Williams

WE MAKE ENERGY HAPPEN

2019 Goal-Setting in Workday

Introduction
Overview

> **2019 goal-setting** process in Workday is underway

> **2018 performance cycle, including year-end reviews, will be completed in My Career Manager/Success Factors.**

    – Historical performance forms will NOT be transferred to Workday; Encourage employees to PDF print/save any past performance reviews prior to Dec. 31

    – Historical performance forms can be added as desired by employees to their Career profile in Workday for reference

> **Right Way/Right Results philosophy remains**

    – Performance is defined by *what* gets done (results) and the *way* in which that work is accomplished

Key Changes: Goal-setting Process

> **Baseline goal now includes reference to day-to-day work tasks in addition to compliance**
  - Only goals above and beyond day-to-day work need to be added to forms

> **Maximum of 11 goals *including pre-populated Baseline goal* can be listed on form**
  - Encourages proper goal setting practices by avoiding listing many tasks and instead focusing on larger goals

> **Goals will now be weighted (100% sum)**
  - Encourages prioritization of work, helps employees and manager have a shared understanding of relative priorities

> **Organization goals and/or a manager's individual goal(s) can be assigned to specific employees or entire subordinate organizations**
  - Use the Add Goal to Employees function by using Search; reference the quick reference guide on the Workday resources site
  - These will be counted toward an employee's maximum of 11 individual goals

> **Employees can associate an individual goal with an organization goal**
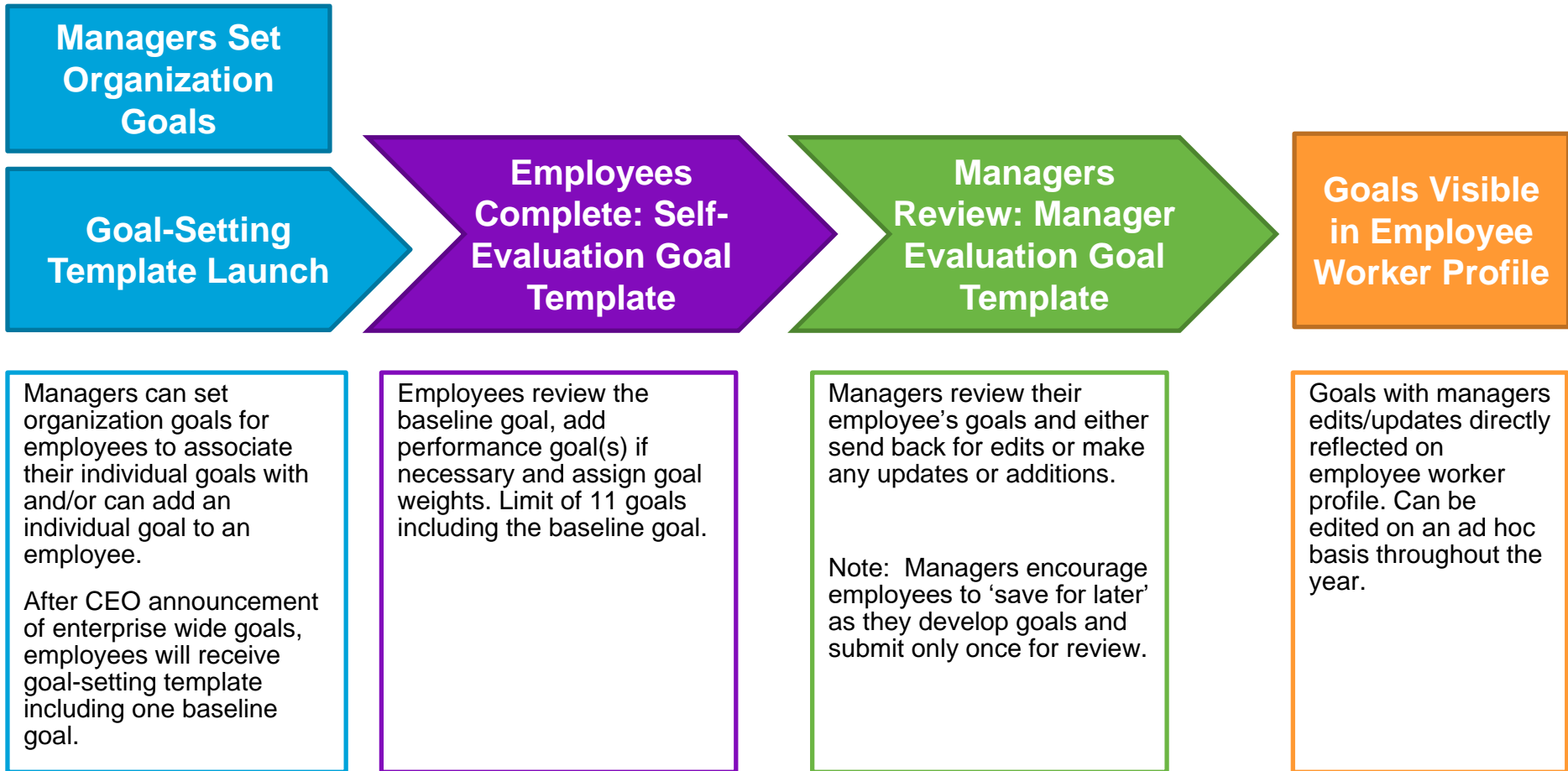 - This is the "Supports" drop-down during goal-setting in Workday

Introduction
Key Changes: Right Way

> **Core Values & Beliefs (CV&Bs) during goal-setting**
  – *Way* continues to be a key component of performance at Williams
  – Beginning with 2019 goal-setting, Williams' Core Values & Beliefs will be the framework by which employees' *way* is assessed.

> **Competencies remain applicable to employee development**
  – Managers and employees should continue to focus on competencies relevant for their specific role and aspirational roles
  – Competencies are a key component of individual development planning and career path conversations
  – Review competencies as some changes have been made

Introduction
Process

Managers Set Organization Goals

Goal-Setting Template Launch

Employees Complete: Self-Evaluation Goal Template

Managers Review: Manager Evaluation Goal Template

Goals Visible in Employee Worker Profile

Managers can set organization goals for employees to associate their individual goals with and/or can add an individual goal to an employee.

After CEO announcement of enterprise wide goals, employees will receive goal-setting template including one baseline goal.

Employees review the baseline goal, add performance goal(s) if necessary and assign goal weights. Limit of 11 goals including the baseline goal.

Managers review their employee's goals and either send back for edits or make any updates or additions.

Note: Managers encourage employees to 'save for later' as they develop goals and submit only once for review.

Goals with managers edits/updates directly reflected on employee worker profile. Can be edited on an ad hoc basis throughout the year.

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# Goal-Setting in Workday

Organization Goals
Overview

> **Organization goals may be set by any manager (formal leader) for their teams through the Manage Organization Goals process.**

  – HRBPs may also assist with and initiate organization goals.

  – Should be set to **private** to limit visibility to manager's direct and indirect supervisory organizations.

> **Organization goals and/or a manager's individual goal(s) can be assigned to specific employees or entire subordinate organizations**

  – Use the Add Goal to Employees function by using Search; reference the quick reference guide on the Workday resources site

  – These will be counted toward an employee's maximum of 11 individual goals

> **Employees can associate each of their individual goals with an organization goal (one org. goal for each individual goal) using the supports field.**

Organization Goals
Getting Started

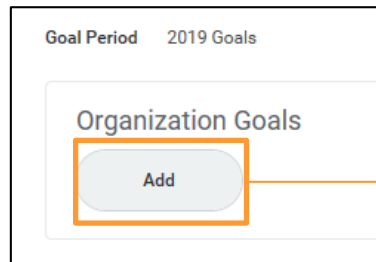Start by searching for the business process by name: **Manage Organization Goals**
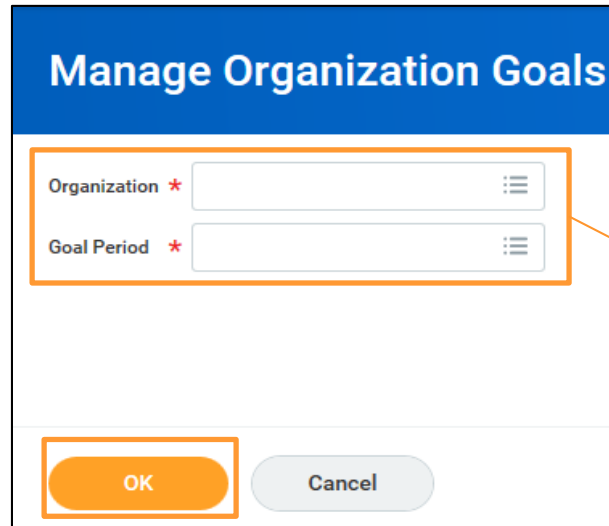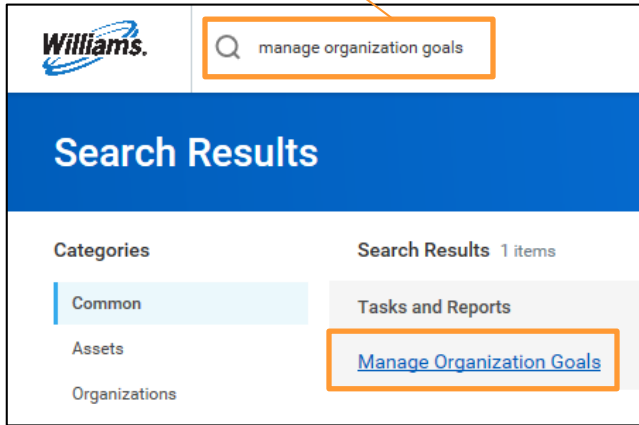
Select either your **supervisory** or **subordinate supervisory organizations** for this goal by choosing from the drop-down or searching for a key word.

Once you've done so, the period will auto-populate.

Remember, we're starting with **2019** goals in Workday.

Click **OK**.

Click **Add** to enter a **new** organization goal.

If you had previously developed organization goals for the same period, they would show here and you would be able to **edit** the details, or add additional new goals.

Organization Goals
Completing Goal

Goal description is required.

For a new goal, you can leave **percent complete** at 0.

You may choose to "link" your organization goal to one of your manager's goals (one level up only) in the **supports** field. This is similar to how your employees will link to this goal as well.

Supporting Initiatives remains "(empty)"

NOTE: Be sure to mark your goal as **private** to limit visibility to your team/ supervisory organization chain. If you leave it public (no check mark) <u>anyone</u> in the organization can see and link to it.

Goal Period   2019 Goals

Organization Goals

Goal	*	TEST GOAL NAME
Percent Complete		0
Supports		
Supporting Initiatives	(empty)	
Private	✓	

Remove

Add

OK   Cancel

Click **Add** to enter additional organization goals or **OK** to save the one you created.

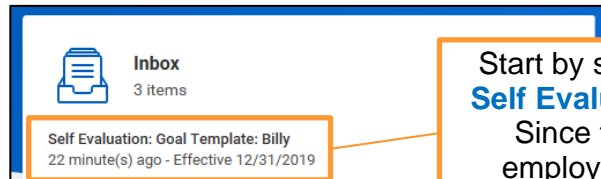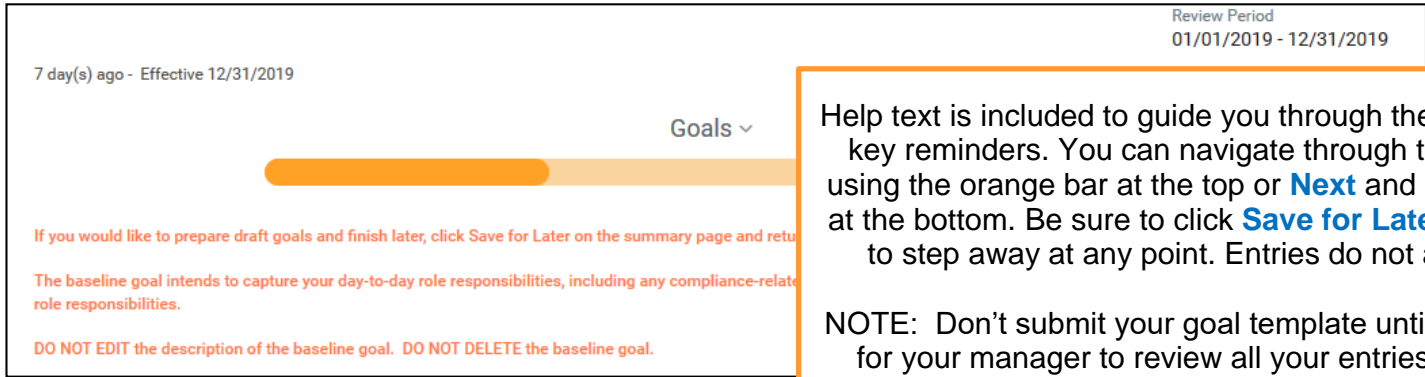# Self Evaluation Goal Template
Overview

> **Individual goal-setting is kicked off to employees across the organization through the Self-Evaluation: Goal Template inbox item.**

  – Does not launch to contingent workers or interns.

> **The template will include one baseline goal for all employees.**

  – This goal captures 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. Some employees, based on the nature of their job, may not have additional goals beyond the baseline goal.

> **Goals are also be weighted, which provides employees and managers an opportunity to prioritize what drives the most value for Williams.**

> **Employees can enter a maximum of eleven performance goals – which includes the cascaded baseline goal – during the goal-setting process.**

  – Goals should reflect stretch-type opportunities for employees to add incremental value to Williams beyond their typical day-to-day. The revised baseline goal intends to now capture these day-to-day responsibilities.

  – Employee are recommended to maintain 5 or fewer performance goals

Self Evaluation Goal Template
Getting Started

Inbox
3 items

Self Evaluation: Goal Template: Billy
22 minute(s) ago - Effective 12/31/2019

Start by selecting the inbox item:
Self Evaluation: Goal Template.
Since this is an action item,
employees will also receive a
notification via outlook email.

Review Period
01/01/2019 - 12/31/2019

7 day(s) ago - Effective 12/31/2019

Goals ⌄

If you would like to prepare draft goals and finish later, click Save for Later on the summary page and retu

The baseline goal intends to capture your day-to-day role responsibilities, including any compliance-relate
role responsibilities.

DO NOT EDIT the description of the baseline goal. DO NOT DELETE the baseline goal.

Help text is included to guide you through the process with
key reminders. You can navigate through the template
using the orange bar at the top or **Next** and **Back** buttons
at the bottom. Be sure to click **Save for Later** if you need
to step away at any point. Entries do not auto-save.

NOTE: Don't submit your goal template until you're ready
for your manager to review all your entries in order to
avoid sending multiple or unnecessary notifications.

Goal *****
Baseline compliance goal test

Supports

Every employee will have one baseline goal in the
template. To "activate" or edit the fields, click on
any field directly or click the pencil icon. The
description and due date ***should not be edited***
however, you should edit/update the weighting
and/or milestones as appropriate.

Self Evaluation Goal Template
Review Baseline Goal

Goal *

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Baseline compliance goal test

Do **not** edit the baseline goal description or due date.

Supports

Weighting

0

Due Date

12 / 31 / 2019

Supports

search

← 2019 Goals

○ TEST GOAL NAME (Private)

You can use the **Supports** drop-down to select from your managers' organization goals. You can link to one.

Weighting

0

Weight will initially show 0 for all. Work with your manager to determine and assign weighting. Some roles may have a more highly weighted baseline goal, while others have more evenly distributed weightings.

Status

✕ Not Started

Adjust **Status** to show **not started**. Throughout the year you can update this with progress.

Add Milestone

✓

Name *

Take class at TCC

Due Date

07 / 31 / 2019

You can also set specific **milestones** or action items for meeting your goal. In order to add milestones you must click the check mark. Then the additional fields will appear. Like the goal itself, milestones also have a **due date** and **status**. While the goal due date is typically the end of the year or performance period, milestone due dates can differ.

> **Once you've reviewed/updated baseline goal, you may add performance goal(s). Only do so if you have additional goals beyond your day-to-day role responsibilities. You must save edits before adding.**

Self Evaluation Goal Template
Add Performance Goal & Review Core Values & Beliefs

Complete the same fields as you did for the baseline goal. However, with performance goals, you **do** enter the **goal description** and set goal **due date**. General guidance is to use the end of the performance period/ end of the year.

If you have additional goals, save and click **Add** again. As you save, your goals will re-order automatically based on alphabetical order.

You can only add up to 10 goals for a total of 11 including the baseline.

Once you are done adding goals, click **Next**.

Use Existing Goal

Goal ⭐

Format | B | I | U | A | ≣ | 🔗

Supports

Weighting

0

Due Date

MM / DD / YYYY

Add

Competency

CV&B: Entrepreneurial Spirit

Description

We maintain a corporate culture that values originality, invention and creativity, and that nurtures these qualities through openness and reverence for the entrepreneurial spirit.

Employees will see a Core Values & Beliefs page in the goal template for review. No action is required.
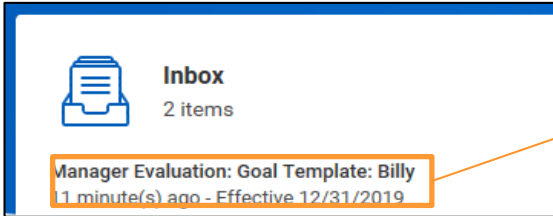
Manager Evaluation Goal Template
Overview

> **Once the employee has completed their goal-setting and submitted this template, the manager will receive an action item Manager Evaluation: Goal Template.**

> **Any changes or edits the manager makes are automatically reflected on the employee's worker profile.**

  – The employee receives a Workday notification that the goal-setting process is complete and they can review the goals on their worker profile to note any changes. The notification does not highlight specifically what was changed.

> **Managers can also review their employees' goals across the entire team from their Team Performance application or by searching for My Team's Goals.**

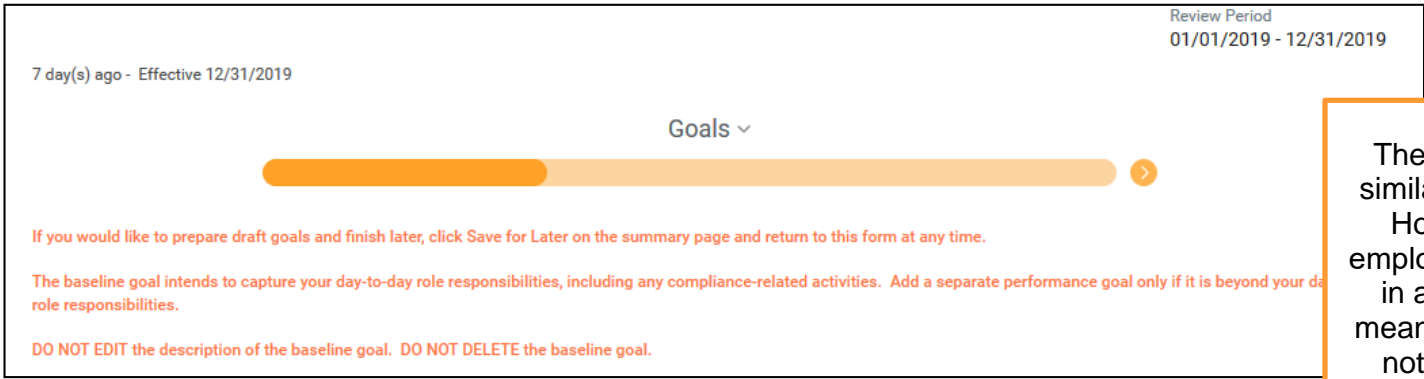# Manager Evaluation Goal Template
Reviewing Employee Goals

Inbox
2 items

Manager Evaluation: Goal Template: Billy
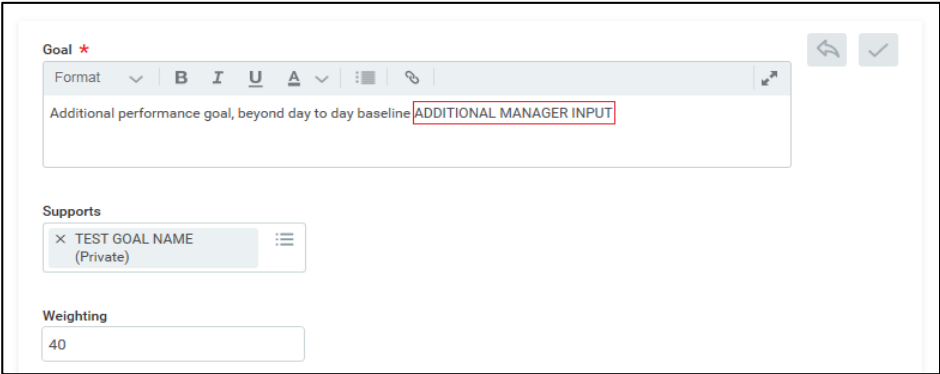11 minute(s) ago - Effective 12/31/2019

Start by selecting the inbox item: **Manager Evaluation: Goal Template.** Since this is an action item, managers will also receive a notification via outlook email.

Review Period
01/01/2019 - 12/31/2019

7 day(s) ago - Effective 12/31/2019

Goals ⌄

If you would like to prepare draft goals and finish later, click Save for Later on the summary page and return to this form at any time.

The baseline goal intends to capture your day-to-day role responsibilities, including any compliance-related activities. Add a separate performance goal only if it is beyond your da... role responsibilities.

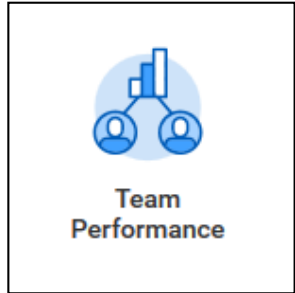DO NOT EDIT the description of the baseline goal. DO NOT DELETE the baseline goal.

The template will look very similar to the self-evaluation. However, note that your employee's goals will be listed in alphabetical order That means the baseline goal may not be the first one listed.

Review the goal descriptions, weighting and other details and make edits as necessary. **Ensure the weighting aligns with prior discussions and expectations**. Any edits the manager makes will be reflected on the employee's worker profile.

Goal *

Format ⌄ | **B** | *I* | U̲ | A ⌄ | ☰ | 🔗

Additional performance goal, beyond day to day baseline ADDITIONAL MANAGER INPUT

Supports

✕ TEST GOAL NAME
(Private)

Weighting

40

Manager Evaluation Goal Template
Review Goals for Team

Managers can see a comprehensive snapshot of goal template progress and their team's individual goals from the **Team Performance** application.