

ANNUAL PERFORMANCE REVIEWS (RETAIL LEADERS)

The annual performance review cycle is a collaborative process between the manager and the team member.

The manager 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.

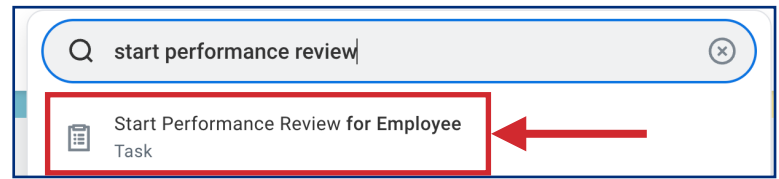
2. The manager completes their evaluation and schedules a meeting with the team member to discuss their review.

3. 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.

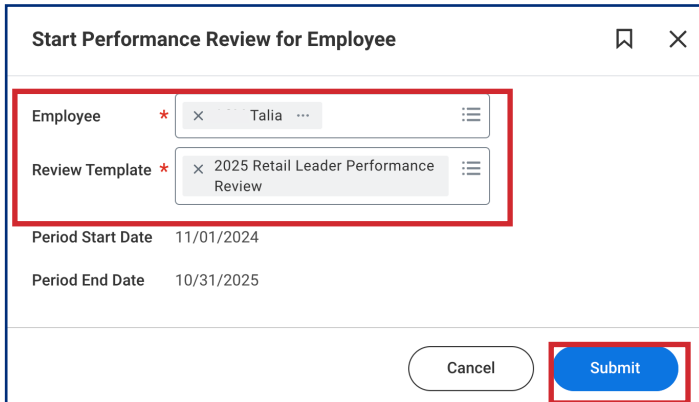
4. The manager submits their final acknowledgment of the team member's evaluation, concluding the performance review process.

1: THE MANAGER INITIATES THE PERFORMANCE REVIEW PROCESS

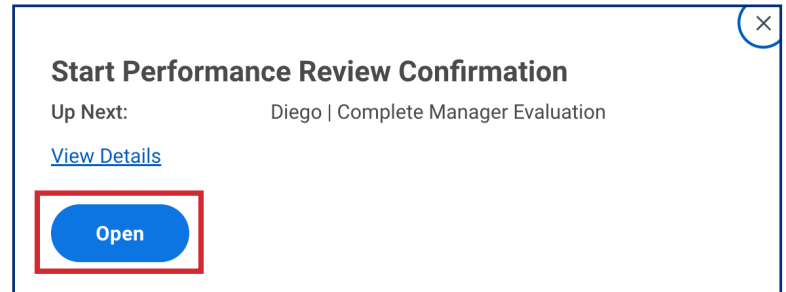
1. Type “start performance review” in the Workday Search Bar > Select the Start Performance Review for Employee Task



2. Under *Employee* > Enter the name of the appropriate team member > Under *Review Template* select *Type* > *Annual Performance Review* > *2025 Retail Leader Performance Review* > Click *Submit*



3. Click **Open** on the pop-up window.



REASSIGN EVALUATION TASKS TO STORE MANAGERS

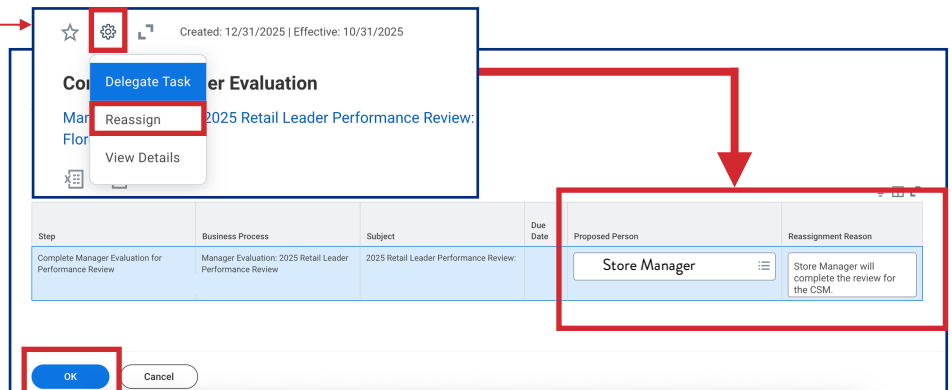
IMPORTANT! Store Managers (SMs) will conduct performance reviews for Customer Service Managers (CSMs). If a CSM reports to an Assistant Store Manager (ASM), the ASM will automatically receive manager performance review tasks for their CSMs in their Workday Inboxes (see chart below) as the SM conducts 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!**

HOW TO REASSIGN INBOX TASKS

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**

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.

WORKDAY TASK	ASM ACTION
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



2: THE 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**

The screenshot shows the 'My Tasks' Workday Inbox. On the left, there are sections for 'All Items', 'Saved Searches', and 'Filters'. On the right, under 'All Items', there is a search bar and a list of tasks. The task 'Manager Evaluation: 2025 Retail Leader Performance Review' is highlighted in a red box, with a due date of 12/31/2025 and a status of 'Effective: 10/31/2025'.

The screenshot shows the 'Complete Manager Evaluation' page for 'Manager Evaluation: 2025 Retail Leader Performance Review'. The review period is 11/01/2024 - 10/31/2025. A welcome message states: 'Welcome to the start of the annual performance review. To begin, please ensure you have 15-30 minutes of uninterrupted time to thoughtfully evaluate performance over this past year.' The 'Get Started' button is highlighted in a red box.

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

The screenshot shows the 'Complete Manager Evaluation' page for 'Manager Evaluation: 2025 Retail Leader Performance Review'. The review period is 11/01/2024 - 10/31/2025. The 'Leadership Competencies' section is highlighted in a red box. It contains a table with 9 items, each with a competency, description, and a 'Manager Evaluation' form. The 'Manager Evaluation' form is highlighted in a red box and includes a 'Rating' dropdown and a 'Comment' text area. A modal window is open showing the rating options: 'Does Not Meet Expectations', 'Meets Job Expectations', and 'Exceeds Job Expectations'.

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

The screenshot shows the 'Manager Summary' page. It displays the 'Calculated Rating' as 2 and the 'Rating' dropdown set to 'Meets Job Expectations'. The 'Next' button is highlighted in a red box.

IMPORTANT! The manager summary rating at the bottom of the section 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

5. Select the Appropriate Rating > Enter a Comment

The screenshot shows a form for an organizational goal. The goal is "Developing our leaders and team". The description is "Leaders will create an environment which fosters growth and development. In order to promote engagement within their teams, leaders will leverage and allow team member access to organizational programs and resources, ensure completion of on the job training, and one on one training and development." The due date is 10/31/2025. The category is "Operational Goals". The status is "Successfully Complete" (highlighted with a red box and arrow labeled 4). The completed on date is 07/01/2025. The manager is "Meets Job Expectations" (highlighted with a red box and arrow labeled 5). The rating description is "(empty)". The comment is "Normal" (highlighted with a red box and arrow labeled 5). The comment text area contains "Example comment".

6. Scroll down and repeat steps 4-5 for the two remaining *Organizational Goals*.

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

The screenshot shows the "Manager Summary" form. The calculated rating is 2.33. The rating is "Meets Job Expectations" (highlighted with a red box and arrow). The rating description is "(empty)". The comment is "Normal" (highlighted with a red box and arrow). The comment text area contains "Example comment". At the bottom, the "Next" button is highlighted with a red box.

IMPORTANT! The manager summary rating at the bottom of the goals section 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.

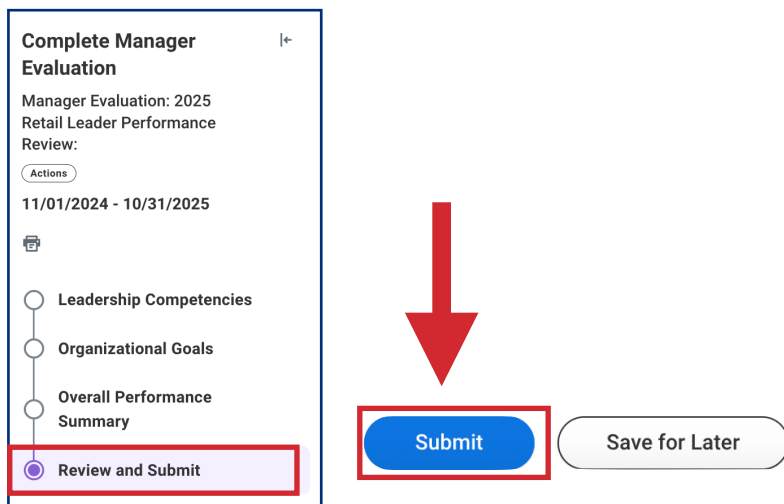
8. View the Overall Performance Summary > Enter a Comment > Click Next

The screenshot shows the "Overall Performance Summary" form. The manager's calculated rating is "Meets Job Expectations (Rounded from 2.08)". The default rating is "Meets Job Expectations". The rating is "Meets Job Expectations" (highlighted with a red box and arrow). The rating description is "(empty)". The comment is "Normal" (highlighted with a red box and arrow). The comment text area contains "Example comment".

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.

Next

9. Review the **Complete Manager Evaluation** > Click **Submit**



Complete Manager Evaluation

Manager Evaluation: 2025
Retail Leader Performance Review:

Actions

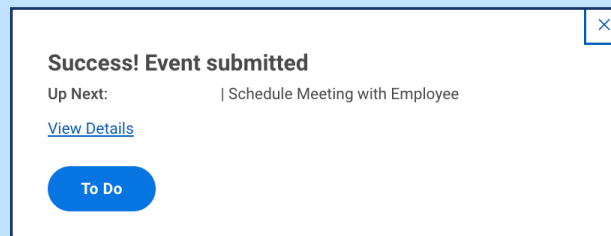
11/01/2024 - 10/31/2025

- Leadership Competencies
- Organizational Goals
- Overall Performance Summary
- Review and Submit**

Submit Save for Later

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.



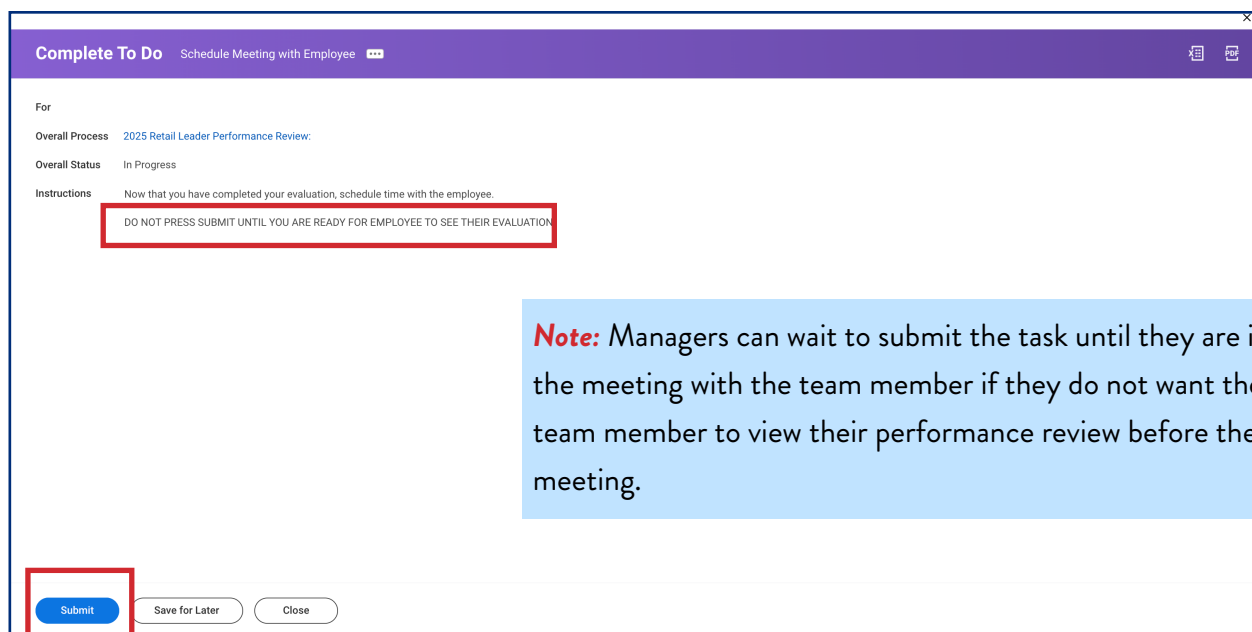
Success! Event submitted

Up Next: | Schedule Meeting with Employee

[View Details](#)

To Do

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.



Complete To Do Schedule Meeting with Employee

For

Overall Process [2025 Retail Leader 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

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.

3: 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.

Provide Employee Review Comments

Manager Evaluation: Retail Leader Performance Review: N

Actions

11/01/2023 - 10/31/2024
Evaluated By: Christine McB...

Summary

Acknowledgement

Acknowledgement

Employee

Status

Comment

Process History

Complete Manager Evaluation for Performance Review - Submitted

4: 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.

Provide Manager Review Comments

Manager Evaluation: Retail Leader Performance Review: Mark Isca

Actions

1 31/2024
Evaluated By: Christine McB...

Summary

Acknowledgement

Acknowledgement

Manager

Status

Comment

Process History

Complete Manager Evaluation for Performance Review - Submitted

Employee

Status

Comment

Acknowledged By

Acknowledgement Date

12 minutes ago

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.