



Goal Setting Communications Timeline

Send date	Item	Reviews Jan 2-Jan 12	Date translation review complete
11/30	Tan & Shundra complete their reviews, doc goes to Andrea COMPLETE		
12/15 (est)	LE sends for translation COMPLETE		
Jan 16 & 18	HRBP training COMPLETE		
Jan 23	Global HRBP Preview Message	AH, Tan, SL, AL	
Jan 24	Msg from Andrea to Mgrs <i>Going to PEC as well</i>	AH, Tan, SL, AL	
Jan 25	Msg from Andrea to all EEs <i>Going to PEC as well</i>	AH, Tan, SL, AL	
Feb 1-16	EFX Central post	AH, SL, Tan, AL	
Feb 2 & 16	Mark's Weekly Note	AH, Tan, SL, AL, Mark	
4/5/24	Close out message		

When	Type/To Whom	Audience
Jan 23, 2024 - 1pm ET	HRBP Preview Message	ANZ- COMPLETE
Jan 23, 2024 - 1:30pm ET	HRBP Preview Message	All other, global HRBPs- COMPLETE
Jan 23, 2024 - 9pm ET	Msg from Andrea to Mgrs	ANZ & PEC- COMPLETE
Jan 24, 2024 - Noon ET	Msg from Andrea to Mgrs	All other, global managers COMPLETE
Jan 25, 2024 - 4pm ET	Msg from Andrea to all EEs	ANZ & PEC COMPLETE
Jan 25, 2024 - Noon ET	Msg from Andrea to all EEs	All other, global employees COMPLETE

Brazil schedule

[Detailed Timeline](#)

When	Type/To Whom	Audience
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January 30	Goal Setting, Mandatory Training, BRAVO!, CLIMB	All Brazil Employees
March 1	CLIMB Promotion to promote demo	All Brazil Employees
March TBD	HRBP Communication Preview	Brazil HRBP's
March TBD	Manager Communication	Brazil Managers
March TBD	Employee Communication	All Brazil Employees

Worker Type = Employee

Not terminated

Manager is not Begor

Employee is not Begor

Country is not Russia

Employee is not on Long-Term Disability

Not an intern

Employee is not Fixed Term and in USA

Employees hired by January 1

No Equifax Brazil

Include PEC (Distribution List)

Global HRBP Preview Message: 2024 Goal Setting

[Add Goal Setting Header with Green Accent Color for All Goal Setting Messages]

To: All HRBPs, AskHR, LOD Leaders, Tan Morales, Shundra Lee (exclude Brazil)

From: Andrea Lawson (banner: A Message from Andrea Lawson)

Date: Tuesday, Jan. 23/Jan 22 for ANZ

Subject: PREVIEW: 2024 Goal setting communications

HR Business Partners,

We are wired for growth! On Wednesday, January 24, we will send a message to all managers outlining the 2024 goal setting process, followed by a communication to all global employees on Thursday, January 25. This year's goal setting window officially opens on Thursday, February 1, with a Workday task in employees' inboxes. The deadline for goals to be set in Workday is Friday, March 1.

It is important that we focus on the critical priorities that deliver strong business performance, and that we each understand the role we play in driving that performance. Setting clear, compelling goals is one way leaders help individuals and teams connect their work to the Equifax Purpose: **Helping People Live Their Financial Best**. Goal setting is the opportunity for leaders to partner with their teams to set clear goals, ensuring every team member understands how they contribute to our collective success. Keep this in mind when counseling people managers during the goal setting window.

What you need to know

- **Employees will add** 3-6 SMART goals via Workday. These goals must reflect management/business initiatives and link to our **strategic priorities**. Employee and manager resources are available on **myPerformance** site.
- **New this year**, if an employee submits their goals and realizes they left something out, before the deadline, they can recall the goals back by using the retraction feature. Please visit the **FAQs** for step-by-step instructions.
- In support of our ongoing Environmental, Social and Governance (ESG) commitments all AIP-eligible employees must have a personal **security goal** and our Global Leadership Team members are also required to set a **Workforce Diversity** goal.

Key resources available at myPerformance:

- **Goal setting resource page** on ACTivate HR site (for HRBPs only)
- **NEW! 3-in-1 goal setting guide, Workday job aid, & FAQ document**
- **NEW! Goal setting overview videos for employees**
- **NEW! Goal setting overview videos for managers**
- **Kai**, Virtual Assistant to support employees with goal setting
- HRBP **one pager** to share with your teams
- **Virtual Manager Foundations Training** *Enabling Performance: Special Goal Setting Edition*
 - January 16 (PEC Managers)
 - January 17 & 18 (PEC Employees)

- January 23 & 26, 1 p.m. CLT (LATAM)
- January 29, 1 p.m. EST (Canada)
- January 31, 10-11:30 a.m. EST (COE)
- Australia/New Zealand
 - Option 1 - 1st Feb @ 10:00 a.m. AEST (virtual)
 - Option 2 - 6th Feb @ 10:00 a.m. AEST (face-to-face only)
 - Option 3 - 7th Feb @ 10:00 a.m. AEST (virtual)
- February 20 & 21 (Brazil managers)
- February 26 - 29 (8 Brazil employee sessions - 2x day)

Important dates & communications

Date	Deliverable
Jan. 24	Global manager comm (Jan. 23 for ANZ)
Jan. 25	Global employee comm (Jan. 24 for ANZ)
Feb. 1	Launch goal setting template in Workday. Alert sent to Gmail/Workday inbox, Workday homepage
Feb. 1-16	EFX Central banner announcement
Feb. 2 & 16	Mark's Weekly Message
Feb. 9, 14, & 16	Employee reminders
Feb. 19	Mass advance All incomplete goal templates or goal templates in-progress/not yet submitted will be returned to the Manager to review & approve, or send back
Feb. 23, 28 & Mar. 1	Targeted messaging to managers with employee goals outstanding (not approved)
Mar. 1	Goal setting deadline
Mar. 2	Workday task will no longer be accessible in manager's inbox
Mar. 4	Goals will be available to view

If you have any questions, please reach out to Shundra Lee at Shundra.Lee@equifax.com.

Thank you, as always, for your support!

Andrea

Global Employee Message: 2024 Goal Setting

[Add Goal Setting Header with Green Accent Color for All Goal Setting Messages]

To: All EFX Employees (excluding Russia, CTEs, interns)
From: Andrea Lawson (banner: A Message from Andrea Lawson)
Date: Thursday, Jan 25 / Jan 24 for ANZ
Subject: Start the year strong! Enter your performance goals by Friday, February 16

EFX Team,

New year, new goals! Setting and achieving goals is fundamental to drive and develop your career at Equifax! Goal setting is an opportunity to ensure we understand the overall objectives of our teams and businesses, and align with our managers on how we each contribute to our collective success.

What is goal setting at Equifax?

Each year employees partner with their manager to create **3-6 SMART goals** via Workday. These goals must reflect business initiatives and align with our **strategic priorities**.

In support of our Environmental, Social and Governance (ESG) commitments, all AIP-eligible employees must have a **global security goal** and are **invited** to create an **additional optional ESG goal**. Our Global Leadership Team members are also **required** to set a **Workforce Diversity goal**.

How do I prepare for this?

Head to **myPerformance** for guides on setting SMART goals and instructions on how to enter goals in Workday. Also, visit Equifax CLIMB, our global learning platform, for curated, on-demand content specific to **goal setting** to aid you throughout the year.

How should I approach development goals?

Key dates

February 1 - February 16

Goal setting window is open!

Key actions

Have a discussion with your manager to understand what is expected of you for the year and how your success will be measured. Next, you'll add in Workday 3-6 SMART business goals that align with your manager's priorities.

Review your goals regularly, both personally and with your manager, to check that you are staying on track and getting the feedback you need to deliver throughout the year.

S	Specific. What will I accomplish?
M	Measurable. How will I determine if it was achieved?
A	Attainable. Is my goal challenging, but achievable?
R	Relevant. Does my goal link to organizational strategies?
T	Timebound. When will I accomplish my goal?

Development goals are an important component of good goal setting conversations. All employees are encouraged to talk with their manager to identify 1-2 relevant development goals that will help you improve your performance in your current role and/or build skills for the future as you **drive and develop** your career.

Key resources available at myPerformance:

- **NEW! [3-in-1 goal setting guide, job aid, & FAQ document](#)**
- **NEW! [Goal setting overview videos for employees](#)**
- **[On-demand training in Equifax CLIMB](#) is also available**
- **[myCareer plan](#)** to aid with developmental conversations

New this year, if you submit your goals and realize that you left something out, before the deadline, you can recall the goals by using the retraction feature, or asking your Manager to send them back to you. Please visit the **FAQs** for step-by-step instructions.

Let's start the new year strong! Remember, it's up to each of us to take ownership of our career path at Equifax and ensure we're **focused on the right priorities** as the New EFX! If you have any questions around this year's goal setting process, **please try our new [Virtual Assistant in People Link](#)** or send an email to askhr@equifax.com.

Regards,

Andrea

Global Manager Message: 2024 Goal Setting

[Add Goal Setting Header with Green Accent Color for All Goal Setting Messages]

To: All EFX Managers (exclude Russia, exclude Brazil)

From: Andrea Lawson (banner: A Message from Andrea Lawson)

Date: Wednesday, Jan 24/Jan 23 for ANZ

Subject: 2024 goal setting: Review and approve goals by March 1

Equifax People Leaders,

As we continue our transformation, and to ensure we remain wired for growth, it is more important than ever that we focus on the critical priorities that deliver strong business performance. Partnering with our teams to set clear, compelling goals is one of the ways we as leaders help ensure our nearly 15,000 bright minds feel connected to our Purpose and vision of the future of Equifax. Goal setting is an ideal time to partner with your team members to set clear objectives and ensure each team member understands how they contribute to our collective success.

What is goal setting at Equifax?

Each year employees add **3-6 SMART goals** via Workday. These goals must reflect business initiatives and align with our **strategic priorities**. In support of our Environmental, Social and Governance (ESG) commitments, all AIP-eligible employees must have a **global security goal** and are **invited** to create an **additional optional ESG goal**. Our Global Leadership Team members are also **required** to set a **Workforce Diversity goal**.

What is your role as a people leader?

Your role is to talk with your team members and help them understand how their work supports Equifax's Purpose and vision. Employees should set **3-6 SMART goals** that reflect management/business initiatives and link to our strategic priorities.

Key dates

February 1 - February 16

Employees write and submit goals via Workday.

February 1 - March 1

Managers review, conduct goal setting conversations and approve goals via Workday.

Key actions

You will receive a task via Workday to review and approve the goals of your employees. Ensure you have an individual conversation with each team member.

How do you prepare for this?

Sign up [here](#) for live training to support in setting SMART goals with your team. On-demand training via [Equifax CLIMB](#) is also available.

How do I support the goals of my employee(s)?

Development goals are an important component of good goal setting conversations, helping our teams drive and develop their career at Equifax and chart their path forward. All employees are encouraged to talk with their manager to identify 1-2 relevant development goals that will help them improve their performance in their current role and/or build skills for the future.

S	Specific. What will I accomplish?
M	Measurable. How will I determine if it was achieved?
A	Attainable. Is my goal challenging, but achievable?
R	Relevant. Does my goal link to organizational strategies?
T	Timebound. When will I accomplish my goal?

Key resources available at [myPerformance](#):

- [NEW! 3-in-1 goal setting guide, Workday job aid, & FAQ document](#)
- [NEW! Goal setting overview videos for employees](#)
- [NEW! Goal setting overview videos for managers](#)
- [myCareer plan](#) to help support career conversations

New this year, if an employee submits their goals and realizes they left something out, before the deadline, they can recall the goals by using the retraction feature. Please visit the [FAQs](#) for step-by-step instructions.

Thank you for your leadership and all you do to **develop our people** and **drive our business** forward! If you have any questions around this year's goal setting process, **please try our new [Virtual Assistant in People Link](#)** or send an email to askhr@equifax.com.

Regards,

Andrea

EFX Central: Announcements

[Add Goal Setting Header with Green Accent Color for All Goal Setting Messages]

Date: Thursday, Feb. 1 - Feb 16

Visible by: All Employees



The 2024 goal setting deadline is almost here

Individual goals should be set and approved in Workday by Friday, March 1

Goal setting is an opportunity to ensure we all understand the overall objectives of our teams and businesses, and align with our managers on how we each contribute to achieving those goals.

With that in mind, employees should have drafted 3-6 SMART (Specific, Measurable, Attainable, Relevant, Time-bound) goals in partnership with their manager via their Goal Setting template in Workday and submitted them to their manager **by Friday, February 16**.

In support of our ongoing Environmental, Social and Governance (ESG) commitments all AIP-eligible employees must have a personal **security goal** and our Global Leadership Team members are also **required** to set a **Workforce Diversity goal**.

The deadline for goals to be set in Workday is **Friday, March 1**.

Managers should review, conduct goal setting conversations with each of their employees and approve in Workday before March 1. Development goals that will help employees improve performance in their current role and/or build skills to drive and develop their career forward should also be part of that conversation.

New this year, if you submit your goals and realize that you left something out, before the deadline, you can recall the goals back by using the retraction feature or asking your manager to send them back to you. Please visit the **FAQs** for step-by-step instructions.

Beginning Monday, **March 4**, goals will be visible in employee profiles in Workday. Employees can edit their goals as necessary throughout the year.

Mark’s Weekly Note

Date: Friday, February 2

To: All Employees

As a part of our ongoing focus each year, our nearly 15,000 bright minds are invited to set 3-6 individual goals in Workday aligned to our [EFX2025 Strategic Priorities](#) which reflect business initiatives and align our teams on how we contribute to achieving these goals. All AIP-eligible employees are required to set a **global security goal** and all Global Leadership Team members are also required to set a **Workforce Diversity goal**. This is also a great time to include 1-2 relevant personal development goals to drive and develop your career. Visit [myPerformance](#) and [Equifax CLIMB](#) for resources and training.

Mark’s Weekly Note

Date: Friday, Feb. 16

To: All Employees

Friday, February 16 is the deadline to get your goals into Workday ... starting the year by setting goals and reviewing them with your manager keeps us all aligned as One Team to deliver on our EFX2025 priorities as well as **drive and develop** our bright minds! **#NewEFX**

Workday Template <i>(needed in EN FR SP PT)</i>	2024 ASKHR/HRBP Goal Setting Training Deck <i>(SP, FR and PT)</i>	myPerformance for Goal Setting <i>(needed in PT)</i>
WD Alerts <i>(needed in EN FR SP PT)</i>	3 in 1 Resource <i>(needed in PT)</i>	1 page flyer <i>(Redesign by Creative)</i>