

# Adding Goals to Employees for Performance Management - Leaders

21 Steps [View most recent version](#) 

---

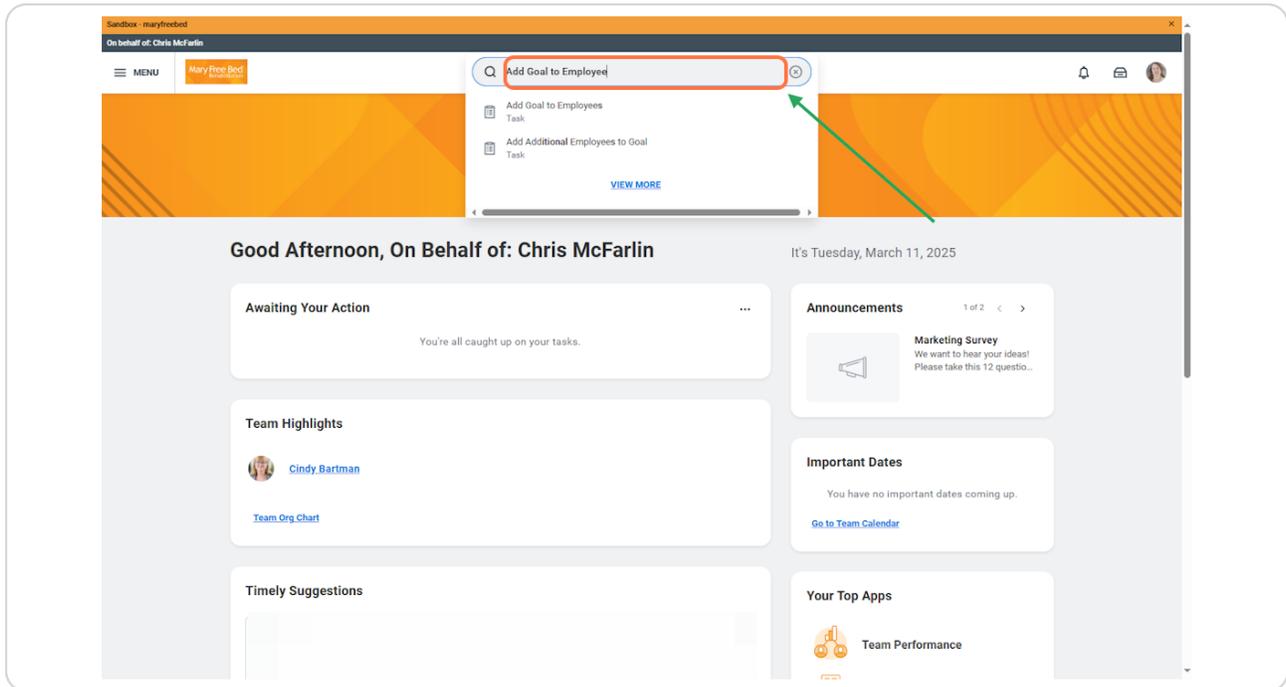
Created by  
Alex Drabik

Creation Date  
Mar 11, 2025

Last Updated  
Mar 11, 2025

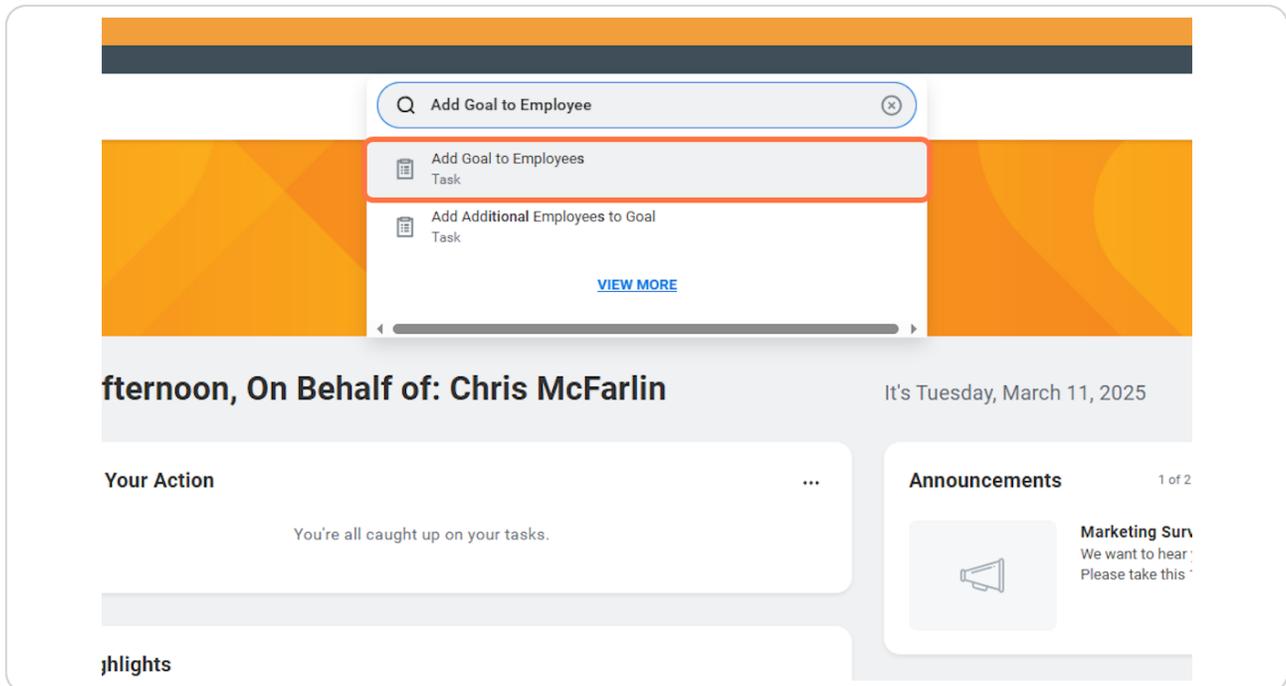
## STEP 1

**Type "Add Goal to Employee" into the search bar on your home page of Workday and select the appropriately named task**



## STEP 2

### Click on Add Goal to Employees...

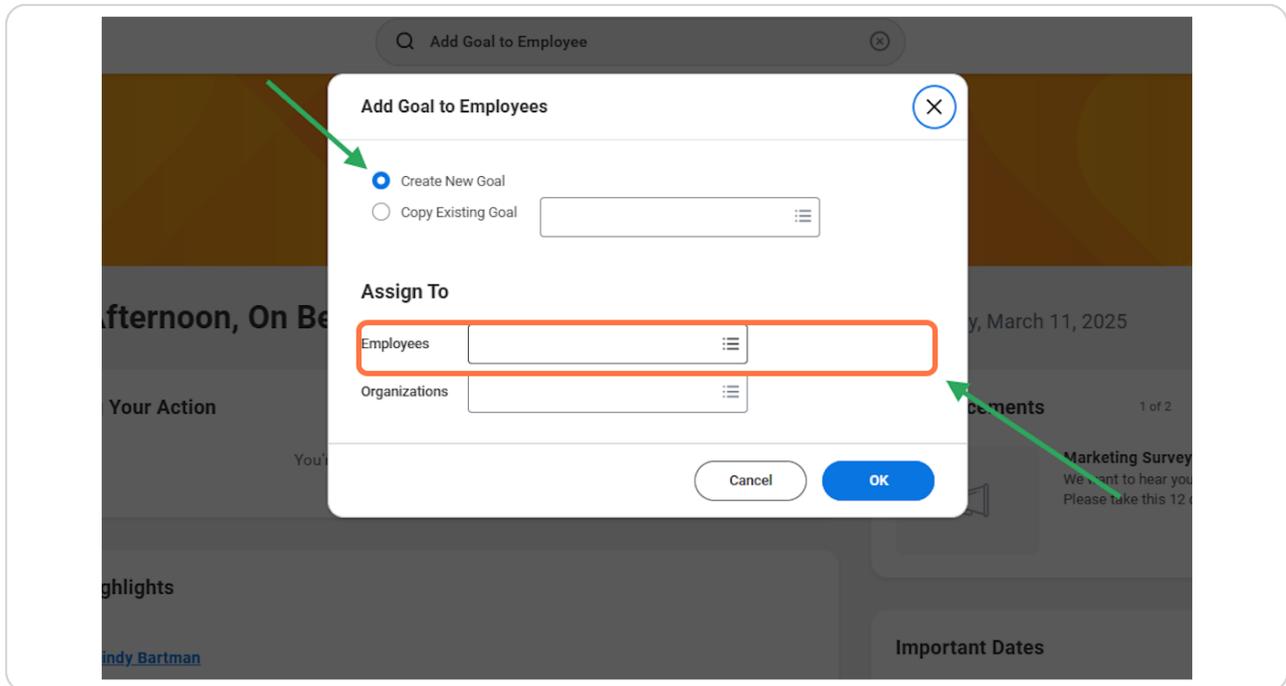


The screenshot displays a Microsoft Teams interface. At the top, a search bar contains the text "Add Goal to Employee". A dropdown menu is open, showing two search results: "Add Goal to Employees" (Task) and "Add Additional Employees to Goal" (Task). The first result is highlighted with a red border. Below the search bar, the interface shows the user's name "Afternoon, On Behalf of: Chris McFarlin" and the date "It's Tuesday, March 11, 2025". The "Your Action" section contains the text "You're all caught up on your tasks." and a "More" menu icon. The "Announcements" section shows "1 of 2" announcements, with the first one titled "Marketing Survey" and the text "We want to hear: Please take this".

### STEP 3

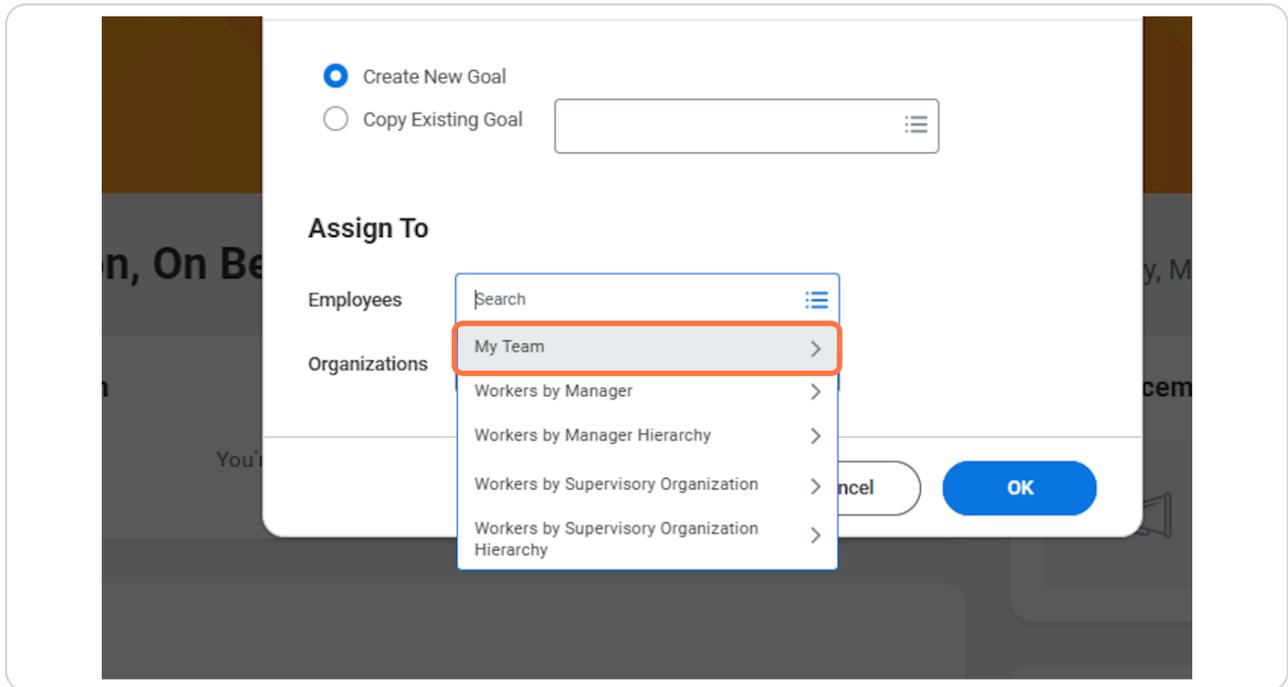
**CREATE A NEW GOAL:** Ensure the "Create New Goal" option is selected and then choose the employees you would like to add this goal for.

This is multi-select and can be added to multiple people at a time.



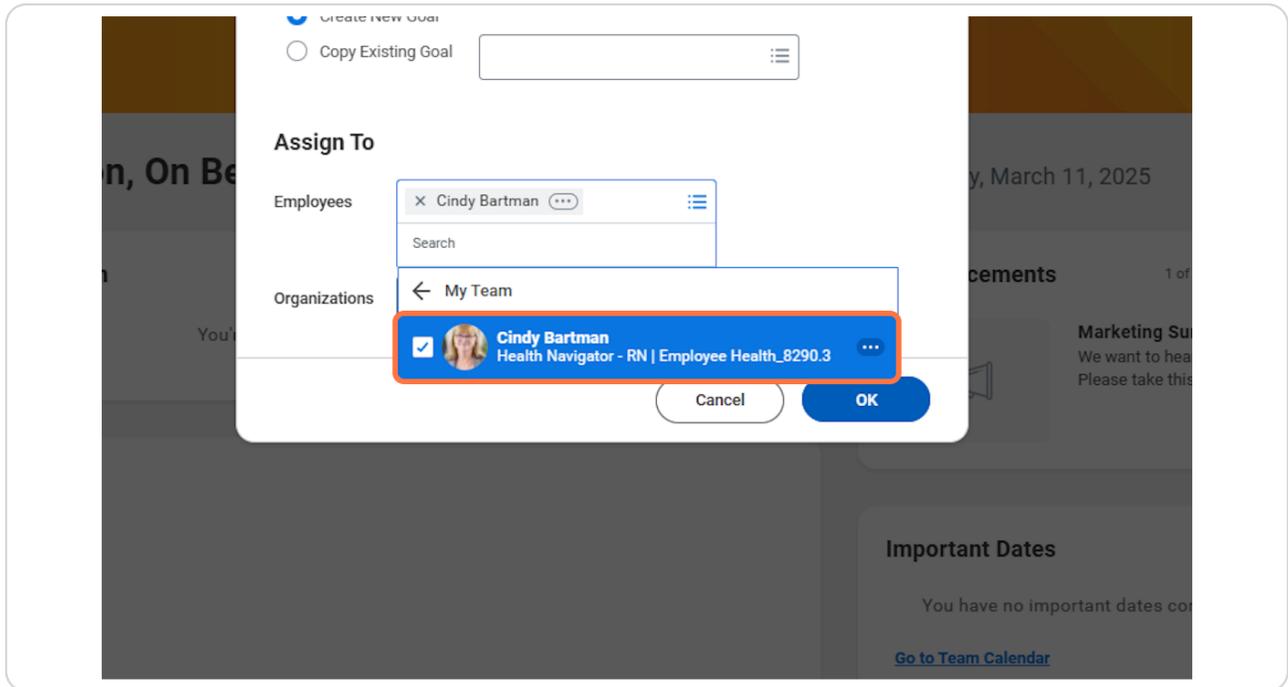
## STEP 4

Click on Submenu 'My Team' to view your direct reports or start typing names into the search bar to add the New Goal to their profile.



## STEP 5

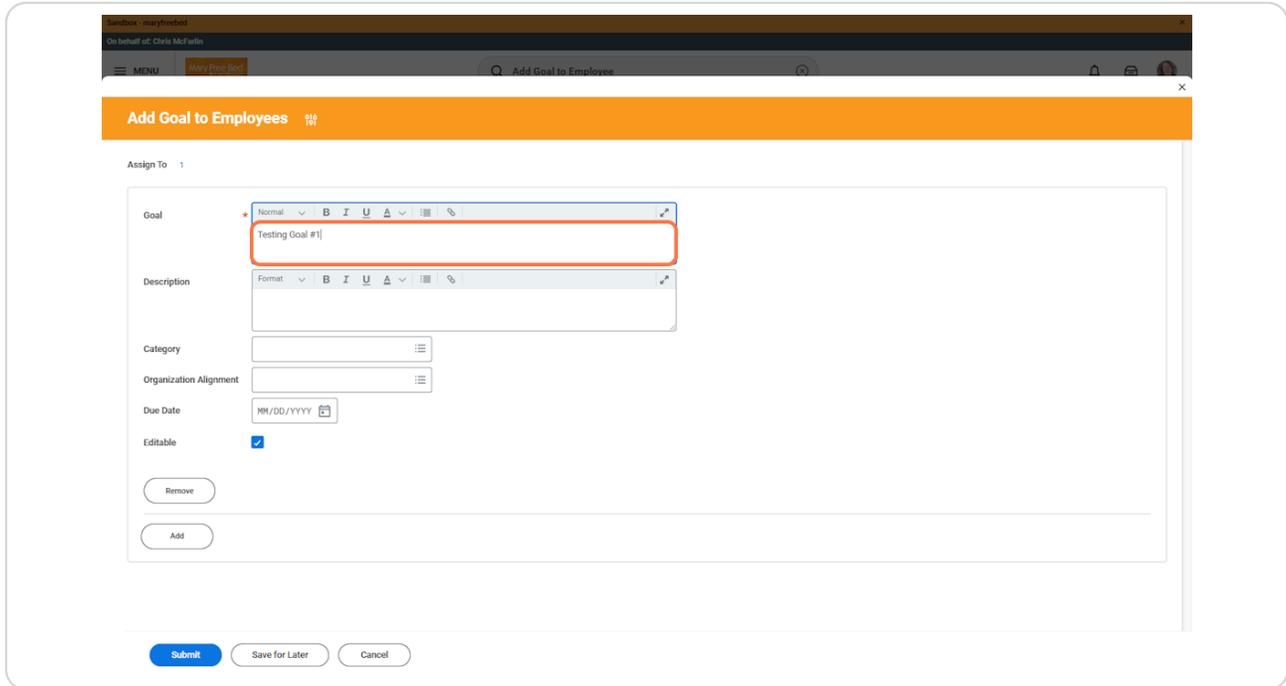
Select all employees you would like to add the New Goal to and then select OK.



## STEP 6

**Add in as much detail as possible for the goal, but the only required field is the free-text space labeled "Goal"**

Ensure the check box for "Editable" is selected so you as a leader, and the employee assigned the goal, can make updates or edits to this goal.



The screenshot shows a web browser window with the URL 'sandhu - myhrtools' and the page title 'Add Goal to Employees'. The page has an orange header bar with the text 'Add Goal to Employees' and a hamburger menu icon. Below the header, there is a section titled 'Assign To 1'. The main form area contains several fields:

- Goal:** A text input field with a red border containing the text 'Testing Goal #1'. Above the input is a rich text editor toolbar with options for Normal, Bold (B), Italic (I), Underline (U), Text Color (A), and Bulleted List.
- Description:** A text input field with a rich text editor toolbar above it, similar to the 'Goal' field.
- Category:** A dropdown menu.
- Organization Alignment:** A dropdown menu.
- Due Date:** A date input field with a calendar icon and the placeholder text 'MM/DD/YYYY'.
- Editable:** A checkbox that is checked.

At the bottom of the form, there are two buttons: 'Remove' and 'Add'. Below the form, there are three buttons: 'Submit' (highlighted in blue), 'Save for Later', and 'Cancel'.

## STEP 7

Click on **Category** to select the appropriate pillar (Finance, People, Quality, Service and Growth) to associate the goal with.

The screenshot shows a web browser window with the URL 'Add Goal to Employee'. The page title is 'Add Goal to Employees'. Below the title, there is a section labeled 'Assign To 1'. The main form contains the following fields and controls:

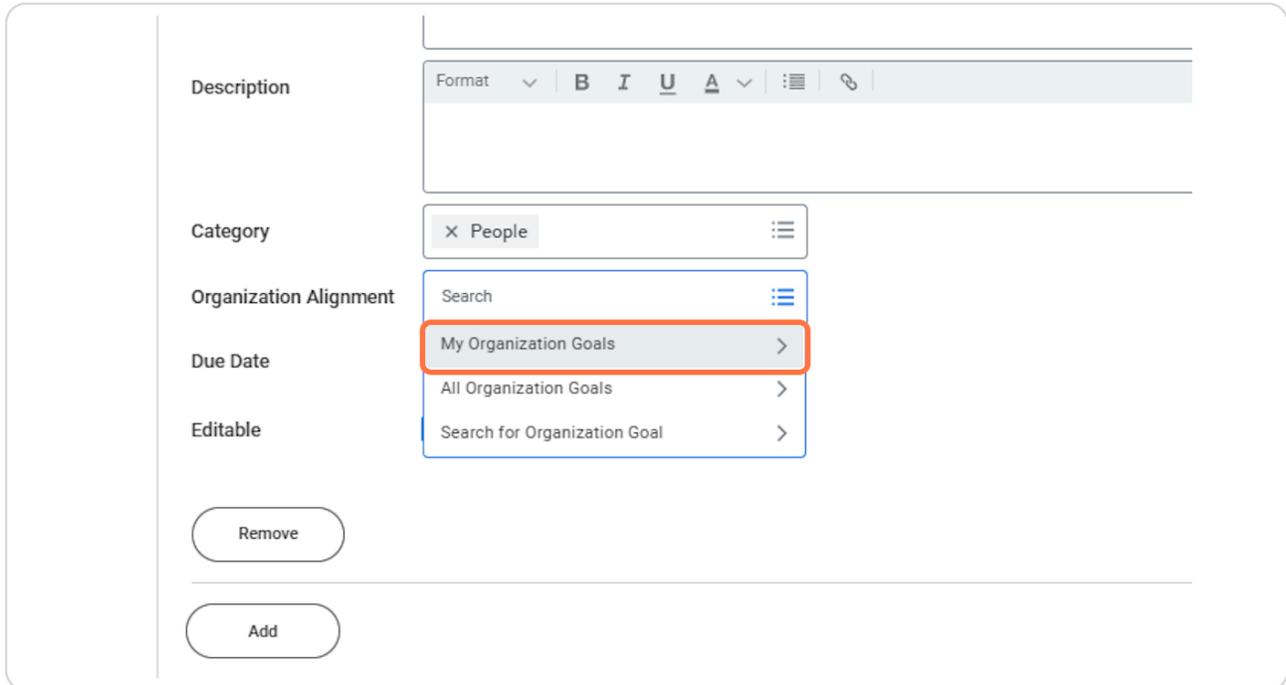
- Goal:** A text input field containing 'Testing Goal #1' with a rich text editor toolbar above it.
- Description:** A text input field with a rich text editor toolbar above it.
- Category:** A dropdown menu with a list icon, highlighted by an orange border.
- Organization Alignment:** A dropdown menu with a list icon.
- Due Date:** A date picker field with the format 'MM/DD/YYYY'.
- Editable:** A checkbox that is checked.
- Remove:** A button.
- Add:** A button.

At the bottom of the form, there are three buttons: 'Submit' (highlighted in blue), 'Save for Later', and 'Cancel'.

## STEP 8

You can also align a personal/departmental goal with an organization goal, but using the "Organization Alignment" menu and viewing "My Organization Goals"

This is not a required field.



The screenshot displays a goal management interface with the following fields and options:

- Description:** A text area with a rich text editor toolbar (Format, Bold, Italic, Underline, Color, Bulleted List, Link).
- Category:** A dropdown menu with "People" selected.
- Organization Alignment:** A dropdown menu with "My Organization Goals" selected and highlighted by a red box. Other options include "All Organization Goals" and "Search for Organization Goal".
- Due Date:** A text field.
- Editable:** A text field.
- Buttons:** "Remove" and "Add" buttons.

## STEP 9

Once the goal is fully filled out, you will "Submit" the task.

NOTE: you can add multiple goals at a time - see the "Add" button where you can do multiple goals in one page and assign to multiple employees.

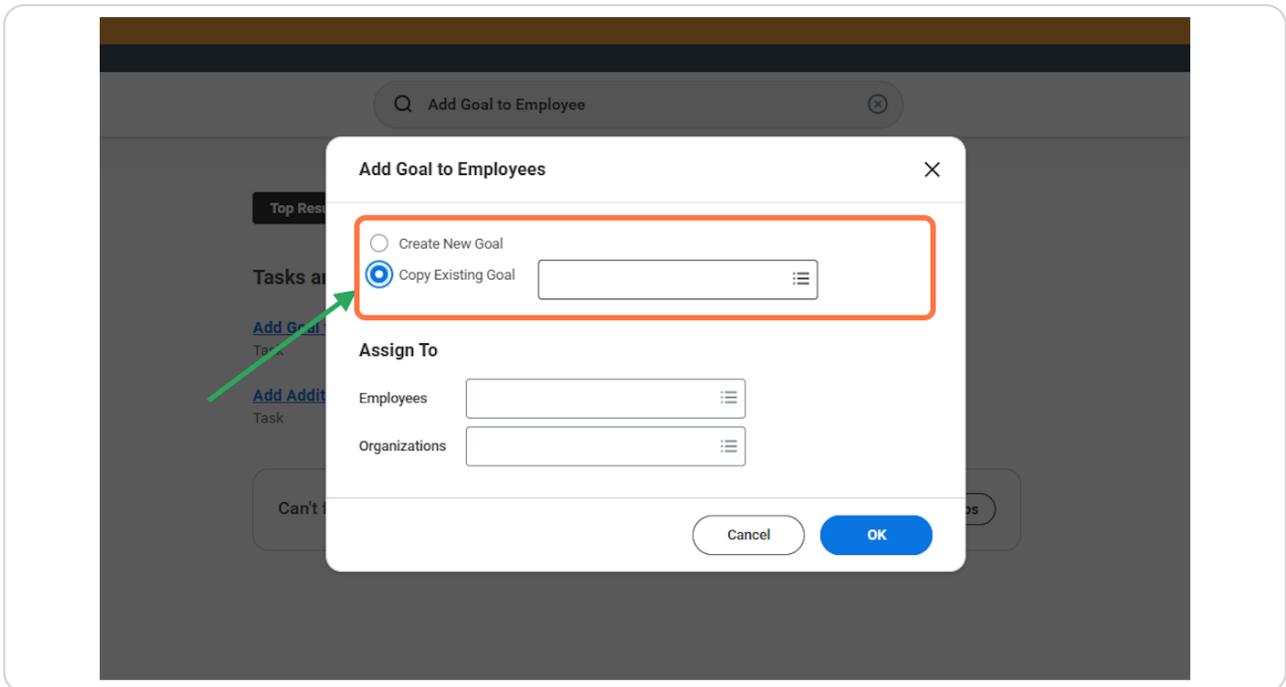
The screenshot displays a web interface titled "Add Goal to Employees". At the top, there is a navigation bar with a "MENU" button and a "Add Goal to Employees" button. Below this, a header bar contains the text "Add Goal to Employees" and a small icon. The main content area is labeled "Assign To 1" and contains a form with the following fields:

- Goal:** A text input field containing "Testing Goal #1".
- Description:** A text input field.
- Category:** A dropdown menu with "People" selected.
- Organization Alignment:** A dropdown menu.
- Due Date:** A date input field with the placeholder "MM/DD/YYYY".
- Editable:** A checkbox that is checked.

Below the form, there are three buttons: "Remove", "Add", and "Submit". The "Submit" button is highlighted with a red border. At the bottom of the interface, there are three buttons: "Submit", "Save for Later", and "Cancel".

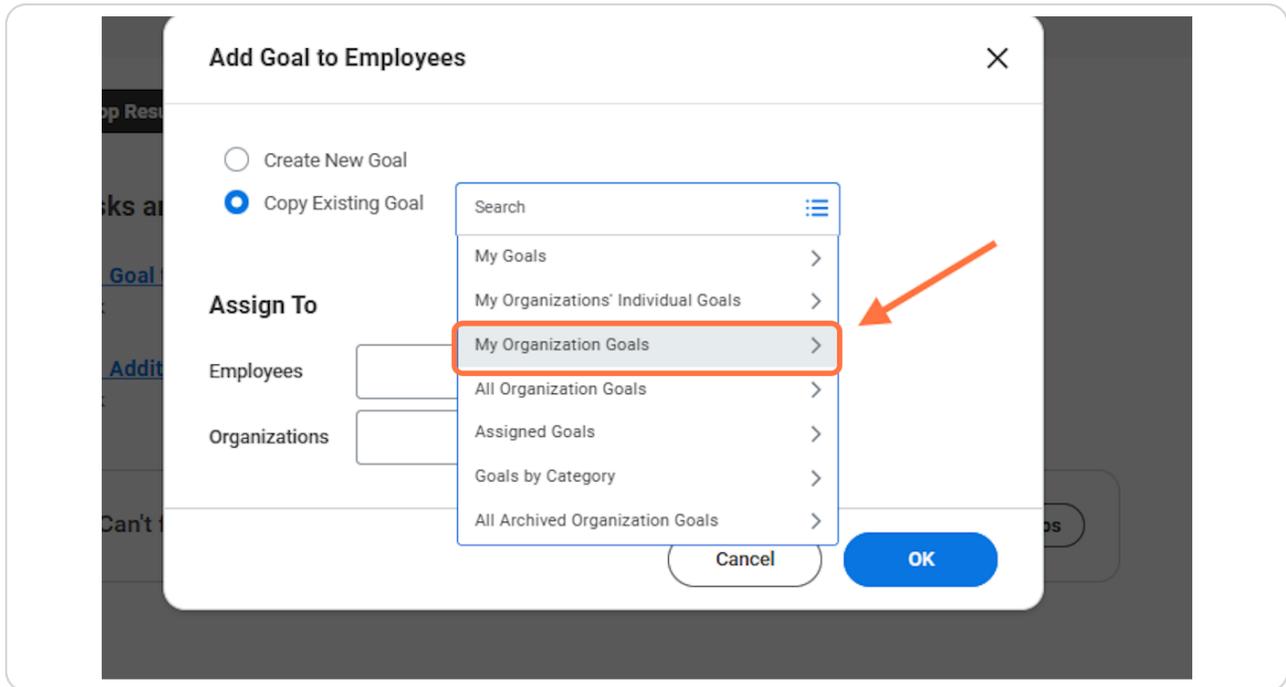
STEP 10

**COPY EXISTING GOAL:** Instead of creating a goal, you could cascade the organizational goals to employees by selecting the "Copy Existing Goal" option when Adding Goal to Employees.



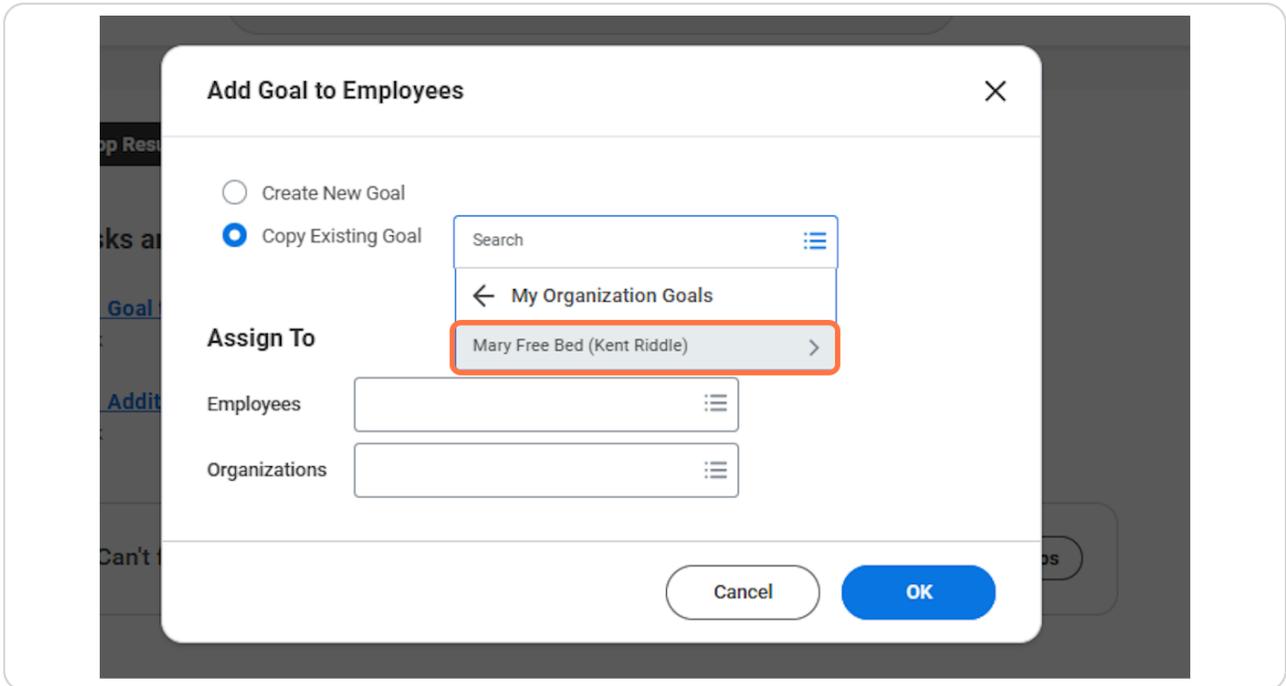
## STEP 11

In the menu, select "My Organization Goals" and you can multi-select those to cascade to your team.



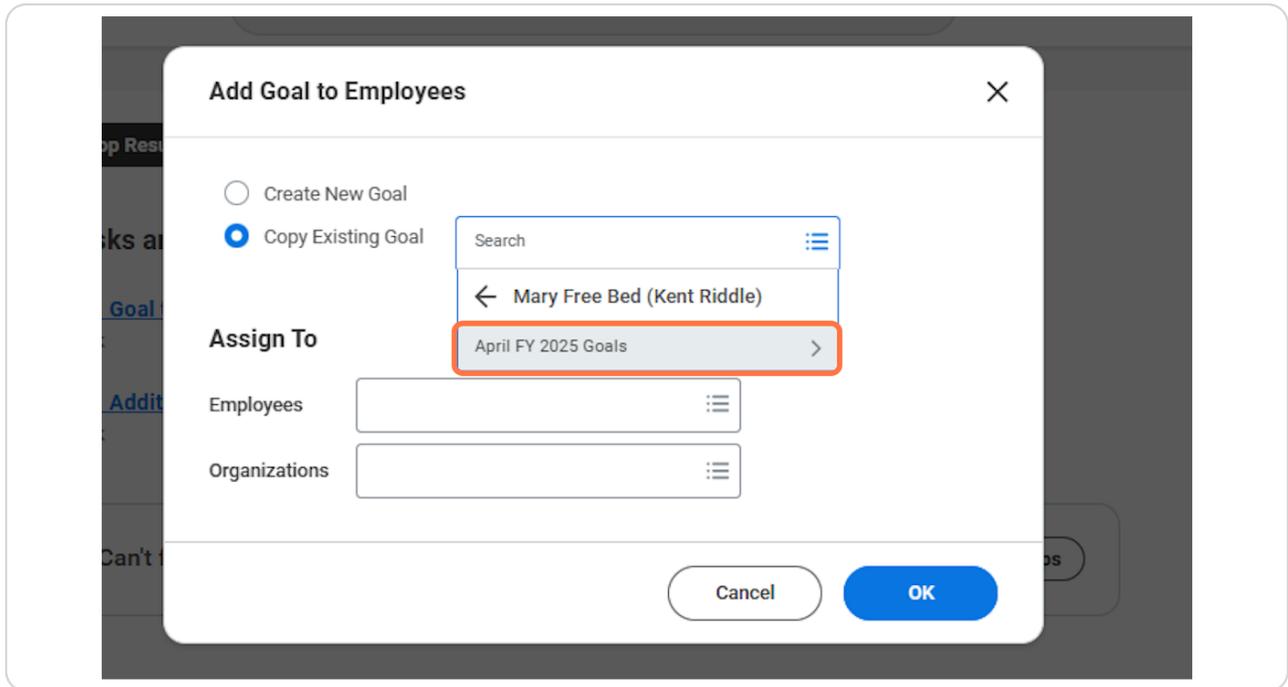
STEP 12

Click on Submenu Mary Free Bed (Kent Riddle)



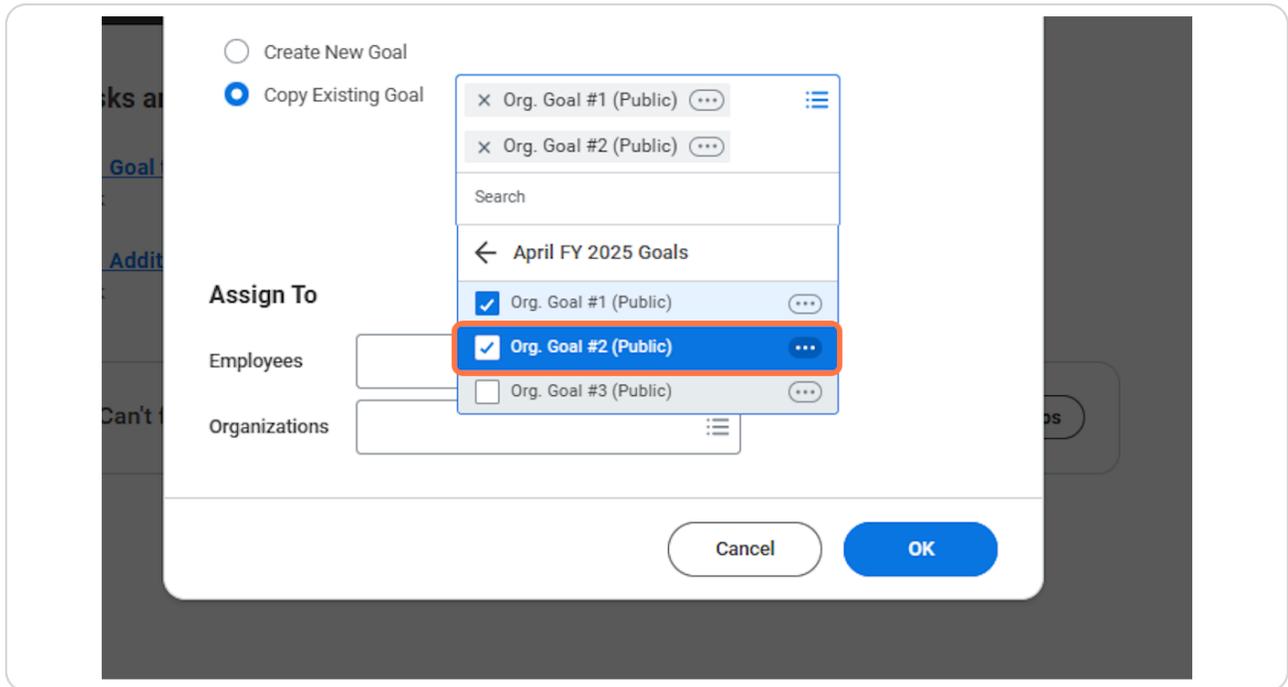
STEP 13

Click on Submenu April FY 2025 Goals (this name will vary depending on the goals and fiscal year your organization falls in to)



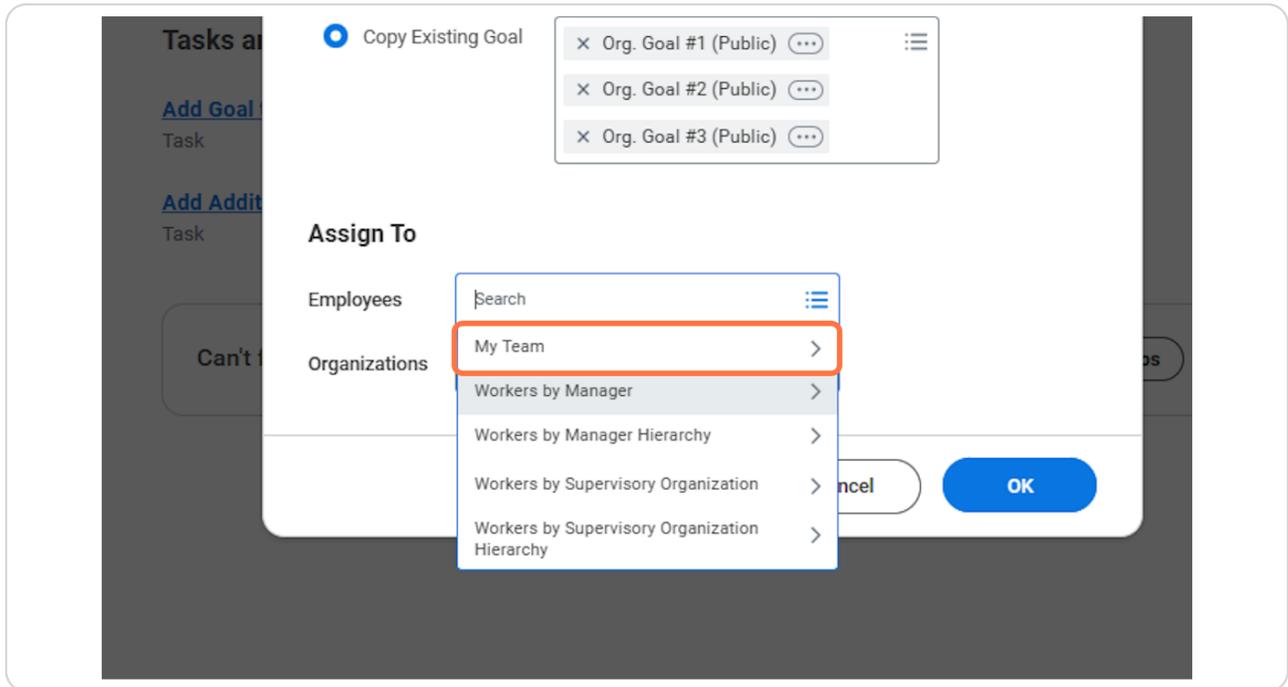
STEP 14

Multi-Select goals you would like to include and then select the "Employees" box to select who on your team to cascade to.



STEP 15

Click on Employees and then select "My Team" for your direct reports, or start typing in names to add employees and once done, select OK.



## STEP 16

Click on **Category** to select the appropriate pillar (Finance, People, Quality, Service and Growth) to associate each organizational goal with.

The screenshot displays a web interface for adding goals to employees. At the top, there is a navigation bar with a menu icon, a 'New Plan Goal' button, and the page title 'Add Goal to Employees'. Below this is a prominent orange header with the text 'Add Goal to Employees' and a list icon. The main content area is titled 'Assign To 1' and contains a form for adding a goal. The form includes several fields: 'Goal' (containing 'Org. Goal #1'), 'Description' (containing 'testing'), 'Category' (highlighted with a red rectangle), 'Organization Alignment' (set to 'X Org. Goal #1 (Public)'), 'Due Date' (with a date picker), and 'Editable' (checked). A 'Remove' button is located below the first goal entry. Below the form, there is a second goal entry with 'Goal' 'Org. Goal #3' and 'Description' 'testing'. At the bottom of the form, there are three buttons: 'Submit', 'Save for Later', and 'Cancel'.

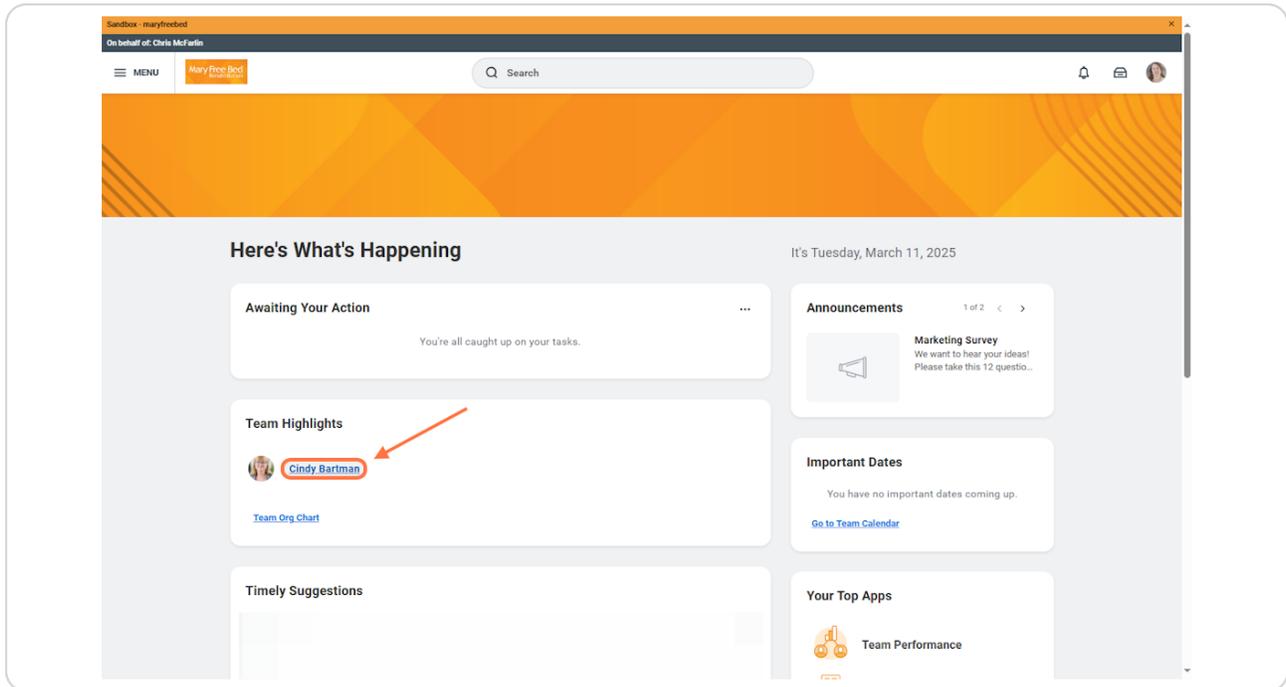
## STEP 17

Click on Submit at the bottom of the screen to send goals to employees profiles.

The screenshot displays a user interface for managing goals. It features two goal cards. Each card includes a 'Category' dropdown, an 'Organization Alignment' dropdown (e.g., 'Org. Goal #3 (Public)'), a 'Due Date' field with a calendar icon, and an 'Editable' checkbox. Below each card is a 'Remove' button. The first card's 'Goal' field contains 'Org. Goal #2' and its 'Description' field contains 'testing'. The second card's 'Category' is 'Growth', its 'Organization Alignment' is 'Org. Goal #2 (Public)', and its 'Due Date' is also present. At the bottom of the interface, there are three buttons: 'Submit' (highlighted with a red arrow), 'Save for Later', and 'Cancel'.

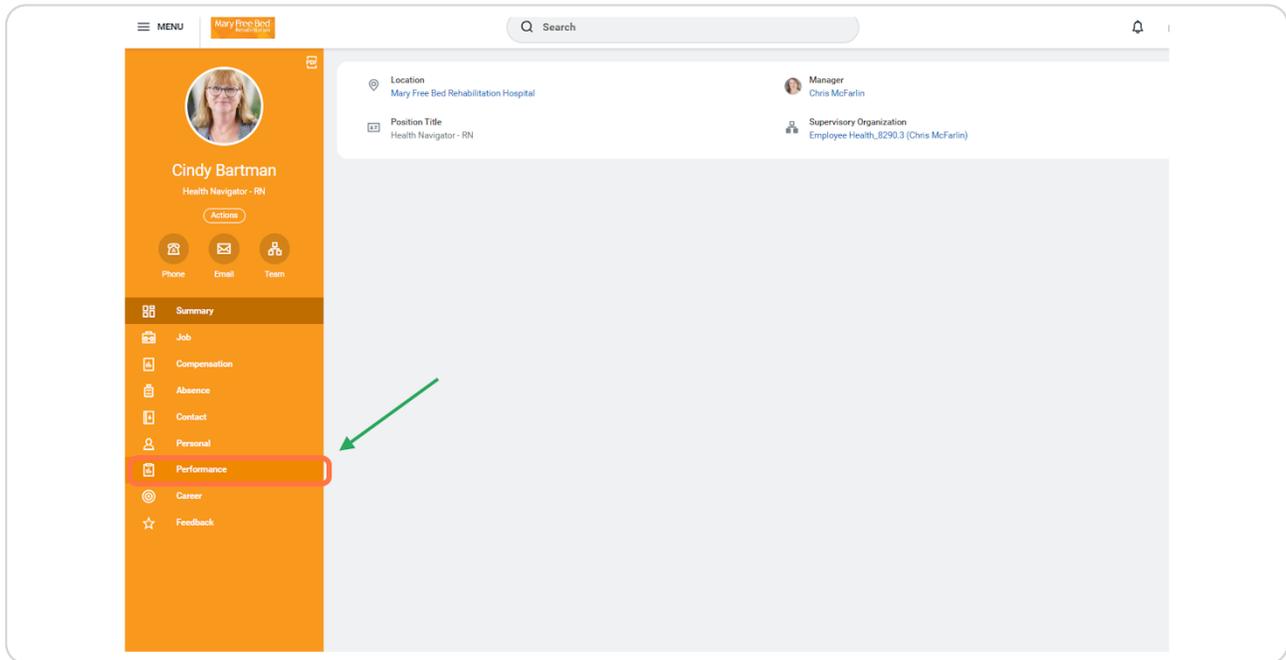
## STEP 18

To find goals on employees' profile, select a member of your team on the homepage of Workday.



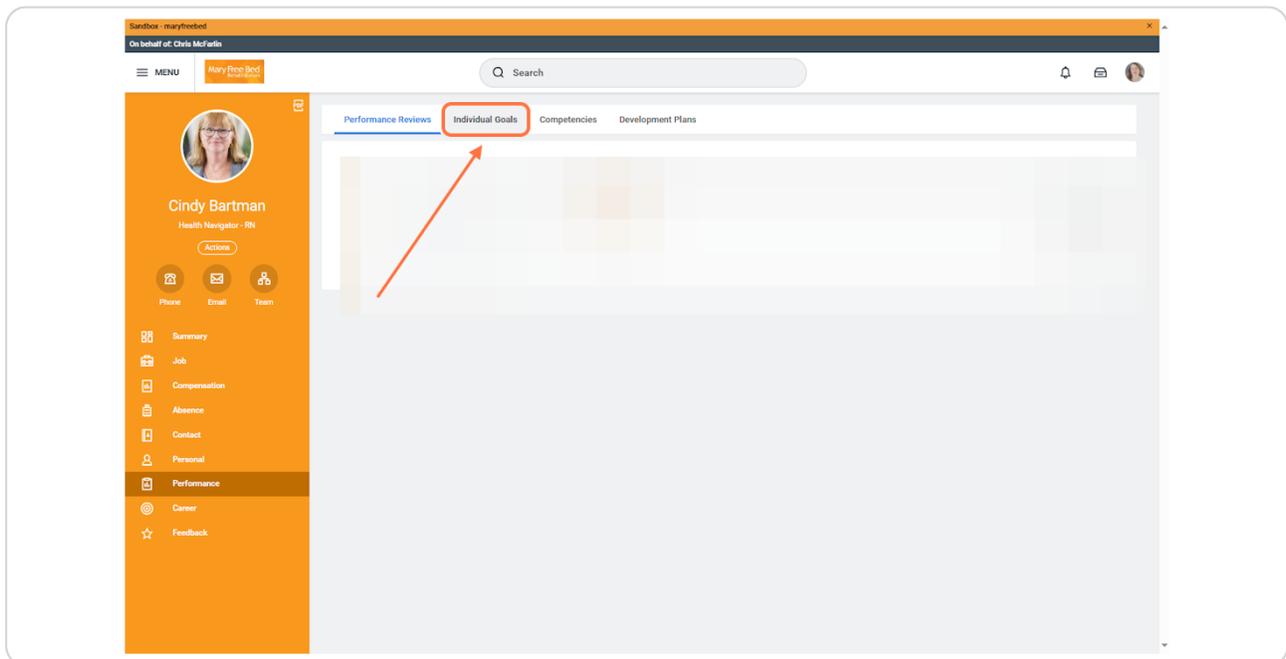
## STEP 19

Click on Performance tab on the left-hand side menu of the employee profile.



## STEP 20

Click on Individual Goals



## STEP 21

Any goals that have been sent by the leader will appear on this screen, and you can view each by selecting goals from the menu.

The screenshot displays a user interface for managing goals. On the left, a list of four items is shown, with the first item selected. On the right, the details for the selected goal are displayed. Below the details, a table for milestones is shown, which is currently empty.

**4 items** Sort By: ▾

- Org. Goal #1 Finance
- Org. Goal #2 Growth
- Org. Goal #3
- Testing Goal #1 People

**View Goal**

Goal ★ Org. Goal #1

Description testing

Category Finance

Status (empty)

Organization Alignment [Org. Goal #1 \(Public\)](#)

Due Date (empty)

Associated Reviews (empty)

Milestones 0 items

*Milestone	Due Date	Status
No items available.		