

Workday Performance Management: Cascading Goals

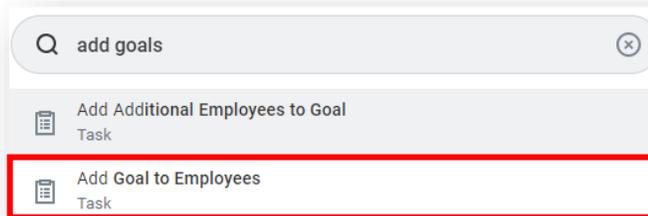
In Workday, supervisors can add goals and cascade them to specific individuals or everyone on their team.

Please refer to the **SMART Goals Worksheet** on the [HR Performance Management site](#) to help create objective goals for every team member. *Keep in mind that goals can and should be revisited throughout the performance management cycle.*

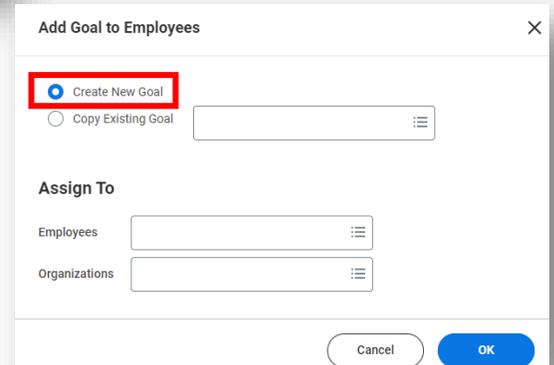
Cascade Goals

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

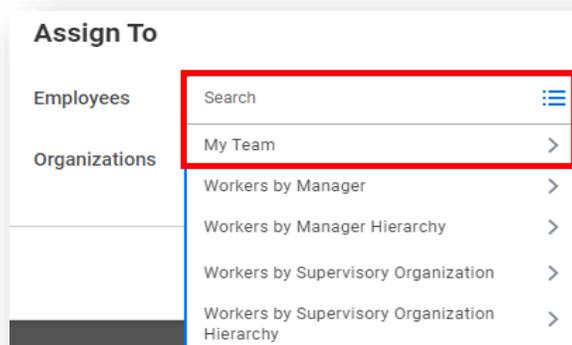
1. Go to myworkday.com to log in. In the **Search** bar, type in **Add Goal** and select **Add Goal to Employees**.



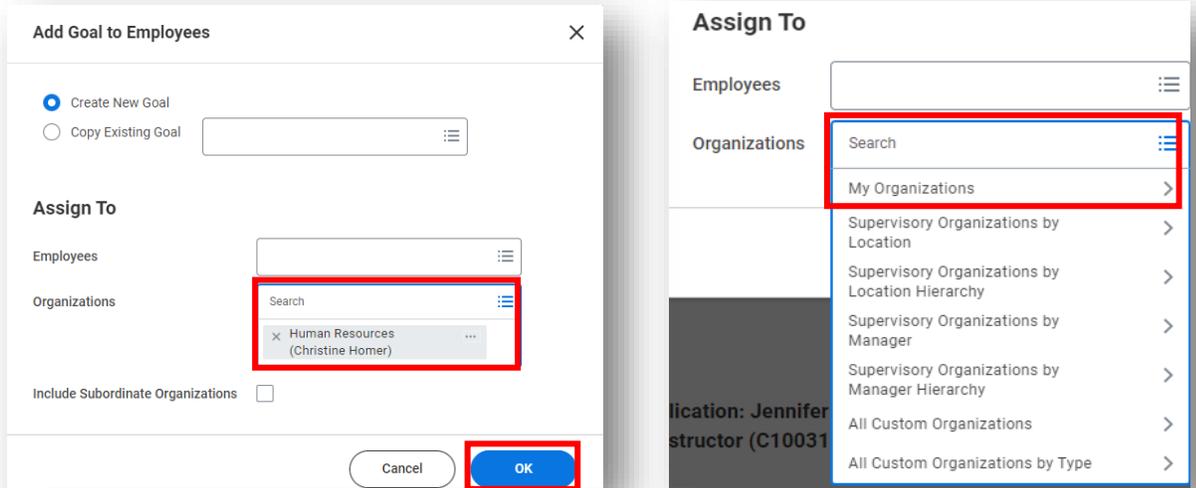
2. Do one of the following:
 - a. Select the **Copy Existing Goal** if it is the same as a previously created goal or a goal entered by Manager +1 to cascade to your team.
 - b. Select the **Create New Goal** radio button.



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.



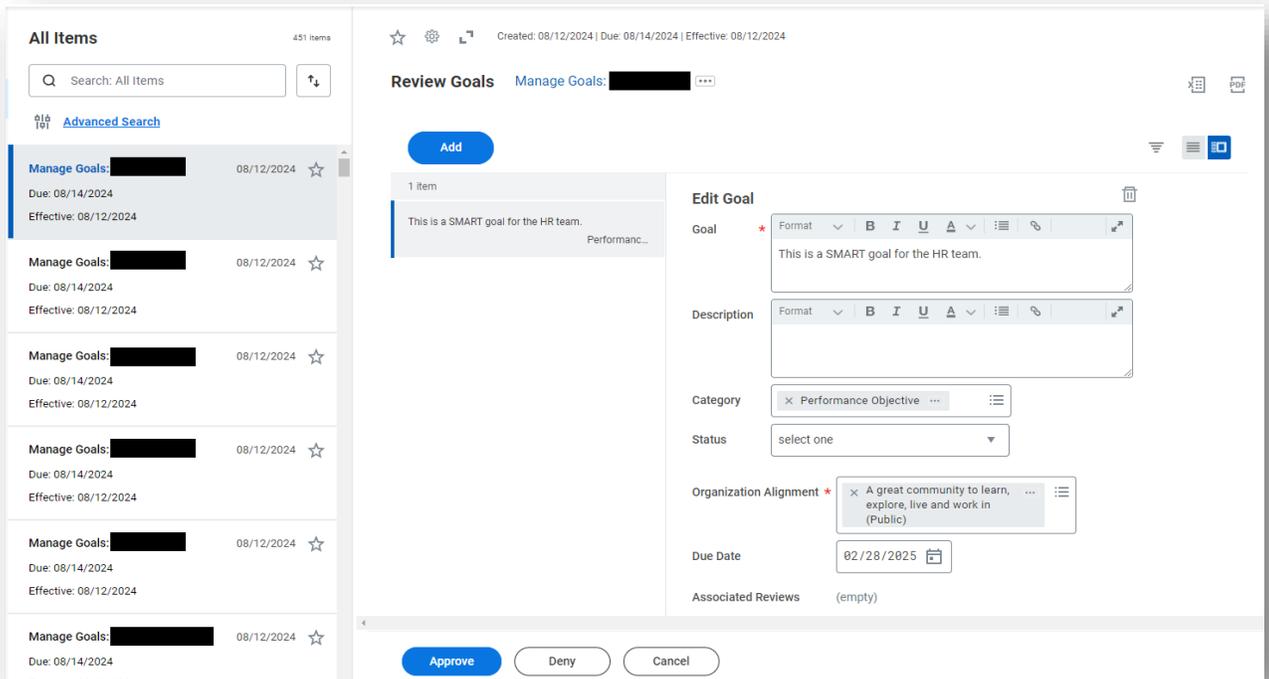
- b. Select **Organizations**, then click on **My Organizations** to select your team to assign the goal to. **Note:** If you oversee multiple work units, enter each group to assign goals to everyone, e.g. Total Rewards.



The left screenshot shows the 'Add Goal to Employees' dialog. Under 'Assign To', the 'Organizations' section is expanded, and 'Human Resources (Christine Homer)' is selected. The 'OK' button is highlighted. The right screenshot shows the 'Assign To' dropdown menu with 'My Organizations' highlighted in red.

- 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**.



The screenshot shows the 'Review Goals' interface. On the left, there is a list of goals with columns for 'Manage Goals', dates, and status. On the right, the 'Edit Goal' form is open, showing fields for Goal, Description, Category, Status, Organization Alignment, Due Date, and Associated Reviews. The 'Approve' button is highlighted at the bottom.

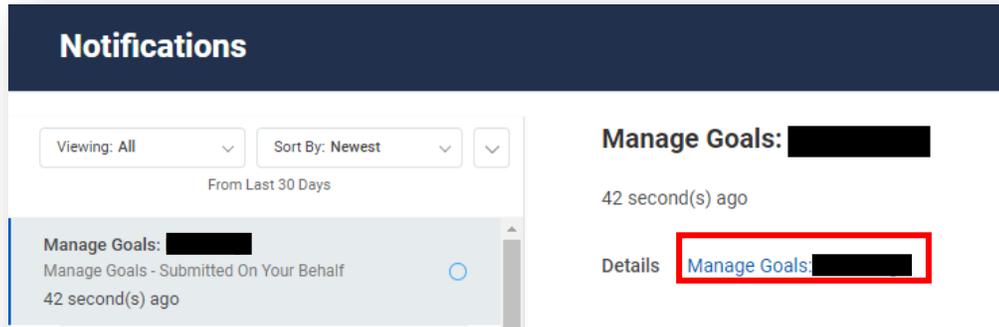


Employee View of Goals

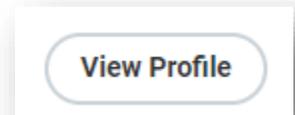
Once the supervisor/manager assigns a goal, the employee will receive a Workday notification.



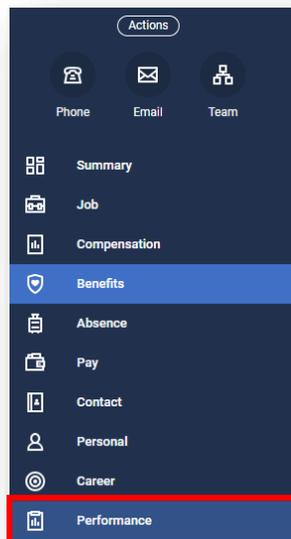
1. Click on the bell icon to view the details.



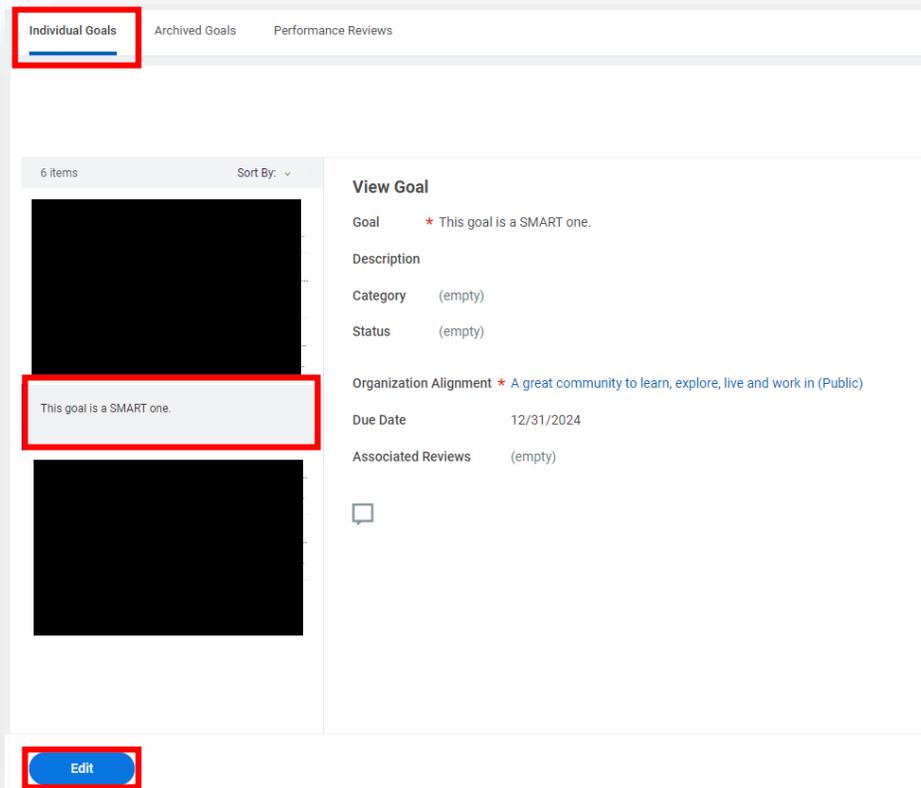
2. Click on your profile on the top right of your Workday screen and click **View Profile**.



- 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.



- 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

Goal *

Format **B** *I* U **A**

This goal is a SMART one.

Description

Format **B** *I* U **A**

Category

Performance Objective

Status

select one

Organization Alignment *

A great community to learn, explore, live and work in (Public)

Due Date

12/31/2024