

Workday Performance Management: Cascading Goals

In Workday, supervisors can add goals and cascade them to specific individuals or everyone on their team.

Please refer to the **SMART Goals Worksheet** on the <u>HR Performance Management site</u> to help create objective goals for every team member. *Keep in mind that goals can and should be revisited throughout the performance management cycle.*

Cascade Goals

Supervisors/Managers have the capability to cascade goals to their teams.

1. Go to myworkday.com to log in. In the **Search** bar, type in **Add Goal** and select **Add Goal to Employees**.



- 2. Do one of the following:
 - a. Select the **Copy Existing Goal** if it is the same as a previously created goal or a goal entered by Manager +1 to cascade to your team.
 - b. Select the Create New Goal radio button.

| Add Cool to Employees | ~ |
|--|--------|
| Add Goal to Employees | ^ |
| Create New Goal Copy Existing Goal | |
| Assign To | |
| Employees | := |
| Organizations | := |
| | Cancel |
| | |

- 3. Under Assign To,
 - a. Select **Employees**, then click on **My Team** and select each employee on your team you would like to assign the goal to.

| Assign To | | |
|---------------|--|----|
| Employees | Search | := |
| Organizations | My Team | > |
| organizationo | Workers by Manager | > |
| | Workers by Manager Hierarchy | > |
| | Workers by Supervisory Organization | > |
| | Workers by Supervisory Organization Hierarchy | > |



b. Select **Organizations**, then click on **My Organizations** to select your team to assign the goal to. **Note**: If you oversee multiple work units, enter each group to assign goals to everyone, e.g. Total Rewards.

| Add Goal to Employees | × | Assign To | | |
|---------------------------------|-------------------|--------------------|--|--|
| O Create New Goal | | Employees | | |
| Copy Existing Goal | := | Organizations | Search | |
| | | | My Organizations | |
| Assign to | · | | Supervisory Organizations by Location | |
| | Search := | | Supervisory Organizations by Location Hierarchy | |
| ganzations | X Human Resources | | Supervisory Organizations by Manager | |
| clude Subordinate Organizations | | | Supervisory Organizations by Manager Hierarchy | |
| | | lication: Jennifer | All Custom Organizations | |
| | Cancel | structor (C10031 | All Custom Organizations by Type | |

- c. Click OK.
- 4. If the goal is assigned to the organization, each supervisor/manager will have to approve the goal for each team member by going to the notifications.
 - a. Click on each notification and click Approve.

| All Items | 451 items | ☆ 🖏 L ^T Created: 08/12/2024 Due: 08/14/20 | 24 Effective: 08/12/2024 | |
|---------------------------|----------------|--|--|----------|
| Q Search: All Items | ↑ ↓ | Review Goals Manage Goals: | | XIII POI |
| 여년 191 Advanced Search | | | | |
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Employee View of Goals

Once the supervisor/manager assigns a goal, the employee will receive a Workday notification.

1. Click on the bell icon to view the details.

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|--------|---|---|---------|------------|------|------|------|
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2. Click on your profile on the top right of your Workday screen and click **View Profile**.



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a. In the left menu, click on **Performance**.





b. On the right, under Individual Goals, you will see the new goal entered by your supervisor/manager.

| Individual Goals | Archived Goals | Performance Rev | views |
|--------------------|----------------|-----------------|--|
| | - | | |
| 6 items | Sor | tBy: ∽ | |
| | | G | lew Goal oal * This goal is a SMART one. |
| | | De | escription |
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| This goal is a SMA | RT one. | Du | ue Date 12/31/2024 |
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| Edit | | | |
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c. Select the

- goal and click Edit.
- d. The employee can add notes in the **Description** field throughout the performance year to make notes of progress and adjustments.
- e. The **Status** field, **Organization Alignment** (Mines Strategy), and **Due Date** are editable at any time.
- f. Click **Submit** once edits are complete.

Note: When it is time for the annual performance evaluation, the goal will be available to select when you click **Add Existing** in the **Performance Objectives** section.



| Edit Goal | | ľ | | | | | |
|--|--|---|--|--|--|--|--|
| Goal * | Format \checkmark \blacksquare \blacksquare \checkmark \blacksquare \checkmark | | | | | | |
| | This goal is a SMART one. | | | | | | |
| Description | Format \vee B I U A \vee $i \equiv 1$ \Im | | | | | | |
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| Status | select one | | | | | | |
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| Due Date | 12/31/2024 🖻 | J | | | | | |