

Workday Talent & Performance Year-End Readiness Checklist

Year-Round Readiness

- ☐ Performance is treated as an ongoing process, not just a year-end event
- ☐ Gaps in goals, feedback, and foundational data are identified and addressed early

Ongoing Performance Conversations

- ☐ Performance conversations occur regularly, not just during review season
- ☐ A defined approach exists for capturing and accessing performance feedback
- ☐ Managers understand how ongoing feedback supports stronger evaluations

Goals Management

- ☐ Goals are created and tracked throughout the year
- ☐ Managers and employees have clear visibility into goals, progress, and expectations
- ☐ Goals are structured and maintained in Workday to support accurate evaluations

New Hire Setup

- ☐ New hires are assigned goals early in their tenure
- ☐ A defined process prompts timely goal assignment
- ☐ New hires are assigned to the correct job profile and eligibility group

Manager Enablement

- ☐ Managers understand how performance reviews are initiated, routed, and completed in Workday
- ☐ Managers know where to access review tasks, supporting data, and relevant reports
- ☐ Managers understand calibration expectations, timelines, notifications, and release responsibilities

Mid Year Manager Changes

- ☐ Review ownership and routing for manager changes are clearly defined and configured in Workday
- ☐ Manager and team changes are accurately reflected in Workday to maintain review integrity
- ☐ Managers collaborate to ensure performance input reflects the full review period



Additional Reviewers

- ☐ The approach to Additional Reviewers is clearly defined in Workday
- ☐ Business process and security roles support appropriate reviewer input and visibility
- ☐ Reviewers understand their responsibilities and how their feedback contributes to evaluations

Eligibility & Job Profiles

- ☐ Review eligibility rules, including hire cutoff dates, are clearly defined and configured
- ☐ Job profiles and review templates reflect current role expectations and competency structure
- ☐ Eligibility and template alignment are audited and validated prior to launch

Performance Review Process Configuration

- ☐ The review business process is clearly designed, including approvals, hold steps, and release timing
- ☐ A decision has been made regarding how calibration will be used within Workday
- ☐ Review templates are reviewed, updated, and tested before launch

Employee Education

- ☐ Employees understand how performance reviews are structured and evaluated in Workday
- ☐ Employees understand their responsibilities, including self-evaluations and acknowledgment
- ☐ Employees understand the value of performance reviews and how outcomes may connect to merit, bonus, or other decisions

Enablement & Journeys

- ☐ Workday is configured to deliver timely guidance and reminders throughout the performance cycle
- ☐ Job aids, to-do content, alerts, announcements, and communications support employees and managers at key moments
- ☐ Workday Journeys (if available) are configured to support education and clarity through performance cycles and other milestones

Reporting & Analytics

- ☐ Key performance data points are clearly defined and aligned to decision-making objectives. Embedded analytics are configured within performance reviews and calibration to support informed decisions
- ☐ Dashboards and standard or custom reports are created and maintained to reflect review template changes and evolving reporting needs
- ☐ Reporting is available to track review progress and completion rates, with alerts leveraged to support timely follow-up

