Talent Management: Cascade, Edit, or Discontinue Goals

Manager ●

Managers have the ability to add department-based goals or cascade organization goal. Managers can also edit in-progress goals or discontinue a goal that is no longer relevant to the employee.

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Tasks

Write Team Goal

1. From the Workday home page, click on the **Team Performance** app.

2. From the **Actions** column, click on the **Add Goal to Employees** menu item.

3. Select **Create New Goal**.

4. To add to immediate team, use the **Employees** field:
   - Select **My Team** and select individuals or
   - Click **Ctrl**, the letter **A** and then hit **Enter** to select all.

5. To add to entire supervisory organizations use the **Organizations** field:
   - Select **My Organizations** and check the corresponding boxes.

- Check the **Include Subordinate Organizations** to cascade throughout all supervisory organization below yours.

6. Click **OK**.

7. Write the goal in the **Goal** field. Add a detailed, SMART description.

8. Click the **Category** box to select if this is either an **Organizational** or **Team** goal.

9. **Editable** will be pre-selected. This allows the employee to edit the goal title.

10. Click **Submit**.

Cascade Organizational Goal

Goals may be cascaded from a higher level of leadership, down through each level to reach all supervisory organizations. This section will include the steps of the leader writing the goal and the approval step of the immediate supervisor of the employee receiving the goal.

Organizational Goal Writer:

1. Complete steps 1-3 and skip step 4 of **Add Goal to Employee**.

2. In step 5, click **Ctrl**, the letter **A** and **Enter** to select entire supervisory chain.

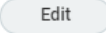3. Complete steps 6-10.

Immediate Supervisor of the Employee:

1. Go to **Inbox**.

2. Review the cascaded goal information for one employee.

3. Click the dropdown ⌄ to the right of "**Sort By**".

4. Select **Bulk Approve**.

5. Check the boxes corresponding to the **Manage Goals** task.

6. Click **OK**.

Edit or Discontinue a Goals

There may be a need to edit or discontinue a goal that was cascaded to employees. This is completed for each employee vs. globally. If a goal needs to be removed from all employees, contact Human Resources.

1. Go to the **Team Performance** app _Team Performance_ and click on **Goals**.

2. In the **View** area, click on **Goals**.

3. Click the **Edit** button `Edit` associated with an employee to open the employee's **Goal** area.

4. Click on the **Goal Title** to open the goal.

5. Edit the **Goal** or **Description** area, as needed.

6. To discontinue a goal, click the **Status** dropdown and select **No Longer Needed**. The goal will remain on the employee's goal list but the goal will not appear on the evaluation.

View Team's Goals

1. From the Workday home page, click on the **Team Performance** app.

2. In the **View** column, click **Goals**. Each employee under the manager's supervisory organization appears.

3. Click the **Edit** button `Edit` to view or edit any of the employee's goals.

4. Add a comment to an employee's goal by clicking the Activity icon 💬. The comment will be visible to the manager and the employee. Once posted, the activity icon will change to a comment icon 💬 for both the manager and employee.

5. Make you edits in the **Goal** or **Description** fields. To discontinue, click in the Status dropdown and select **No Longer Needed**. The goal will remain on the employee's goal list but will not be editable and it will not appear on future evaluations.