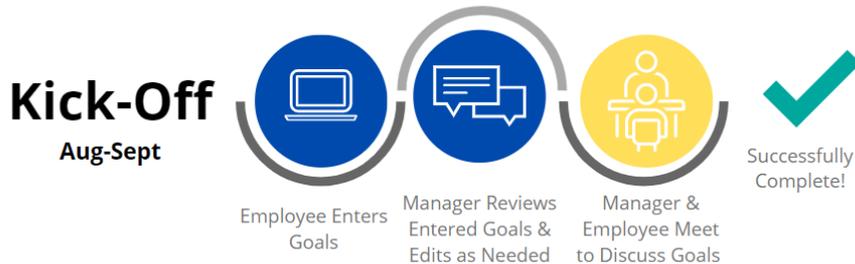


## Workday: Kick-Off Overview



The following step-by-step guide is designed to walk employees and managers through the Performance Management process (CAP) in Workday. This Manual goes through the Employee and Manager's Workday steps for Kick-Off. Users needing assistance at any point in the process should contact Learning and Development.

## Employee's Screen

Welcome, Meg Ward

**Announcements**  
2 items

**Applications**  
12 items

**Inbox**  
2 items

CAP Kickoff: Enter Goals: Meg Ward  
23 hour(s) ago - Effective 07/20/2020

Tell us about your... with Bentley: P17809 Associate Director, Learning, Dev...

HRIS pushes Kick-Off to employees, and it appears in Inbox. Employee clicks Inbox notification to initiate setting goals.

# Inbox

Actions (3)

Archive

Viewing: All

Sort By: Newest

CAP Kickoff: Enter Goals: Meg Ward

43 minute(s) ago - Effective 09/30/2020

## Set Review Content

### Set Content: 2020 - 2021 CAP Kickoff: Meg Ward

Review Period 08/10/2020 - 09/30/2020

43 minute(s) ago - Effective 09/30/2020

The Conversations About Performance (CAP) process provides managers and employees a framework for engaging in regular communication throughout the year about goals, performance, and employee development. The process is meant to be flexible and interactive while requiring only minimal written documentation. The Kick-Off meeting should begin in August.

To get started, click on Get Started below and [also refer to the User Guide for instructions.](#)

Get Started

Employee reviews directions and clicks "Get Started" to begin Kick-Off.

## Set Review Content

### Set Content: 2020 - 2021 CAP Kick-Off V3: Darius Davis

Actions

08/10/2020 - 09/30/2020

CAP - Kick-off Goals and Devel...

Review and Submit

Reference the side bar menu at any time to view what step in the process you are in.

## CAP - Kick-off Goals and Development Activities

The employee begins the Kick-off process by drafting goals for the upcoming year, but it's up to the manager to review, edit as needed, and finalize these goals with their employees. Both managers and employees should use the [SMART](#) goal format to develop meaningful, measurable goals and consult the [Competency Dictionary](#) to identify specific competencies that the employee may want to develop.

### Goal Categories:

When setting and reviewing goals, please be aware that there are three categories of goals: Individual Goals, Inclusive Excellence Goals, & Developmental Goals. **Employees must enter at least one goal for each category.** Please see additional information below:

### Individual Goals:

Setting clear expectations around job duties is important for both managers and employees. An individual goal should focus on specific tasks, projects, and actions that employees need to be complete over the next year. **Employees should have at least one Individual goal each performance cycle.** Some questions to consider when creating and reviewing individual goals:

- What tasks, projects, and actions related to your specific role are vital over the next year?
- How will you support departmental operations and goals through your actions and contributions?

### Inclusive Excellence Goals:

Bentley University has named [Inclusive Excellence](#) as an enabling feature of our strategic plan, driving our mission to become a more just, inclusive, and equitable campus. **Employees should have at least one Inclusive Excellence goal each performance cycle.** Some questions to consider when creating and reviewing Inclusive Excellence goals:

- What changes or actions can you take in their role to actively engage historically underrepresented and underserved populations?
- What do I need to learn about communities and identities that are different than my own?
- What tools or skills do I need to learn to engage in brave dialogue across difference?

### Developmental Goals:

Employee development is an important part of the CAP process. **Employees should have at least one development goal each performance cycle.** A developmental goal focuses on an area where an employee can grow over the next year. Some questions to consider when creating and reviewing development goals:

- What are your career ambitions?
- What can the manager do to support your development?

### TO ADD GOALS:

- CLICK on the grey **ADD** button to add goals.
- Add the goal name and category (**required**).
- Click on **ADD** again to add another goal.
- Click **Next** when done adding all the goals.
- Click **Submit**.

Employee reviews directions and clicks "Add" to begin adding goals.

Add

Save for Later

Next

Close

**Set Review Content**

Set Content: 2020 - 2021 CAP

Kick-Off V3: Darius Davis

Actions

08/10/2020 - 09/30/2020

CAP - Kick-off Goals and Develo...

Review and Submit

Figure 4: Sample questions to consider when creating and reviewing inclusive excellence goals.

- What changes or actions can you take in their role to actively engage historically underrepresented and underserved populations?
- What do I need to learn about communities and identities that are different than my own?
- What tools or skills do I need to learn to engage in brave dialogue across difference?

**Developmental Goals:**

Employee development is an important part of the CAP process. *Employees should have at least one development goal each performance cycle.* A developmental goal focuses on an area where an employee can grow over the next year. Some questions to consider when creating and reviewing development goals:

- What are your career ambitions?
- What can the manager do to support your development?

**TO ADD GOALS:**

- CLICK on the grey ADD button to add goals.
- Add the goal name and category (**required**).
- Click on ADD again to add another goal.
- Click Next when done adding all the goals.
- Click Submit.

Employee Inputs Goal 1 in text box.

Select Goal Category; **this is required**. If you do not select a Category, you will receive an error upon submitting.

**Note:** All Employees must enter at least one individual goal, one inclusive excellence goal, and one developmental goal.

Click "Save for Later" to save draft to return to later.

Repeat steps for Goal 2, Goal 3 etc.

Once all Employee Goals are entered and categories are selected, click "Next" to advance to the review page.

**Set Review Content**  
Set Content: 2020 - 2021 CAP  
Kick-Off: Meg Ward  
[Actions](#)  
08/10/2020 - 09/30/2020

CAP - Kick-off Goals and Devel...  
Review and Submit

### CAP - Kick-off Goals and Development Activities

Goal Enter 2nd Goal here

Category Inclusive Excellence Goal  
Status (empty)

Goal Enter 3rd Goal Here

Category Individual Goal  
Status (empty)

Goal Enter Goal Here

Category Development Goal  
Status Not Started

enter your comment

View Comments (1)  
Meg Ward on behalf of [Profile Picture]

[Submit](#) [Save for Later](#)

Review entered goals here.

If you include a comment here, it will show on Process History. It is not a part of the goal.

Click "Submit" once all goals are reviewed to route to Manager.  
Click "Save for Later" to save draft to return to later.

The End for Employee

# Manager's Screen

On behalf of: Melissa Looney

Welcome, On behalf of: Melissa Looney

**Announcements**  
1 item

**Keep Your Information Current**  
As the winter season approaches, it's important that we have your updated contact information so that our emergency n...  
[Update Your Contact Information](#)

**Inbox**  
6 items

CAP Kickoff: Manager Review Goals: Meg Ward  
20 second(s) ago - Effective 09/30/2020

**Applications**  
19 items

- Teaching and Advising
- Career
- Recruiting Dashboard
- Purchases
- Benefits
- My Team
- Personal Information
- Time Tracking Reports
- Pay
- Time
- Time Off
- Team Time Off
- Expenses
- Performance
- Team Performance
- Reports for HR Team

Manager is notified via Workday inbox when they can review Employee submitted goals. Click Inbox notification to open task.

Inbox

Actions (4) Archive

Viewing: Favorites Sort By: Newest

CAP Kickoff: Manager Review Goals: Meg Ward  
43 minute(s) ago - Effective 09/30/2020

**Set Review Content**

Set Content: 2020 - 2021 CAP Kickoff: Meg Ward (Actions)

Review Period 08/10/2020 - 09/30/2020 43 minute(s) ago - Effective 09/30/2020

The Conversations About Performance (CAP) process provides managers and employees a framework for engaging in regular communication throughout the year about goals, performance, and employee development. The process is meant to be flexible and interactive while requiring only minimal written documentation. The Kick-Off meeting should begin in August.

To get started, click on Get Started below and [also refer to the User Guide for instructions](#).

**Get Started**

Click "Get Started" to review goals set by employee.

## Set Review Content

Set Content: 2020 - 2021 CAP  
Kick-Off: Meg Ward

Actions

08/10/2020 - 09/30/2020

CAP - Kick-off Goals and Devel...

Review and Submit

## CAP - Kick-off Goals and Development Activities

The employee begins the Kick-off process by drafting goals for the upcoming year, but it's up to the manager to review, edit as needed, and finalize these goals with their employees. Both managers and employees should use the [SMART](#) goal format to develop meaningful, measurable goals and consult the [Competency Dictionary](#) to identify specific competencies that the employee may want to develop.

### Goal Categories:

When setting and reviewing goals, please be aware that there are three categories of goals: Individual Goals, Inclusive Excellence Goals, & Developmental Goals. **Employees must enter at least one goal for each category.** Please see additional information below:

### Individual Goals:

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- What are your career ambitions?
- What can the manager do to support your development?

### TO ADD GOALS:

- CLICK on the grey **ADD** button to add goals.
- Add the goal name and category (**required**).
- Click on **ADD** again to add another goal.
- Click **Next** when done adding all the goals.
- Click **Submit**.

**Reminder:** Employees must enter in Kick-Off at least one individual goal, one inclusive excellence goal, and one developmental goal.

Managers will read all directions and goal category descriptions to gain a better understanding and confirm if employee drafted goals are related to employee's individual job duties, their development, and/or their commitment to inclusive excellence.

Click "Save for Later" to save draft and return and finalize later.

Managers can click the goal text box and edit Employee entered goals and/or change goal category or status from drop down menus.

Click "Next" to advance to final review and submit page.

The screenshot shows a web interface for entering goals. At the top, there is a text box with the placeholder "Enter 2nd Goal here" and "Manager Additions/Edits" below it. Below the text box is a "Category" dropdown menu with "Inclusive Excellence Goal" selected. Below that is a "Status" dropdown menu with "select one" selected. There is a "Remove" button to the left of the "Status" dropdown. At the bottom of the form, there are three buttons: "Save for Later" (orange), "Next" (grey), and "Close" (grey). Below the buttons, there is a placeholder "Enter 3rd Goal Here".



### Set Review Content

Set Content: 2020 - 2021 CAP  
Kick-Off: Meg Ward

Actions

08/10/2020 - 09/30/2020

CAP - Kick-off Goals and Devel...

Review and Submit

## CAP - Kick-off Goals and Development Activities

Goal Enter 2nd Goal here  
**Manager Additions/Edits**

Category Inclusive Excellence Goal

Status (empty)

Goal Enter 3rd Goal Here

Category Individual Goal

Status (empty)

Goal Enter Goal Here

Category Development Goal

Status Not Started

If you include a comment here, it will show on Process History. It is not a part of the goal.



enter your comment

#### Process History



**Meg Ward**  
CAP Kick-Off: Enter Goals- Submitted

- 9 minutes ago



**Melissa Looney**  
CAP Kick-Off: Manager Review Goals- Await

Click "Send-Back" if you have made edits and you want the employee to review before submitting



Submit

Send Back

Click "Submit" after reviewing the employee entered and manager edited goals.

### Success! Event submitted

Set Content: 2020 - 2021 CAP Kickoff: Meg Ward [Actions](#)



Process Successfully Completed

> **Details and Process**

Click "Done" to exit Kick-Off

Done

Goals are now entered, and you should meet with you employee to discuss goals together. The goals will auto-populate into future CAP phases (Check-in & Wrap-Up) and can be viewed or edited in those phases.