Monthly POBP Checklist

Tip: This checklist is meant to be a guide and is neither required or exhaustive - be sure to check in with your BU leaders to see if they have any additional needs!

OCTOBER

- [ ] Encourage managers to start thinking about requesting feedback on their direct reports in Workday
- [ ] Begin performance and compensation data validations in Workday

NOVEMBER

- [ ] Email BU leaders to request year-end promotions (must be approved by BU VPs before submitting to People Ops)
- [ ] Place calendar holds in early Jan for performance calibration meetings with the appropriate BU leaders (**POBP Note:** this will vary by BU depending on org structure/size)
- [ ] Submit additional equity planners below VP level (if necessary)

DECEMBER

- [ ] Remind employees to complete their self reviews by **Dec 8**
- [ ] Consolidate promos from each team in the promotion planning template (provided by comp) and complete recommendations for compteam review
- [ ] Share comp approved promotion recommendations with VPs for review/approval before comp planning opens in Jan (**POBP Note:** promotions will **not** be fully approved until MG review in Feb)
- [ ] Remind managers to complete The Learning Cloud E-Learning on performance reviews & comp planning (**POBP Note:** "Making Effective Compensation Decisions" will be especially helpful for new managers during comp planning)
- [ ] Remind managers to enter performance ratings in Workday by Jan **2** (**POBP Note:** this is the same day the company returns from Holiday break so they will need to plan ahead)

JANUARY

- [ ] Prep all necessary calibration meeting decks
- [ ] Share promotion recommendations + instructions with managers for comp planning input into Workday before **Jan 3**
- [ ] Schedule optional comp planning office hours for managers between **Jan 3 - 12**
- [ ] Complete all necessary performance calibration meetings with BU leaders
- [ ] Complete all necessary changes in Workday after initial calibration meetings with the BU and make sure all updates are reflected in the final calibration deck for Beth and Matt

FEB/MARCH

- [ ] Complete final BU performance, promo and comp calibration meetings with Beth + ELT members and make any final changes in Workday following the meeting
- [ ] Remind managers to schedule 1:1 performance and compensation conversations before March 7 (**POBP Note:** compensation discussions can not begin until after final comp committee approvals)
- [ ] Remind managers all performance and comp data will be visible to all employees in Workday on April 1