

# Monthly Manager Checklist

## OCTOBER

- ☐ Request feedback on your direct reports early! ([Manager Tip](#): at your next 1:1 ask your employee who they feel would be able to give feedback on their work)

## NOVEMBER

- ☐ Take the [Manager Performance Review & Comp Planning](#) self paced E-Learning on The Learning Cloud ([Manager Tip](#): bookmark this page for later so you can come back to it as needed!)
- ☐ Think through any promotions you would like to request on your team and draft a justification to share with your manager (your People Ops Business Partner will be reaching out to collect these)

## DECEMBER

- ☐ Complete your own self review in Workday by Dec 8 and follow up with your team to do the same!
- ☐ Begin reviewing employee self reviews and feedback in Workday ([Manager Tip](#): revisit the "Writing an Effective Year-end Review" module in the manager training on The Learning Cloud for tips on how to incorporate feedback from others in a year-end review)
- ☐ Prepare performance ratings for your direct reports ([Manager Tip](#): this will be the first thing you need to enter in Workday the day the company returns from holiday break)

## JANUARY

- ☐ Enter performance ratings for all direct reports in Workday by Jan 2
- ☐ Complete comp planning in Workday for all direct reports ([Manager Tip](#): revisit the "Annual Compensation Planning" and "Making Effective Compensation Decisions" modules in the manager training on The Learning Cloud or reach out to your manager or POBP with any questions)
- ☐ Begin drafting your manager review for all direct reports

## FEB/MARCH

- ☐ Enter all manager reviews in Workday ([Manager Tip](#): do not submit/finalize the process in Workday until you have had your 1:1 performance conversations)
- ☐ Schedule 1:1 performance and compensation conversations ([Manager Tip](#): performance conversations can begin in early Feb, but compensation discussions can **not** begin until after final comp committee approvals at the end of Feb - it is OK to have these conversations separately if needed)
- ☐ Complete all performance and comp conversations by March 7