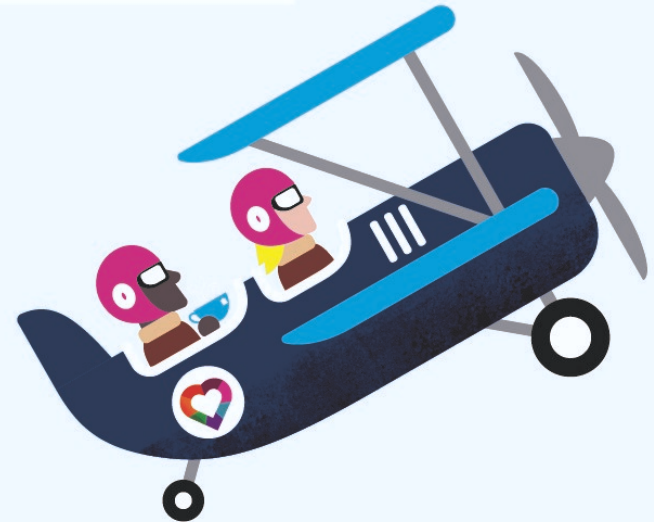


Start of Year Performance Conversations

January 2020



In this guide you'll find:



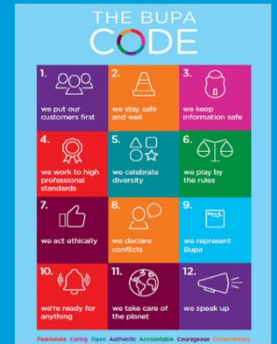
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At the start of the year.....

Start of year conversations are critical to setting clear expectations and goals for the year ahead. To do a good job people need to know what's expected of them, so by helping your team members understand all the elements involved in doing their job well, you'll set them up for success. One of the keys to success is to set manageable Performance goals of no more than 6 for each team member. Once you have agreed the goals, your team member can capture their goals in the Performance icon in Workday and you can both track the progress. All completed goals will remain in the Performance icon.

As part of your goal setting conversations remember;

- use the 4 steps in the Performance conversations [guide](#)
 1. Set clear expectations and goals
 2. Talk honestly and often
 3. Develop and grow
 4. Review and look forwards
- don't just look at 'what you've done to get to your destination' look at 'how you did it' too because that's just as important and reminds us we should all be living our [Values](#) and the [Bupa Code](#) everyday.



In addition to the Performance goals, you should set a **behavioural goal** so they can evidence living our Values and the Bupa Code throughout the year. We would also encourage you to agree a **wellbeing goal** to help your team member have a happier and healthier year.

Making goals meaningful

Angela manages a team of six who all do similar roles. Here are some of her considerations...

“Most of my team are working towards a common goal and I need to make sure it is personalised to them but the language they use is the same when they input their goal into the Performance icon in Workday”



“The right environment needs to be set so we can have an open and honest conversation about their aspirations for this year”

“Asking my team to prepare what they would like to work on over the next year will help gain their buy-in. Then they can input the goals we agree in Workday for this year”

“As a team it is important that we live the Bupa Values and Code in everything we do personally and as a team I need to make sure everyone captures this when setting their goals for the coming year”

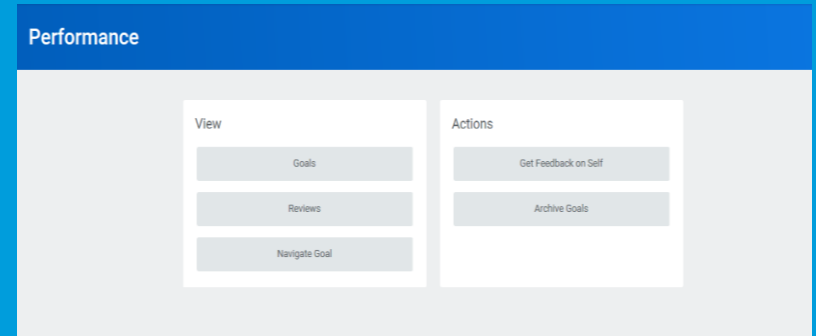
“There are always things we can improve on and I need to be mindful when setting goals that I ask for feedback as to how we track their goals set and how often, as I know this is a new process in Workday”

Performance icon in Workday

The Performance icon in Workday allows us to set and track performance and development goals, share feedback, manage performance improvement plans, capture end of year ratings and calibrate performance.

All employees (excluding frontline Care Homes, Dental and non Workday users) will use the Performance icon in Workday as their goals capture tool. If you previously used the capture form to document these goals, Workday is just replacing this. If you are part of the T&C scheme you will capture your goals in Workday and continue to update Grow. Every employee will receive a task to complete their own goals in Workday. Once the employee has added their goal this will generate a task to the manager to approve.

Start of year performance conversations should be held by 31 January and goals captured by the employee in Workday.



***If you are a non Workday user please continue to capture goals using your current process.**

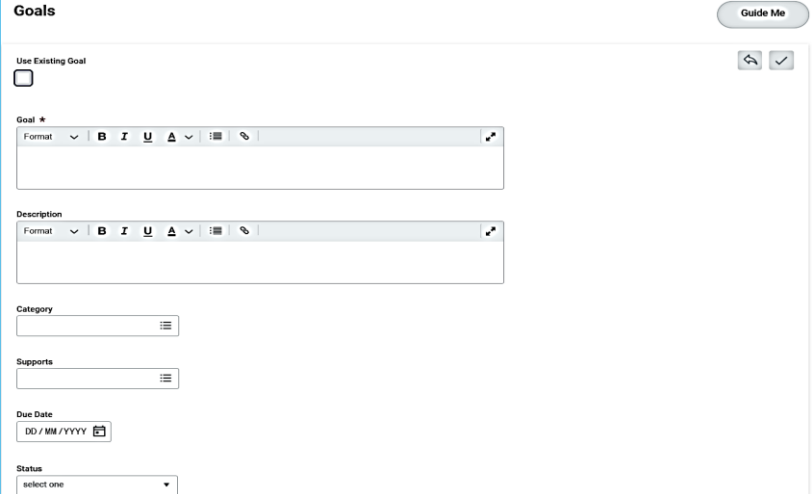
Inputting Goals in the Performance icon in Workday

Every Workday user will receive a task in their Outlook and Workday inbox to input the goals they have agreed during their start of year conversation with their manager in Workday. It is the employees responsibility to add the agreed goals for the year ahead.

The employee should click on the link that will take them to their task. Once the employee has added their goal this will generate a task to the manager to approve or send back to the employee.

Steps to setting goals

- click on 'add'
- 'goal' title
- 'description' of goal
- 'category' select performance or development goal
- 'supports' – leave it blank
- add 'due date'
- select 'status' – not started / in progress
- click 'submit' goal and it will go to the manager
- click 'add' to add another goal



The screenshot shows the 'Goals' form in Workday. At the top right is a 'Guide Me' button. Below it is a 'Use Existing Goal' checkbox with a 'Go Back' and 'Check' icon. The form contains two rich text editors for 'Goal #' and 'Description', each with a 'Format' dropdown and icons for bold, italic, underline, text color, background color, bulleted list, numbered list, and link. Below these are dropdown menus for 'Category' and 'Supports'. There is a 'Due Date' field with a date picker (DD/MM/YYYY) and a 'Status' dropdown menu with 'select one' as the current selection.

To see all the steps visit ['Workday support'](#) on People Place and select 'Goal Setting' in the guide

Track and amend Goals in the Performance icon in Workday

Both employee and managers can see any 'approved goals' in the Performance icon. As the manager you can view your team members goals individually or as a team.

The manager can 'view goals set by the manager' and view and edit those goals via the Performance icon. Please visit '[Workday support](#)' and select Goal Setting where you will see the steps.

The manager can also view goals via 'Team Performance' and 'Goals' icon and export their team goals to an Excel report by clicking on the Excel symbol on the righthand side. Please visit '[Workday support](#)' and in 'Goals and Feedback' select 'Creating and cascading goals' where you will see the steps.

Employees can view their approved goals in the Performance 'Goals' icon. Only the employee can amend the goal they have inputted, and once they have amended their goal and click 'submit' the changes will generate a task to their manager for approval.

Add Goal to Employees								
By Worker	By Goal							
By Worker 14 items								
Worker	Individual Goals							
	Goal Section	Goal	Description	Supports	Goal Category	Status	Due Date	Completed On
	<input type="button" value="Edit"/>	<input type="checkbox"/>	Cascaded Goal	Goal for all the team	Performance Goal		31/12/2019	
	<input type="button" value="Edit"/>	<input type="checkbox"/>	My own goal	SMART Goal	Development Goal	In Progress		
	<input type="button" value="Edit"/>	<input type="checkbox"/>	Cascaded Goal	Goal for all the team	Performance Goal		31/12/2019	
	<input type="button" value="Edit"/>	<input type="checkbox"/>	Cascaded Goal	Goal for all the team	Performance Goal		31/11/2019	

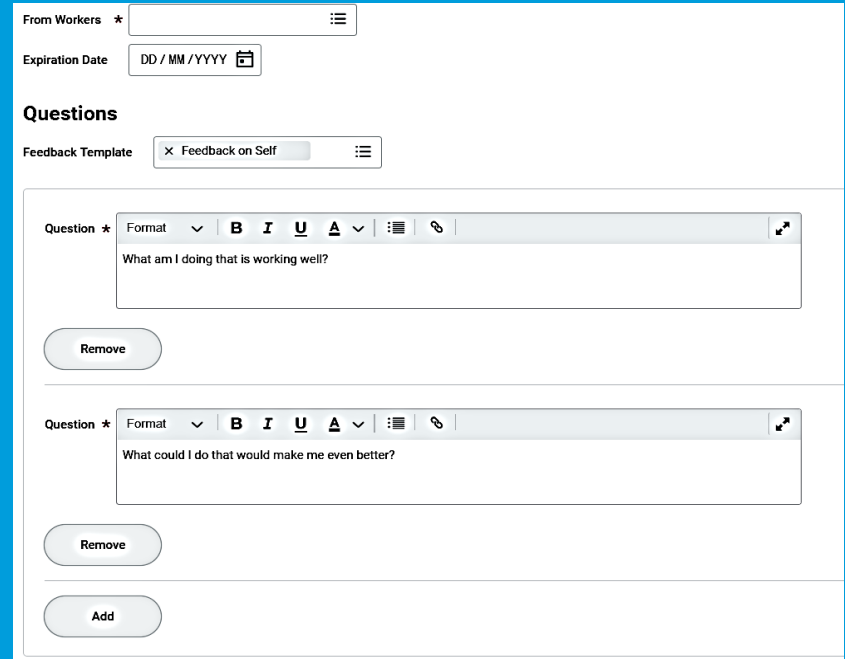
Feedback in Workday

We all thrive on constructive, timely and meaningful feedback or even just a simple “Well Done” or “Thank you” can go a long way. Workday allows all employees to request ‘feedback on self’, send and receive feedback in the Performance icon.

To request feedback on yourself click on the ‘Actions’ in the Performance icon and select ‘Get Feedback on Self’ choose the ‘worker’ you would like feedback from and complete the steps.

You can also send and receive feedback to colleagues individually or to a group.

To see the steps on how to request, receive or give feedback please visit [‘Workday support’](#) and in the ‘guide’ Performance select ‘Feedback’



The screenshot displays the Workday Feedback interface. At the top, there is a 'From Workers' dropdown menu with a star icon and a list icon. Below it is an 'Expiration Date' field with a calendar icon and the format 'DD / MM / YYYY'. The main section is titled 'Questions' and features a 'Feedback Template' dropdown menu with 'Feedback on Self' selected. Below this, there are two question input fields. Each field has a 'Question' label, a star icon, and a rich text editor toolbar with options for Format, Bold (B), Italic (I), Underline (U), Text Color (A), List, and Link. The first question is 'What am I doing that is working well?' and the second is 'What could I do that would make me even better?'. Each question field has a 'Remove' button below it. At the bottom of the form, there is an 'Add' button.

Help and support



For more information on Bupa's performance conversations including how to link behaviours against the values, please visit [People Place](#)

All information is available on People Place in [Workday support](#) section

If you'd like to develop your performance conversations skills, please go to Grow for courses and videos to support you.

For any support with the Performance icon on Workday please contact [People Place Help](#)

Employee guide





Guide to input your goals in the Performance icon in Workday

Start of year conversations with your manager are critical to setting clear expectations and goals for the year ahead. Once you have agreed your goals you can capture them in Workday. Every employee will receive a task to complete their own goals in Workday. Once the employee has added their goal this will generate a task to their manager to approve the goal agreed.

How do I input a Goal in Workday?

- ✓ You will see a task in your inbox '**UK Goal Setting 2020**' – click on it and it will take you to the Goal task
- ✓ Click on 'add'
- ✓ Type in your Goal 'title'
- ✓ Add the 'description' of the Goal
- ✓ In category choose 'performance' or 'development' Goal
- ✓ Supports – leave it blank
- ✓ Select a 'due date' for the Goal to be completed
- ✓ Add 'status' i.e. not started / in progress etc
- ✓ Click 'submit' goal and it will go to your manger for approval
- ✓ Click 'add' to add another goal

Track and amend your Goals

You can view your approved goals in the Performance 'Goals' icon. Only you can amend your goal, and once you have amended your goal you will click 'submit' the changes that will then go to your manager for approval.

Here are some recommended tips when thinking of your Goal:

- use the 4 steps in the Performance Conversation [Guide](#) on People Place - clear expectations and goal, talk honestly and often to your manager, develop and grow and review and look forwards
- don't just look at 'what you've done to get to your destination' look at 'how you did it' too because that's just as important and reminds us we should all be living our [Values](#) and [Bupa Code](#) everyday. And for more information visit [Workday support](#) and select 'Performance' where you can see all the steps.



Frequently asked questions

Question	Answer
I haven't received a task in my inbox on 21 January, who should I contact?	Your task should be in your inbox and if it isn't please contact the People Operations team via Service Now
How do I input a goal?	For individuals to input their goals see the guide on People Place Workday support and in the 'guide' if you go to the 'Performance' section it gives you step by step guidance. For managers please see Workday support 'Goals and feedback' 'Creating and cascading goals'.
I have submitted my goals to my manager but haven't received anything back, what should I do?	First check with your manager that they have 'approved' or 'sent back' your goals and if your manager has approved them and you still haven't received them please contact the People Operations team via Service Now
How do I amend a goal?	There is a guide on People Place called Workday support and in the guides if you go to the Performance section it gives to step by step guidance.
As a manager how do I cascade a goal?	The guide on People Place called Workday support and in the guide if you go to the Performance section it gives to step by step guidance.
What if I receive feedback and I don't agree with, what should I do?	If you receive feedback and don't agree with it in the first instance speak to your manager to talk about next steps. You can contact the People Operations team via Service Now who can remove this for you.