CAREER MANAGER JOB AID

COLLABORATING WITH STAFF TO CREATE AND APPROVE GOALS

The Performance Management process begins with you and the employee collaborating to set 3-5 clearly defined Goals that describe what the employee has been asked to do. As a career manager, you are responsible for ensuring that each of your direct reports has appropriate goals. Encourage employees to have a voice in the process by drafting their Goals. You may also assign Goals to your direct reports. Remember: the sooner Goals are set, the sooner staff can work towards achieving them and getting feedback against them.

Goals should be SMART (specific, measurable, actionable, relevant, and time-bound) to the extent possible. Career managers will have an auto-populated Goal and senior staff have an auto-populated purpose and values Goal. These Goals cannot be edited. Please have the employee contact the Help Desk to remove one of these Goals if needed (e.g., if the employee is no longer a career manager). As Goals are added, updated, or deleted, you will need to reapprove the Goal. Remember to also periodically request 360 feedback on the employee’s performance against their Goals, especially when milestones are hit or Goals are completed.

APPROVING GOALS

1. From Workday Inbox, select the action to Manage Goals

2. Carefully review the Goal(s). Send Back any Goal(s) that you would like the employee to edit. When you Send Back, you will need to enter a reason to explain any necessary changes.

   NOTES: While you are working through iterations of Goals for your employees, you will receive notices to your Outlook inbox and an Action in your Workday Inbox. Sending a goal back is not meant to replace conversations between career managers and staff. If significant changes are needed, discuss the changes with the employee before sending the Goal back.

3. To approve the Goal(s), click the Approve button
ADD A GOAL TO EMPLOYEE’S GOALS

As a career manager, you have the option to cascade/Add Goals to Employees. Before Goals are added to an employee, make sure to have a conversation with your employee for awareness and understanding.

1. From Workday Home, click the Team Performance worklet

2. On the Team Performance page, click Add Goal to Employees in the Actions box

3. On this screen, you can select Create a New Goal or Copy an Existing Goal to cascade/Add Goal to Employees

   • To Create a New Goal, you can type in a new Goal
4. Under **Assign To**, you can add the Goal to the specific employee(s) under **My Team** or within your **Organization** by noting their name in the search box.

5. If you choose **Organizations vs. Employees**, you will be able to check a box to **Include Subordinate Organizations** and the Goal will populate to all your direct reports.

6. Click **OK**. On the next page, add the goal, description, category, and due date.

   - You can also add more than one Goal on this page by clicking **Add**.
• If you don’t want the employee(s) to be able to edit the added Goal, be sure to uncheck the **Editable** checkbox

• Click **Submit**.