

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

| Field [*] Required | 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 |



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

GOAL FREQUENTLY ASKED QUESTIONS

| Question | Answer |
|-------------------------------|--|
| What is baseline goal? | <ul style="list-style-type: none"> Compliance-specific goal auto-assigned to every employee and includes language related to employee's day-to-day work. Intends to capture both day-to-day job-related tasks and required compliance activities in one. When creating goals, employees should not include day-to-day tasks separately. |

| | |
|--|---|
| What is goal best practice to keep in mind? | <ul style="list-style-type: none"> Auto Assigned Baseline goal intends to capture regular, routine work. Some employees, based on nature of job, may not have additional goals beyond baseline goal. Only add goals that are above and beyond typical job and that will require relatively significant portion of time and energy at work. IF goals above baseline goal are needed, it's recommended to maintain five or fewer goals. Only document meaningful goals that are significant portion of job; in doing this, percentages should be in large buckets (20% for example, not 2%). Do not include personal development items with performance goals. Add additional specificity to goals via milestones. Milestones can be statused individually. Weightings vary among employees. The intent is to maintain shared vision between employee and manager, which comes from prioritization/weighting discussion. |
| What should I consider when weighting my goals? | <ul style="list-style-type: none"> Goal weighting provides employees and leaders an opportunity to prioritize what drives 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 goal priority or value to organization and have regular discussions to review progress and priority. Only goals with meaningful weights should be included in annual goals, thus helping to keep total number of goals to minimum. The more impactful an individual goal is with respect to company's organization goals, the higher the weighting should be. Goal weights should equal 100 percent throughout 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 –midyear or annual process is currently open. During this time, goals are “locked” for editing from employee through individual goals tab. Once midyear or annual process is complete, goals again become editable via individual goals tab. Option 2 – your manager assigned goal 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 created ad hoc and haven't been pulled into any prior performance review. |
| How do I update goals during 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 |
| Can goal weights be changed during year if my goals change? | <ul style="list-style-type: none"> Yes, goal weights can be edited throughout year but should always equal 100 |

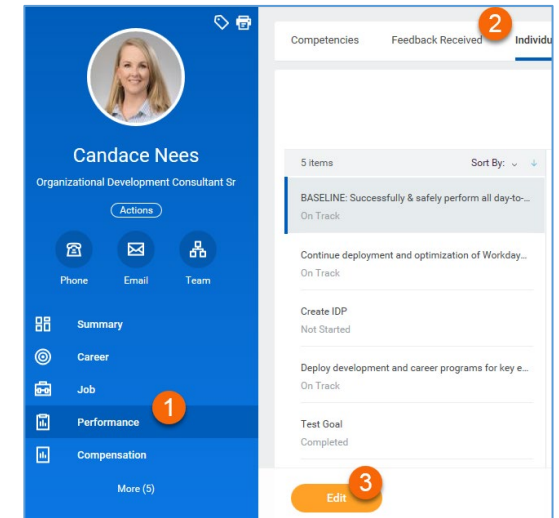
| | |
|--|---|
| Who can see my goals? | <ul style="list-style-type: none"> Your Individual Goals can be seen by you, your leader and leadership chain, and your HR Business Partner. |
| Can leader see all team members' goals in one place? | <ul style="list-style-type: none"> Yes, leaders can navigate to My Team's Goals report (by typing into Workday search bar) to see all direct reports' goals in one place. |
| Can I see Individual Goals up my leadership chain? | <ul style="list-style-type: none"> No, Individual Goals are not visible upwards |
| How do I link to an Organization Goal or cascade a goal? | <ul style="list-style-type: none"> Organization Goals are visible in Workday and can be assigned by leaders. In addition, employees can link their individual goal to an organization goal during the goal-setting process or when editing goals throughout the year. This is reflected as "supporting" an organizational goal in Workday. |
| How are my competencies determined? | <ul style="list-style-type: none"> Competencies are based on your career ladder level (associated with your Job Profile) See MyWilliams for more information on competency framework. |
| How do I view my Career Ladder/Level? | <ul style="list-style-type: none"> From worker profile summary screen, click Job Profile Scroll to Job Level = Career Ladder/Level |
| Where are my old performance forms? | <ul style="list-style-type: none"> Stored in your Performance section of Workday profile: <ul style="list-style-type: none"> Historical performance review forms beginning with 2019 Historical scores from 2016 |
| I have goals that I've marked Postponed/ Canceled. What happens to all my weightings now? | <ul style="list-style-type: none"> Best practice is to update remaining goal weightings appropriately If this is not done, remaining goal weights automatically update by reapplying cancelled goal weights proportionately to remaining active goals during mid-year and end of year processes. |
| Where do development goals go? | <ul style="list-style-type: none"> Under Performance section of worker profile Enter development goals in "Development Items" section or as result of creating Development Plan |
| Because we start performance processes so early in year, should all our goals have due dates of 9/30 instead of 12/31? | <ul style="list-style-type: none"> Goals can have any due date; thus, they should be set according to work itself. If goal extends beyond current year, consider adding milestones with due dates that are measurable within this performance year. |
| Are any employees exempt from creating goals? | <ul style="list-style-type: none"> No. However, some employees may have work that allows them to rely entirely on baseline goal. |
| If you complete goal mid-year, should you remove weighting for that goal and reallocate it to other active goals? | <ul style="list-style-type: none"> No. You should leave it with weight so that it is included in determining calculated annual rating during end of year performance assessments. Goals with no weighting, archived, and postponed/cancelled goals are not included in performance calculations. |

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.

| Milestone | Due Date | Status |
|-------------|------------|-----------|
| Milestone 2 | 09/31/2019 | On Track |
| Milestone 1 | 09/31/2019 | Completed |

13. If you have additional goals to add, repeat steps 4-12.

NOTE: Goal adds/edits send manager notifications

- Once all updates are made and all goals are entered, 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)
- Click **Done**

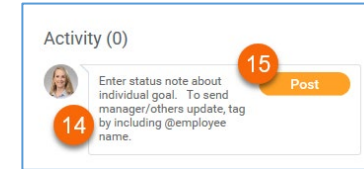


NOTE: Goals with activity stream display a callout box with lines



Click callout to view notes in chronological order

- Click **Post**
- 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)



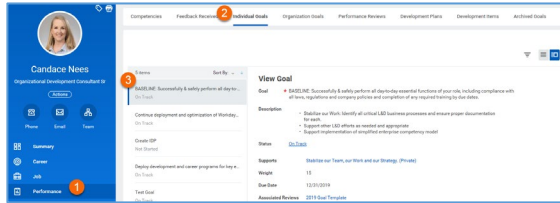
- Click **Done**
- NOTE:** Goal updates send manager notifications

UPDATE EXISTING GOAL

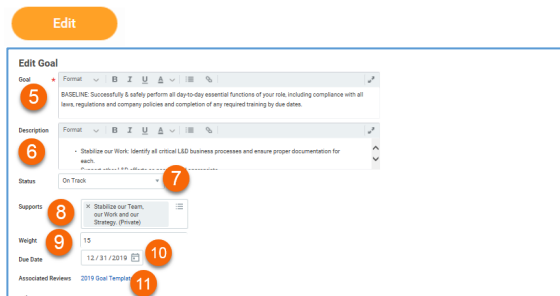
The **Individual Goals** tab displays both baseline goal and any other performance goals.

From Worker profile:

- Click on **Performance** tab
- Click **Individual Goals**
- Click goal to review
NOTE: Goals are listed in alphabetical order but clicking **Sort By** or other filters allow different views
- Click **Edit** to update



- Update Goal Title - do not edit baseline goal title
- Update Description
- Select Status from dropdown
- Update Supports linkage if needed
- Update Weight
- Update Due Date
- View Associated Reviews
- Update/Add Milestones



| Milestones: 2 items | Milestone | Due Date | Status |
|---------------------|-------------|------------|-----------|
| 12 | 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

- Click
- Enter status note – use @employee name to notify others of status



MY GOALS – MILESTONE & ACTIVITY REPORT



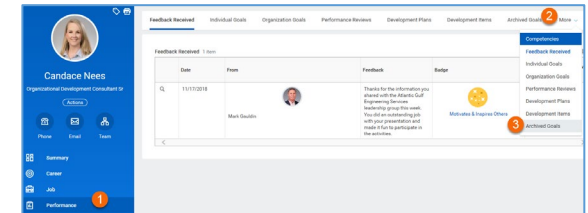
- To view a summary list of all goals, milestones and activity; run My Goals – Milestone & Activity Detail report (by typing into Workday search bar)
- This report can be exported to excel or printed if needed

ARCHIVE/RESTORE GOALS

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.

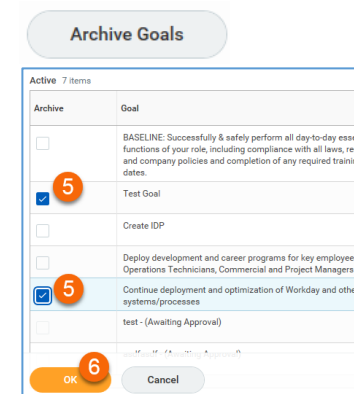
From Worker profile:

- Click on **Performance** tab
- Click **More** dropdown
- Click **Archived Goal**



- Click **Archive Goal**
- Select goal(s) to archive by checking box to left of each
- Click **OK**

NOTE: Copy/paste content as needed from to create new goals



MANAGER FUNCTIONALITY



Managers have full access to all goal functionality for their direct reports (add, edit, archive, change goal details, etc).

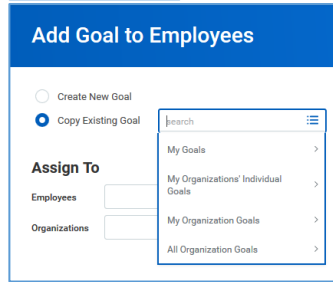
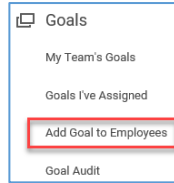
Notifications generate to employees as updates are submitted.

ADD GOAL(S) TO EMPLOYEE(S)

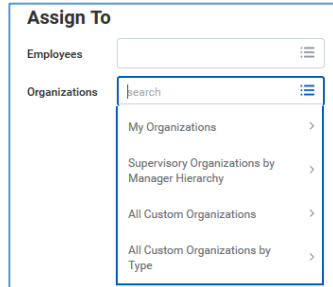
After organization goal(s) are created, managers can assign or add those goals to their employees.

From Workday Homepage:

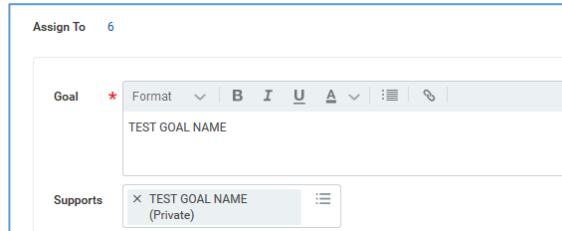
1. Click **Team Performance** application
2. Click **Add Goal to Employees** from Actions menu
3. Change selection to Copy Existing Goal and use drop-down menu to identify organization goal to copy.



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/ADD GOAL ACTIVITY STREAM

1. Option 1 - Navigate to individual employee > Performance > Individual Goals. Click **Edit**. Click callout box to view stream.
2. Option 2 - Run **My Team's Goals** report (from **Team Performance** application or by typing into Workday search bar). All direct reports' goals are displayed with ability to click associated callout box. Managers can review (or add) posts en masse and prepare for performance feedback conversations.

AUDIT GOALS

1. Run **Goal Summary** report (from **Team Performance** application or by typing into Workday search bar) to see the count of goals each employee has entered and check that their goal weights sum to 100%.
2. Run **Goal Audit** report (from **Team Performance** application or by typing into Workday search bar) to access all direct reports' goal details including milestones and activity stream.
3. Review ALL goal fields for accuracy (title, supports, weighting, due date, etc) and edit as needed (see below).

EDIT GOALS

1. Navigate to individual employee > Performance > Individual Goals
2. Click **Edit**. Make necessary changes
3. Click **Submit**. Notifications generate to employees as updates are submitted