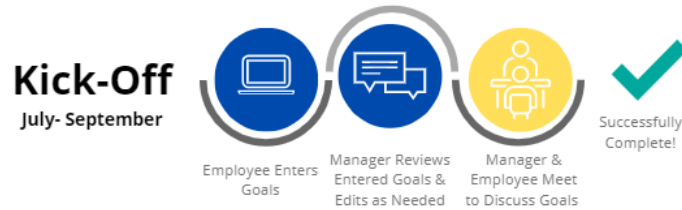


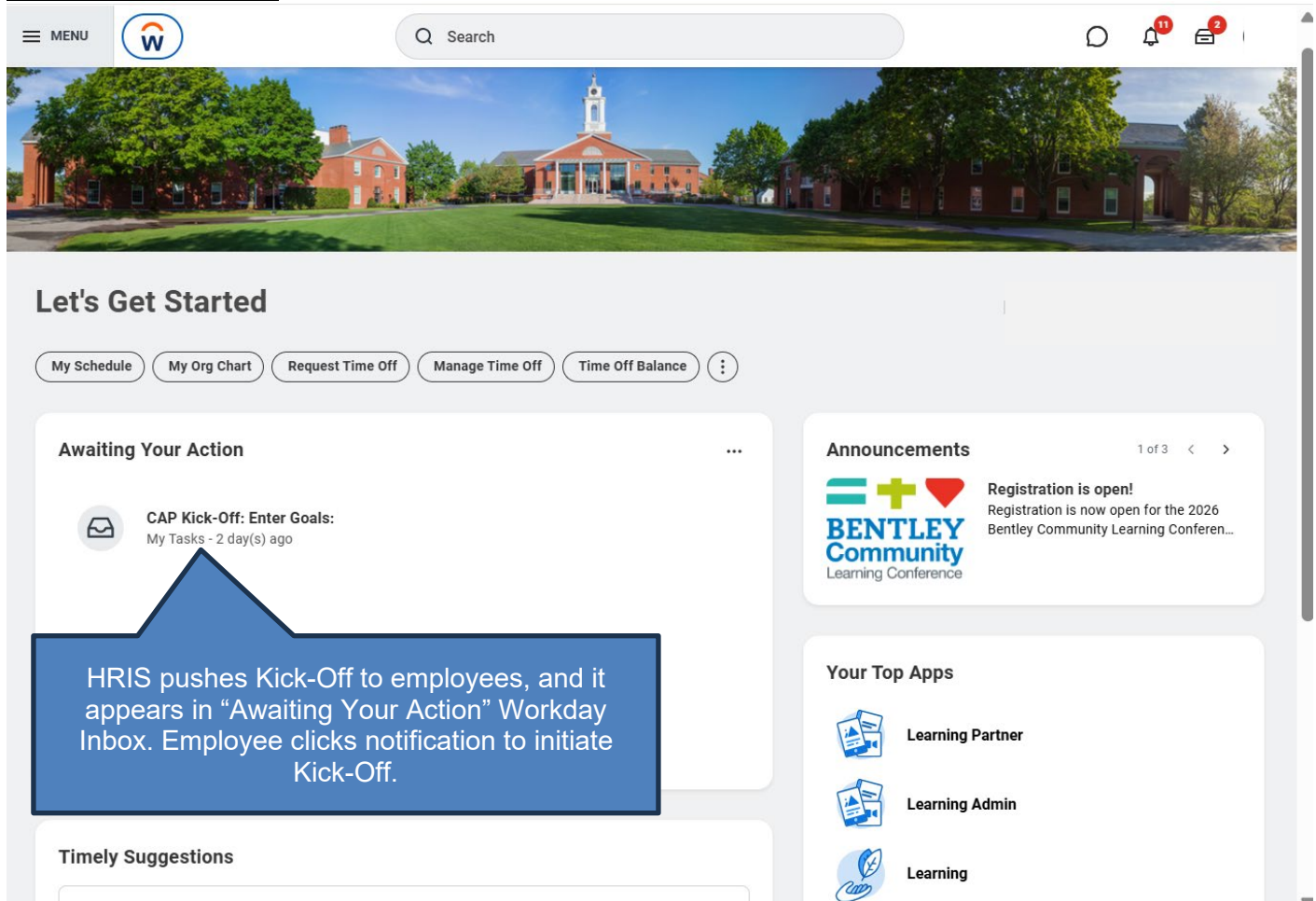
Workday - User Guide to Performance Management (CAP)

Workday: Kick-Off Overview



The following step-by-step guide is designed to walk employees and managers through the Performance Management process (CAP) in Workday. This Manual goes through the Employee and Manager's Workday steps for Kick-Off. Users needing assistance at any point in the process should contact Learning and Development.

Employee's Screen



The screenshot shows the Workday interface for an employee. At the top, there is a navigation bar with a 'MENU' icon, the Workday logo, a search bar, and notification icons. Below the navigation bar is a large banner image of a university building. The main content area is titled 'Let's Get Started' and contains several buttons: 'My Schedule', 'My Org Chart', 'Request Time Off', 'Manage Time Off', and 'Time Off Balance'. Below these buttons is a section titled 'Awaiting Your Action' which contains a notification card for 'CAP Kick-Off: Enter Goals: My Tasks - 2 day(s) ago'. A blue callout box points to this notification with the text: 'HRIS pushes Kick-Off to employees, and it appears in "Awaiting Your Action" Workday Inbox. Employee clicks notification to initiate Kick-Off.' To the right of the 'Awaiting Your Action' section is an 'Announcements' section with a card for 'BENTLEY Community Learning Conference' stating 'Registration is open! Registration is now open for the 2026 Bentley Community Learning Conferen...'. Below the 'Awaiting Your Action' section is a 'Timely Suggestions' section. To the right of the 'Announcements' section is a 'Your Top Apps' section with three app icons: 'Learning Partner', 'Learning Admin', and 'Learning'.

All Items 2 items

Search: All Items

[Advanced Search](#)

CAP Kick-Off: Enter Goals:

Complete Self Evaluation

Self Evaluation: :

Review Period

The Conversations About Performance (CAP) process provides managers and employees a framework for engaging in regular communication throughout the year about goals, performance, and employee development. The process is meant to be flexible and interactive while requiring only minimal written documentation.

Kick-Off is the first phase of CAP and is an opportunity for employees to draft their goals for the year and for managers to help solidify them. Although some aspects of an employee's role may stay consistent year after year, we encourage both employees and managers to draft fresh goals every year, and take into account last year's successes, areas of improvement, and upcoming priorities.

To get started, click on "Get Started" below and also refer to the [Learning and Development CAP page](#) for CAP User Guides, and other tools!

Get Started

Employee reviews directions and clicks "Get Started"

Complete Self Evaluation

Self Evaluation:

Actions

- CAP - Kick-off Goals and Development Activities**
- Development Questions
- Review and Submit

CAP - Kick-off Goals and Development Activities

The employee begins the Kick-off process by drafting goals for the upcoming year, but it's up to the manager to review, edit as needed, and finalize these goals with their employees. Both managers and employees should use the **SMART** goal format to develop meaningful, measurable goals and to reflect on how the **"What" and the "How" of performance** comes into play when achieving those goals.

Goal Categories:
When setting and reviewing goals, please be aware that there are three categories of goals: Individual Goals, Inclusive Excellence Goals, & Developmental Goals. **Employees are encouraged to have at least one goal for each category each annual performance cycle.** Please see additional information below:

Individual Goals:
Setting clear expectations around job duties is important for both managers and employees. An individual goal should focus on specific tasks, projects, and actions that employees need to complete over the next year. **Employees should have at least one individual goal each performance cycle.** Some questions to consider when creating and reviewing individual goals:

- What tasks, projects, and actions related to your specific role are vital over the next year?
- How will you support departmental operations and goals through your actions and contributions?
- What is a project you are working on, a resource you've developed, or service you provide that you'd like to build upon and take from "good to great"?
- What committees or initiatives (internally within your department or collaboratively/cross-campus) are you contributing to or assisting with?

Inclusive Excellence Goals:
Bentley University has named **Inclusive Excellence** as an enabling feature of our strategic plan, driving our mission to become a more just, inclusive, and equitable campus. **Employees should have at least one Inclusive Excellence goal each performance cycle.** Some questions to consider when creating and reviewing Inclusive Excellence goals:

- What changes or actions can you take in your role to actively serve a broader audience?
- What skills do you need to develop to better identify and impact equity gaps?

Developmental Goals:
Employee development is an important part of the CAP process. **Employees should have at least one developmental goal each performance cycle.** A developmental goal focuses on an area where an employee can grow over the next year. Some questions to consider when creating and reviewing development goals:

- What are your career ambitions?
- What is a skill you'd like to gain, an audience or group (clients, Bentley department/division etc.) you'd like to understand better, or a job function/industry problem you'd like to help solve? How would you grow from these opportunities?
- What can the manager do to support your development?

TO ADD GOALS:

- CLICK on the **ADD** button to add goals.
- Add the goal name and category (**required**).
- Click on ADD again to add another goal.
- Click Next when done adding all the goals.
- Click Submit.

Add

Next Save Close

Reference the side bar menu at any time to view what step in the process you are in.

Employee reviews directions and clicks "Add" to begin adding goals.

Complete Self Evaluation

Self Evaluation:
CAP Kick-Off:

Actions



CAP - Kick-off Goals and
Development Activities

Development Questions

Review and Submit

Click
"Save" to
save draft
to return to
later.

Goal * Normal | B | I | U | A

Enter goal here

Employee inputs
goal 1 in text box.

Category

× Individual Goal

Search

Status

Development Goal

Inclusive Excellence Goal

Individual Goal

Remove

Select goal category, **this is required**. If you do not select a category, you will receive an error upon submitting.

Note: all employees should enter at least one goal for each goal category.

Goal * Normal | B | I | U | A | :: | [Link] | [Email] | [Fullscreen]

Enter Goal here

Repeat steps for
goal 2, 3, etc.

Category

× Development Goal

Status

select one

Remove

Add

Back

Next



Once all goals are
entered and categories
are selected, click "Next"
to advance to the next
page.

Complete Self Evaluation |←

Self Evaluation: :
CAP Kick-Off:

Actions



CAP - Kick-off Goals and
Development Activities

Development Questions

Review and Submit

Development Questions

Managers and employees should have at least one formal Kick-Off conversation per year and should continue to reference goals and development progress in one-on-one meetings throughout the year. Now that you've identified and articulated goals for the year, please answer the following reflection questions for the upcoming year.

Question What is a professional growth opportunity the employee is most excited about and would like to accomplish/pursue this year?

Employee

Answer Normal **B** *I* U **A**

Employee reviews developmental question prompts and enters a response into the open text box.

Question How can the employee best be supported to achieve their goals and grow this year?

Employee

Answer Normal **B** *I* U **A**

Back

Next

Save

...

After responses are entered, click "Save", to save draft, or "Next" to advance to the review page. Responses will auto-save after 30 seconds of inactivity.

Complete Self Evaluation

Self Evaluation: 2
CAP Kick-Off:

Actions



CAP - Kick-off Goals and Development Activities

Development Questions

Review and Submit

CAP - Kick-off Goals and Development Activities

Goal Enter Goal here

Category Development Goal

Status (empty)

Goal Enter goal here

Category Individual Goal

Status (empty)

Review entered goals and responses to developmental questions here.

Development Questions

Question What is a professional growth opportunity the employee is most excited about and would like to accomplish/pursue this year?

Employee

Answer

Question How can the employee best be supported to achieve their goals and grow this year?

Employee

Answer

If you add a comment here, it will show on Process History. It is not part of the goal.

Your comment

Submit

Save for Later

Click "Submit" once page is reviewed to route to manager. Click "Save for Later" to save draft to return to later.

The End for Employee

Manager's Screen

Welcome

My Schedule Enter Time for Worker My Org Chart Feedback on My Team Request Time Off

Awaiting Your Action

CAP Kick-Off: Manager Review Goals:
My Tasks - 17 second(s) ago

Announcements 1 of 2

Registration is open!
Registration is now open for the 2026 Bentley Community Learning Conferen...

Important Dates

The manager is notified via Workday when they can review the employee submitted portion of Kick-Off. Click the "Awaiting Your Action" notification to open the task.

All Items 2 items

Search: All Items

[Advanced Search](#)

CAP Kick-Off:

Complete Manager Evaluation

Manager Evaluation: 2026 - 2027 CAP Kick-Off:

Review Period

The Conversations About Performance (CAP) process provides managers and employees a framework for engaging in regular communication throughout the year about goals, performance, and employee development. The process is meant to be flexible and interactive while requiring only minimal written documentation.

Kick-Off is the first phase of CAP and is an opportunity for employees to draft their goals for the year and for managers to help solidify them. Although some aspects of an employee's role may stay consistent year after year, we encourage both employees and managers to draft fresh goals every year, and take into account last year's successes, areas of improvement, and upcoming priorities.

To get started, click on "Get Started" below and also refer to the [Learning and Development CAP page](#) for CAP User Guides, and other tools!

Get Started

Click "Get Started" to review goals set by the employee.

Complete Manager Evaluation

Manager Evaluation: 1
CAP Kick-Off:

Actions



CAP - Kick-off Goals and Development Activities

Development Questions

Meeting Reminder

Review and Submit

CAP - Kick-off Goals and Development Activities

The employee begins the Kick-off process by drafting goals for the upcoming year, but it's up to the manager to review, edit as needed, and finalize these goals with their employees. Both managers and employees should use the **SMART** goal format to develop meaningful, measurable goals and to reflect on how the **"What" and the "How" of performance** comes into play when achieving those goals.

Goal Categories:

When setting and reviewing goals, please be aware that there are three categories: Inclusive Excellence Goals, & Developmental Goals. **Employees are encouraged to have at least one goal in each category.** Please see additional information below:

Individual Goals:

Setting clear expectations around job duties is important for both managers and employees. Individual goals focus on specific tasks, projects, and actions that employees need to complete over the course of their **Individual goal each performance cycle.** Some questions to consider when creating individual goals:

- What tasks, projects, and actions related to your specific job duties?
- How will you support departmental operations and goals this year?
- What is a project you are working on, a resource you've developed, or a challenge you've overcome? How did you take from "good to great"?
- What committees or initiatives (internally within your department or externally with other departments) are you leading or assisting with?

Inclusive Excellence Goals:

Bentley University has named **Inclusive Excellence** as an enabling feature of our strategic plan, driving our mission to become a more just, inclusive, and equitable campus. **Employees should have at least one Inclusive Excellence goal each performance cycle.** Some questions to consider when creating and reviewing Inclusive Excellence goals:

- What changes or actions can you take in your role to actively serve a broader audience?
- What skills do you need to develop to better identify and impact equity gaps?

Developmental Goals:

Employee development is an important part of the CAP process. **Employees should have at least one development goal each performance cycle.** A developmental goal focuses on an area where an employee can grow over the next year. Some questions to consider when creating and reviewing development goals:

- What are your career ambitions?
- What is a skill you'd like to gain, an audience or group (clients, Bentley department/division etc.) you'd like to understand better, or a job function/industry problem you'd like to help solve? How would you grow from these opportunities?
- What can the manager do to support your development?

TO ADD GOALS:

- CLICK on the **ADD** button to add goals.
- Add the goal name and category (**required**).
- Click on **ADD** again to add another goal.
- Click **Next** when done adding all the goals.
- Click **Submit**.

Back Next Save ...

- Click Submit.

Goal * Normal B I U A ...

Enter Goal here

Category X Development Goal

Status select one

Remove

Goal * Normal B I U A ...

Enter goal here

Category X Individual Goal

Status select one

Remove

Add

Back Next Save ...

Managers will read all directions and goal category descriptions to gain a better understanding and confirm if the employee goals are related to their individual job duties, their development, and/or their commitment to inclusive excellence.

Reminder: employees are encouraged to have at least one goal in each goal category.

Managers can click into the goal text box and edit the employee entered goals, change the goal category, and/or the goal status.

Click "Next" to advance to the final review and submit page.

Click "Save" to save a draft, and return to finalize later. Responses will auto-save after 30 seconds of inactivity.

Complete Manager Evaluation

Manager Evaluation:
CAP Kick-Off:

Actions



CAP - Kick-off Goals and Development Activities

Development Questions

Meeting Reminder

Review and Submit

Development Questions

Managers and employees should have at least one formal Kick-Off conversation per year and should document development progress in one-on-one meetings throughout the year. Now that you've identified and answered the following reflection questions for the upcoming year.

Question What is a professional growth opportunity the employee is most excited about and working on this year?

Manager

Answer Normal B I U A ::

Employee

Answer test

Question How can the employee best be supported to achieve their goals and grow this year?

Manager

Answer Normal B I U A ::

Employee

Answer test

After responses are entered click "Save" to save draft and return later, or "Next" to advance to meeting reminder page.

Manager reviews developmental question prompts and the employees responses and then enters their responses in the open text fields.

Back Next Save

At this point in the process, Managers are reminded about the Kick-Off meeting with their employee. If the Manager wishes to reference Kick-Off, and/or make any additions or changes, they are encouraged to click "Save for Later." After the meeting is held and feedback is final, please click "Next" to advance to the final review page.

Complete Manager Evaluation

Manager Evaluation:
CAP Kick-Off:

Actions



CAP - Kick-off Goals and Development Activities

Development Questions

Meeting Reminder

Review and Submit

Meeting Reminder

At this point in Kick-Off the Manager should schedule the Kick-Off meeting with their employee. Please select the "Save for Later" button below if you would like to make additions or changes to the Kick-Off during the meeting with your employee.

After final edits/additions are made during the meeting, please select "Next" to advance to the final review page where you may select "Submit".

Reminder: Once you submit this review, you will no longer be able to edit Kick-Off and the employee will be able to view the manager Kick-Off comments.

Please note, you can attach any helpful or supplemental documents for this CAP cycle below, but it is not a requirement. Any attachments added are only viewable to the manager.

Manager

Drop files here

or

Select files

Back Next Save

Complete Manager Evaluation

Manager Evaluation: 1
CAP Kick-Off:

Actions

- CAP - Kick-off Goals and Development Activities
- Development Questions
- Meeting Reminder
- Review and Submit

Goal

Category

Status

Goal

Category

Status

Development Questions

Question

| Manager | Employee |
|-----------------------------|--|
| Answer <input type="text"/> | Answer <input type="text" value="test"/> |

Question

| Manager | Employee |
|-----------------------------|--|
| Answer <input type="text"/> | Answer <input type="text" value="test"/> |

Meeting Reminder

enter your comment

Submit
Send Back
Save for Later

If you add a comment here, it will show on Process History. It is not part of the goal.

Click "Submit" after reviewing the employee and manager entered goals and reflections. **Note: after clicking "Submit" Kick-Off is finalized and sent to the employee to view.**

Click "Send Back" if you have made edits and want the employee to review before submitting.

Kick-Off is now complete! The entered goals will auto-populate into future CAP phases (Check-in & Wrap-Up) and can be viewed or edited in those phases.

For CAP related questions, please email GA_HRLearningDevelopment@bentley.edu