

Talent Management: Matrix Organization Management

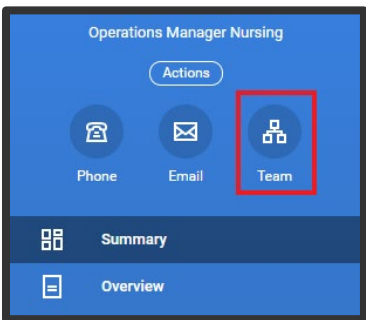
Matrix Management is a tool in Workday that allows leaders to route certain tasks to one of their direct reports. This will provide support during annual or ad hoc tasks that, due to volume, would be prohibitive for the leader to complete on their own. **As a Matrix Manager, you will have access to eligible tasks in Workday for specific workers as designated by your manager.**

TASKS AVAILABLE WITH MATRIX MANAGEMENT

1. Goal Setting
2. Performance Reviews
3. Performance Improvement Plans
4. Disciplinary Actions

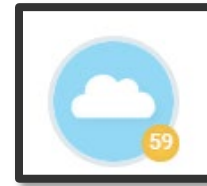
HOW MATRIX MANAGEMENT WORKS

1. **Eligible tasks are maintained by both the manager and matrix manager.** Both you (and any other matrix manager for the matrix organization) and the worker's manager will receive a task in your Workday inboxes, and once the task is completed, it will be removed from all inboxes.



2. If you open a task and begin working on it, once you click **Save for Later**, the task will only be assigned to you. See our [job aid](#) to reassign a task if needed.

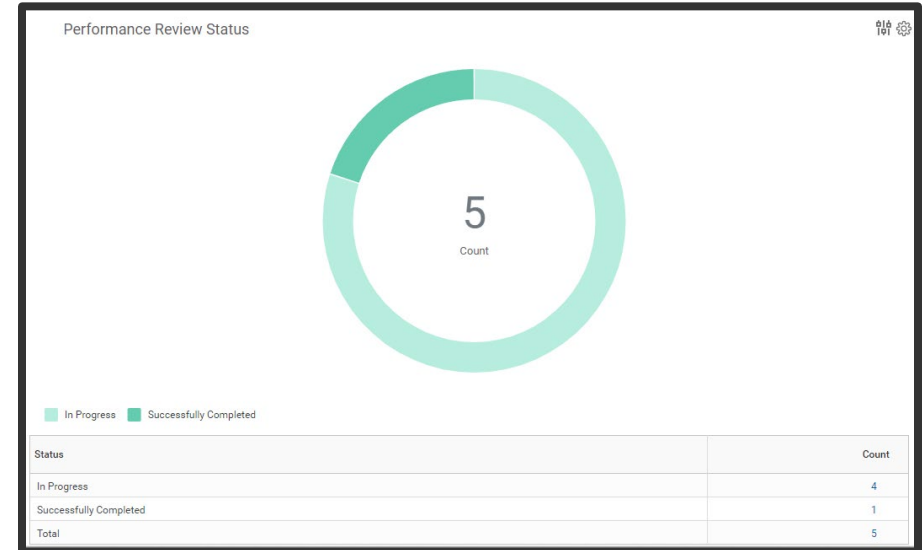
3. **You can view your matrix organization** by clicking on the **Team icon** on your Workday profile.



4. **You will have number icon on your cloud**, which represents the number of people that have a dotted line to you.

PERFORMANCE REVIEW

1. **Performance Review Status** for workers assigned to your Matrix Organization can be viewed by selecting the **Team Performance** application on your Workday home page, then selecting **the number in the circle** on report graph.



2. You can also view performance reviews by status:
 - a. Click on the number under **Count** in the Status column of **In Progress**, **Successfully Completed** or **Total**.



Note: A Matrix Manager will not have all the same permissions as a worker's manager. For example, a Matrix

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Manager is not able to Move Forward or Send Back performance reviews, only the worker's manager can.

e. Add all required fields to the goal and click **Submit**.

GOALS

1. You can add goals to workers in your matrix organization.
 - a. From the home page, click the **Team Performance** application.
 - b. Click **Add Goal to Employees**
 - c. As a Matrix Manager, you can enter multiple worker's names into the **Employees** prompt at a time to cascade goals, if needed. You are **not** able to cascade goals using the Organization prompt.

Add Goal to Employees

☒ Create New Goal

☐ Copy Existing Goal

Assign To

Employees

Organizations

OK Cancel

d. Click **OK**.