Product Specification Sheet

Built on Workday – Advanced AI Check-In

Version 0.1 - August 2025

Product Description

Advanced AI Check-Ins enhances Workday's native Check-In functionality by adding automation, structure, and intelligence. It enables recurring, high-quality 1:1 conversations between managers and employees that are consistent, trackable, and integrated into the broader performance process. AI-generated summaries, reminders, and configurable templates make preparation effortless, while Outlook integration eliminates scheduling friction. It's fully native to Workday and deploys via the Built on Workday platform.

The main benefits are:

- Save hours annually by streamlining check-ins
- Better conversations, follow-up, and performance insights
- AI-driven preparation reduces admin time and increases quality

The main features of the product are:

- Configurable templates and agendas for various check-in types
- Outlook calendar sync and automated scheduling
- AI-generated summaries, reminders, and follow-ups
- Shared and private notes with role-based access
- Native Workday task triggering and performance review integration

Components

Supported Languages:
- English (US)
- Translatable in configuration to any language

Tasks:
- Schedule Check-In
- Schedule Check-In for Organization

Security Domains:
- A
- B
- C

Business Processes:
- Schedule Check-In
- Complete Check-In

Workday Touchpoints

Below you can view the touchpoints with other Workday modules and subcomponents
- Workday HCM: Core worker data and organization data is needed
- Workday Security: Need existing security groups to be configured

External Touchpoints

The following components are optional, but if you want to use these services they require external preconfigured integrations:
- Outlook – integration via GraphAPI with MSFindTime
- LLM – to leverage the AI features you need to provide an API key to a LLM. Currently supported are Azure OpenAI, Google Gemini and AWS Bedrock

Process Descriptions

- **Create & Schedule:**
  Managers or admins select check-in type, set frequency, and assign participants.

- **AI Preparation:**
  Prior notes and tasks are summarized; action reminders are surfaced using an external LLM (optional).

- **Conduct Check-In:**
  Structured template guides the conversation; participants can use shared or private notes.

- **Follow-Up:**
  Post-meeting tasks or Workday processes can be triggered (e.g., goals, performance entries).

- **Review & Reporting:**
  Data is available for HR reporting and optionally feeds into formal performance evaluations. Standard reports are not included.

Limitations

- AI features require access to an external LLM (e.g., OpenAI via Azure)

- Google Calendar integration is planned but not yet available

- The app does not store historical chat or performance data outside of Workday

Key Assumptions

- Customers have a valid Workday HCM and Talent & Performance license
- LLM usage (if enabled) is configured and will come at additional cost. License for LLM will be directly with third party vendor.
- Security setup and calendar integration are client responsibilities
- No customizations outside standard configuration
- Data remains within Workday unless explicitly pushed via API

Appendix

Maintenance and Management

- Biannual updates to align with Workday releases

- All customers receive release notes and access to new features

- Critical fixes or legal compliance updates delivered as needed

- Product managed by Incubane's Extend team, with dedicated service support team

- See SLA for more details

Additional Services

The product description does not include the services below, but these can be purchased separately.

- Custom configuration workshops
- Implementation services of functional services or integration services
- Training for HRBPs and managers
- Change management campaign support
- LLM prompt customization
- Integration with internal systems or dashboards