

Hello and thank you for joining this training on how to create goals in Workday. My name is Scot Brown, I'm a Human Resource Manager here at Montgomery College. What we're looking at here is a sandbox tenant of Workday, which means it's just a training tenant filled with information that we can use just to create scenarios to help people learn. What we're looking at here is my profile. So, this is my profile in this sandbox tenant, which it's called. And, um, what I would like to do is go through what... how to mechanically make goals in Workday as an employee, highlight how managers could do that for and with employees, and then, also identify, uh, what makes a good goal and then discuss some resources along the way, okay, that you can use to develop good quality goals that will help drive performance and support your learning. There's also two types of goals that I would like to talk about: one are individual or performance goals, and then, one other ones are professional development goals. So, let's say it's, uh, I'm an employee here at Montgomery College, is the scenario, I have been asked by my direct supervisor to create some goals, uh, for the upcoming year. This can be a back and forth conversation, and that back and forth can take place in Workday. So, just because I'm creating a goal and submitting it to my direct supervisor, doesn't mean it can't be updated and changed, um, in a fluid living document manner. The first step I would do in regards to creating goals in Workday for myself is to log into Workday and open up my profile. So, if you click on your picture, or your icon up here in the top right, and go to your profile, it'll open up this page. This is my profile. To find goals, you would go to Performance and then you would click Individual Goals. As you can see here from the Performance tab, you can click on Reviews Individual Goals, Archived Goals, Professional Development Goals, Competencies, Feedback Given, Feedback Received. Today, we're going to be talking about Individual Goals and Professional Development Goals. So, first off the bat, I would like to identify what is Individual Goals. Individual Goals are also... also called Performance Goals. These are your work-related goals, uh, something that you and your boss have identified: hey, this quarter, this month, this half year, this year, this semester, whatever your time frame is, whether it be fiscal year or smaller. Uh, it's something that you guys are going to work on, uh, to achieve.

The other type of goal is the Professional Development Goal, and as you can... here is a... a mock Professional Development Goal set up here for myself. It is to, um, you know, identify, you know, what it is that we want for me to develop myself as a professional. So, professional development goals aren't evaluated in a performance evaluation, but they are a great tool to, one, identify for my direct supervisor to say, hey, this is where I'm interested in growing, and it's also a great tool for the, um, direct supervisor to be able to say, hey, I think let me try to support you in your career. Where do you want to go? How do we want to get you there? And what resources can we align to get you where you want to be? So, those are Professional Development Goals. Individual Goals, or Performance Goals, are what we'll focus on right now. And these are the ones that are more work-related: what we need to accomplish at work to succeed. So, as you can see here, I've clicked an individual goal and the very first one says item removed because this is a test tenant and I've removed that goal. Here is another goal. As you can see, it's, um, pending approval. So, this is a test goal that we had created and here

are in-progress goals, you can see in this tab here, in-progress goals over here. And then below that would be completed goals, goals that have been completed. So, to create a new goal, there's not a new goal, but first, you have to go to edit. There's an orange button right there and add. See that up there: Add. So, now we've created the template for a new goal.

I can add in what I want this goal to be. I would recommend your title, you know, what is the goal? What is the broader, you know, description, uh, the goal is to complete a certain performance metric. The goal is to complete a certain report or project by a certain time period. So, this would be the, uh, Test 1, is what we're just going to put down here. Description would be: steps along the way or more detail, uh, more details along the way for that to be accomplished. In addition to that, we highly recommend the use of SMART goals, uh, when creating a goal. Now, there is a training class that we recommend on Workday Learning. There's tons of training... training classes out there. There's one specifically created for Montgomery College about, you know, how to create good goals. It includes the use of SMART goals. There's also on Workday Learning access to LinkedIn Learning, which is a wonderful resource we strongly recommend, which has multiple trainings in regards to creation of SMART goals. The Category may or may not be used. It does not matter. It is helpful if you're creating many different goals in many different areas for many different people. It might be helpful to categorize them so later you can look up different categories of goals. The Status. There's four to choose from. Um, No Longer Applicable, Not Started, In Progress, or Completed. So, if you're creating a structure of goals for your year, you might have some that are not started, right. Um, also a more, probably the most common status when creating a goal is, you know, here, there's one that I've been working on. Here's a goal that I want to start working on. Um, so, select In Progress. When the goal is completed, you would come back and mark it as Complete. And then, it would ask you, well, what day did you complete it on? But for us right now, we're going to go with In Progress. So, Supports. What is meant by this Supports button? Well, this is a way to link your Individual Goals, your Performance Goals, to the broader organization's strategic plan. So, if you were to look at this Supports: What are my organizational goals? Let's look at Montgomery College. And here's the... as you can see, this goal period from 2020-2025. And there's the five strategic goals. So, this provides us the opportunity to say, well, how does my work fit into the big picture? Being in HR, a lot of my work is Goal Five: How do we invest in our employees? So, this test goal up here. Let's say it's something, it's a project that has to get done before the winter break, so I would say, hey, this goal needs to be done by December 22nd. Um, I've added in details. I could add SMART goal... it's SMART goal characteristics. And then on... then, after that, I would click Submit. If I'm feeling good that I have this down, I click Submit. And as you'll see, if I click Submit, that goes up next Lauren Landau. That means my direct supervisor would then have to, you know, have the opportunity to review the goal, maybe edit the goal, um, and approve the goal. A lot of this conversation, I would recommend doing in person. This is a place to document conversations that you've already had or initiate conversations that you'd like to have in person, but please don't leave this to just an online process. We do want this to be

iterative and we want this to be a tool that helps you succeed at your job, a tool that helps clarify communications and expectations between a direct supervisor and their employee. So, here are goals that you can use. You do not have to use Workday goals. We do strongly recommend that goals are created every year, every month, every quarter, whatever works in credence for your area. Um, that are a tool used by the employee and managers to create and document the progress that belongs to work. There is a rule of thumb, you know, two to three goals, I think is a good thing for an employee to have to help them see the big picture, see how your work connects to the organization's larger goals and strategic plan. Now, that is for Individual Goals. As you can see, I've created Test Goal 1 and Test Goal, and the other one without the 1. As you can see, they're both In Progress. If I were to click on this guy, as you can see, this is the one I just created. Steps or more detail for SMART goals is in the description, and it was due in December 22nd. Now, my direct supervisor hasn't approved that because we just created it, so, as you can see, it says Pending Approval up here. Your direct supervisor, after creating a goal, will get an Outlook in-- excuse me, will get a Workday notification that says you have a goal to review. Now, the other item I wanted to discuss was Professional Development Goals. So, these are also critically important for your success, and what I would really recommend everyone do is take some time to figure out, hey, it's a changing world out there, how do I fit into it? How does my job, uh, how is my job impacted by changes that are occurring on our campus? By changes that are occurring to higher education? Changes that are occurring within the industry and within the work that I do? Um, and how do I remain competitive, uh, and skilled up as it were and knowledgeable for my work? Well, I... we created Professional Development Goals, right?

I would create a Professional Development Goal that says, hey, this is the title whatever. We'll just use Goal 1 Test in this, uh, in this connect scenario. Then, I would say, you know, whatever the details are: I need to get a professional certification, I need to, um, add in some details in this area. Whatever those details are. And then, the Status of Not Started, In Progress, Completed, or Not... Not Applicable. The idea here is to have had a conversation with a direct supervisor or use this to start a conversation with the direct supervisor. While this is a place to store the information, once again, I don't recommend we just use this as our only method of conversation. It's really an opportunity for the employee to say, hey, this is where I want to go in my career, this is what I feel is important. Or, it's an opportunity for the direct supervisor to say, hey, this is where our department's heading in the future, this is where the industry is heading in the future, um, and to stay competitive, I think would be great for you to grow in that direction. These are not required things. They are not Individual Goals that's not created on performance, but it does help in regards to engagement and connection to our broader mission, to understand that the College cares about our employees and their professional future. So, in this case, we would click the little check button to say, okay, I have my goal title, I've sampled it. There're not due dates on these things. There are a space for detail if you wanted to go down and add more information you can. A Start Date and Completion Date, but these are Professional Development Goals, so if you

don't have that, it's not necessary, uh, necessarily a requirement. Let's say this one in this test situation is due Valentine's Day, let's say, just to mark something we can remember. Um, and then, you would say, okay, check the old box, and that is the status and the progress. This is not sent to my direct supervisor for approval because it doesn't require their approval. It's about my professional development, that's why we strongly recommend people work with their direct supervisors to create a few professional development goals every year to keep things moving forward. Now, that is the Click Here/Type This, um, mechanical, uh, side of creating goals, but what I try to embed in this conversation is the bigger picture. One, you're not required to store goals in Workday. Well, we strongly recommend it and it is a really great tool, we also acknowledge that this might be not the correct format for, um, your specific work area. If you don't use Workday, we strongly recommend that there is some written, documented, traceable, accountable way to store goals, create goals, and be able to track them with you and your direct supervisor or you and your direct reports. On top of that, there is a Workday Learning programs about SMART goals. If you go into Workday Learning, you will find one specific Montgomery College class that was created by ELITE, which is 23 minutes long and very helpful about how to make good goals, you know, how to make SMART goals as an employee. On top of that, there are many LinkedIn Learning programs out there. In addition, to that, there will be a few live sessions led by HR in the coming months of the fall semester of 2023 that can be dropped in or scheduled to ask further questions or ask for a one-on-one demonstration, uh, there in the training session or an in-person demonstration in the training session. These will be live, virtual events. In addition to that, you can always reach out to HR Help Desk to ask for more specific support, and there are, on the HRSTM webpage, there are JobAids. So, in addition to that, it is possible for managers to assign goals to employees, to set up individual goals. They can't set up Professional Development Goals but they can assign, uh, Individual Goals. Let's say you have a group of people that all do the same thing and you have a performance metric they need to meet every month, you can set something up for all of them that is due on a monthly basis and you can track them within Workday. If you would like help setting goals up like that, please reach out to an HRIC on campus, uh, the HR Help Desk, or to myself, Scot Brown, to set up a time to dive deeper into how Workday can support your... your needs. So, thank you very much for your time. That is how you create goals in Workday. Don't forget you log in and you go to your profile and then from the profile, it's the Performance button down here. And then, up here, it's Individual Goals, and that's how you do it. So, fantastic. Thank you everyone. Please reach out to the Help Desk, uh, or your HRIC on campus for further information.