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.

^

 The manager starts the review process in Workday.

 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. The manager skips the request for additional manager feedback <u>OR</u> requests additional manager feedback and the additional manager submits their comments.

 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

 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





 Click Open to Request Additional Manager Feedback (Optional) <u>OR</u> Click Skip if additional manager feedback is not necessary

Start Performance Review Confirmation	
Start Performance Review Committation	
Up Next: John Doe Get Additional Manager Evaluation	1
View Details	

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

 Click the Gear Icon > Click
 Reasign > 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		N	
Request Additional Manager Feedback		Skip the Task <u>OR</u> Complete the Task on Behalf of the Store Manager (**This task cannot be reassigned**)		e the Task on Aanager Issigned**)	
Complete Manager Evaluation		Reassign Task to Store Manager			
Schedule Meeting with Employee		Click Submit on the Store Manager's behalf <u>OR</u> Reassign the Task to the SM			
Provide Manager Review Comments			Reassign Task to Store Manager		
Created: 12/05/2024 Effective: 10/31/2024 Delegate Task Reassign Revi: View Details 2023 - 10/31/2024					
My Tasks 1 item			Due		± □ 1,
Step To Do: Schedule Meeting with Employee	Business Process Schedule Meeting with Employee	Subject Schedule Meeting with Employee	Date	Proposed Person Store Manager	Reassignment Reason SM will complete review for CSM

3: THE INITIATING MANAGER COMPLETES THEIR EVALUATION

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



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

9 items		Does Not Meet Expectations		= ⊡ .¹
Competency	Description	O Meets Job Expectations	Additional Manager Evaluation	
Builds a High Performing Team	What this competency looks like when	Exceeds Job Expectations		
	done well: Hires and retains high caliber talent with diverse skills and abilities. Teaches, mentors and coaches to develop future learing. Promotes continuous learning.	Şearch :	Name	
		× Exceeds Job Expectations	Anonymous	
		Comment	Comment Example Comment	
	and development. Ensures each team member understands how his or her role contributes to the Organization's overall success.			



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

Calculated Rating Rating	1.89 Meets Job Expectations	
Rating Description (empty)		

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

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

Goal * Developing our leaders and team Description Store leaders will create an environment which fosters • Ensure all members of management are proper • Ensure leaders can locate the frontline onboard • Encourage team members to access enrichment • Encourage team members to attend at least one	growth and development. In order to promote engagement v r supported throughout their training ng and training resources for DA, RMP, and RSA : resources via the employee portal professional development course each rating period (Real C	vithin their teams, leaders will: olors, Mastermind, LMS)	
Due Date Category (empty)	select one 💌	Ģ	
Status Successfully Complete Completed On 07/01/2024	Not Applicable Not Started Partially Complete	-	
Manager	Successfully Complete		
Rating * Meets Job Expectations •	select one	5.	Select the Appropriate
Rating Description (empty)	select one	R:	ting > Enter a Comment
Comment ★ Normal ✓ B I U A ✓ III Example comment	Does Not Meet Expectations Meets Job Expectations Exceeds Job Expectations		
Additional Manager Name Anonymous	Note: Add	itional manager	
Comment Example comment	feedback a	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

Manager Summary Calculated Rating 2.33 Rating * Meets Job Expectations v	IMPORTANT! The manager summary rating at the bottom of the goals form is the computed
Rating Description (empty) Comment * B I U A Example Comment	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.
Name Anonymous Comment feedback appears here, if any.	Back Next 🔂 Save



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

Overall Performance Summary		IMPORTANT! The Overall Performance
Provide a brief summary of overall performance for the review period. Take into c	sideration performance in both the Leadership Competencies and Operational Goals.	Summary Rating is the computed average
Manager		of the manager's ratings of the nine
Calculated Rating Meets Job Expectations (Rounded from 2.33) Default Rating Meets Job Expectations		Leadership Competencies <u>and</u> the three
Rating * Meets Job Expectations *		Organizational Goals. If desired, managers
Override Calculated Rating Rating Description (empty)		can click to select a new rating to override
Comment ★ Format ∨ B I U A ∨ i≣ %	×	the overall computed average.
	2	
Additional Manager Name Anonymous	Note: Additional manager	Back Next 🖺 Save \cdots
Comment Example comment	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.
Complete Manager I← Evaluation Manager Evaluation: Retail Leader Performance Review: I		Note: A pop-up appears, reminding the manager to set up a meeting with the team member to
(Actions) 11/01/2023 - 10/31/2024		discuss their Performance Review.
Leadership Competencies Organizational Goals		Success! Event submitted Up Next: Schedule Meeting with Employee View Details
Overall Performance Summary Review and Submit	Submit Save for Later	То До

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.

÷	All Items 30 items	☆ © ご	Created: 11/22/2024 Effective: 10/31/2024
1	Q Search: All Items 1	Complete To	Do Schedule Meeting with Employee
	016 Advanced Search	For	Christine McBride
e	Schedule Meeting with Employee: 11/22/2024	Overall Process	Retail Leader Performance Review: Christine McBride
	Performance Review	Overall Status	In Progress
\$		Instructions	Now that you have completed your evaluation, schedule time with the employee.
			DO NOT PRESS SUBMIT UNTIL YOU ARE READY FOR EMPLOYEE TO SEE THEIR EVALUATION.
1			
B			
2.			
0		-	•
		Submit	Save for Later Close

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.

 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 <u>OR</u> Select Acknowledge Review with Comments and Enter a Comment > Click Submit when complete. <u>Note:</u> Comments are optional.

Provide Employee Review Comments		
Manager Evaluation: Retail Leader Performance Review:	Acknowledgement	
Actions 11/01/2023 - 10/31/2024 Evaluated By: Christine McB E	Employee Status * Search Acknowledge Review without Comments Acknowledge Review with Comments Acknowledge Review with Comments	e ⁿ
Acknowledgement	Process History	
	Complete Manager Evaluation for Performance Review- Submitted	

5: THE INITIATING MANAGER ACKNOWLEDGES THEIR REVIEW

 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 <u>OR</u> Select Acknowledge Review with Comments and Enter a

Comment > Click 3	Submit when complete. Note: Comments are optional.	Note: Team member acknowledgment and comment (if any).
Provide Manager Review Comments Manager Evaluation: Retail Leader Performance Review:	Acknowledgement	↓
(Actions) 11/01/2023 - 10/31/2024 Evaluated By: Christine McB	Manager Status ★ × Acknowledge Review without Comments Comments Comment	Employee Status Acknowledge Review with Comments Comment Example comment Acknowledged By
Summary Acknowledgement	Process History Complete Manager Evaluation for Performance Review- Submitted	Acknowledgement Date 12/04/2024 10:57 AM

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.

