NAVIGATE THE PERFORMANCE MANAGEMENT (PM) DASHBOARDS
FOR: CAREER MANAGERS AND JOB LEADERS

TOPICS COVERED
- Access the Dashboards
- Navigate Performance Management Overview for Managers
- Navigate Performance Management Overview for Job Leader (JL) Dashboard
- Accessing the Dashboard on your Mobile Device

OVERVIEW
Dashboards drive a consistent employee experience by providing Career Managers and Job Leaders with visibility into real-time performance management data.
- The PM Overview for Managers dashboard provides insights into current Goals, SnapShot survey results, Pulse Check and Annual Summary completion, and Feedback responsiveness
- The PM Overview for Job Leaders dashboard provides insights into the SnapShot survey completion and responses from designated employees

ACCESS THE DASHBOARDS
WORKDAY STEPS
- Click the Dashboards worklet on the Workday homepage
- Click PM Overview for Managers or PM Overview for Job Leaders based on your role
  Results: The dashboard elements display
- If you do not see the Dashboards worklet on your Workday homepage, take the steps below:
  - From your home page, click the Gear icon
  - Under Optional Worklets, type “Dashboard” into the search field on the right
    - Locate “PM Overview for Job Leaders” and/or “PM Overview for Managers” and select “OK”
    - Click “Done
Note: If you are a CM and a JL you will have access to both Dashboards
Note: A blue bar displays at the bottom of the screen to indicate the dashboard elements are in the process of loading.

NAVIGATE PERFORMANCE MANAGEMENT OVERVIEW FOR MANAGERS DASHBOARD

DASHBOARD ELEMENTS
- This dashboard consists of five charts. Each chart includes a graph (i.e., stacked bar) and a table (i.e., legend)
- Graphs and tables in the dashboard are summaries of reports
- You will see the following charts:
How many goals do employees in my org have?

Guidance: All employees should have current goals in Workday

Definition: This chart shows the number of goals active/on leave employees within a Career Manager’s supervisory organization have created or updated within the past 12 calendar months (excludes VPs, Exec/Senior Exec Advisors, Officers). Note that goal numbers include both approved and goals pending approval from the Career Manager.

Did JLS in my org conduct SnapShot conversations with their designated employees in the last month?

Guidance: Job Leaders must conduct monthly SnapShot conversations with all employees

Definition: This chart provides visibility into whether Job Leaders within a Career Manager’s supervisory organization are conducting monthly SnapShot conversations; it shows yes/no responses to Question 1 of the SnapShot survey, “My Job Leader and I had at least one SnapShot conversation this month,” during the previous month. To view dashboard results for an earlier month, select View More and adjust the Review Period End Date to the last day of the month (i.e., 1/31/19 instead of 1/29/19).

How did employees designated to my JLS feel about SnapShot conversations last month?

Guidance: All employees should have meaningful SnapShot conversations

Definition: This chart provides insight into employees’ perception of the value of monthly SnapShot conversations with Job Leaders within a Career Manager’s supervisory organization; it displays aggregate responses to Questions 2-5 of the SnapShot survey from the prior month. Note: For data to appear, at least three employees must have completed the survey for the Job Leader.

Did CMs in my org complete Pulse Checks over the last 3 months? (CMs of Senior Associates and Principals):

Guidance: We need 100% timely completion to ensure employees’ successful integration and onboarding

Definition: This chart tracks the status of 6-month Pulse Checks. Data is shown over a three-month period (ending with the prior month) and is broken down by completed or not completed. (Pulse Checks are due by the end of the employee’s sixth month with the firm or in a senior staff role.)

Are my employees responding to feedback requests within 10 days?

Guidance: We need 100% timely completion to ensure employees receive feedback they deserve to grow and develop

Definition: This chart tracks whether employees in a Career Manager’s supervisory organization are responding to Workday feedback requests during the calendar year. Data is broken down by if/when feedback requests were completed by the recipient (Within 10 Days, After 10 Days, Not Yet Due, Overdue).

Did CMs in my org complete Annual Summaries over the last 3 months? (CMs of Senior Associates and Principals):

Guidance: We need 100% timely completion to ensure senior staff receive performance feedback

Definition: This chart tracks the status of Annual Summaries. Data is shown over a three-month period (ending with the prior month) and is broken down by completed or not completed.
• Graphs and tables in the dashboard are summaries of reports

• You will see the following charts:
  Did SnapShot conversations occur over the last 3 months?
    – Guidance: Job Leaders must conduct monthly SnapShot conversations with all employees
      Definition: This chart shows yes/no responses to the SnapShot survey Question 1 from a Job Leader’s designated employees, “My Job Leader and I had at least one SnapShot conversation this month.”

How did your designated employees feel about last month’s conversation?
    – Guidance: All employees should have meaningful SnapShot conversations
      Definition: This chart displays aggregate responses to Questions 2-5 of the SnapShot survey for a Job Leader’s designated employees during the prior month. Note: For data to appear, at least three employees must have completed the survey for the Job Leader. Job Leaders with one or two designated employees are encouraged to reach to their HR Talent Consultant for trends/themes to support their conversations.

FILTER THE DASHBOARD

• You may see the message above for some of the charts
• To resolve this or to filter any of the charts in the dashboard, click the Gear icon in the top right corner of the chart and select Edit Settings to filter the report
• A dialog box displays with fields to enter data elements by which you can filter the underlying report
• Filters differ based on the chart and the underlying report
• A blue bar displays at the bottom of the screen to indicate the dashboards are in the process of loading
• If you receive an error message, that the report load has timed out due to the amount of data requested. Use Edit Settings to filter your request

DRILL INTO THE DATA REPRESENTED

Note: While Career Managers and Job Leaders should not need to filter, we do want to make sure employees understand that senior leadership can see how their Job Leaders and Career Managers are executing a consistent employee experience by drilling into the data for their supervisory organization.

• Below graphs and charts you will see a legend that explains how the data is being represented within that graph or chart
• To the right of each chart, two icons display. The Chart Selection icon allows you to change the graphical representation of the data
• The Gear icon allows you to Edit Settings (filter the report), Restore Default Settings (remove filters), and Download to Excel. Click within the chart to display additional options for filtering and downloading the data
DRILLING DOWN

- **SnapShot survey results:**
  - **Are designated employees completing their monthly SnapShot survey?** Click on the numbers in the table under the first chart to see responses to Question 1. If yes, thank them for consistently completing the survey. If not, reach to those designated employees to ensure they are completed going forward. **Are SnapShot conversations occurring?** It's also important to check if all designated employees aligned to you are confirming that they had a SnapShot conversation. View the “yes/no” stacked bar column.
    - Example of low results: Job Leader’s designated employees are not completing the survey or are completing the survey with a “no” response to the first SnapShot survey question “My Job Leader and I had at least one SnapShot conversation this month”
    - Example of high results: Job Leader’s designated employees complete the survey and confirm by responding “yes” in the first SnapShot survey question
    - **Career Manager actions:** recognize Job Leaders who consistently have SnapShot conversations and provide guidance to those who are not
  - **How do employees feel about their monthly SnapShot conversations with their Job Leader?** Anonymity is in effect; however, Job Leaders and their management chains can see aggregate data. Job Leaders should strive for a score of 4.0 or higher. Job Leaders should look at average scores to see if there are certain areas (e.g., giving actionable feedback) where they can improve
    - Example of low results: Job Leader sees average scores below 3.0 across the four remaining SnapShot survey questions
    - Example of high results: Job Leader consistently receives average scores of 4.0 or higher
    - **Career Manager actions:** recognize Job Leaders with high average scores; provide coaching and guidance to those with opportunity for improvement

- **Goal count:**
  - **Do all employees that you are the Career Manager for have current goals in Workday?** Career Managers can drill down by clicking “View More” to see details regarding the number of goals (both those approved and those pending review and approval from the Career Manager) and the goal details.
    - Example of low results: Employees have zero goals entered in Workday
    - Example of high results: Employees are dynamically creating and updating goals in Workday, and have between 3-5 active goals
    - **Career Manager action:** ensure direct reports have current (created or updated in the last 12 months) goals in Workday

- **Pulse Checks:**
  - **Are Pulse Checks being completed on time?** Drill into the stacked bar chart to confirm if Career Managers are completing Pulse Checks on-time and identify Career Managers who are not.
    - Example of low results: Career Managers not completing Pulse Checks on time
    - Example of high results: Career Managers are completing Pulse Checks on time
    - **Career Manager actions:** recognize Career Managers who are consistently completing Pulse Checks in a timely manner; provide coaching to those who are not
• **Feedback responsiveness:**
  - **Are feedback requests being completed on time?** Drill into the stacked bar chart to confirm if feedback is responded to and completed within 10 calendar days
    - Example of low results: Late feedback request that was not responded to
    - Example of high results: Employee provides actionable feedback within 10 days
  - **Career Manager actions:** Thank direct reports who are consistently responding to feedback requests in a timely manner; provide coaching to those who are not

• **Annual Summaries (for Senior Associates and Principals only):**
  - **Are Annual Summaries completed on time?** Click on the bar chart and in the table below the chart to drill down into the completion rates.
    - Example of low results: Career Managers of senior staff not completing Annual Summaries on time
    - Example of high results: Career Managers of senior staff are completing Annual Summaries on time
  - **Career Manager actions:** recognize Career Managers who are consistently completing Annual Summaries in a timely manner; provide coaching to those who are not

**ACCESS UNDERLYING REPORTS**

• Click the blue hyperlinks in the table below each graph to view details of the data
  - Depending on the data/size of report you are requesting, a dialog box asking if you want to be notified later will display. Click **Notify Me Later** if you want to run the report; you will receive notification when the report is ready in a generated email from Workday to your Booz Allen Outlook inbox
  - If you click **Cancel** the data request will be canceled
• If you wait for the data, it will appear in a separate window. You can filter the data that appears as needed by using the boxes shown to the right:

  - Click **Refresh** to apply the filter criteria selected
  - You will also see that some elements on the report are hyperlinked so that you can gain additional insight when analyzing the report and/or view descriptions and definitions of data elements

**CUSTOM REPORTS & EXTERNAL LINKS**

• On the top right of the Dashboard next to the first chart, you will see links to Custom Reports and External Links
• These links provide easy access to related reports and information not included in the Dashboard

**ACCESSING DASHBOARDS FROM A MOBILE DEVICE**

• Both the PM Overview for Managers and PM Overview for Job Leaders are viewable on a mobile device
• Reference the [Mobile App Workday job aid](#) for instructions to get started