



# Talent Management & Performance at Workday



## **Roxanne Henselman**

VP Talent Management & Development

Workmate since July 2017

# The Challenge

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



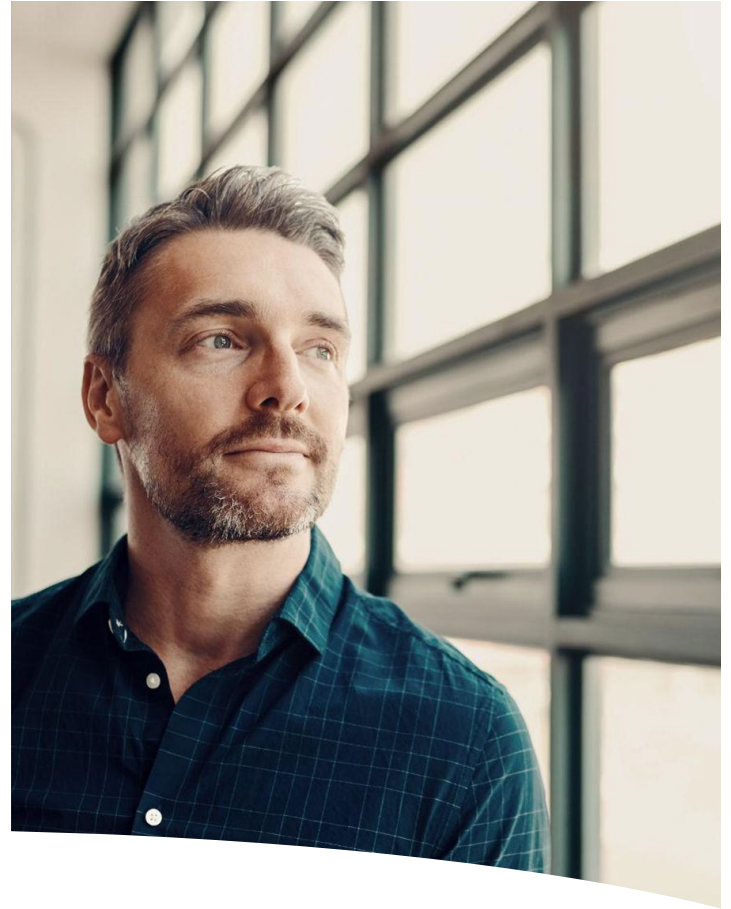
# The Challenge

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

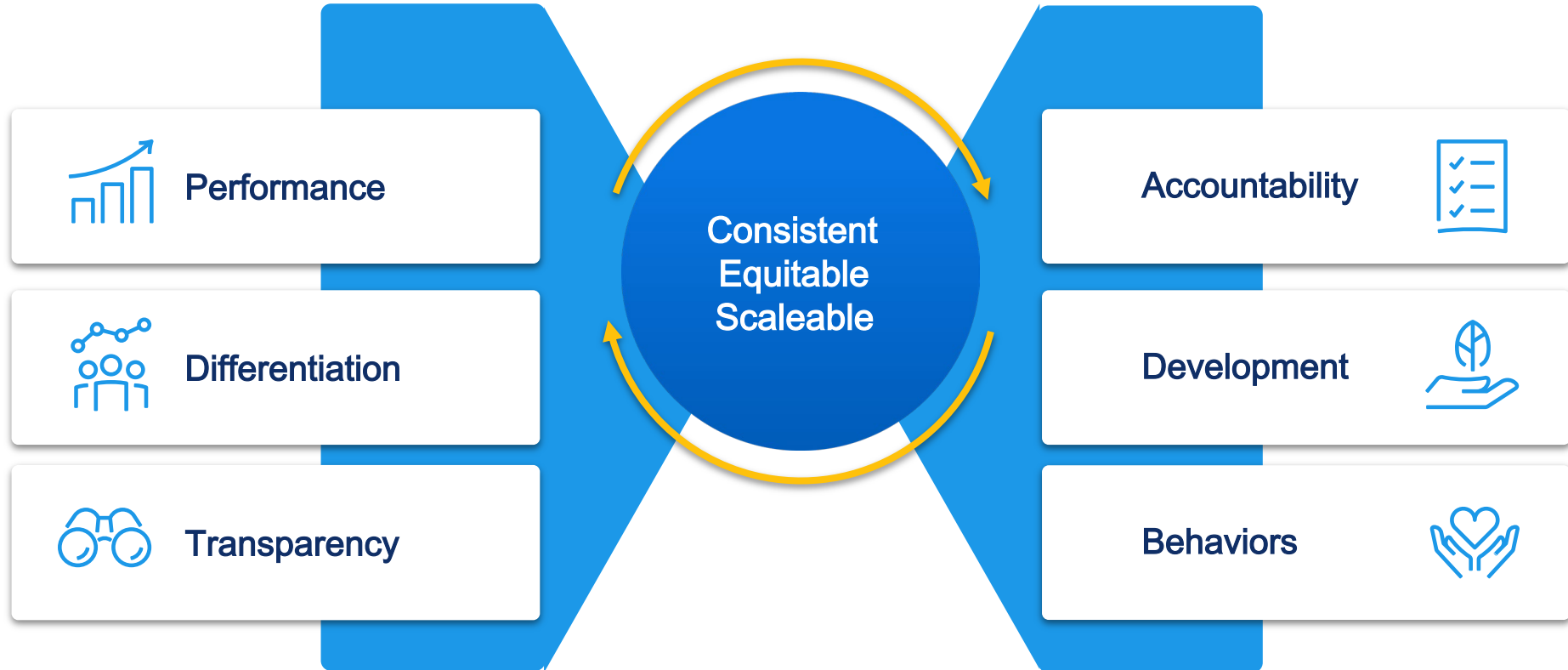
*With over 42% of employees joining since the start of the pandemic, we risked an "accidental" culture (or subcultures) to creep in, creating misalignment in how we work together to achieve our strategy globally.*



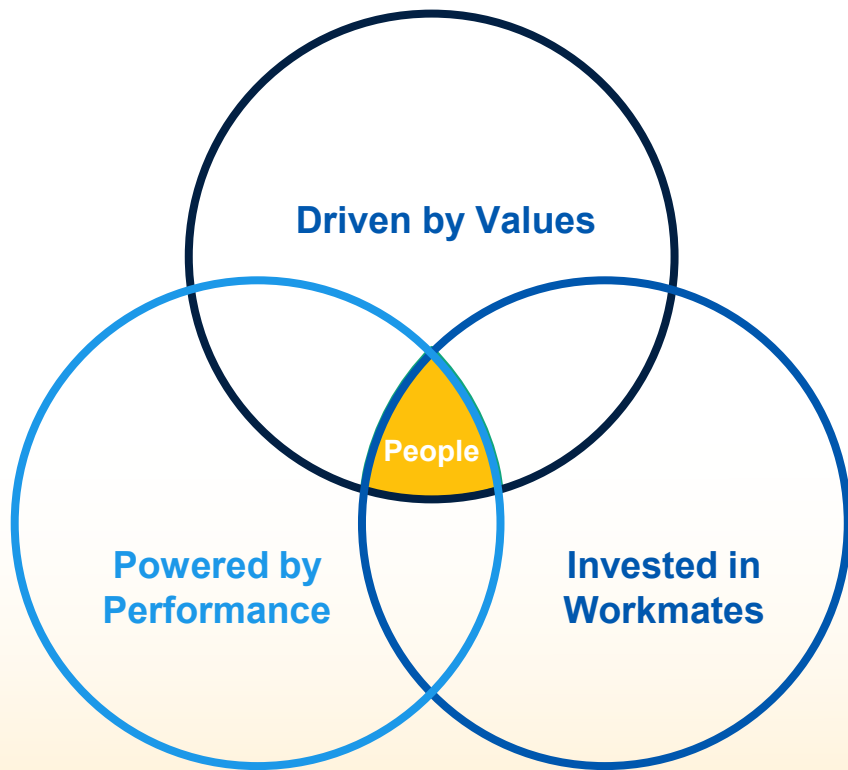
## Sustain our Culture

*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



# Our People Commitment



# 3 High-Impact Talent Practices







# Goals

POINT OF VIEW

**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 on alignment field to connect goals to a WD SGO
- Category** field is no longer required & will not include FYQX tags

#### KNOW

Goals are key to 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 →

#### On-Demand Workshops

Goal Setting at Workday

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, they 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. <a href="#">Read more</a> .

## On-Demand Workshops

Why are goals important?

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 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

Strategic Growth Objectives (SGOs)

Functional Priorities

## Examples

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

I will oversee the triage of 100% open Jiras for the top 300 ACV customers before Q3, positioning 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.

**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 Q3.

**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.

## 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:

- Refine a broad goal using the "What, why, and how" framework:
- Review the response Gemini provided, and structure your goal or provide more context if necessary.
- Get Gemini to help you demonstrate how your goal supports a specific SGO, functional OKR, or team goal:
- 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:

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."

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.'"

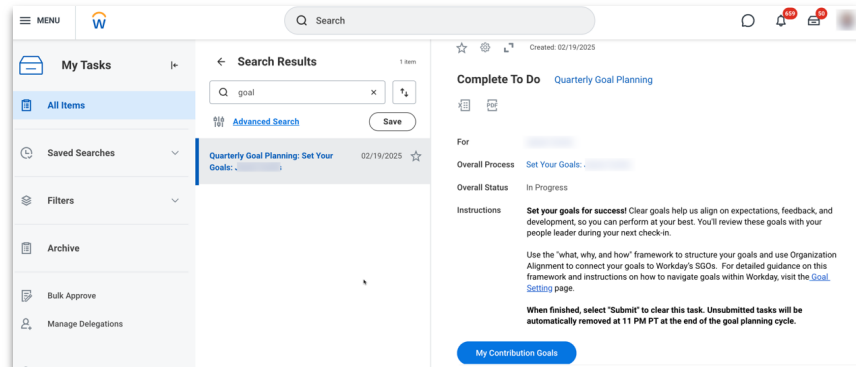
The more information you provide to Gemini the better the result will be.

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



### It's time to set your goals for the new quarter!

Setting and tracking goals creates focus and accountability on what matters most, connecting our individual work to our company strategy. Clear goals drive alignment on expectations, feedback, and development—empowering you to perform at your best. Learn more about [Goal Setting](#).

All Workmates are **required**\* to set and track goals in Workday. During your next check-in, you will review your goals with your people leader.

### Key Actions for Goal Setting

- Align with your people leader on individual goals specific to your role.
- Connect your individual contribution goals to a Strategic Growth Objective (SGO).
- Be sure both you and your leader have clarity on what is expected and what success looks like.
- Ensure your goals are up to date and relevant:
  - Add or update existing goals by March 31.
  - [Archive](#) historical goals to streamline your view and remain focused on current objectives.

### Development Items

What skills or knowledge could enhance your performance and help you reach your goals? Discuss development opportunities with your people leader and add them to Workday to track your progress. Learn more about [Development Items](#).

\***Goal Setting** is a **Required Action at Workday**. Not completing this requirement will be considered a failure to meet role expectations and will impact performance assessment. Learn more about [Required Actions](#). [Click here to view the notification details](#).

# Driving Adoption: Contribution Goals in Workday

## Org Alignment to Company Objectives

Create Contribution Goal

Roxanne Henselman

Use the "what, why, and how" framework to create your goals. Visit the [Goal Setting](#) page for more guidance and to review examples.

Quick Tips:

- **Results:** Summarize the goal's strategic outcomes that contribute to your team's success.
- **Status:** Update each quarter to track your progress towards completion.
- **Category:** If applicable, select the category that best aligns with the goal.
- **Organization Alignment:** Use the Organization Alignment field to connect your goal to a [Strategic Growth Objective \(SGO\)](#). Type SGO in the search box to advance to the list of SGOs.

Once submitted, both you and your people leader can view or edit these goals at any time by visiting [My Contribution Goals](#).

Contribution Goal Details

Additional Details

Contribution Goal

Normal

B I U

Results

Normal

B I U

Status

select one

Category

Organization Alignment

Due Date

MM/DD/YYYY

Org Alignment Dropdown:

Search Results

(9)

SGO: Customer Reach (Public)

...

SGO: Workday Economy (Public)

...

SGO: Workmate Skills (Public)

...

SGO: AI-Powered Innovation (Public)

...

SGO: US Federal Readiness (Public)

...

SGO: Best of Suite Value (Public)

...

SGO: Global Rights to Win (Public)

...

SGO: ME Pipeline + Cost to Reopen (Public)

...

SGO: Operate at scale as an AI-first company (Public)

...

Roxanne Henselman

HR Director

Actions

Phone

Email

Team

Summary

Overview

Content

Compensation

Benefits

Pay

Time Off

Performance

Contribution Goals

Check-ins

Feedback Received

Feedback Given

Education

Achievements

Create Contribution Goal

Bulk Update

Individual Contribution Goals

Archived Contribution Goals

Organization Contribution Goals

In Progress

Finalize the design and complete the discovery phase for configuring the...

Due Date: 07/31/2025

Organization Alignment: SGO Workmate Skills

Category: ...

Edit Contribution Goal

In Progress

Hire an Executive Talent Strategist and a Career Development Portfolio...

Due Date: 05/30/2025

Organization Alignment: SGO Operate at scale as an AI-first company

Category: ...

Edit Contribution Goal

In Progress

Successfully launch the Q1 Check-in cycle for the Workday enterprise...

Due Date: 04/30/2025

Organization Alignment: SGO Workmate Skills

Category: ...

Edit Contribution Goal

In Progress

Work with key stakeholders to develop and align on an impactful...

Due Date: 04/30/2025

Organization Alignment: SGO Operate at scale as an AI-first company

Category: ...

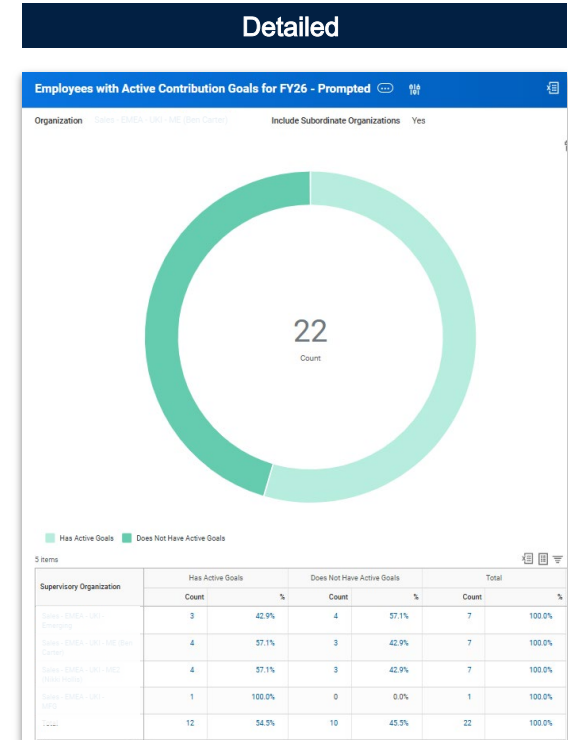
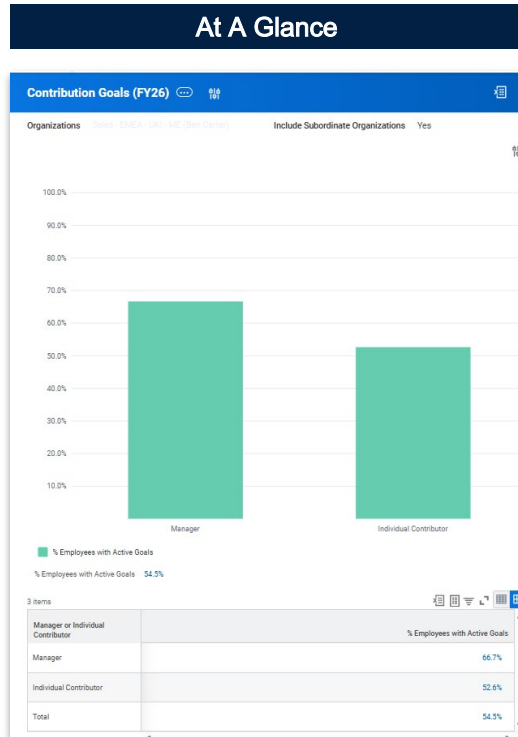
Edit Contribution Goal

Workday Confidential

# Driving Accountability

## Workday Reports & Dashboards

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

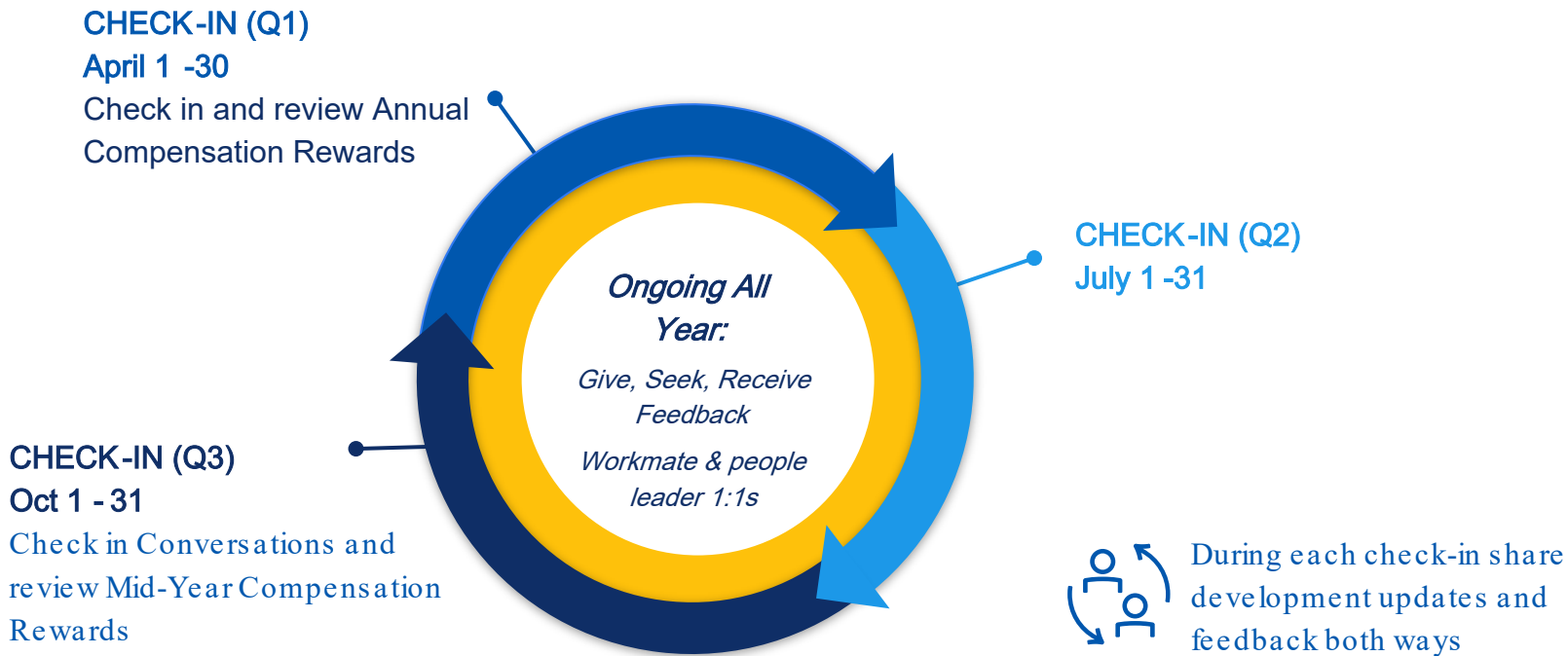




# Check-Ins

# Workday's Check -In Cycle

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



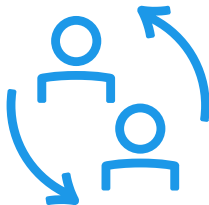
# Check -Ins

## A Look Back

Align on contributions

Feedback

Goals achieved



## A Look Ahead

Align on one skill to develop

Align on goals for next quarter

Development plans

Flow



Employee Completes  
check-in in Workday

*Notifications*



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

*Notifications*



Live check-in  
Conversation

*Notifications*



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)

The screenshot displays the 'Complete Self Perspective' form in Workday. The form is titled 'Self Perspective: FY26 Q1' and 'Check-In: Performance & Development'. It shows the date range '02/01/2025 - 03/05/2025' and a navigation bar with three items: 'Performance & Development' (selected), 'Review and Submit', and 'Actions'. The main content area is titled 'Performance & Development' and includes instructions: 'Reflect on the questions below to prepare for your check-in conversation with your manager. Summarize your thoughts with a few key points in each section.' It contains two sections: 'Performance Summary' and 'Development Summary'. Each section has a list of questions and a text area for the answer. The 'Performance Summary' section has two questions: 'List your top 3 contributions since your last check-in. Consider your progress toward goals, and achieved outcomes.' and 'Identify 1-2 things you would do differently or approach in a new way.' The 'Development Summary' section has two questions: 'Describe one skill you plan to develop or build upon, and outline the specific actions you will take.' and 'Explain what support you need from your manager or others to achieve your development goals.' A tip at the bottom states: 'Tip: Select the light bulb icon for relevant skills and talent information. You can find skill descriptions on the Job Critical Skills or Core Skills tabs of your Workday profile. Select "Submit" when you're ready to share your responses with your manager. You are required to complete this form by 11 PM PT on the last day of the quarter.'

**Complete Self Perspective** |  
Self Perspective: FY26 Q1  
Check-In: Performance & Development  
Actions  
02/01/2025 - 03/05/2025  
Performance & Development  
Review and Submit

**Performance & Development**  
Reflect on the questions below to prepare for your check-in conversation with your manager. Summarize your thoughts with a few key points in each section.

**Performance Summary**

- List your top 3 contributions since your last check-in. Consider your progress toward goals, and achieved outcomes.
- Identify 1-2 things you would do differently or approach in a new way.

**Development Summary**

- Describe one skill you plan to develop or build upon, and outline the specific actions you will take.
- Explain what support you need from your manager or others to achieve your development goals.

**Tip:** Select the light bulb icon for relevant skills and talent information. You can find skill descriptions on the [Job Critical Skills](#) or [Core Skills](#) tabs of your Workday profile.

Select "Submit" when you're ready to share your responses with your manager. You are required to complete this form by 11 PM PT on the last day of the quarter.

Question Performance Summary

Employee

Answer \*

Question Development Summary

Employee

Answer \*

# Embedded Analytics

View Job Profile Skills, Contribution Goals and Development Items within the Checkin Form.

## Complete Self Perspective

Self Perspective: FY26 Q1

Check-In: Performance

Actions

02/01/2025 - 03/05/2025



Performance & Development

Review and Submit

Important Skills For Worker's Job

Core Skills

Job Critical Skills

Reflect on the

Performance

• List your  
• Identify

Worker's Contributions

Worker	Contribution Goal	Status	Contribution Goal Results	Due Date	Contribution Goal Relates To	Completed Date	Last Updated
Rachana Hanselman	Attend 1 EBC event/quarter	In Progress		01/01/2025			03/08/2024 08:30:44 PT 1M
	Ensure project health across major transformation initiatives - Customer Success, Transformation, Knowledge, etc.	Completed	COT struggled in late Q3 but is back on track in Q4. 2.1 readiness is looking good. Knowledge as a project retired but CPO continues to make progress on program and org transformation.	01/01/2024		03/08/2024 09:28:31 PST 4M	
	I will read a book, listen to podcast or watch a documentary that is VIBE related and share highlights with my team.	Completed	Listened to Bridging Divides, a podcast which featured Steve X Kennel interviewing Malcolm Gladwell. Podcast is a new format for Kennel to share his anti-racist message. Discussed open mindedness and ability to have a discussion with someone who has different ideas on topics. Low stakes conversation - able to agree more with others. Need to give people the ability and opportunity to change.	12/01/2023		01/17/2024 06:45:12 PST 4M	

Worker's Development Items

Worker	Development Item Title	Description	Start Date	Completion Date	Status	Last Updated
Rachana Hanselman	Expand Executive Peer Network	As identified in my executive 360, I will take action to improve relationship within P&P and the business. These conversations will	01/15/2024	12/31/2024	In Progress	01/18/2024 02:37 PM

# 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)

### Complete Manager Perspective

Manager Perspective: FY26

Q1 Check-In: 02/01/2025 - 03/05/2025

Actions

02/01/2025 - 03/05/2025

Performance Pulse

Performance & Development

Performance Concerns

Review and Submit

### Performance & Development

Review your employee's reflections on their contributions and development. Consider your Performance Pulse response and the prompts below to summarize your thoughts with a few key points in each section.

#### Performance Summary

- Share your perspective on their key contributions and their approach. Be specific and provide examples.

#### Development Summary

- Offer constructive suggestions for skills they can develop to enhance performance and support growth.

**Tip:** Select the light bulb icon in the left navigation pane to view relevant talent and skills information.

**Visibility:** Your employee will see your summary after you submit.

Question Performance Summary

Manager

Answer \*

Normal

▼

T

▼

🔗

📧

🔍

Employee

Answer

Test 1

abc

Question Development Summary

Manager

Answer \*

Normal

▼

T

▼

🔗

📧

🔍

Employee

Answer

Test 2

def



# Performance, Potential and Calibration

# Assessing Performance & Potential



# Step 1: Assess Performance

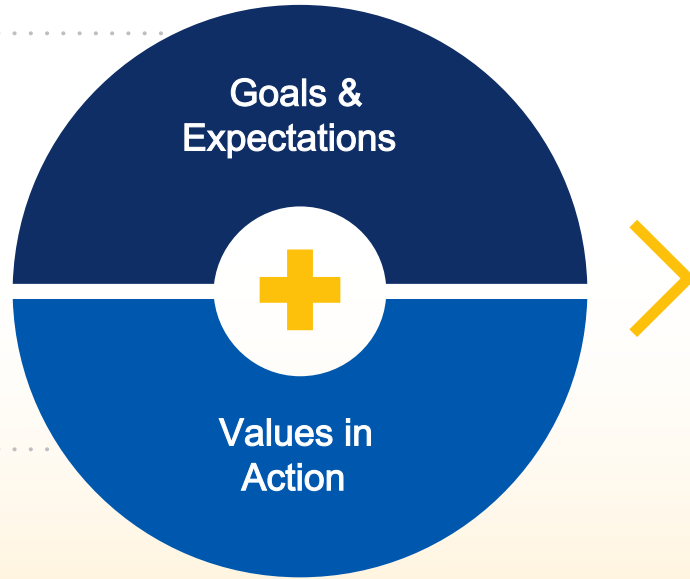
## What

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.



**Exceptional Year**

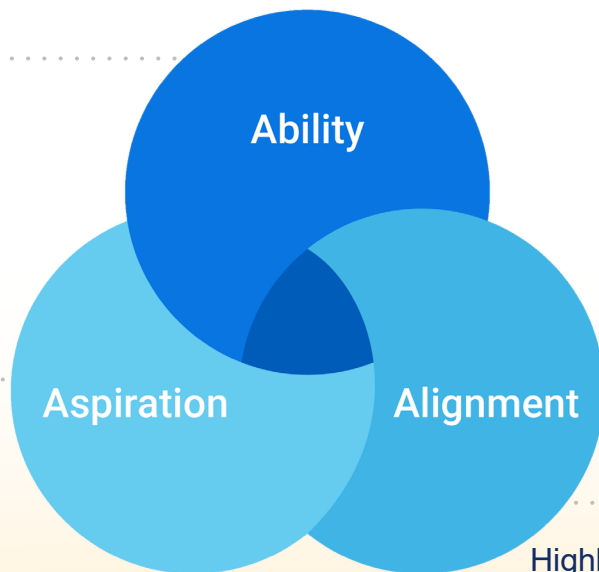
**Successful Year**

**Challenging Year**

## Step 2: Assess Potential

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

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**

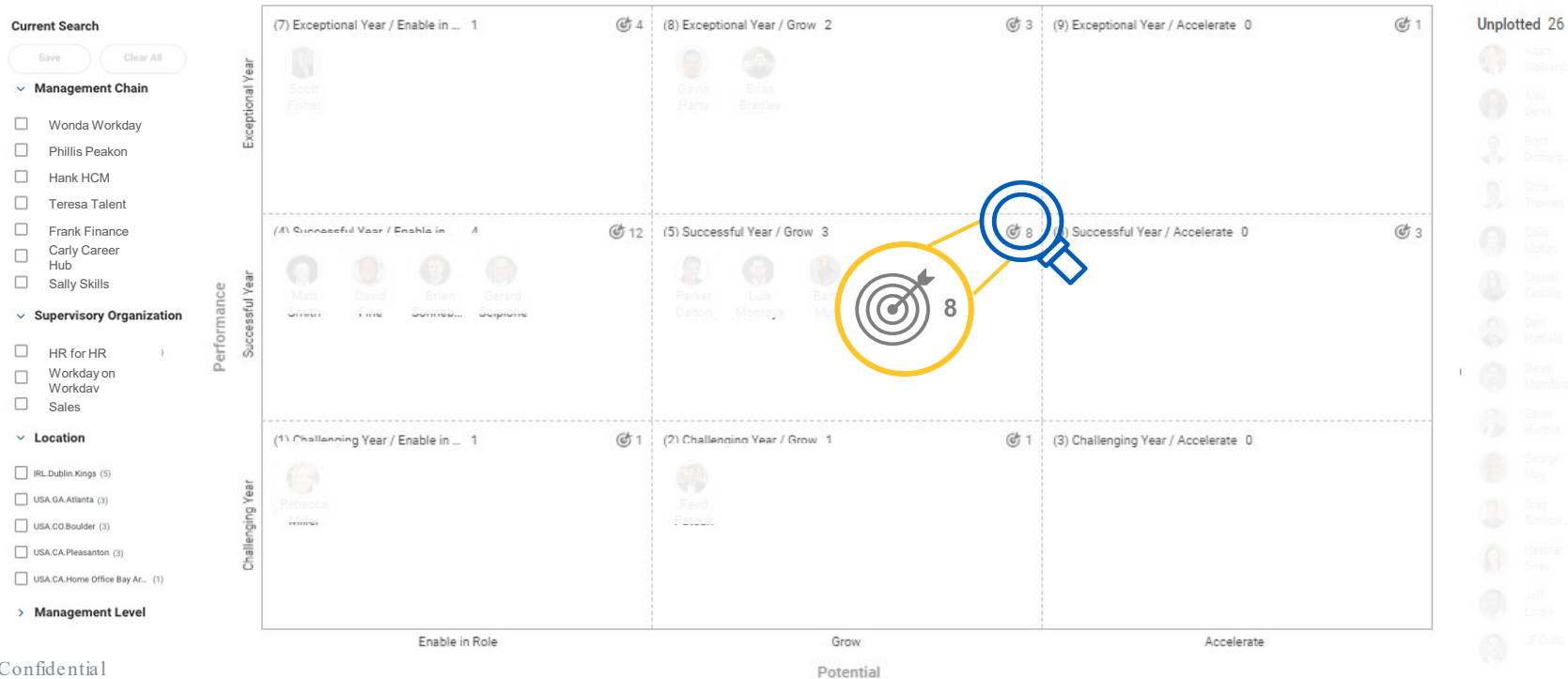
**Grow**

**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

People Leader Dashboard

**Bite-Size Guide**  
 Quick video providing an overview of the People Leader Dashboard.  
[People Leader Dashboard Bite-Sized Guide](#)

**Quickcard**  
 Overview of the People Leader Dashboard functionality and the associated worklets and metrics.  
[People Leader Dashboard Quickcard](#)

**Help Article**  
 In-depth guide on the People Leader Dashboard.  
[Help Article for People Leader Dashboard](#)

**Feedback**  
 Fill out this short survey with any ideas for how to improve the People Leader Dashboard experience!  
[People Leader Dashboard Feedback Form](#)

Overview

Hiring Effectiveness

Rewards & Recognition

Career Growth

**Assess Talent**

Time and Absence

Supervisory Organization: GLT

My Team's Last Completed Talent Summary

Worker	Time in Job Profile	Most Recent Talent Matrix Placement	Most Recently Completed GO	Most Recently Completed GO Review Period End Date	Most Recent Performance Pulse	Most Recent Performance Concern	Recent Most Recently GO
	2 year(s), 4 month(s), 1 day(s)	Executive Career & Progress Check-in	Executive Career & Progress Check-in	01/16/2023	(Blank)	(Blank)	Executive Career & Progress Check-in
	0 year(s), 7 month(s), 12 day(s)	Quarterly Check-In FY2023	Quarterly Check-In FY2023	06/01/2024	All expectations	No Performance Concerns indicated	Career & Progress Check-in
	2 year(s), 5 month(s), 19 day(s)						
	1 year(s), 4 month(s), 18 day(s)	Quarterly Check-In FY2022	Quarterly Check-In FY2022	06/01/2024	(Blank)	(Blank)	
	0 year(s), 10 month(s), 19	Quarterly Check-In FY2022	Quarterly Check-In FY2022	06/01/2024	All expectations	No Performance Concerns	

View More ...

Completed Calibration Matrix

	Exceptional Year / Enable in Role	Exceptional Year / Grow	Exceptional Year / Accelerate
Contribution Chain... Example...	14	17	8
Successful Year / Enable in Role	57	34	16
Challenging Year / Enable in Role		4	4

Not Shown: 12

Total: 166

View More ...

My Organization

Employee Detail Report for People Leaders

My Org Chart

Peakon Login

Management Actions

Add Contribution Goal to Employees

Archive Contribution Goals

Additional Reports

Comp Planning Dashboard

Employee Contribution Goals and Development Items

In Progress Calibration Details

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!

Workday Confidential

# Step 4: Take Action

Talent Grid placement helps guide choices for:

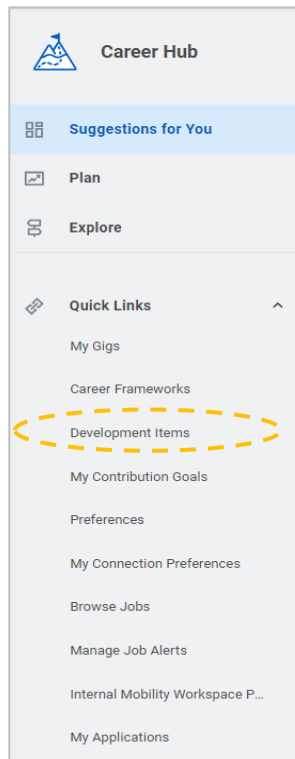
- Development
- Feedback and Coaching
- Internal Mobility or Succession Planning
- Compensation Investment



# 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*



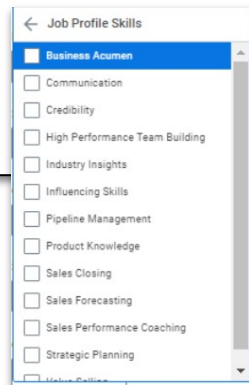
The Development Item form contains the following sections:

- Development Item \***: A text input field containing "Communication".
- Additional Information**: A rich text editor with a toolbar (Format, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Link, Unlink) and a text area containing "I'm still working on communicating the Workday way but need to better embrace the collaborative culture instead of being frustrated at what seems to me to be slow progress."
- Skills to Develop**: A list of skill categories with a search bar and a list of items: Search, By Category Group, By Category, Skill Interests for Worker, Job Profile Skills, and In Progress (highlighted with a dashed yellow box).

Annotations on the form include:

- A dashed yellow circle around the top right corner containing a refresh icon and a checkmark icon.
- A dashed yellow arrow pointing from the "In Progress" status to a separate "Status drop down" menu.

*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



Senior leaders at Workday show that employee wellbeing is important to them.

What is it that makes you feel that way? (optional)

Yes, I have seen several

9

Click to change

Next question



# 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



**Thank You**