF you created them ad hoc and they haven't been pulled into any prior performance review.
How do I update my goals during the year?	<ul style="list-style-type: none"> See UPDATE EXISTING GOAL below
How do I add progress notes to my goals?	<ul style="list-style-type: none"> See ACTIVITY STREAM below under Update Existing Goal

ADD INDIVIDUAL PERFORMANCE GOAL(S)

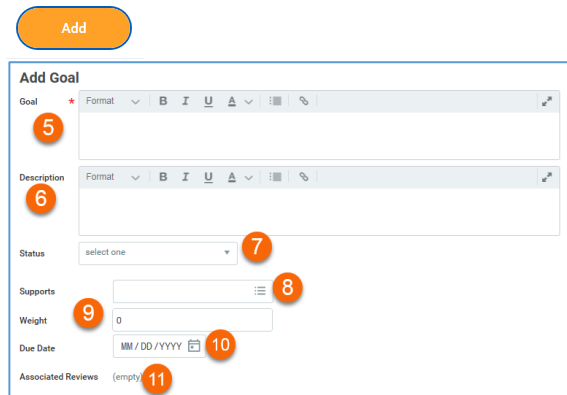
Add separate performance goal(s) ONLY if they are beyond consistent day-to-day role responsibilities. Best practice is to have 5-7 goals maximum.

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
9. Enter Weight
10. Enter Due Date
11. View Associated Reviews

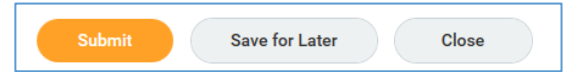


12. Add Milestones
 - a. Click plus sign
 - b. Enter description of Milestone, Due Date and Status.

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

13. Once all updates are made, click **Submit** to notify Manager OR **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 4-14.

NOTE: Goal additions send manager notification

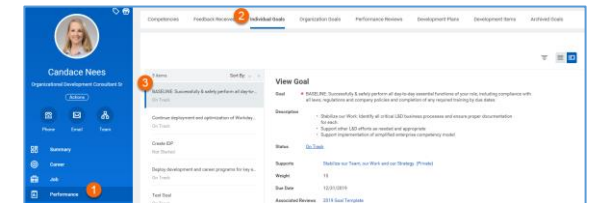


UPDATE EXISTING GOAL

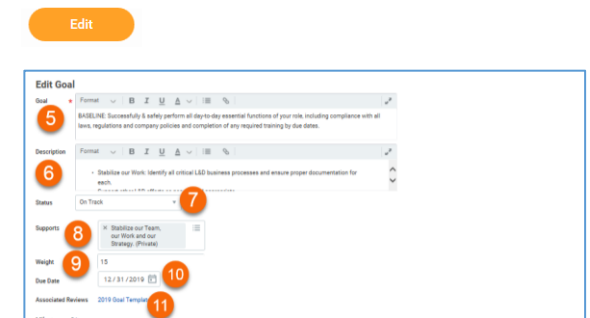
The **Individual Goals** tab displays both baseline goal and any other performance goals.

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 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

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

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

ADD ACTIVITY STREAM

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

Activity (0)

Enter status note about individual goal. To send manager/others update, tag by including @employee name.

15 Post

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

Submit **Save for Later** **Close**

17. Click **Done**

NOTE: Goal updates send manager notifications



MY GOALS – MILESTONE & ACTIVITY REPORT

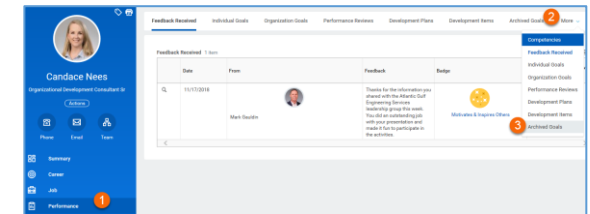
1. To view a summary list of all goals, milestones and activity; run My Goals – Milestone & Activity Detail report (by typing into Workday search bar)
2. This report can be exported to excel or printed if needed

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: You can copy/paste content from this screen to create a new goal

Archive Goals

Active 7 items

Archive	Goal
<input type="checkbox"/>	BASELINE: Successfully & safely perform all day-to-day essential functions of your role, including compliance with all laws, regulations and company policies and completion of any required training dates.
<input checked="" type="checkbox"/>	Test Goal
<input type="checkbox"/>	Create IDP
<input type="checkbox"/>	Deploy development and career programs for key employee groups: Operations Technicians, Commercial and Project Managers
<input checked="" type="checkbox"/>	Continue deployment and optimization of Workday and other LMS systems/processes
<input type="checkbox"/>	test - (Awaiting Approval)

5 **6** **OK** **Cancel**

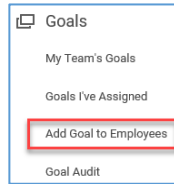
MANAGER FUNCTIONALITY

ADD GOAL(S) TO EMPLOYEE(S)

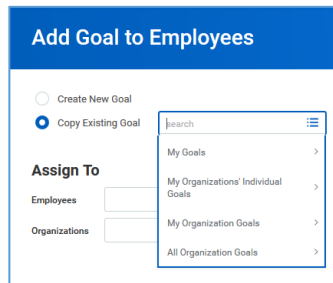
After organization goal(s) are created, managers can assign or add those goals to their employees.

From Workday Homepage:

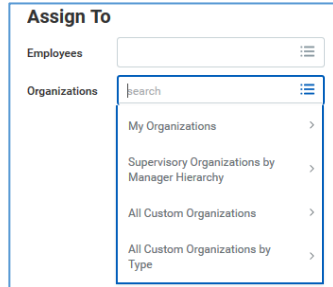
1. Click **Team Performance** application
2. Click **Add Goal to Employees** from Actions menu



3. Change selection to Copy Existing Goal and use drop-down menu to identify organization goal to copy.



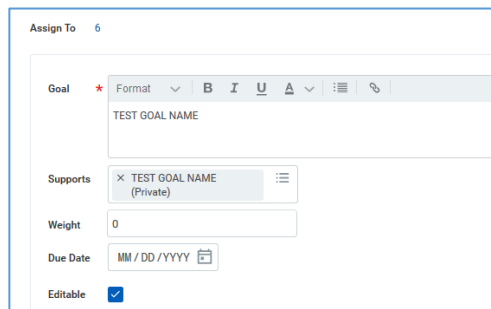
4. In **Assign To** section, select either individual employees or entire team by using **Employees** or **Organizations** drop-down. If you select an organization, you will also see a check box to determine whether to include subordinates.



5. Click **OK**.

6. Review goal to be added to employees:

- a. **Assign To:** Displays how many employees will receive goal. Click number for more details
- b. **Goal:** Adjust goal description if necessary



- c. **Supports:** Shows which higher-level organization goal this goal supports. You can adjust this before adding to employees
- d. **Weight:** You may pre-determine weight for employees
- e. **Due Date:** Add goal due date if desired.
- f. **Editable:** When checked, you and those you assign goal to CAN edit details during goal-setting process or throughout year. CAUTION: When unchecked, it becomes NOT editable in any way.

7. Click **Submit** to share goal or **Save for Later** to come back to it in your Inbox

VIEW ASSIGNED GOALS

1. Once assigned, goals are visible in **Team Performance** application by clicking on **Goals I've Assigned** or by typing "View Goals I've Assigned" in Workday search bar

VIEW GOAL ACTIVITY STREAM

2. Navigate to individual employee and to individual goal. Click callout box to view stream.
3. Run **My Team's Goals** report (from **Team Performance** application or 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 managers to review (or add) posts en masse and prepare for midyear and other conversations.

AUDIT GOALS

1. Run **Goal Audit** report (from **Team Performance** application or by typing into Workday search bar). All direct reports' goals are displayed, along with view of milestones and activity stream.