Talent Management & Performance at Workday

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VP Talent Management & Development

Workmate since July 2017

The Challenge

## A Key Priority for Workday: Accelerate Profitable Growth by Executing with Speed and Agility
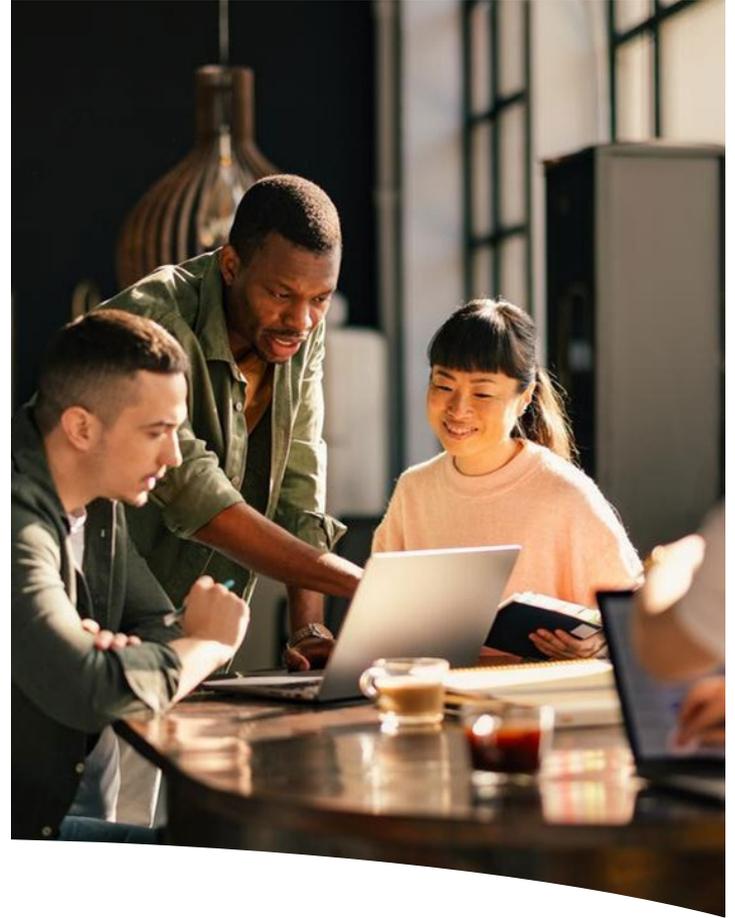
The Challenge

Leavers are 3X more likely to be disassified with growth

Priorities for our Workmates

Career growth, Development and Performance
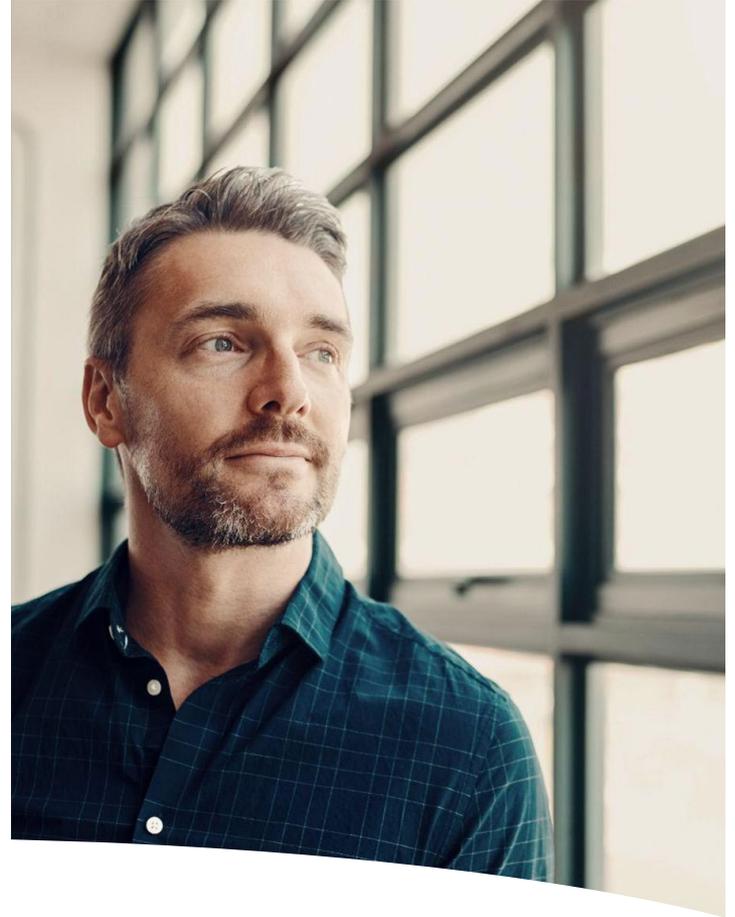
Where Challenge Meets Opportunity…

Inconsistent talent practice adoption

Managed attrition **under** industry benchmark

Lack of differentiated rewards

A **need** for transparency

Talent Philosophy Background

To drive growth, strengthen culture, and maximize performance, we needed to refresh how we describe our values in action and to define an enterprise Talent Philosophy that translates our values into how we treat and manage talent at Workday.

Maximize Talent Investment

Workday's investments in talent represents over 70% of our expenses annually, yet we lack clear, shared and explicit guidelines for moving the needle on critical outcomes for attracting, developing, retaining and maximizing the performance of talent.

Create Consistency

With over 42% of employees joining since the start of the pandemic, we risked an "accidental" culture (or subcultures) to creep in, creating misalignment in how we work together to achieve our strategy globally.

Sustain our Culture

Our Core Values are enduring, defining the first principles of Workday. However, the business context around our values had changed dramatically since they were created in 2016.

Talent Philosophy Dimensions

Performance

Differentiation

Transparency

Consistent
Equitable
Scaleable

Accountability

Development

Behaviors

Our People Commitment

Driven by Values

People

Powered by Performance

Invested in Workmates
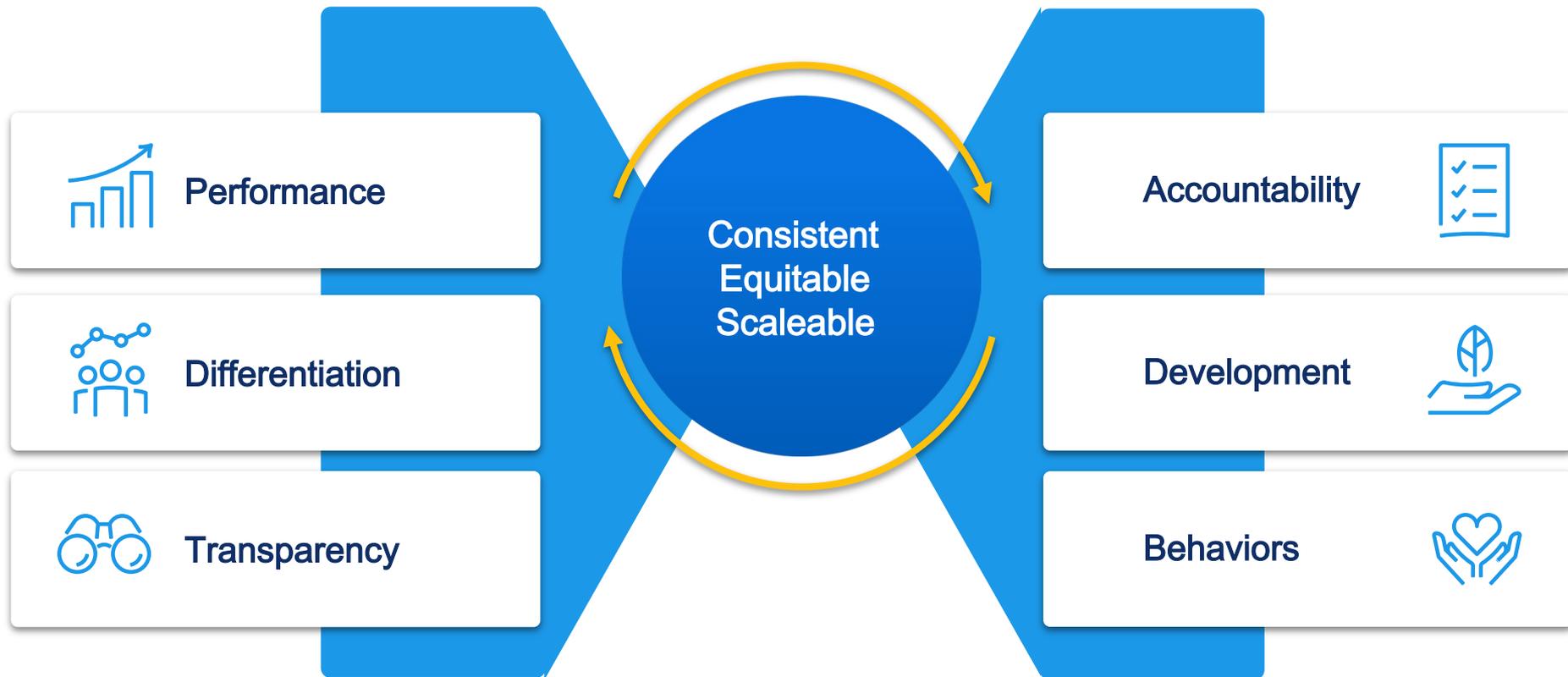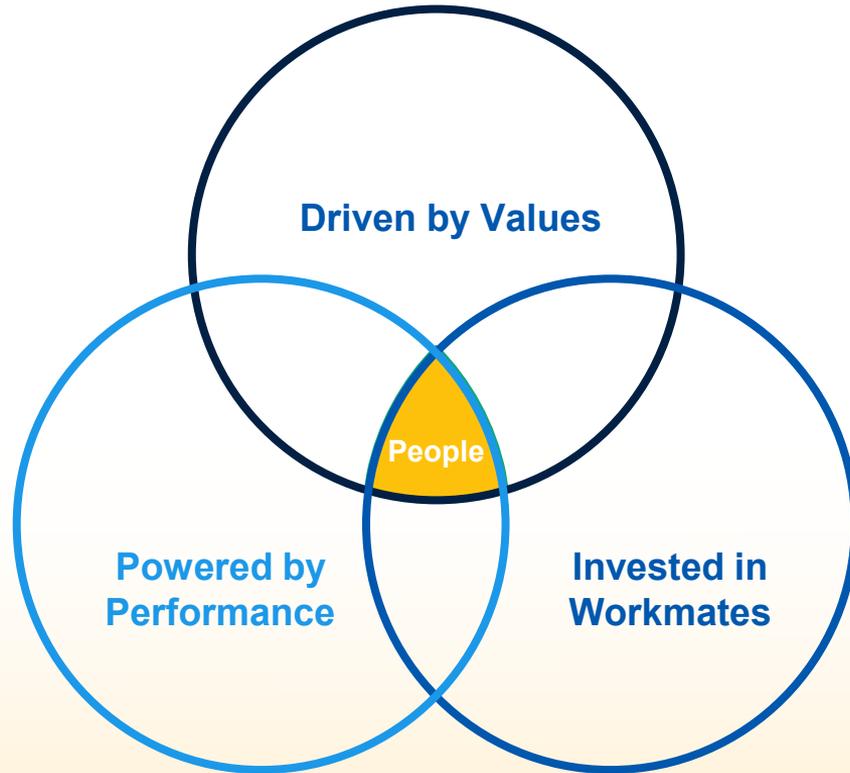
3 High-Impact Talent Practices

Set Goals

Drive transparency and accountability through high expectations and clear goals

Consistent

Equitable

Scaleable

Assess Performance & Potential

To guide feedback, differentiated rewards and opportunities

Frequent Check-Ins

Provide direct & transparent feedback and coaching on goals, development & behaviors

Workday's Talent Cycle FY26

Q1			Q2			Q3			Q4			FY27			
FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY

Set Q1 Goals (FEB)

Annual Comp Planning (MAR)

Check-In Comp & Performance Convo (APR)

Set Q2 Goals (MAY)

Check-In (JUL)

Set Q3 Goals (AUG)

Mid Year Comp Planning (SEP)

Check-In Mid-Year Comp Convo (OCT)

Set Q4 Goals (NOV)

Assess Perf & Potential (JAN)

Calibrate Ratings (FEB)

Set Q1 Goals (FEB)

Annual Comp Planning (MAR)

Check-In Comp & Performance Convo (APR)

Set Q2 Goals (MAY)

Goals

Goals underpin performance and drive clarity by defining the desired result and setting the standard for success.
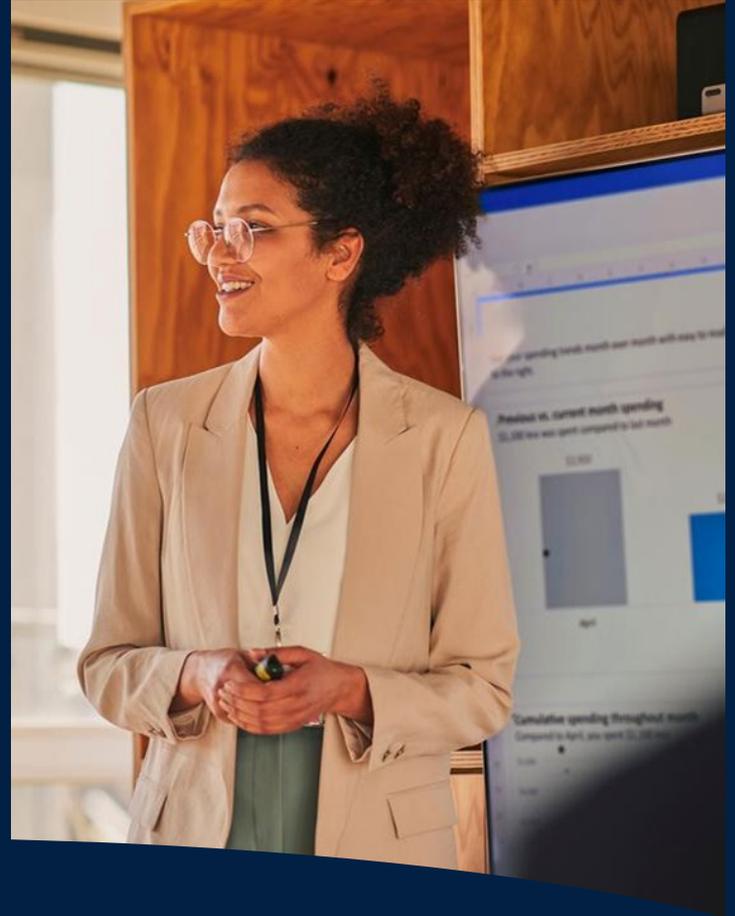
A Well Written Goal

Drives Clarity in 3 ways
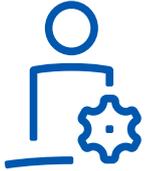
Outlines what someone's expected to deliver

Brings clarity to why the goal is important

Outlines how the goal will be achieved

Driving Adoption: Workmate & People Leader Enablement

Intranet content and On-Demand Workshops connecting Goals to OKRs and vice versa!

Your day to grow
Goal Setting at Workday

⚠ What's Changing in FY26

- Goals are a required action: At least 1 active goal in WD
- Quarterly reminder in WD to create or update goals
- New org alignment field to connect goals to a WD SGO
- Category field is no longer required & will not include FYQX tags

⊙ On-Demand Workshops

Goal Setting at Workday

Intro to OKRs

★ Additional Resources

Strategy Hub on Horizon

Check-Ins at Workday

Powered by Performance

Goal Setting FAQs

KNOW

Goals are key to success in your role, having successful check-ins, and career growth. They provide focus and accountability, connecting your work to the company strategy. Clear goals drive alignment on expectations, feedback, and development for peak performance. Workday has a strategic framework to guide priorities and alignment.

Our multi-year strategy drives our vision. Strategic Growth Objectives (SGOs) are the year's top priorities, guiding team objectives and individual contribution goals. Learn more about our company strategy, priorities, and progress on the strategy hub.

Explore more on goal setting in our on-demand course! Let's Go →

What you need to know about goal setting
- Every Workmate is required to have at least one active contribution goal in Workday at all times. Typically, you will have up to 5 high-level goals during the year.
- To be active, a goal must be listed as "IN PROGRESS" with an updated Due Date in Workday.
- Not completing this requirement is a failure to meet role expectations and impacts performance reviews. Learn more about Required Actions.
- Goals can be set for a quarter, multiple quarters, or annually and will be reviewed by people leaders during check-ins.
  - View or edit goals by visiting My Contribution Goals
  - See Workday's Talent Cycle for dates.

PLAN

Create effective goals

Goals should focus on your most impactful work.	Goals are ongoing.	Goals and development items are equally important but different.
When creating individual goals, it's important to ensure that your goals support our company-wide SGOs, functional OKRs, or team objectives.	As business needs change or delay, so will a goal. Workmates should adjust in Workday as needed and check-in with their people leader.	Contribution goals are all about work delivered. Development items are focused on individual growth and development. Read more.

On-Demand Workshops

Workday

Goal Setting at Wo...

Welcome
- ☑ Goal Setting
- ☑ Welcome!
- ● One Word

Goal Setting
- ☐ Goal Setting Overview
- ☐ Workday SGOs
- ☐ Individual Goals
- ☐ Contribution Goals
- ☐ What makes an...
- ☐ Process Flow
- ☐ Goals vs Dev Items
- ☐ A well-written goal

Examps + Practice
- ☐ Example 1

Why are goals important?
Respond with one word

Write something...   View all

Goal Setting: Company and Functional Level

At Workday, we have a clear company vision to capture the opportunities ahead: To move businesses forever forward, elevating humans and supercharging work by giving organizations the power to transform how they manage their people and their money.

So how do we achieve this vision? By executing against our company strategy – where every Workmate plays their part. Review the graphic below.

From strategy to execution

Vision & Strategy
Workday's multi-year strategy to achieve our ambitious, transformational vision

Strategic Growth Objectives (SGOs)
Our most critical strategic priorities for the year measured by Company KPIs

Functional Priorities
The work each function is doing to drive our strategy forward and achieve our growth goals

FOUNDATION
Our core values and everything we do

(left panel navigation)
Workday — Goal Setting
- ● Goal Setting Overview
- ☐ Workday SGOs
- ☐ Individual Goals
- ☐ Contribution Goals
- ☐ What makes an...
- ☐ Process Flow
- ☐ Goals vs Dev Items
- ☐ A well-written goal

Examps + Practice
- ☐ Example 1
- ☐ Example 2
- ☐ Example 3
- ☑ Leverage AI to Help...
- ☐ Now it's your turn!
- ☐ Get feedback

Examples

Example of a Well Written Goal (P&T focus)

WHAT
- Ensure 100% of open Jiras for the top 300 ACV customers will be triaged and either fixed, prioritized to a future release, or closed by the end of Q2.

WHY
- To drive operational excellence and enable Workday customers and their employees to thrive in the face of the rapidly changing nature of employment and the enterprise.

HOW
- By conducting a root cause analysis for recurring issues, track progress through monthly reviews, and implementing corrective actions to reduce the occurrence of similar Jiras in the future.

" I will oversee the triage of 100% open Jiras for the top 300 ACV customers before Q3, dispositioning them to a status of either closed or prioritized to a future release, because it will ensure that the needs of our key customers are met promptly & drive customer satisfaction and operational efficiency. I will do this by executing a root cause analysis for recurring issues, measure progress through monthly reviews, and implement a process improvement plan to reduce the occurrence of similar Jiras in the future.

AI Prompt Guidance

Leverage AI to Help You Write Your Goals

Workday offers AI tools like Google Gemini to help you create actionable goals.

To get the most out of Gemini when creating actionable goals, try these:

1. Refine a broad goal using the "What, why, and how" framework:

For example, "I work in P&T at Workday and want to launch a new product. Use the what, why, and how framework to create a more specific goal for me."

2. Review the response Gemini provided, and structure your goal or provide more context if necessary.

The more information you provide to Gemini the better the result will be.

3. Get Gemini to help you demonstrate how your goal supports a specific SGO, functional OKR, or team goal:

Enter your new goal into Gemini and ask: "How does my goal support "enter the SGO, OKR, or team goal you feel your goal supports."

**4.** Create a stronger what, why, or how: Provide your refined goal and ask Gemini how I can strengthen one of these 3 attributes. For example, " My goal is:

What: Launch a beta version of a new talent management product
Why: Strengthen Workday's position in the talent management market
How: Research to validate the product idea and identify key differentiators.

Ask Gemini: How can I strengthen the "what" even further?

Driving Adoption: Contribution Goals in Workday
In-box "To-Do" Task and Custom Business Process Notification

Driving Adoption: Contribution Goals in Workday

Org Alignment to Company Objectives

Org Alignment Dropdown:

Driving Accountability
Workday Reports & Dashboards

*These four elements must be in place for a System of Accountability to be effective.*
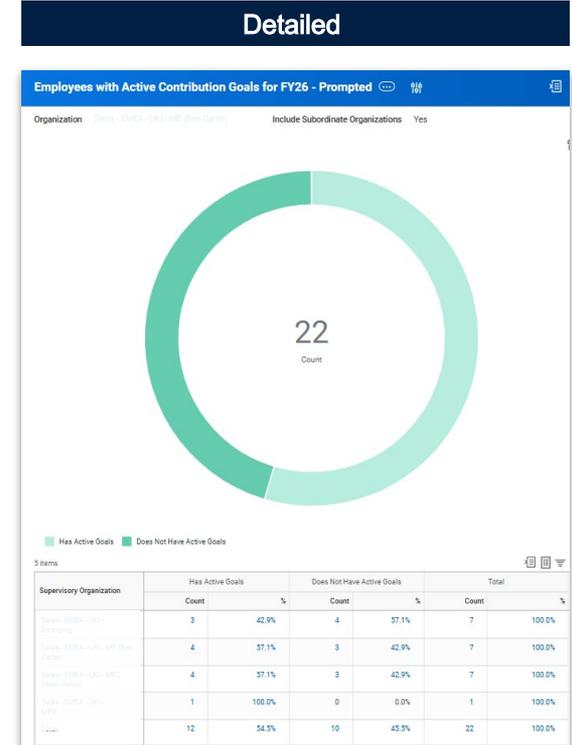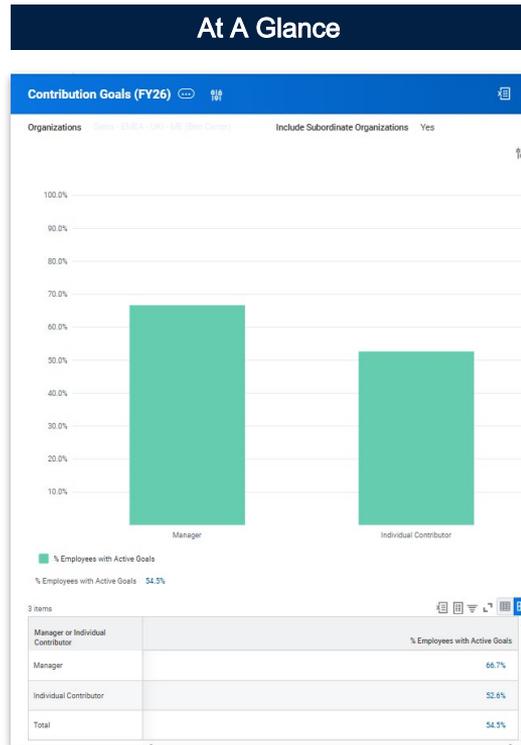
Check-Ins

Workday's Check -In Cycle

Check-Ins are designed to align on goals, expectations, skills and support needed.

CHECK-IN (Q1)
April 1 -30
Check in and review Annual Compensation Rewards

CHECK-IN (Q2)
July 1 -31

Ongoing All Year:

Give, Seek, Receive Feedback

Workmate & people leader 1:1s

CHECK-IN (Q3)
Oct 1 - 31
Check in Conversations and review Mid-Year Compensation Rewards

During each check-in share development updates and feedback both ways
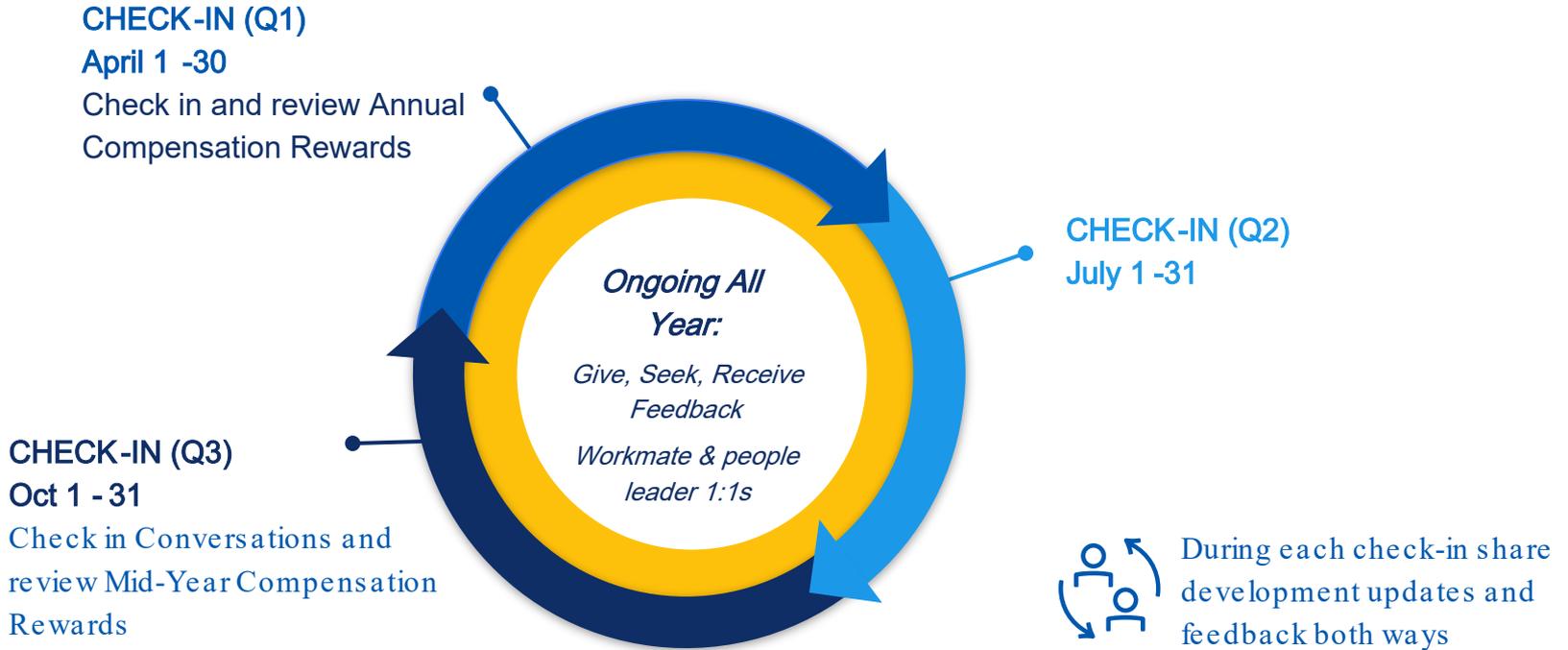
Check -Ins

A Look Back	A Look Ahead
Align on contributions	Align on one skill to develop
Feedback	Align on goals for next quarter
Goals achieved	Development plans

Flow

Notifications → Notifications → Notifications →

Employee Completes check-in in Workday

Form routes to Manager to Review, add comments and make note of how employee's performance is trending

Live check-in Conversation

Form completed by both Employee & Manager

Simple Workmate Experience

Check-Ins are designed to align on goals, expectations, development actions, skills and support needed.

Workmate Check -in Form Question:

- Performance Summary:
  - Top 3 contributions
  - 1-2 things you would do differently
- Development Summary:
  - One skill you will develop or build on and what specific actions
  - What support do you need from your people leader or others?

Workmate Check -in Form Screenshot: (1 screen then submit)

Embedded Analytics

View Job Profile Skills, Contribution Goals and Development Items within the Check-in Form.

Simple People Leader Experience

Check-Ins are designed to align on goals, expectations, skills and support needed.

People Leader Check -in Form Question:

Performance Pulse (not visible to worker):
How is your employee trending on performance expectations year-to-date?
- Above, Meeting, Below, New To Role

People Leader provide performance and development perspective to guide conversation.

Performance Concern Pulse (not visible to worker):
Do you have any concerns about this employee's performance?
- No,
- Yes and I'm already receiving support from P&P
- Yes but I have not yet engaged with P&P

People Leader Check -in Form Screenshot: (3 screen then submit)

Performance, Potential and Calibration

workday™

Assessing Performance & Potential

1 → **2** → **3** → **4**

Assess performance	Assess potential	Calibrate Workmates	Communicate & Take Action
Exceptional Year, Successful Year, or Challenging Year	Enable in Role, Grow, or Accelerate	9-box Talent Grid Placement through Calibration	Reward & Develop Based on Talent Grid placement
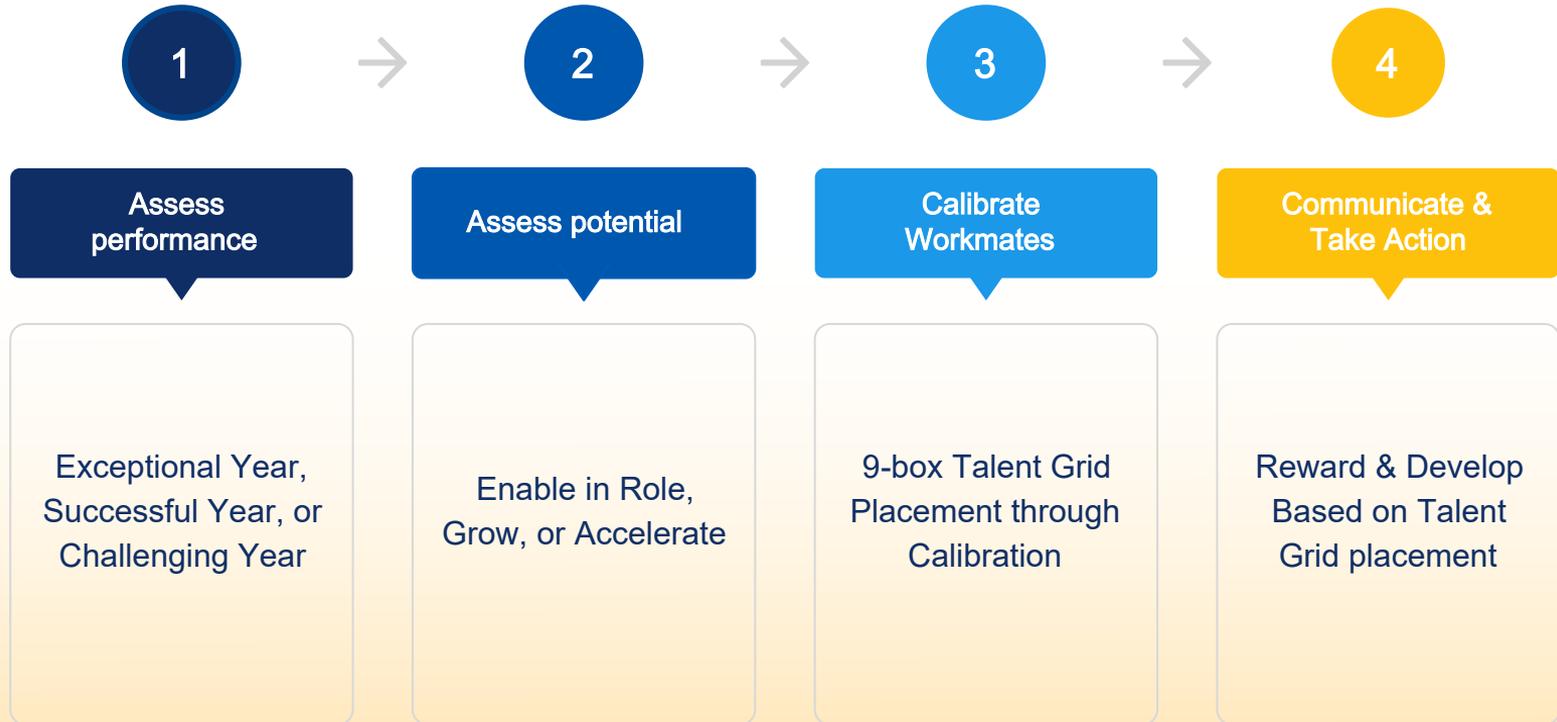
Step 1: Assess Performance

What

Assess results delivered against fiscal-year individual contribution goals.

Assess performance against expectations of the role, job level, and in relation to peers.

How

Assess the behaviors used to deliver on goals and expectations.

Goals & Expectations

Values in Action

Exceptional Year

Successful Year

Challenging Year

Step 2: Assess Potential

Ability to learn and apply new skills and effectively take on more complex concepts and tasks

Ability

Aspiration

Alignment

The willingness to advance into a more complex or expanded role; taking initiative to grow skills and take on stretch assignments.
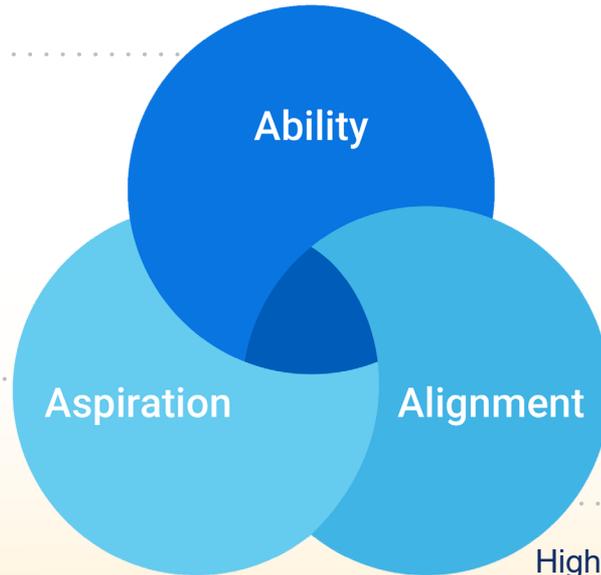
Highly engaged and committed to the future success of Workday and sustaining the culture.

Accelerate

Grow

Enable in Role

Step 3: Calibrate Workmates
9-Box Talent Grid in Workday with Distribution Targets

*Targets update based on org size and are there to assist in **differentiating talent** as expected in our Performance and Potential framework.*
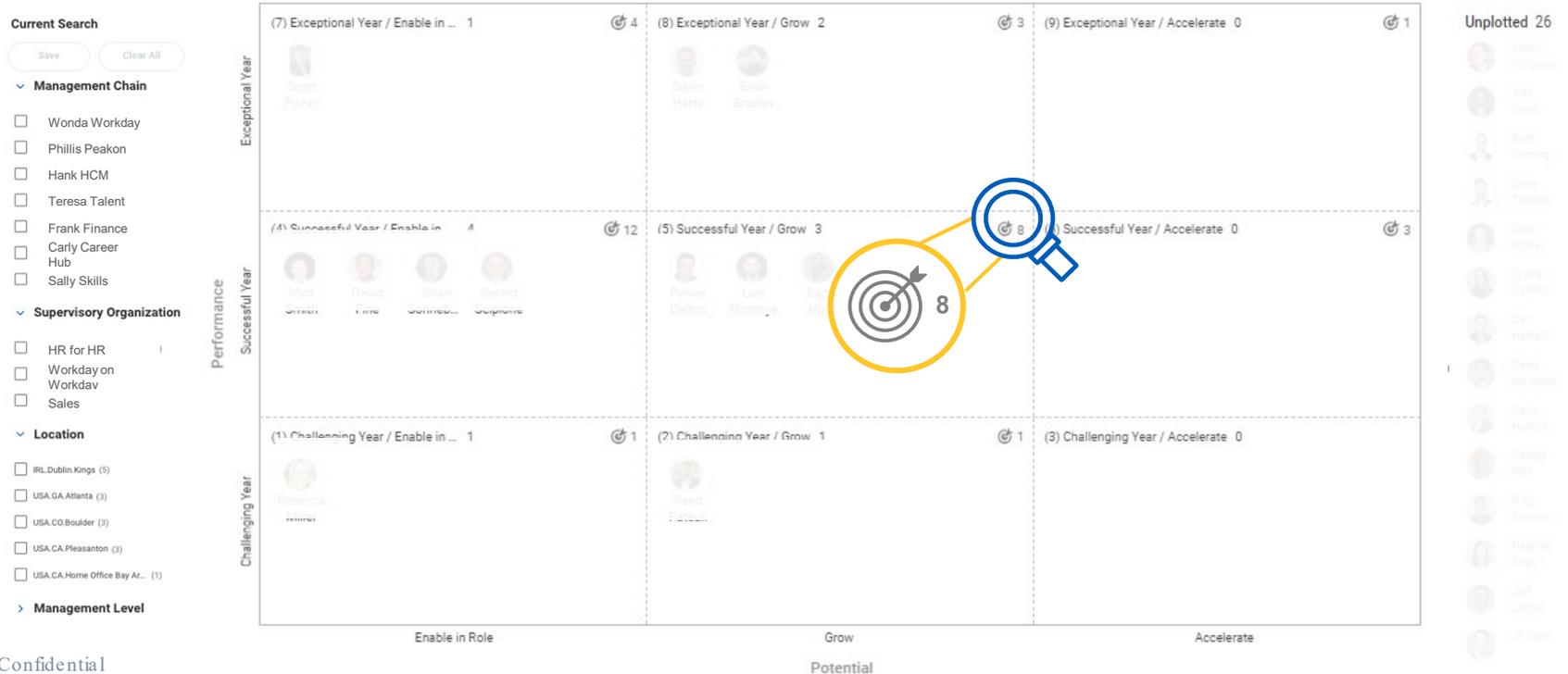
Talent Insights and Reports

To make **Objective, Data -Informed Assessments,** Performance data from recent check-ins are accessible on the People Leader dashboard. They can review items such as:

- Time in Job Profile
- Most Recent:
  - Talent Matrix Placement
  - Check-ins
  - Performance Pulse
  - Performance Concern
- Goals in Current FY
- Development Items
- And More!

Step 4: Take Action

Talent Grid placement helps guide choices for:

- Development

- Feedback and Coaching

- Internal Mobility or Succession Planning

- Compensation Investment

Development Items

Development focuses on the skill(s) you can grow to increase performance in current role or prepare for a new role.
Track development focus and actions you'll take using Development Items in Workday.

Save the add/edit

Skills drop down:

Status drop down

Improving Talent Outcomes

Results:

- Improved goal setting—from 12% of employees setting contribution goals to **90%** with active (current) goals.

- Improved manager-worker connection—from 74% holding regular check-ins to **94%**

- Improved perceptions of individual growth with **~35%** decrease in the number of employees who stated they were dissatisfied with their growth and career path

Measuring Experience

📅 Weekly surveys for all employees consisting of **four questions*** - using question rotation sampling algorithm

💗 Leveraging the standard engagement, wellbeing, and belonging question sets and **True Benchmark**

🏢 Several **custom questions** aligned to company initiatives and integration of acquired companies added

Tracking Talent Trends in Peakon

At work, I know what I'm expected to contribute.

I understand how my work supports the goals of my team.

I get enough feedback to understand if I'm doing my job well.

I feel that I'm growing professionally.

I see a path for me to advance my career in our organization.

My job enables me to learn and develop new skills.

Either my manager or a mentor encourages and supports my development.

My manager provides me with the support that I need to complete my work.

| NPS | Region | Org L2 | Job Family | Tenure |
| Average | Location | Org L3 | Job Level | Hire Date |