



Syssero[®] Solution Packet

Cascade Goals to An Organization



Solution Overview

This process enables individuals with elevated access to the Performance module to efficiently create and disseminate goals across the entire organization with just a few clicks. Managers and HR can simultaneously send one or multiple goals to all employees, eliminating the need for each employee or manager to create goals individually. Furthermore, these goals can be aligned with the organization's overarching objectives, streamlining efforts and ensuring that everyone is on the same page. This approach saves time, fosters alignment among employees, and simplifies goal tracking.

Impacted Functional Areas

- Performance

Definitions:

- Percent Complete: Enter the completion percentage of the organization goal manually.
- Organization Alignment: Link this organization goal to goals that are 1 or more levels up in the organization hierarchy. To delete a link to another organization goal, clear this field.
- Supporting Initiatives: Select initiatives that aren't already associated with an organization's goal. (*Goals with Supporting Initiatives can't be private.*)
- Private: Only members of the organization chain can see the goal.
- Calculated: Workday automatically calculates the completion percentage of your organization's goals. You can use this OR Percent Complete.



Step 1: In the Workday search bar, type and click the task: Manage Organization Goals.

1. Select a Supervisory Organization and Goal Period, click the OK button:
2. Click +Add to enter the Organization Goal, and click OK when finished.

Manage Organization Goals HR Services Department

Goal Period 2021 - 2024 Goals

+ Add

Operational Performance - HR Systems

Goal * Operational Performance - HR Systems

Description
Format B I U A
Demonstrate commitment and understanding in identifying and communicating strategic priorities, aligning workforce efforts, and cascading accountability.

Percent Complete 50

Organization Alignment x Maximize Operational Performance

Supporting Initiatives

Private

Calculated



Step 2: In the Workday search bar, type and click on the task: Add Goal to Employees:

1. Create or copy existing goals and assign them to specific employees or Supervisory Organizations. Click OK to move to the next screen.

The screenshot shows the 'Add Goal to Employees' dialog box. It has a close button (X) in the top right corner. There are two radio buttons: 'Create New Goal' (unselected) and 'Copy Existing Goal' (selected). Below the radio buttons is a search bar containing 'Operational Performance - HR Systems (Public)'. Under the 'Assign To' section, there are three input fields: 'Employees' (empty), 'Talent Pool' (empty), and 'Organizations' (containing 'HR Services Department'). There is a checked checkbox for 'Include Subordinate Organizations'. At the bottom, there are 'Cancel' and 'OK' buttons.

2. Update this screen as needed, and click the Submit button to cascade the goals:

The screenshot shows the 'Add Goal to Employees' form. The title bar is blue with the text 'Add Goal to Employees' and a refresh icon. Below the title bar, it says 'Assign To 14'. The form has several fields: 'Goal' (with a red asterisk and a rich text editor containing 'Operational Performance - HR Systems'), 'Description' (with a rich text editor containing 'Demonstrate commitment and understanding in identifying and communicating strategic priorities, aligning workforce efforts, and cascading accountability.'), 'Category' (dropdown menu with 'Operational' selected), 'Organization Alignment' (dropdown menu with 'Operational Performance - HR Systems (Public)' selected), 'Weight' (input field with '15'), 'Due Date' (calendar icon with 'MM/DD/YYYY'), 'Editable' (checked checkbox), 'Track By' (dropdown menu with 'select one'), 'Remove' button, 'Add' button, and 'enter your comment' (text input field). At the bottom, there are 'Submit', 'Save for Later', and 'Cancel' buttons.



Step 3: To view the Organization Goals, type and click on the report: View Organization Goals.

1. Enter the Supervisory Organization, and the goal period will populate. Click the OK button:

View Organization Goals [X]

Organization * [X HR Services Department ...] [☰]

Goal Period * [X 2021 - 2024 Goals ...] [☰]

[Cancel] [OK]

2. Goals will now display in the report:

View Organization Goals [☰]

Supervisory Organization HR Services Department

Goal Period 2021 - 2024 Goals

Operational Performance - HR Systems	
Goal	Operational Performance - HR Systems
Description	Demonstrate commitment and understanding in identifying and communicating strategic priorities, aligning workforce efforts, and cascading accountability.
Percent Complete	0.00%
Organization Alignment	Maximize Operational Performance
Supporting Initiatives	(empty)
Private	
Calculated	



Step 4: To update/edit Organization Goals, use the Workday Task: Manage Organization Goals.

1. Enter the Supervisory Organization and click the OK button:

View Organization Goals [X]

Organization * X HR Services Department [...]

Goal Period * X 2021 - 2024 Goals [...]

Cancel OK

2. Make changes as needed and click the OK button:

Manage Organization Goals HR Services Department [...]

Goal Period 2021 - 2024 Goals

+ Add

Operational Performance - HR Systems

Goal * Operational Performance - HR Systems

Description **Format** B I U A [...]
Demonstrate commitment and understanding in identifying and communicating strategic priorities, aligning workforce efforts, and cascading accountability.

Percent Complete 50

Organization Alignment X Maximize Operational Performance [...]

Supporting Initiatives [...]

Private

Calculated

OK Cancel



Step 5: Organization Goals are displayed on an employee's Performance tab:

The screenshot shows a user interface with three tabs: "Individual Goals", "Archived Goals", and "Organization Goals". The "Organization Goals" tab is selected and highlighted with a blue underline. Below the tabs, there is a card titled "Operational Performance - HR Systems" with a three-dot menu icon to its right. Inside the card, there are three items:

- Organization**: HR Services Department (with an organization chart icon)
- Organization Alignment**: Maximize Operational Performance (with a network icon)
- Percent Complete**: 50.00% (with a line graph icon)

At the bottom of the card, there is a blue link labeled [View Goal](#).

Conclusion

With this streamlined process, goal-setting becomes a breeze, letting everyone focus on what matters—achieving success together! So, let's click our way to a more aligned and efficient organization.

