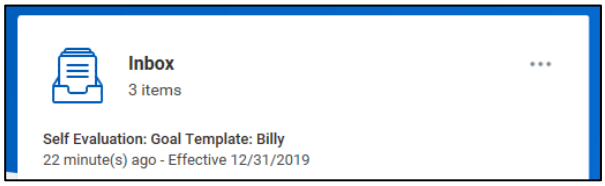
Complete Self Evaluation: Goal Template

In Workday, the **annual goal-setting process** is kicked off through the process called **Self Evaluation: Goal Template**. Employees will receive an action item in their Workday Inbox and their Outlook Inbox alerting them to complete the goal template. Throughout the year, employees may also add, edit and remove individual goals through a different process.

1. To get started, go to your Workday Inbox and select the action item titled **Self Evaluation: Goal Template**.

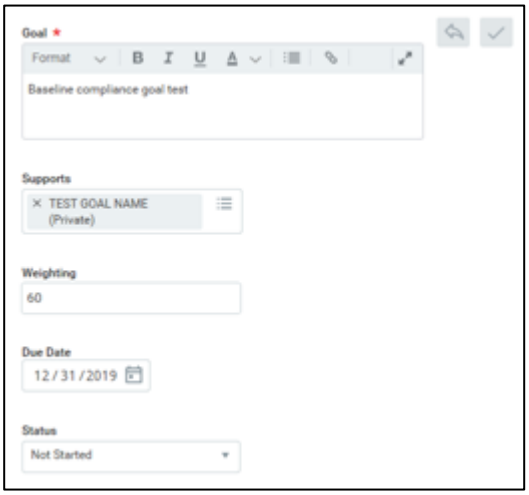


Review Baseline Goal

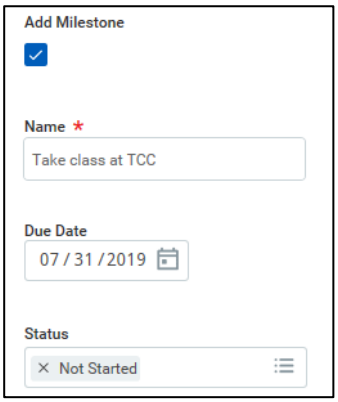
When you open the template, you will see at least one goal already listed - the **baseline** goal. The baseline goal intends to capture your day-to-day role responsibilities, including any compliance-related activities.

2. Edit certain components (see below) of the baseline goal by clicking directly on the fields or by clicking the pencil icon. Do **not** change the description or due date.
   a. **Goal:** Do not edit the baseline goal description.
   b. **Supports:** You can use the support list to associate or link your goals to higher level organization goals.
   c. **Weighting:** Work with your leader to define your weightings then adjust the weight of your baseline goal. Note that all your goals including the baseline, must add up to 100.
   d. **Due Date:** Do not edit the baseline goal due date.
   e. **Milestones:** Milestones are like action items that support goals. Milestone dates can and should be added/edited to appropriately reflect specific actions you will take to make this goal applicable to your job.
   f. **Status:** From the drop-down, select On Track, Completed, Behind/At Risk or Postponed/Canceled as appropriate.

> **Note:** The more impactful an individual goal is with respect to the company's enterprise goals, the higher the weighting should be.
>
> Some roles may have a more highly weighted baseline goal, while others have more evenly distributed weightings.



g. **Milestones:** Or action items you can meet in order to meet your overall goal can be added by clicking the check box next to **Add Milestone.** Once you do, you can enter a milestone **Name, Due Date** and **Status.** Milestones are not required and can be added and/or edited throughout the year.

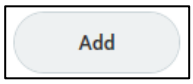


3. Save your edits or additions to the baseline goal by clicking the check mark or by clicking anywhere on the screen outside the fields you're editing. You must save in order to add more goals.

Add Additional Performance Goals

Remember, you should only add a separate performance goal if it is beyond your day-to-day role responsibilities. You may add up to eleven (11) total including the baseline. If you don't have additional goals, skip to step **8**.

4. Click **Add**.



5. Review and/or edit the following information:

   a. **Goal:** You must enter a description for your additional performance goal(s). You may also choose to use an existing goal if you had previously created one on an ad-hoc basis.

   b. **Supports:** You can use the support list to link your goal to a higher level organization goal.

   c. **Weighting:** Work with your leader to define your weightings and adjust the weight of your goal. Note that all your goals including the baseline, must add up to 100.

d. **Due Date:** You can edit the goal due date. General guidance is to use the end of the performance period/ end of the year.

e. **Status:** From the drop-down, select **Not Started**.

f. **Milestones:** Or action items you can meet in order to meet your overall goal can be added by clicking the check box next to **Add Milestone.** Once you do, you can enter a milestone **Name, Due Date** and **Status.** Milestones are not required and can be added and/or edited throughout the year.

6. Save your edits or additions to the baseline goal by clicking the check mark or by clicking anywhere on the screen outside the fields you're editing. As you save, goals are re-ordered by alphabetical order.

7. If you have additional goals, repeat steps 5-6. **You can only add five goals for a total of eleven (11) including the baseline.**

8. Once you have completed and added any necessary goals, click **Next**.

Review Core Values & Beliefs

Beginning with 2019 goal-setting, Williams' Core Values & Beliefs will be the framework by which employees' *way* is assessed. All employees are expected to demonstrate mindsets and behaviors in support of our Core Values & Beliefs. For your convenience, a list of our Core Values & Beliefs is provided during the goal-setting process; no action is required on this page during goal-setting.

9. Once you've reviewed our Core Values & Beliefs, click **Next**.

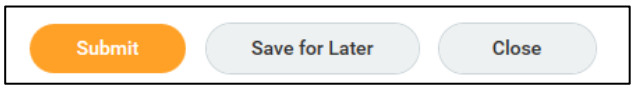
Review and Submit Self Evaluation: Goal Template

10. On the **Summary** page:

a. Review the Goals you edited and/or added. Make any additional edits here if necessary.

b. Review the CV&Bs you may have selected. Note that all CV&Bs are listed in this view, not just those you may have selected as focus areas.

11. Once you've reviewed your entries, click **Submit** to send this to your manager when your template is *complete*. If you need to continue editing your template, select **Save for Later** to come back to your form at any time.



Note: Once you submit you may receive an **error** if your goal weights do not equal 100 or if you entered more than eleven (11) total goals (including the baseline). Review the error language and the section outlined in red. Adjust before clicking submit again.