

ANNUAL PERFORMANCE REVIEWS: RETAIL LEADERSHIP

The annual performance review cycle is a collaborative process between the manager, the team member, and an (optional) additional manager.

The manager and an additional manager (optional) will complete the evaluation process in Workday to determine a numerical score that indicates a team member's performance based on established leadership competencies and organizational goals. See the graphic below for details about *Leadership Competencies*.

Leadership Competencies

The Leadership Competencies identify nine skills and behaviors that all Leaders should be skillful in. These competencies serve as a guide for leading people, leading performance and leading the business. All leaders are rated on their level of proficiency for each competency.

Evaluate performance using the rating scale below:

- **1-Below Expectations:** Does not consistently perform to established expectations. Needs improvement to be successful.
- **2-Meets Expectations:** Performance is generally successful and has opportunity to grow in a few areas.
- **3-Exceeds Expectations:** Consistently demonstrates high performance and serves as a role model to others.

1. The manager starts the review process in Workday.

2. The manager skips the request for additional manager feedback **OR** requests additional manager feedback and the additional manager submits their comments.

4. The manager(s) and the team member meet to discuss the team member's review, and the team member formally acknowledges their evaluation in Workday.

3. The manager completes their evaluation and schedules a meeting with the team member to discuss their review.

5. The manager submits their final acknowledgment of the team member's evaluation, concluding the performance review process.

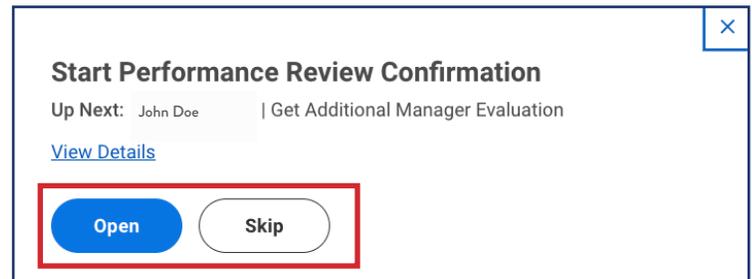
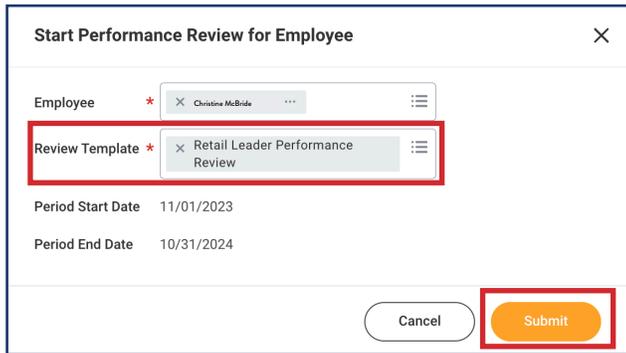
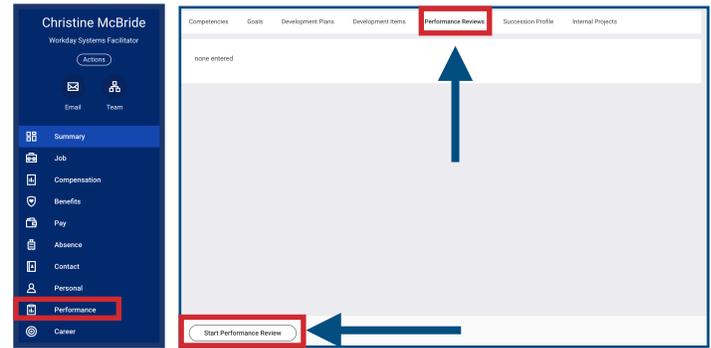
1: THE MANAGER INITIATES THE PERFORMANCE REVIEW PROCESS

1. Navigate to the appropriate team member's Workday profile > Click Performance from the sidebar

2. Click the Performance Reviews tab > Start Performance Review

3. In the Review Template box, select Type > Annual Performance Review > Retail Leader Performance Review > Click Submit

4. Click Open to Request Additional Manager Feedback (Optional) OR Click Skip if additional manager feedback is not necessary



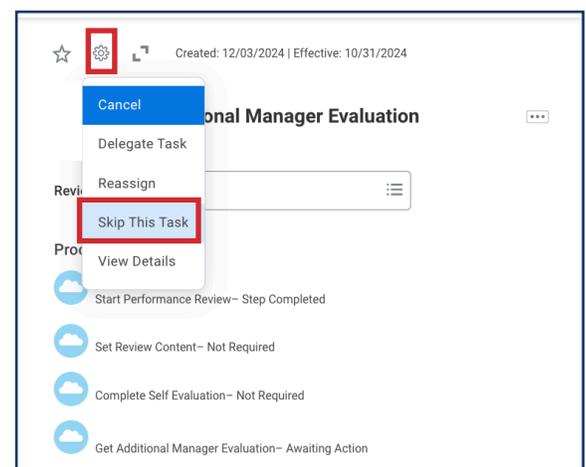
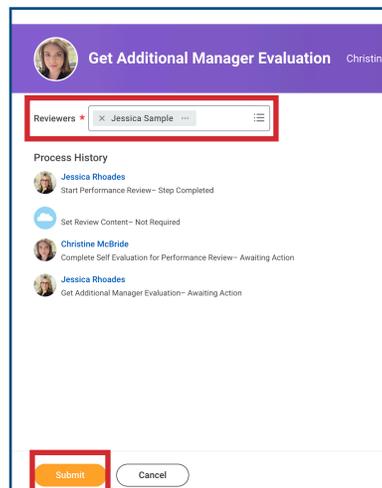
2: THE MANAGER REQUESTS ADDITIONAL MANAGER FEEDBACK OR SKIPS THE TASK

Note: If the additional manager feedback pop-up window disappears before an action is selected, the task can be found in the manager's "My Tasks" Inbox.

1A. To request additional feedback, Type the Name of the Appropriate Manager in the Reviewers box > Click Enter on the keyboard > Click Submit > Click Done on the next page

1B. To skip the request for additional feedback, Click the Gear Icon > Click Skip This Task > Click OK on the next screen

Note: The request for additional manager feedback will be sent to the receiving manager's "My Tasks" inbox; however, the initiating manager will **NOT** be notified when the additional manager has submitted their feedback. Additional managers will **NOT** be able to rate the team member but will be able to provide comments.



REASSIGNING EVALUATION TASKS TO STORE MANAGERS

IMPORTANT! Store Managers (SMs) will conduct performance reviews for Customer Service Managers (CSMs). If a CSM reports to an Assistant Store Manager (ASM), the ASM will automatically receive manager performance review tasks for their CSMs in their Workday Inboxes (see chart below) as the SM conducts the review process. **ASSISTANT STORE MANAGERS MUST TAKE ACTION ON TASKS ON BEHALF OF THE STORE MANAGER AND/OR REASSIGN APPROPRIATE TASKS TO THE STORE MANAGER!**

Note: The reassigned task will still appear in the ASM's inbox for up to 2 business days before being transferred to the Store Manager's Inbox.

HOW TO REASSIGN INBOX TASKS

1. Click the Gear Icon > Click Reassign > Type the name of the appropriate SM in the *Proposed Person* section > Enter the task reassignment reason under *Reassignment Reason* > Click OK

WORKDAY TASK	ASM ACTION
Request Additional Manager Feedback	Skip the Task OR Complete the Task on Behalf of the Store Manager (**This task cannot be reassigned**)
Complete Manager Evaluation	Reassign Task to Store Manager
Schedule Meeting with Employee	Click Submit on the Store Manager's behalf OR Reassign the Task to the SM
Provide Manager Review Comments	Reassign Task to Store Manager

3: THE INITIATING MANAGER COMPLETES THEIR EVALUATION

1. Navigate to your "My Tasks" Workday Inbox > Click the Manager Evaluation: Performance Review Task with the Appropriate Team Member's Name > Click Get Started

Note: Additional manager feedback appears here, if any.

2. Select a Rating for all nine (9) Leadership Competencies and enter (optional) comments.

3. Review the Manager Summary at the bottom of the Leadership Competencies form > Click Next

IMPORTANT! The manager summary rating at the bottom of the form is the computed average of the manager's ratings of the nine *Leadership Competencies*. If desired, managers can click to select a new rating to override the computed average.

4. Select the Appropriate Goal Status > Enter an Optional Goal Completion Date

4
5

5. Select the Appropriate Rating > Enter a Comment

Note: Additional manager feedback appears here, if any.

6. Repeat steps 4-5 for the two remaining *Organizational Goals*.

7. Review the Manager Summary at the bottom of the Organizational Goals Form > Enter a Comment > Click Next

IMPORTANT! The manager summary rating at the bottom of the goals form is the computed average of the manager's ratings of the three *Organizational Goals*. If desired, managers can click to select a new rating to override the computed average.

Note: Additional manager feedback appears here, if any.

8. View the Overall Performance Summary > Enter a Comment > Click Next

IMPORTANT! The Overall Performance Summary Rating is the computed average of the manager’s ratings of the nine *Leadership Competencies* and the three *Organizational Goals*. If desired, managers can click to select a new rating to override the overall computed average.

Note: Additional manager feedback appears here, if any.

9. Review the Complete Manager Evaluation > Click Submit

10. Schedule a meeting with the team member to discuss their evaluation.

Note: A pop-up appears, reminding the manager to set up a meeting with the team member to discuss their Performance Review.

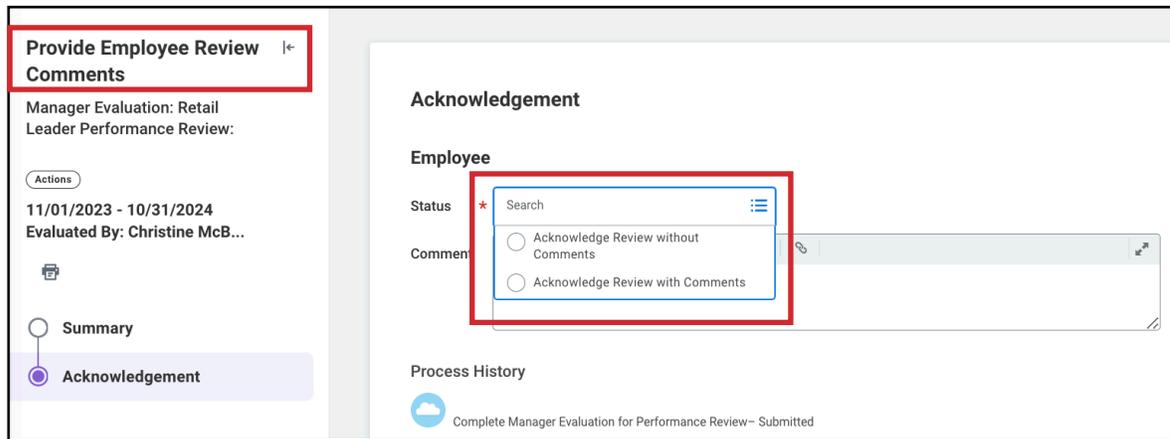
11. When the manager is ready for the team member to see their performance review, the manager should Navigate to their Workday “My Tasks” Inbox > Click the Appropriate Schedule Meeting with Employee Task > Click Submit. This action will route the manager’s evaluation to the team member’s “My Tasks” Workday Inbox.

Note: Managers can wait to submit the task until they are in the meeting with the team member if they do not want the team member to view their performance review before the meeting.

4: THE TEAM MEMBER ACKNOWLEDGES THEIR REVIEW

Note: It is recommended that this process takes place during the meeting with the team member’s manager to discuss their performance review.

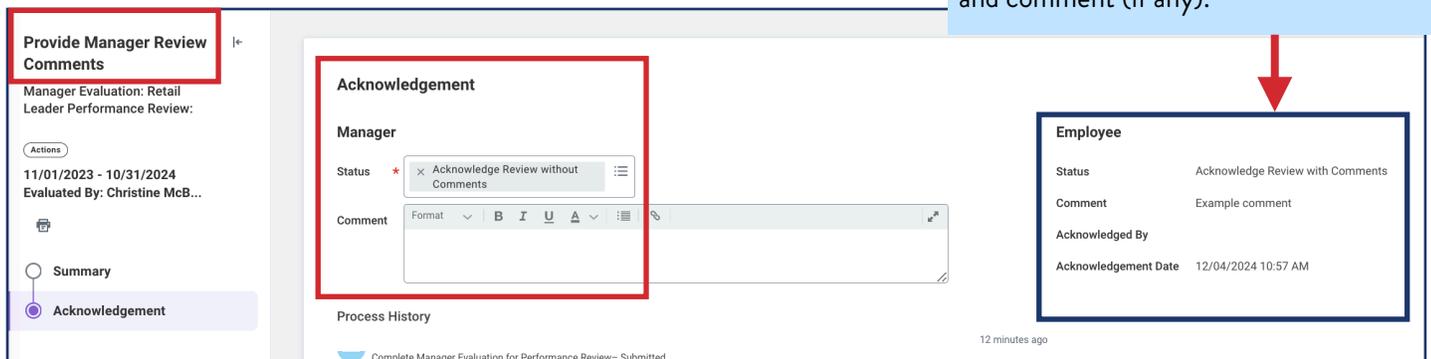
1. Instruct the team member to navigate to their Workday “My Tasks” inbox to access the “Manager Evaluation: Retail Leader Performance Review” task > Click **Get Started**
2. The team member should review the contents of their evaluation > Click **Next** at the bottom of the screen
3. The team member should select **Acknowledge Review without Comments** **OR** Select **Acknowledge Review with Comments** and Enter a **Comment** > Click **Submit** when complete. **Note:** Comments are optional.



5: THE INITIATING MANAGER ACKNOWLEDGES THEIR REVIEW

1. The manager should navigate to their Workday “My Tasks” inbox to access the “Manager Evaluation: Retail Leader Performance Review” task > Click **Get Started** > Click **Next** at the bottom of the page on the next screen
2. Select **Acknowledge Review without Comments** **OR** Select **Acknowledge Review with Comments** and Enter a **Comment** > Click **Submit** when complete. **Note:** Comments are optional.

Note: Team member acknowledgment and comment (if any).



IMPORTANT! Annual merit increases for retail managers take effect the first pay period in January of the new year. **Note:** The *Compensation Team* will submit all increases, there is no action needed from managers. Please reach out to your leader or HRBP if you have any questions.