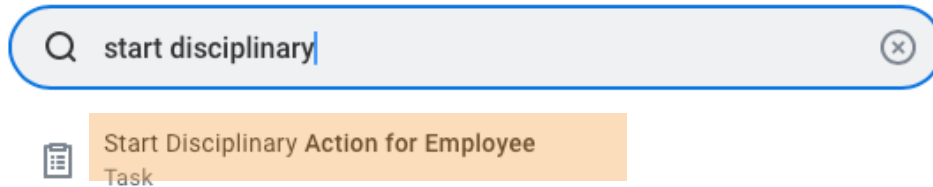# Performance Coaching Documentation

1. From your Workday Homepage, type **Start Disciplinary** in the search box.
2. Click Start **Disciplinary Action for Employee**.



> *Important:* Workday has categorized Coaching as discipline; however, it is critical to know that it is **NOT** discipline. Coaching is a performance tool to document coaching conversations with team members.

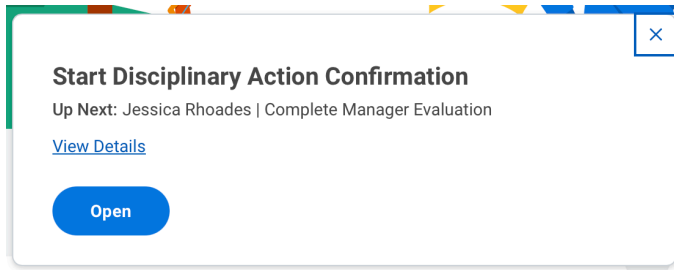3. Type the member's name.



4. Select **Type > Coaching**

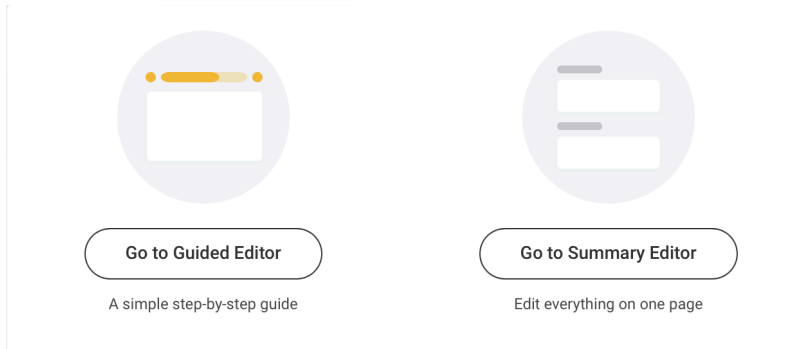5. Select **Reason for Employee's Country > United States of America > Disciplinary Action Reasons**, then select your reason
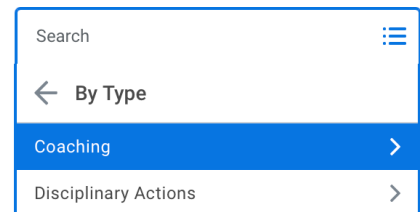
6. **Period Start and End Date** should be the same day that the coaching took place

7. Click Submit

**Start Disciplinary Action Confirmation**

Up Next: Jessica Rhoades | Complete Manager Evaluation

View Details

Open

8. Click Open

Go to Guided Editor

A simple step-by-step guide

Go to Summary Editor

Edit everything on one page

9. Choose between **Guided Editor** and **Summary Editor.**

10. Fill out the **See**, **Do**, and **Review** Sections.

**Note**: Be as specific as possible when you are filling this out.  Include -

- Who has the performance gap
- How do you know that it is a gap?
- When do you expect the team member to improve
- What should you and the team member do to close the gap?

**More specifically** -

See:

      State the expectation

Address the expectation of following company policy or performance gap.

      State the current Performance Gap

Include any behaviors that can be seen or heard which need to be corrected.

Do:

      What specifically does the team member need to do to close the

behavior or performance gap?

2

Include the action steps you and the team member discussed in your conversation. Be specific.

Review:

**Expected date the behavior or performance gap should be met.**
Decide together when the action steps should be completed and both of you will review how performance is trending. Typically a few days is enough.

**What specifically will leadership do to help the team member close the performance gap?**
Make sure to include action steps that you will use to help your team member