

HRBP preview message

To: All HRBPs, AskHR, LOD Leaders, Stephanie Rizzuti, Shundra Lee, Brooke Roycroft

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

[Add mid-year & talent review email banner]

Date: Tuesday, June 4

Subject: PREVIEW: Mid-year check-in & Talent Review

Mid-Year
Elevate, Accelerate,
Dominate!



HR Business Partners,

Tomorrow, **Wednesday, June 5**, we will send an email to all managers outlining the **2024 mid-year check-in and talent review process**, followed by an email to all global employees on Thursday, June 6 outlining the **2024 mid-year check-in process and timeline**.

Earlier this year, employees set 3-6 SMART business goals. AIP and global leadership team members set required (and optional) ESG goals, all of which will populate in the mid-year template.

- On **Monday, June 10** the mid-year window officially opens
 - Managers will receive an *early* Workday notification on **Friday, June 7**, outlining the mid-year process and dates
- Workday tasks will launch with notifications to Gmail inboxes accordingly
 - Prompt to employees – complete an *optional* self-evaluation by **Friday, June 21**
 - Prompt to managers – complete an *optional* manager-evaluation (available **June 24 - July 12**)
 - Prompt to managers – have a **required** performance conversation and complete the Acknowledgement task (**July 15 - July 19**)
- All mid-year check-in conversations and acknowledgements should take place by **Friday, July 19**
- On **Wednesday, July 24** a global communication will be sent to all employees thanking them for their participation in this year's process.

Employees will be encouraged to showcase their experience, education, certifications and skills by updating their [career profile](#) in Workday.

Additionally, I will highlight the [Equifax Scaled Behaviors](#), which offer a deeper look at the behaviors associated with our [Shared Values](#). This is an excellent resource for employees wanting to further develop themselves. The resource illustrates what our Shared Values and behaviors look like in action at our different [Connections](#) career levels.

This time of year is also when people leaders will proceed with [assessing their teams' potential](#) in preparation for [Talent Review](#). Talent Review is an opportunity for managers to take a deep look at their employees to determine possibilities for development as well as identify potential successors and bench strength.

As in previous years the local execution plan for your teams' [Talent Review](#) rests with you (HRBP), to set and manage. Prior to Talent Review, managers will launch the [Assess My Team's Potential](#) task in Workday and indicate a potential rating and other key data points for each team member.

As a reminder, a calibrated Talent Review session is required for Layer 5 and above in the U.S., and Layer 6 and above outside the U.S. We ask that your sessions be completed by Friday, August 30 in advance of Corporate Talent Review preparations and subsequent sessions in October. Please work with your relevant HRLT member to understand your BU/COE/Regional specific plan and timeline.

Key Resources

- [ACTivate HR](#) (for HRBPs only)
- [Equifax Scaled Behaviors](#)
- [myPerformance](#)
- [Equifax CLIMB](#)

Global Training Offerings

When promoting training offerings to your teams, you may use [this link](#) to direct employees and managers to the full set of offerings. If you prefer to provide employees and managers with links specific to local offerings only, please work with **Christina Pickett** to ensure you have the applicable links.

Have questions? Start a chat with [Kai, our HR virtual assistant](#) or submit a ticket to AskHR@equifax.com.

Thank you as always for your support!

Regards,

Andrea

+ [manager message here](#)

+ [employee message here](#)

Manager Message

To: EFX Managers (w/ above audience requirements)

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

[Add mid-year & talent review email banner]

Date: Wednesday, June 5

Subject: Mid-year check-in & Talent Review

Mid-Year
Elevate, Accelerate,
Dominate!



Equifax People Leaders,

We are **Wired for Growth**, driven by performance and innovation. That's why the mid-year check-in is an important opportunity for us to connect with our bright minds to ensure they remain focused on the right goals.

What is mid-year and Talent Review at Equifax?

The mid-year check-in is an opportunity to review progress and adjust goals as needed, stay aligned on the level of support needed, and ensure proper resources are available for success.

Talent Review enables leaders to effectively assess, develop, and retain their top talent and identify successors for key roles.

What is your role as a people leader?

Most importantly your role is to have a meaningful feedback conversation with your team members about how they have progressed towards their goals to date. Schedule your conversations to ensure that you and your employee are able to complete the Acknowledgement task in Workday by Friday, July 19.

Talent Review is an opportunity for managers to take a deep look at their employees and assess their potential to determine possibilities

Key dates

June 10 - June 21

Employee *optional* self-evaluation template available in Workday

June 24 - July 12

Manager *optional* evaluation template available in Workday

July 19

Employees & Managers 1:1 conversation and Workday acknowledgement due

for development as well as identify potential successors and bench strength.

How do I prepare?

While check-ins with your team members occur regularly, the mid-year conversation is a time to:

ASSESS & UPDATE the strategic business and development goals set at the beginning of the year, and make adjustments where necessary.

REVIEW & SUBMIT how to successfully reach goals by the end of the year.

CHAT & ACKNOWLEDGE what's going well, highlight strengths, and deliver constructive feedback around opportunities for improvement.

Follow instructions provided by your local HR team on how to prepare for Talent Review and when you may be asked to participate in a Talent Review session.

Prior to Talent Review, managers will launch the [Assess My Team's Potential](#) task in Workday and indicate a potential rating and other key data points for each team member.

Tomorrow, **Thursday, June 6**, I will send a message to global employees encouraging everyone to **complete the optional self-evaluation** and share resources to help them prepare for the **1:1 conversation they will have** with their leader.

All employees will also be encouraged to showcase their experience, education, certifications and skills by updating their [career profile](#) in Workday.



I will also highlight the [Equifax Scaled Behaviors](#), which offer a deeper look at the behaviors associated with our **Shared Values**. This is an excellent resource for employees wanting to further develop themselves. The resource illustrates what our Shared Values and behaviors look like in action at our different **Connections** career levels.

Key Resources

- [myPerformance](#)
- [Equifax CLIMB](#)
- [People Link](#)
- [Equifax Scaled Behaviors](#)

Thank you in advance for engaging in our mid-year performance cycle. This is an opportunity for our bright minds to shine a light on the great work taking place across the organization and for you to help guide them on their career development journey. **#PowerYourPossible**

Have questions? Start a chat with [Kai, our HR virtual assistant](#) or submit a ticket to AskHR@equifax.com.

Regards,

Andrea

Employee Message: 2024 Goals: Mid-year check-in
To: EFX Employees (w/ above audience requirements, excluding SLT, etc.)
From: Andrea Lawson (banner: A Message from Andrea Lawson)
[\[Add mid-year email banner\]](#)
Date: Thursday, June 6
Subject: Time to shine: Prepare for your mid-year check-in

Mid-Year

Elevate, Accelerate,
Dominate!



Equifax Team,

We are **Wired for Growth** and driven by performance and innovation. That is why at mid-year we make a point to check-in and connect with our bright minds to ensure we are focused on the right goals, with the proper support to be successful.

What is mid-year at Equifax?

The mid-year check-in is an opportunity for you and your manager to review goals, align on the support needed, and ensure that relevant resources are available.

This is an ideal time to evaluate the goals you set at the beginning of the year and adjust based on progress and changes to priorities.

Now is also a great time to discuss your career development goals. Think about what education, experiences and exposure you will need to achieve those goals and discuss the support you will need with your manager.

Key dates

June 10 - June 21

Employee *optional* self-evaluation template available in Workday

July 19

Employees & Managers 1:1 conversation and Workday acknowledgement due

How do I prepare?

ASSESS & UPDATE the business goals and development goals set at the beginning of the year, and make adjustments where necessary.

REVIEW & SUBMIT what's going well and how to successfully overcome obstacles to achieve success during the remainder of the year.

CHAT & ACKNOWLEDGE your progress, aspirations, and the level of support, connectivity, and resources you need for success.



Remember, you can showcase your experience, education, certifications and skills by updating your [career profile](#) in Workday!

[Equifax Scaled Behaviors](#) offer a deeper look at the behaviors associated with our **Shared Values**. This is an excellent resource for employees wanting to further develop themselves. The resource illustrates what our Shared Values and behaviors look like in action aligned to our different **Connections** career levels.

Key Resources

- [myPerformance](#)
- [Equifax CLIMB](#)
- [Equifax Scaled Behaviors](#)

Thank you in advance for engaging in our mid-year performance cycle. This is an opportunity for our bright minds to shine a light on the great work taking place across the organization and to **Power Your Possible!**

Have questions? Start a chat with [Kai, our HR virtual assistant](#) or submit a ticket to AskHR@equifax.com.

Regards,

Andrea