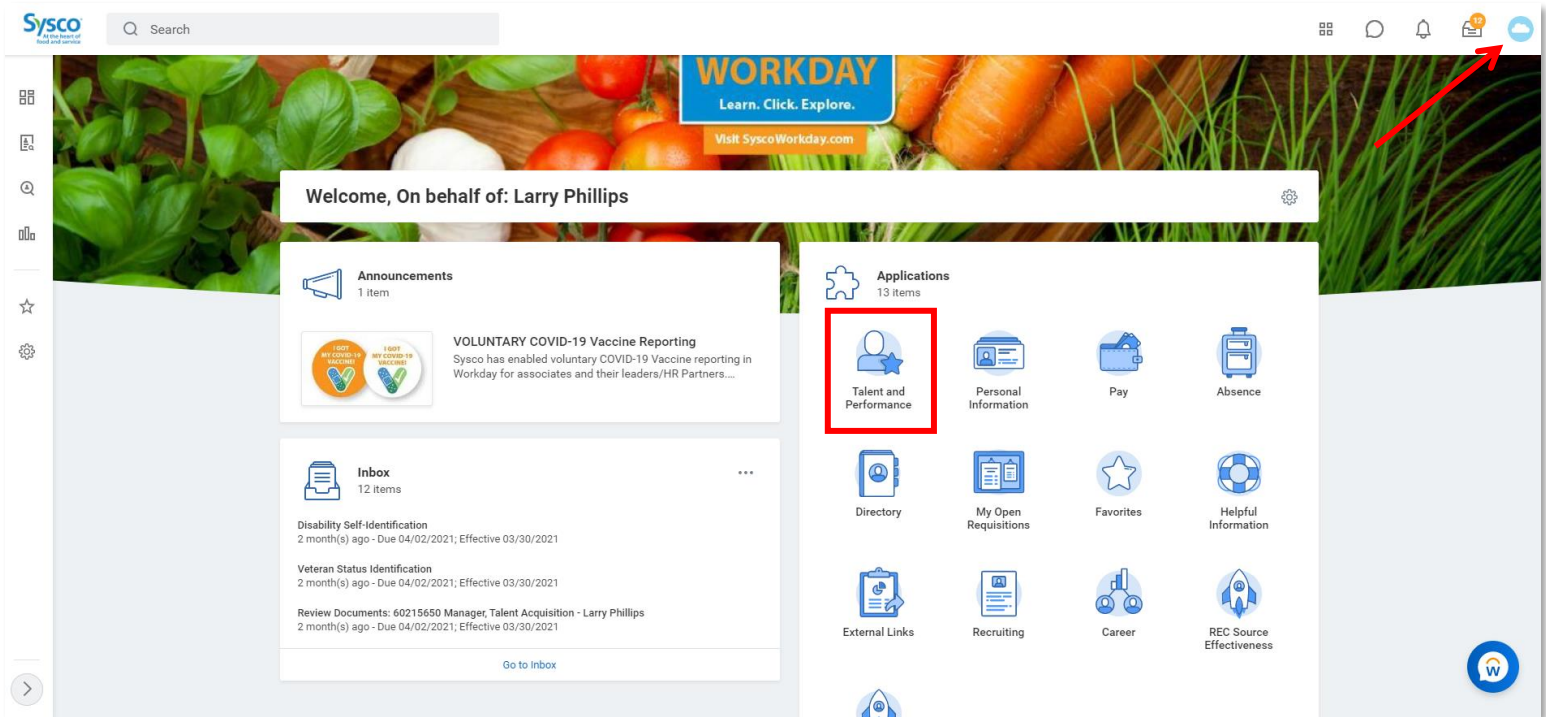


Associate Goal Setting Guide – Ad Hoc Goals

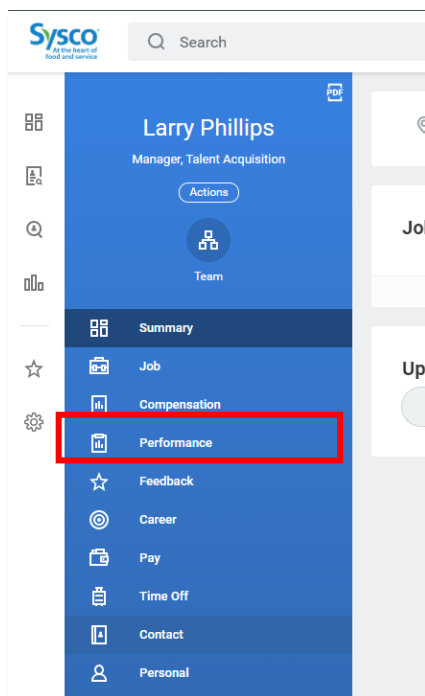
All associates with access to Workday will input their CMP goals into the system beginning FY22. Most associates will have an Inbox task delivered to them. In the case that they don't goals can be added Ad Hoc. Follow the steps in this guide to add an Ad Hoc goal.

Workday Homepage



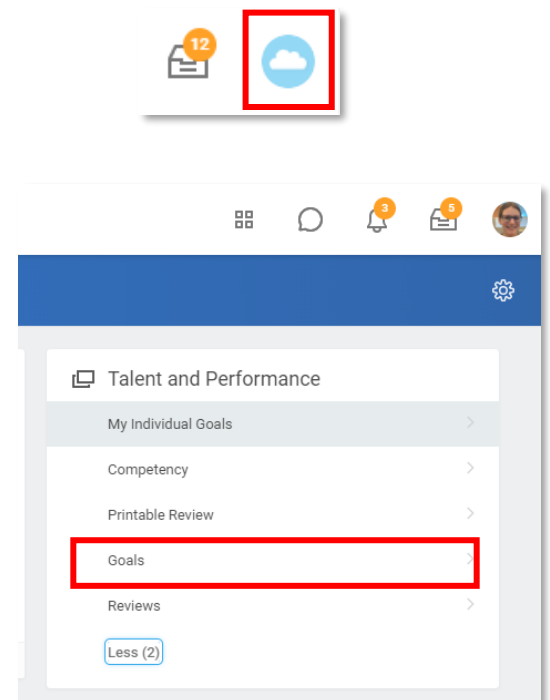
To input your goals:

1. Access Talent and Performance, you can select your **Profile icon** (Displays as an image or a blue circle with white cloud), or the **Talent and Performance tile**



➤ If going through your profile, select the **Performance tab** on the middle-left side of your profile page

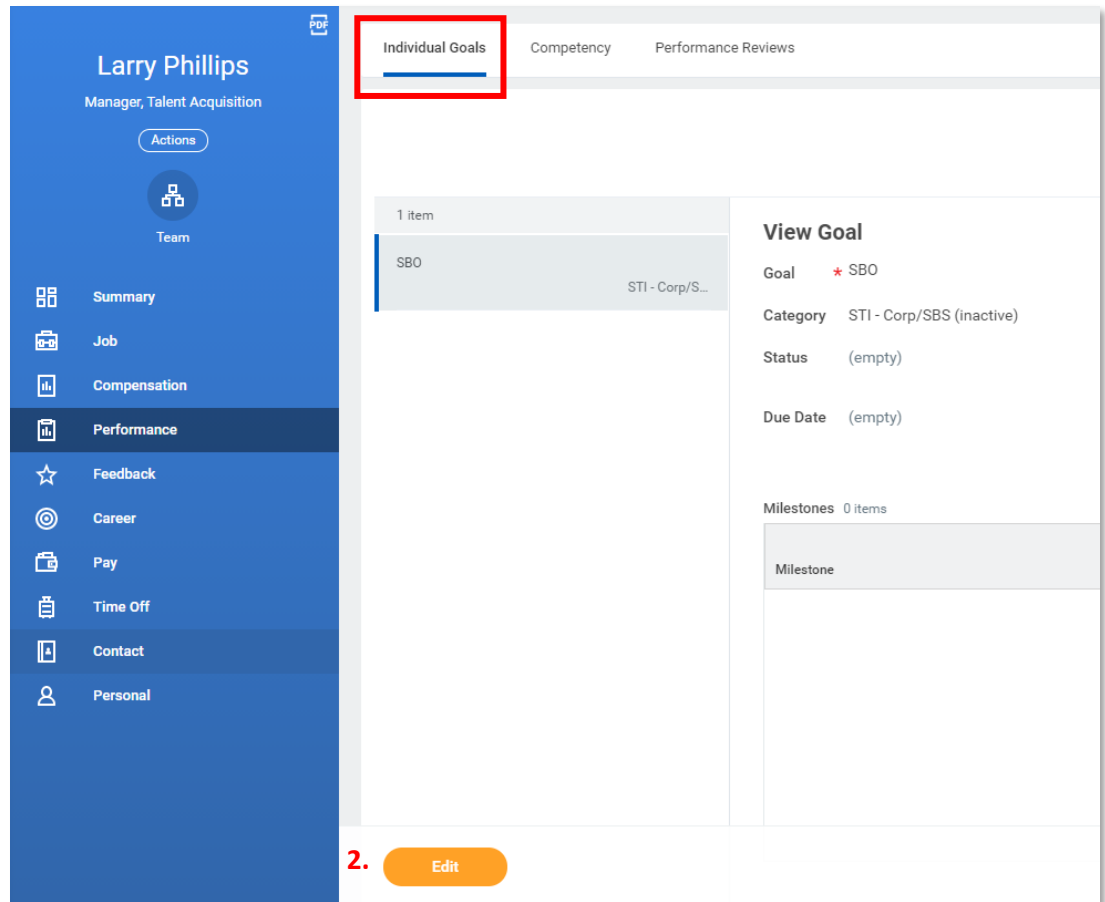
➤ If going through the Talent and Performance tile, select the **Goals tab** from the middle-right side of the Talent and Performance page



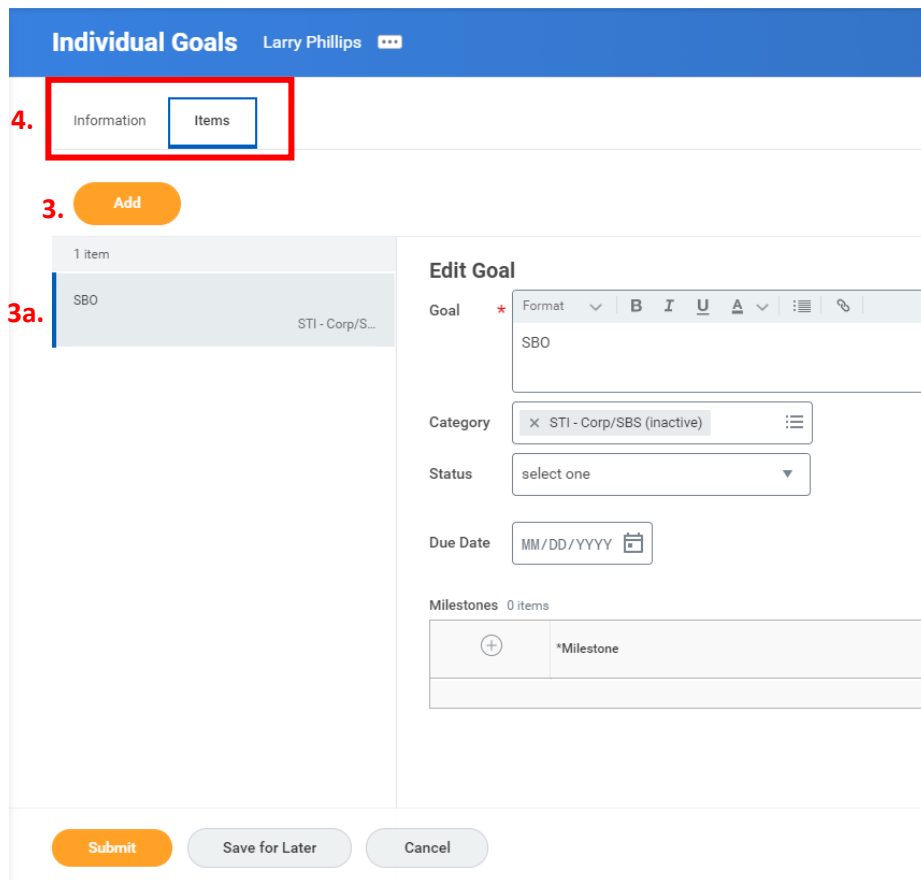
Associate Goal Setting Guide – Ad Hoc Goals

2. Add/create a goal by selecting **Individual Goals** tab from the top ribbon (Workday defaults to Individual Goals)
> Select **Edit**

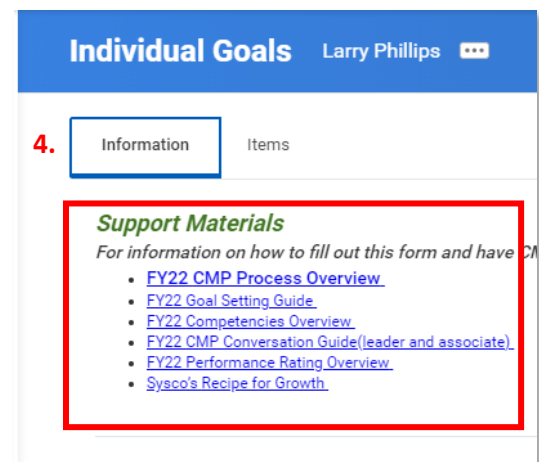
3. Under **Individual Goals**, select to **Add** a goal at the top. [See image below]
 - a. Select a specific goal from the side to edit.



4. In your Individual Goals



section, the top has two tabs, **Information**, and **Items** – Workday defaults to Items, when you select the Information tab you find links to support materials.



Support Materials

For information on how to fill out this form and have CM

- [FY22 CMP Process Overview](#)
- [FY22 Goal Setting Guide](#)
- [FY22 Competencies Overview](#)
- [FY22 CMP Conversation Guide\(leader and associate\)](#)
- [FY22 Performance Rating Overview](#)
- [Sysco's Recipe for Growth](#)

Associate Goal Setting Guide – Ad Hoc Goals

5. Fill in all fields: **Goal**, **Category**, **Status**, **Due Date** (typically the end of the FY), and **Milestones** (if available).

The screenshot shows the 'Individual Goals' interface for Larry Phillips. The 'Edit Goal' form is open, displaying the following fields:

- Goal:** Simple goal here
- Category:** Recipe for Growth - Customer Teams
- Status:** Not Started
- Due Date:** 06/30/2022
- Milestones:** 2 items (Task 2, Task 1)

A dropdown menu for Status is open, showing the following options:

- select one
- select one
- Not Started
- In Progress
- Cancelled
- Completed

A list of categories is also visible, including:

- Financial Plan/Scorecard
- Leadership - Purpose & Diversity EI
- Recipe for Growth - Customer Teams
- Recipe for Growth - Digital
- Recipe for Growth - Future Horizons
- Recipe for Growth - Products and Solutions
- Recipe for Growth - Supply Chain

6. When done, select **Submit** to send a notification to your manager to review and approve. You can select **Save for Later** if your goal information is incomplete or select **Cancel** if you would like to discard the goal creation/changes.

The screenshot shows the bottom of the 'Edit Goal' form with three buttons:

- Submit** (highlighted with a red box)
- Save for Later**
- Cancel**

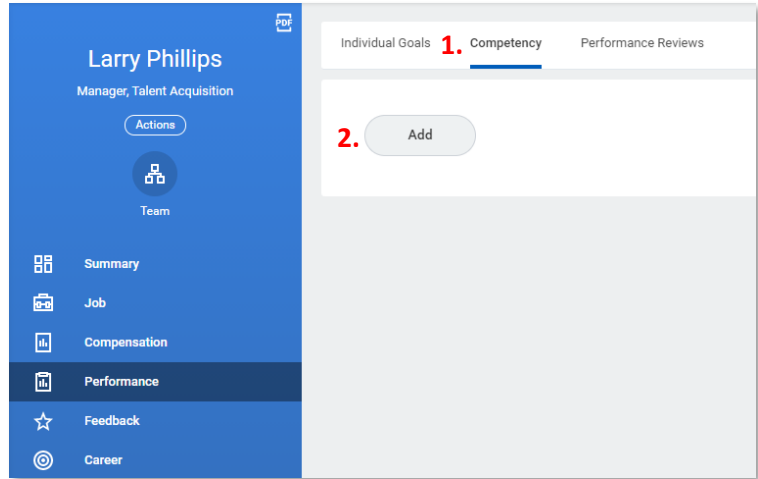
7. When you select Submit, you will see a pop-up notifying you that it has been sent to your manager for review.

The screenshot shows a pop-up notification titled "You have submitted". The message reads:

Up Next: Rafael James, Review Goals
[View Details](#)

Competencies/Skills:

1. On the Performance page, select the **Competency** tab from the top.
2. Select **Add** to create a new Competency/Development Item.



3. Fill in all needed information: **Competency** (or Skill), **Additional Information** (From, To, How), **Status** (Unskilled, Skilled, Talented, Overused), and any additional **Details**. (To add comments, tasks, or events select Details.)
4. When all information has been put in, Select the **Check Mark** in the top right corner.

A screenshot of a form for adding a competency. The form has a red border. It includes a 'Competency' field with 'Excel Advanced' entered. Below it is an 'Additional Information' section with a rich text editor and fields for 'From:', 'To:', and 'How:'. The 'Status' field is set to 'Skilled'. A 'Details' section is collapsed. A red arrow points from the 'Details' label to the expanded details section in the next image. In the top right corner, there is a red '4.', a search icon, and a checkmark icon. An 'Add' button is at the bottom left.

5. To submit, select the **Add** button
 - a. Select the **Pencil icon** to edit.

A screenshot of the expanded 'Details' section of the form. It contains fields for 'Start Date' and 'Completion Date', both with date pickers. Below these is a 'Status Note' text area. At the bottom, it shows 'Last Updated By: Larry Phillips' and 'Last Updated: 06/02/2021 01:17 PM', along with 'Created by: Larry Phillips'. A red box highlights this entire section.A screenshot of the completed form. The 'Competency' field contains 'Excel Advanced'. The 'Status' field is 'Skilled'. At the bottom left, the 'Add' button is highlighted with a red '5.'. In the top right corner, there is a red '5a.' and a pencil icon.

Associate Goal Setting Guide – Ad Hoc Goals

Performance Reviews:

On the Performance page, the **Performance Review tab** at the top shows all past performance reviews input into the system.

The screenshot shows a user interface for Larry Phillips, Manager, Talent Acquisition. The 'Performance Reviews' tab is selected and highlighted with a red box. The interface displays a table of completed performance reviews. A red arrow points to the 'Job' menu item in the left sidebar.

Review	Review Period		View	Create New PDF
	Start Date	End Date		
Sysco FY21 2H S80 Review: Larry Phillips	12/27/2020	07/03/2021		