# Workday & CPM

# AgCenter Classified Performance Evaluations

For Classified Employees

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# Agenda

- Performance Management Changes
- 2025-2026 CPM Timeline
- Workday Access
- Planning Session Overview
- Workday Process
- Planning Session Steps
- Meeting with the Employee

# Planning Sessions

Overview

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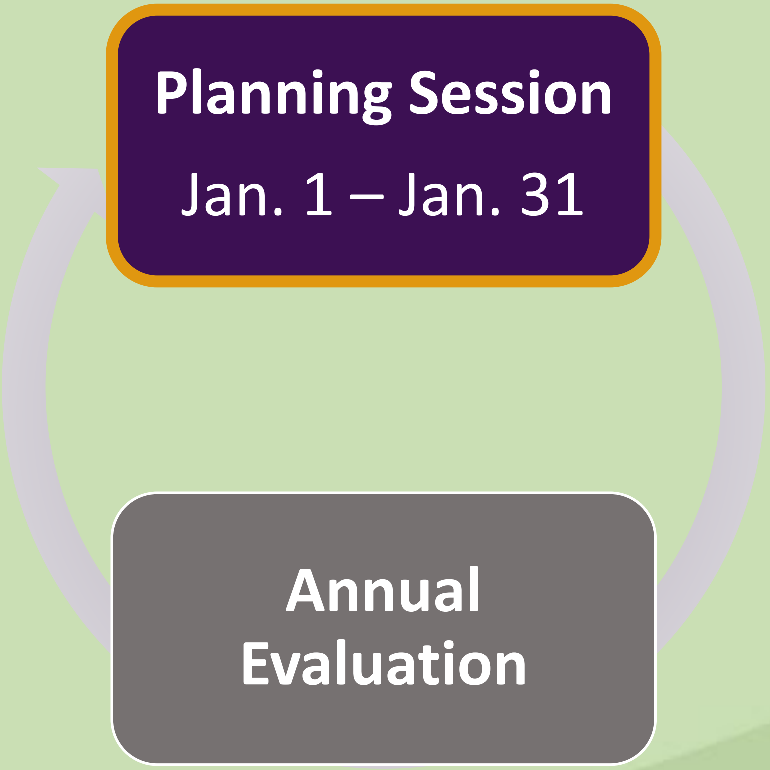
# PES: Planning Session




- Set (or review) major responsibilities
- Review University competencies
- Create goals

If the Planning Session is not completed, most sections for the Annual Evaluation will be **blank.**

# The Purpose of the Planning Session

- Goal alignment
- Clarity of expectations
- Development opportunities
- Motivation and engagement
- Feedback and communication

# When do you receive a Planning Session?

- Planning Sessions are initiated annually in January
- However, Planning Sessions are also initiated when an employee
  - Is hired
  - Makes lateral position move
  - Is promoted or demoted

# Who receives a Planning Session?

All classified employees, except Classified WAE's receive a performance plan.

**Faculty and unclassified employees are evaluated through a different process.*

# Workday Process

Routing, Major Responsibilities, Competencies, and Goals

# Planning Session Routing

**1 Manager**

At the beginning of each performance period or within 30 days of a new hire or change in job, complete a Planning Session for the employee(s) in Workday.

Submit the Planning Session.

**2 Manager's Manager**

Review Planning Session.

Can send back if they find inaccuracies, or they can approve the Planning Session.

**3 Planning Conversations (Manager)**

Once approved, the manager should meet with the employee to review the Planning Session.

The Planning Session cannot be submitted in Workday until the conversation with the employee has taken place or scheduled.

**4 Employee**

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# First Step

Manager Complete Planning Session Document

# Planning Session Routing

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# Planning Session Components

## 1. Major Responsibilities

1. Major Responsibilities
2. University Competencies
3. Goals for the Employee

# What are Major Responsibilities?

- Responsibilities listed on job description
  - It should match what is in the job description per Civil Service
  - If job description *isn't accurate*, it will need to be updated **before** completing the planning session
- Performance expectations should also be discussed

# Planning Session: Major Responsibilities

**Set Review Content** Set Content: LSU Unclassified Planning Session 2024: [redacted]

8 second(s) ago - Due 10/27/2023; Effective 11/01/2023

Review Period
10/31/2023 - 11/01/2023

Major Responsibilities

The manager must review the employee's job description and summarize the position's major responsibilities.
(Required) Click Add to add a Major Responsibility. Type the major responsibility in the Responsibility text box. Repeat this step until the major responsibilities are all listed.
Click Next once all the major responsibilities are listed.

Add

Responsibility *

Format B I U A

# Planning Session Components

1. Major Responsibilities
2. **University Competencies**
3. Goals for the Employee

# University Competencies

- LSU has 7 pre-set competencies
- In Workday:
  - These are pre-populated with descriptions
  - No action is required by the manager

# Planning Session: Competencies

Competencies

Goals

All competencies and behavior expectations for employees and managers are listed below. The manager should review the relevant competencies below with the employee. Click Next once the competencies are reviewed.

*No action required for managers*

# Planning Session Components

1. Major Responsibilities
2. University Competencies
3. **Goals for the Employee**

# Goals

- Should reflect core, ongoing responsibilities
- Collaborate with the employee (create 3 goals each)
- Create clear, measurable performance standards
- Include defined expectations for success
  - Make them S.M.A.R.T. goals

# Setting *S.M.A.R.T.* Goals

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**imely

# S.M.A.R.T. Goal Setting

**Specific**

- State exactly what you want to accomplish
- The five W's
  - Who, What, Where, When, Why

# S.M.A.R.T. Goal Setting

**Measureable**

- How will you *demonstrate* the extent to which the goal has been met?
- How can you *evaluate* the extent to which the goal has been met?

# S.M.A.R.T. Goal Setting

## Achievable

- Challenging yet within the employee's ability to achieve an outcome
- A goal that is completely unachievable can decrease motivation and productivity

# S.M.A.R.T. Goal Setting

**R**elevant

- How does the goal tie into the major responsibilities?
- How is it aligned to LSU AgCenter objectives?

# S.M.A.R.T. Goal Setting

**T**imely

- Setting one or more target dates
- Be sure to include deadlines and check-ins

# S.M.A.R.T. Goal Example

**Current Goal: Decrease customer complaints**

**S.M.A.R.T. Goal:**

To enhance productivity and customer satisfaction within the department, by December 31, the employee will decrease email response time by one week. By the end of the year, the response rate will be measured through the service ticketing system to ensure all tickets are opened and responded to within one week.

# Planning Session: Goals

Goals

Summary

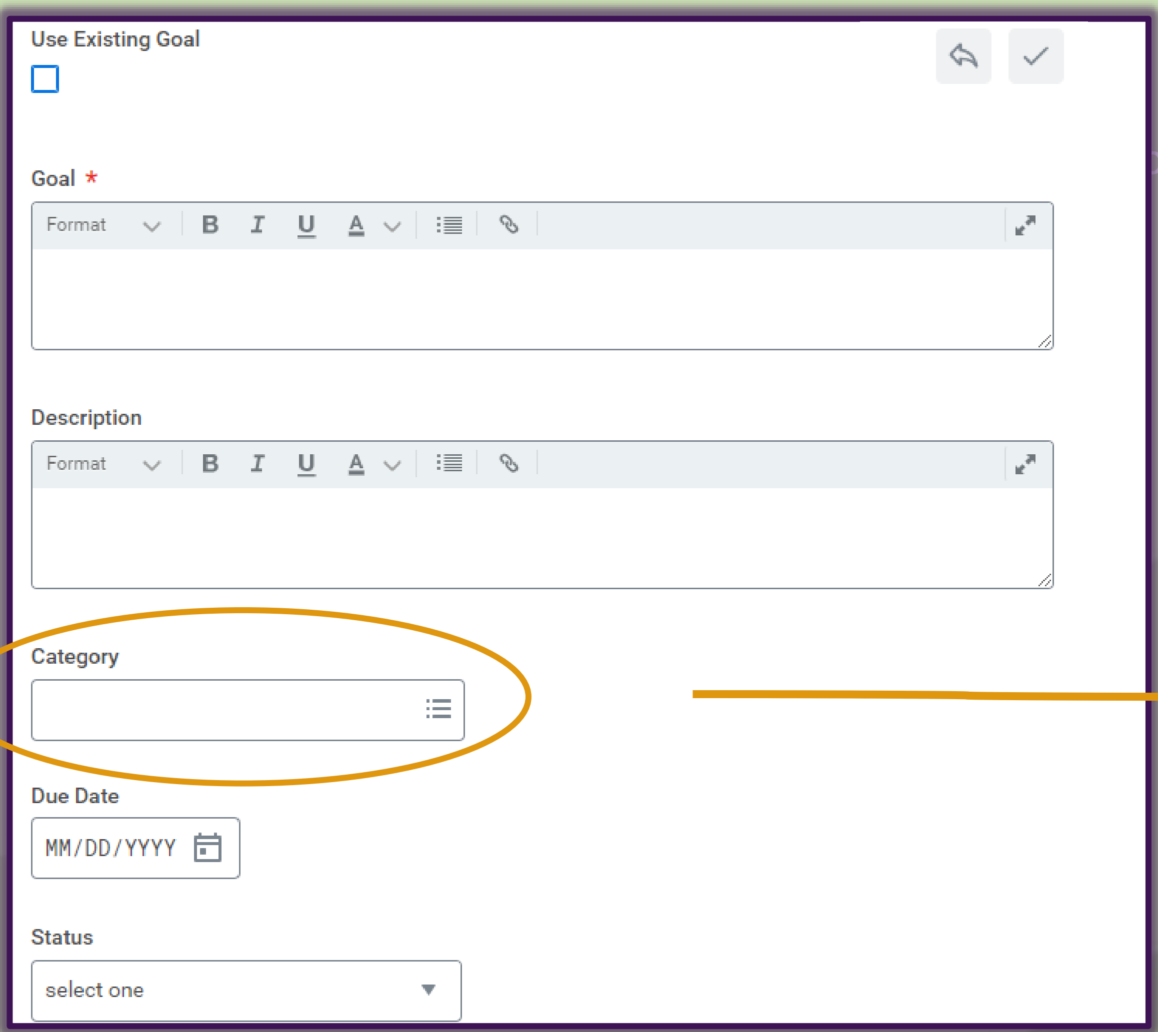
As part of the planning process, the manager must list performance goals for the employee to achieve during the future performance period. Goals and objectives should be specific, measurable, actionable, relevant and time-bound.

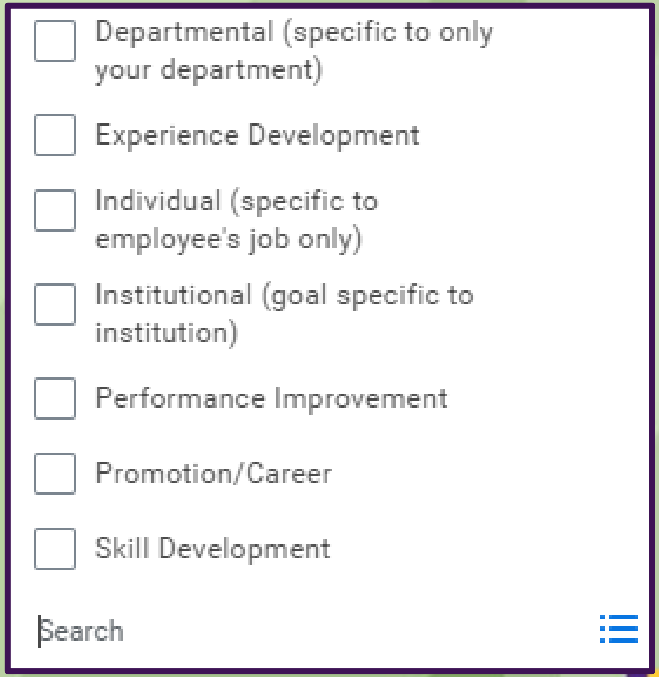
- (Required) Click Add to list a goal for the employee. (If there are goals from past performance reviews that you would like the employee to continue working on, **you can check the box Use Existing Goal, then click the prompt** icon and select the previous goal by the search criteria of Review, Status, or Category).
- (Required) To create a new goal, type the goal in the Goal text box.
- The Status section will be completed either during the mid-year review or the annual performance review.
- To add additional goals, click the Add box at the bottom of the page and repeat steps.

Click Next to continue.

Add

# Planning Session: Goals

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# Planning Session: Overview

Manager

Planning Conversation (Manager)

Employee

- Once the information for major responsibilities and goals has been added, the manager will receive an overview of the Planning Session.
- From there, they will click “Submit”

# Second Step

Manager's Manager

# Planning Session Routing

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# Third Step

Manager To Do: Meeting

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# How to Prepare for the Planning Meeting

- What to Discuss
- Meeting Structure
  - Timing
  - Virtual vs. In-Person
  - FMLA
- Final Notes
  - Attendees
  - Confidentiality

# Meeting Structure

Choose an optimal time of day

- If the employee prefers receiving information in the mornings, consider scheduling a meeting in the morning.
- If there are many areas of improvement, then the afternoon or the end of the day might be better so they can process it at home.

Face-to-Face is best for relaying the performance information to an employee

# FMLA and Worker's Compensation

If the employee is on FMLA, additional steps must be taken

- The Planning Session should be sent to the employee via certificate of mailing.
- A certificate of mailing receipt must be attached to documents in Workday.
- A meeting with the employee is not required if they will not return prior to January 31 (deadline date)

# Final Notes

- Who will be in the room?
  - The employee
  - The managers(s)
- Employee's performance is confidential
- This information and the meeting should not be shared with those outside of the chain of command

# Fourth Step

Employee Approval

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# Post-Meeting

- After the meeting with the employee, the manager will submit the Planning Session to the employee in Workday.
- The employee must approve the Planning Session in Workday, unless on FMLA or Worker's Compensation.
- The Planning Session is not complete until the employee approves it in Workday.

# Post-Planning Session

What to do in between performance reviews

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# Conversation Tips

**Ask Strategic Questions**

- During your one-on-one meetings

**Problem Solve**

- Work with your employee’s ideas to help them overcome challenges

**Express Gratitude**

- Let employees know when they are doing well

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# Strategic Question Examples

What do you expect to be the most challenging about your goals for this quarter?

What support can the department provide for you that will help you reach your goals?

What do you hope to achieve in our unit this year?

# Strategic Question Examples

As your manager, what would you like me to continue doing or start doing?

How often would you like to receive feedback?

What would be a helpful agenda for our weekly one-on-one meetings?

# Documentation is not a bad thing

- Both low and high performers should be documented
- Always room for improvement, even high performers

**Documentation Examples:**

- Making notes of any frequent errors or other progress reports
- Projects or assignments worked on during the year
- Record of conversations or check-ins for later reference
- Saving emails that praise the work your employee performed

# How to Document

1. Describe the Behavior

2. Explain the Impact

3. Specify the Change

# How to Document: Step 1

## **Describe Specific Behavior**

- Focus on facts and observations, not opinion and personalities
- Specify when describing the behavior you observed, include who, what, where, and when
- Ensure the description is nonjudgmental

# Describing Specific Behavior Examples

Do Not

You were assigned a task and did not complete it on time. Are you seriously incapable of completing a task on time?

Do

On March 1st, you were assigned the task of completing 20 service tickets by March 10th. On March 11th, you had only completed 10 service tickets.

# How to Document: Step 2

## Explain the Impact

- Explain how the behavior impacts the customer, the employee themselves, and the department
- It is also important to connect the impact to the University's mission and vision

# Explaining Impact Examples

Do Not

You have worked here for 10 years and should know the importance of deadlines. How dare you not complete the work by the deadline! This resulted in more work for me!

Do

Because the assigned task was not completed by the deadline, this required other employees to work overtime to complete the unfinished tasks. The unfinished tasks delayed our response time to the customer which impacts the view of the University's service excellence.

# How to Document: Step 3

**Specify the Change**

- Be assertive rather than aggressive when describing the expected changes
- Explain the specific change in behavior you anticipate from your employee

# Specifying Change in Behavior Examples

Do Not

You are performing worse than usual and need some improvement.

Do

Timeliness is a priority for the position, in the future, tasks need to be completed before or by the provided deadline. If there is an unexpected delay, this needs to be communicated in advance to help meet the deadline.

# Follow-Up

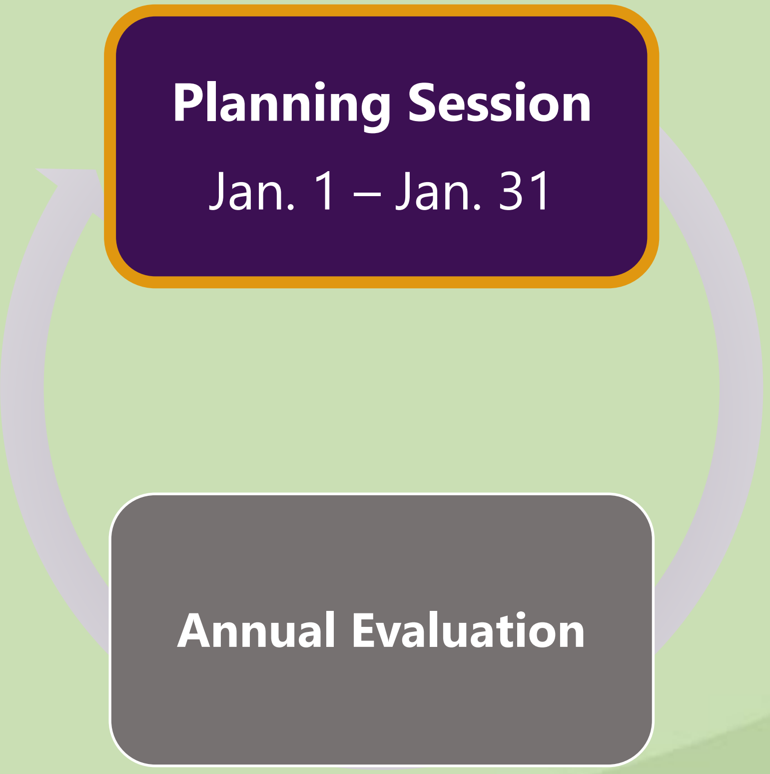
- Takes place after important performance conversations
- Important for both the employee and the unit for documentation purposes
- Send follow-up documentation in a timely manner
- Include the date of the actual meeting, what was discussed, and what the expectations are moving forward

# Follow-Up Example

*We met on **Friday, March 13th** to discuss your service ticket task. March 1st, you were assigned the task of **completing twenty (20) service tickets by March 10th**. **On March 11th, you only completed ten (10) service tickets**. As a result, **we met on Friday to discuss the incomplete tickets**. You explained that you misjudged your time when completing the tickets. We **discussed that timeliness is a priority** for your position and to communicate when you are getting behind. As a result, we agreed that you would **attend a time management class by July 1st**. If there is anything, as your supervisor, that I can help you with, please let me know. My door is always open!*

# Summary

# PES: Planning Session

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# Resources

For more information and resources on performance management, contact Denise Fontenot (defontenot@agcenter.lsu.edu) or Rebecca Smelley (Rsmelley@agcenter.lsu.edu)in Human Resources.

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# Thank you!