

iProConference 2015

Amy Grubb



Introduction to SuccessFactors

About Me...



Amy Grubb, CEO/Principal Consultant @ Cloud Consulting Partners, Inc.

- 17+ years SAP and Human Capital Mgt consulting
- 8 years SuccessFactors implementation experience (across suite), 9 years SAP HCM implementation experience
- Teaches SFSF Mastery courses for SAP Education
- Author, *SuccessFactors for SAP ERP HCM 1st and 2nd Editions*
- SME on SuccessFactors for SAP Labs development on SAP-SFSF integration
- Expertise includes deep knowledge across entire SFSF suite including integration of modules; Talent management process design

In This Session



- Overview of all SuccessFactors HCM modules
- Discuss key features of all modules including:
 - Employee Central
 - Goal and Performance Management
 - Succession & Development
 - Compensation
 - Recruiting
 - Onboarding
 - Learning
 - Jam
 - Workforce Analytics & Planning
 - Foundation (Platform)
- Discuss best practice features built into the modules

Components of the SuccessFactors HCM Platform



- The SuccessFactors HCM Platform is made up of:



- Employee Central
- Goal Management
- Performance Management
- Compensation
- Recruiting
- Onboarding
- Learning
- Succession & Development
- SAP Jam
- Workforce Planning
- Workforce Analytics
- SuccessFactors Mobile
- Platform

Components of the SuccessFactors HCM Platform—Employee Central



- Employee Central
 - Provides enterprise-level core HCM functionality in an intuitive user interface
 - Allows users to view, manipulate, audit, and report organizational data across countries, cost centers, legal entities, and employee types
 - Core HRIS in the cloud

Components of the SuccessFactors HCM Platform—Goal/Performance Mgt



- Goal and Performance Management
 - These are two of the strongest modules of the suite
 - They are feature-rich, they support organizations to deliver more meaningful reviews, and they align employee goals with business goals
 - Current versions are best-practice for completing goal planning and reviewing performance
 - Modules can be implemented quickly and fairly easily

Components of the SuccessFactors HCM Platform—Goal Management



- Goal Management v12 User Interface

Goals

Mary Battle Stump (mary) on behalf of Carla Grant3 (cgrant3) | People

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Goal Plan | Status Report | Execution Map | Meeting Agenda | Help & Tutorials

Carla Grant3 | 2014 Goals

Mass Assign | Cascade | Add New | Display

Goal Status: Not Approved

Displaying 1–7 of 7 Goals

Total Weight: 100.0%

Goal	Link Data	Metrics	Actual	Complete	Weight	Start Date	Due Date	Status	Action
☐ Decrease average cost per hire 10% by first quarter Edit		% decrease in cost per hire		0%	10%	01/01/2014	12/31/2014	On Track	⚙️
 Goal aligned down to Richard Maxc: Decrease average cost per hire 5% by first quarter		% decrease in cost per hire		0%	10%	01/01/2014	12/31/2014	Not Started	
 Goal aligned down to Sld Morton: Decrease average cost per hire 5% by first quarter		% decrease in cost per hire		0%	10%	01/01/2014	12/31/2014	Not Started	
☐ Increase market share by 8% Edit		market share reports on a quarterly basis; review of win/loss		75%	30%	01/01/2014	12/31/2014	On Track	⚙️
 Goal aligned down to Brenda Davis: Document all administrative procedures for position in the case of absence		# of procedures documented		0%	Max: 50.0% 100%	01/01/2014	12/31/2014	On Track	
☐ Implement a system to provide online monitoring of vendors Edit		Online monitoring implemented		0%	10%	01/01/2014	12/31/2014	Not Started	⚙️

Components of the SuccessFactors HCM Platform—Performance Management



- Performance Management Team Overview and Team Rater

Team Evaluation

Recommended Now Calibration **Team Rater**

	Due Thu 10/31/2013	Due Fri 11/30/2013	Due Thu 01/31/2013	Due Sun 02/03/2013
My Team >	Feedback from Others	Employee Assessment	Team Evaluation	1:1 Meeting
 Vic Stokes		3.1	2.74	 Confirm 1:1 meeting and send to Vic
 Sid Murren		3.45	3.45	 Confirm 1:1 meeting and send to Sid
 Marcus Hoff		3.74	3.54	 Review Marcus

Performance

Mary Battle Stump (mary) on behalf of Carla Grant3 (cgrant3) People

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Reviews Team Overview Help & Tutorials

Team Evaluation Competencies

Save Cancel Print Preview

	Brenda Davis	Marcus Hoff	Richard Maxx	Sid Morton	Wilma Sown	Vic Stokes
Accepting Direction	1 2 3 4 5	n/a	n/a	n/a	n/a	n/a
Communication	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Customer Focus	n/a	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Hiring	n/a	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Integrity/Ethics	n/a	n/a	n/a	n/a	1 2 3 4 5	n/a
Productivity	1 2 3 4 5	n/a	n/a	n/a	n/a	n/a
Project Management	1 2 3 4 5	n/a	n/a	n/a	n/a	n/a
Sense of Urgency	1 2 3 4 5	n/a	n/a	n/a	n/a	n/a
Teamwork	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Summary						

Team Rater

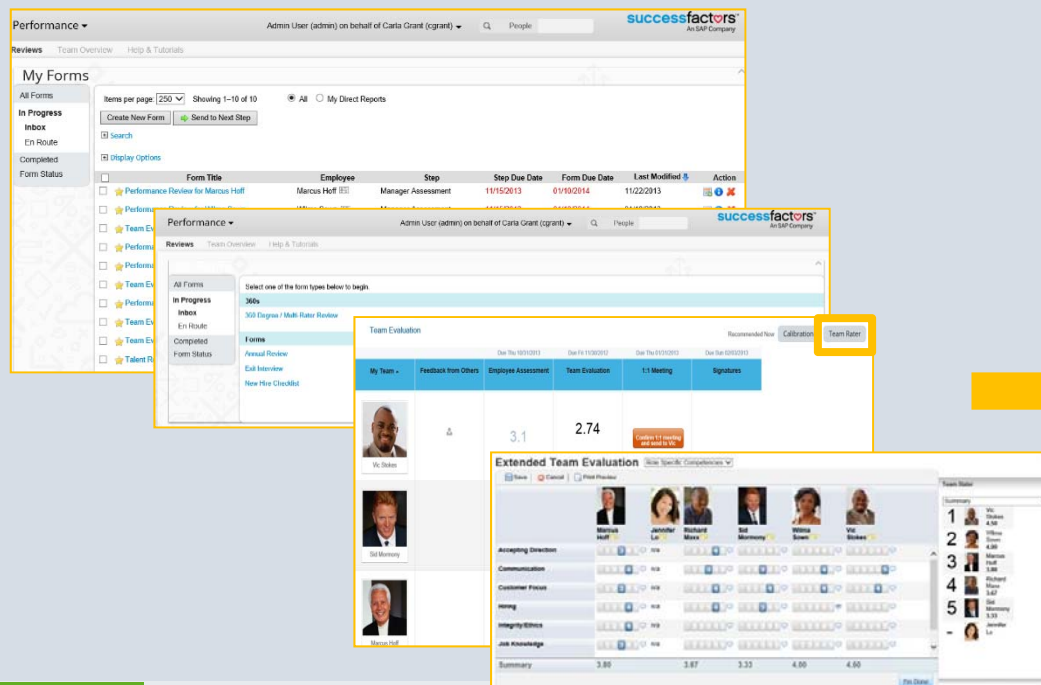
Summary

- Brenda Davis
- Marcus Hoff
- Richard Maxx
- Sid Morton
- Wilma Sown
- Vic Stokes

Components of the SuccessFactors HCM Platform—Performance Management



- Goal and Performance Management data feeds into a number of other talent management processes within SuccessFactors, such as:



Components of the SuccessFactors HCM Platform—Compensation/Variable Pay



- Compensation
 - Provides a range of functionality such as:
 - Access-controlled compensation plans, budgeting, calibration, variable pay options, pay-for-performance
 - Features hierarchy-based approvals, departmental budget roll-ups, and total rewards statements
 - Dashboard and analytics measure the impact of compensation measurements and adjustments on budgets in real time

Components of the SuccessFactors HCM Platform—Compensation/Variable Pay



- Compensation worksheet

Compensation ▾ Carla Grant (cgrant) ▾ ? People ▾ successfactors™ An SAP Company

Forms Executive Review Budget Assignments Planning Permissions Approval Help & Tutorials

My Forms: 2012 Comp and Bonus Plan for Carla Grant (cgrant)

Route Map

Complete Compensation Planning → Comp Admin Review → Completed

Get Feedback Send to Next Step

Use this grid to plan or allocate compensation for your group. A proposed allocation is suggested by the system, based on each team member's performance, pay grade, and benchmark. Fill in the allocation you want.

Display Options

Date Range: 11/01/2012 to 11/30/2012 Currency View: Functional Currency (USD) ▾

	Merit	Promotion	Lump Sum
Budget	\$38,303 3.97%	\$43,850 4.54%	\$48,250 5.00%
Total	\$30,582 3.17%	\$0 0.00%	\$0 0.00%
Unallocated	\$7,721 0.80%	\$43,850 4.54%	\$48,250 5.00%

Metrics

Items per page: 10 Showing 1–6 of 6 Full View

Name	Job Title	Review Rating	Prorating	Local Currency Code	Current Salary			2011 Increase	Salary Grade	Merit		Adjustment		Lump Sum	
					Current Annual Salary	Hire Date	Range Penetration			Merit Guidelines \$ %	Merit	Adjustment	Lump Sum		
Marcus Hoff	Sales Director, NE	Exceeds Expectations	100.0%	USD	\$186,000	07/12/1995	60.00%	4.50%	18	4.00%-8.00%	\$ 7,440	4.00%	\$ 0	0.00%	\$ 0
Jennifer Lo	Administrative Assistant	Meets Expectations	100.0%	USD	\$88,000	07/01/2009	80.00%	3.00%	8	3.00%-6.00%	\$ 2,640	3.00%	\$ 0	0.00%	\$ 0
Richard Max	Sales Director, NC	Meets Expectations	100.0%	EUR	\$190,000	01/11/1995	0.00%	4.00%	19	3.00%-6.00%	\$ 5,700	3.00%	\$ 0	0.00%	\$ 0
Sid Mormony	Sales Director, SC	Meets Expectations	41.92%	USD	\$191,000	08/01/2011	10.00%	0.00%	19	1.26%-2.52%	\$ 2,402	1.26%	\$ 0	0.00%	\$ 0
Wilma Sown	Senior Director, NW Sales	Exceeds Expectations	100.0%	USD	\$193,000	01/11/1995	30.00%	6.00%	19	4.00%-8.00%	\$ 7,720	4.00%	\$ 0	0.00%	\$ 0
Vic Stokes	Sales	Exceeds Expectations	100.0%	USD	\$117,000	07/12/2007	70.00%	5.00%	11	4.00%-8.00%	\$ 4,580	4.00%	\$ 0	0.00%	\$ 0

Components of the SuccessFactors HCM Platform—Succession & Development

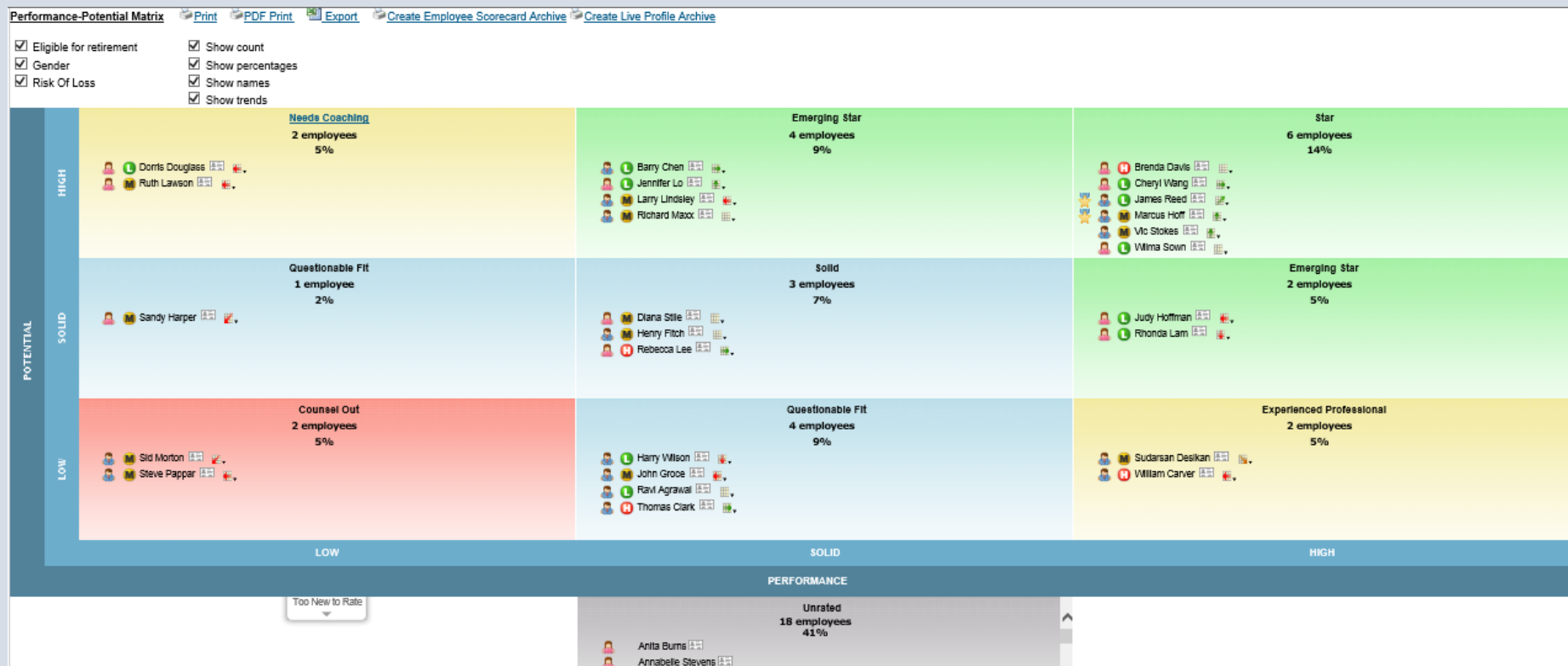


- Succession and Development allows managers to:
 - Objectively Identify High-Potential Individuals
 - Assign Successors to Key Positions
 - Evaluate Successor Readiness
 - View team placement on the 9 box grid (Performance by Potential Matrix)
 - Create Development Plans for Successors
 - Manage Learning Activities for Development objectives

Components of the SuccessFactors HCM Platform—Succession & Development



- 9 Box Matrix Grid (Performance by Potential)



Components of the SuccessFactors HCM Platform—Recruiting Execution



- Recruiting Execution includes:
 - Recruiting Management (ATS) and Recruiting Marketing features
 - Supports attracting, engaging, and selecting hires more efficiently.
 - Feeds from and to EC and SAP HCM (on-premise)

The screenshot shows the 'Candidates' section of the SuccessFactors Recruiting interface. It includes a search bar with 'Keyword and Item Search', a 'Candidate Search' dropdown, and a 'Saved Searches' link. Below the search bar, there are filters for 'Candidate is' (external or internal) and 'and resume or cover letter contains keyword'. The 'Search' button is highlighted.

The screenshot shows the 'Interview Central' section of the SuccessFactors Recruiting interface. It displays a table with columns for Job Title, Req ID, Hiring Manager, and Job Description. Below the table, there is a section for 'Candidates' with columns for Name, Interview Date, Team, Interview Details, and Overall Ratings. The table shows one candidate, Sebastian Criss, with an interview date of 2 and a team of 2. The 'Interview Details' column has a 'Print and Go!' button. The 'Overall Ratings' column shows 'Unrated' and a 'Rate now' button.

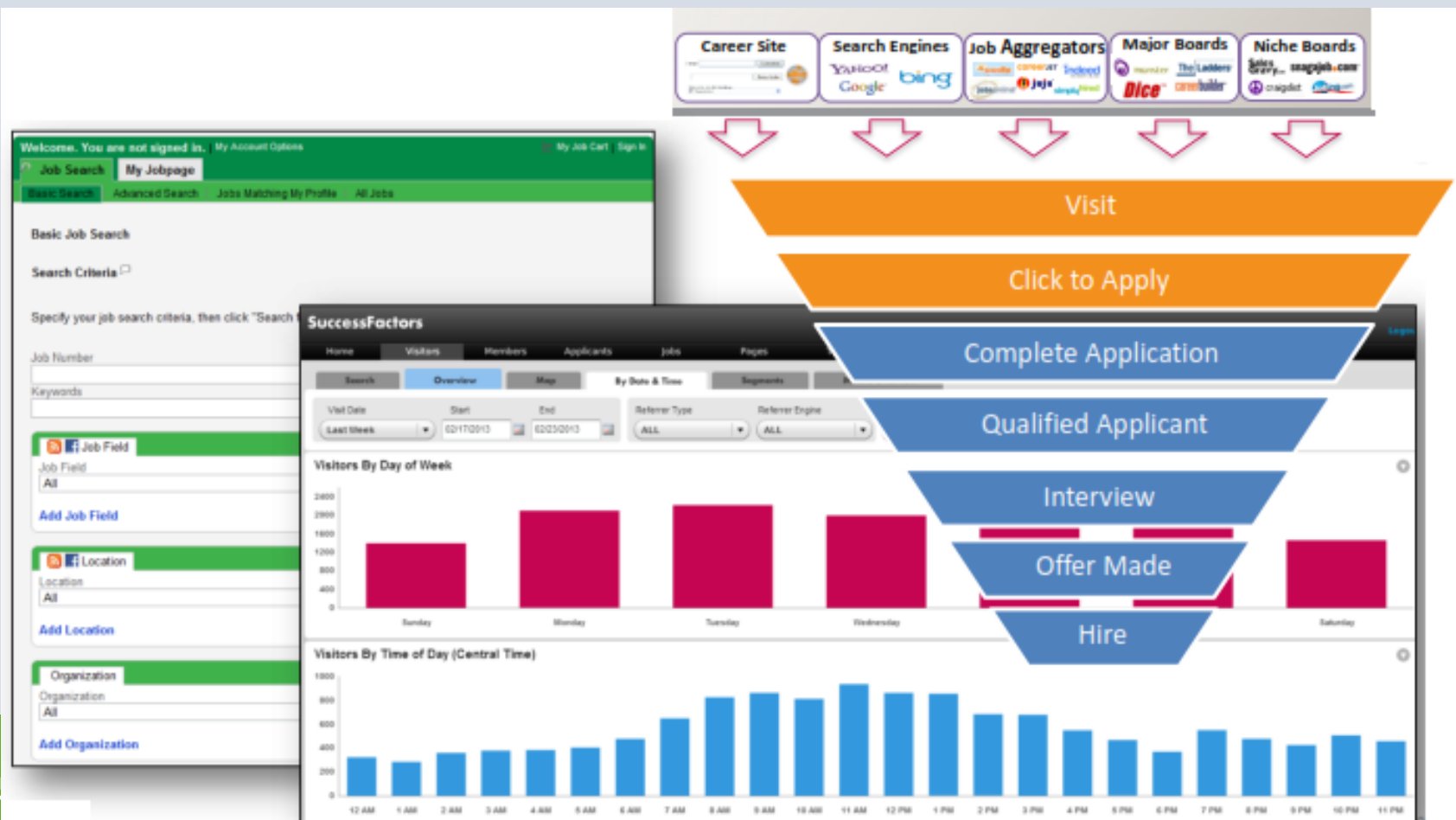
Job Title	Req ID	Hiring Manager	Job Description
Database Programmer	1306	Jennifer Herley	Job Description

Name	Interview Date	Team	Interview Details	Overall Ratings
Sebastian Criss		2	Print and Go!	Unrated Rate now

Components of the SuccessFactors HCM Platform—Recruiting Execution



- Recruiting Marketing tools increase candidate engagement and retention



Components of the SuccessFactors HCM Platform—Onboarding



- Onboarding allows new hires to gain access to the online portal to:
- Complete required documentation, get oriented to their team, view their learning plan, interact with SAP Jam groups & more!

The image shows a screenshot of the SuccessFactors Onboarding portal. The interface is dark-themed with a top navigation bar containing 'Home', 'Activities', and 'Paperwork'. The main content area is divided into several sections. On the left, a 'New Employee Step' form titled 'Enter Your Name and Social Security Number' is displayed, with fields for SSN, name, and date of birth. To the right, a 'Welcome onboard!' message is shown with a photo of Lisa Morton. Further right, a 'Meet Your Buddy' section features a photo of Chloe Burns, a Marketing Specialist. Below this, a 'Meet Your Team' section shows a grid of team member photos, including Julie Richards. A 'Recommended People' section at the bottom right features photos of Carl Lewis and Darlene Sharp. A 'Learning' section is partially visible at the bottom. The SuccessFactors logo is in the top right corner, and the user's name 'Lisa Morton' is in the top left.

Components of the SuccessFactors HCM Platform—Learning



- Learning
 - Feature-rich Learning Management System (LMS) that allows the use of social and mobile features to enhance learning
 - Provides ability for supervisors to delegate courses; allows employees to search the course catalog
 - Provides employees a To-Do List, Easy Links, and Status Pods to track their learning activities
 - Provides Managers the ability to track due and overdue courses; as well as identify skill gaps in their employees
 - Allows e-learning content to be created, managed, and delivered using iContent

Components of the SuccessFactors HCM Platform—Learning



- Learning Plan always accessible to employees and managers

The screenshot displays the SuccessFactors Learning Plan interface. At the top, the SuccessFactors logo and 'BUSINESS EXECUTION SOFTWARE' are visible. Below the logo, there are tabs for 'Home' and 'My Employees'. The main content area is titled 'Learning Plan' and includes a search bar for 'Search Learning Plan' and a 'Show:' dropdown menu set to 'Everything'. A list of learning items is displayed, including 'Data Privacy - P101', 'EC Priorities for 2012 by Marty Pitkow', 'Employee Central Integration to SAP ERP Overview - SC', 'Employee Central Pitch and Demo', 'Employee Central Product Essentials', 'HRIS Concepts (and how to position EC)', 'Jam Mastery - Checklist for Observation', 'Online Demo Training - Employee Central', and 'Overview of SuccessFactors Business Execution Integration with SAP HCM - SC'. On the right side, there is a 'Search Catalog' bar with a 'Go' button and a 'Browse' link. Below this, there are sections for 'Easy Links' (Approvals, News, Options and Settings, Reports), 'Learning Status' (Curricula), 'Learning History' (28 items completed in the last 30 days), and 'My Employees' (Overdue (1), Due within a week (0), On Time (2)).

successfactors[™]
BUSINESS EXECUTION SOFTWARE

Home My Employees

Learning Plan

Search Learning Plan Show: Everything

▼ No due date

- Data Privacy - P101 Available
- EC Priorities for 2012 by Marty Pitkow Available
- Employee Central Integration to SAP ERP Overview - SC Must be registered
- Employee Central Pitch and Demo Available
- Employee Central Product Essentials Available
- HRIS Concepts (and how to position EC) Available
- Jam Mastery - Checklist for Observation Request Observation
- Online Demo Training - Employee Central Available
- Overview of SuccessFactors Business Execution Integration with SAP HCM - SC

Search Catalog Go

Browse

Easy Links

- Approvals News Options and Settings Reports

Learning Status

Curricula

All required Curricula are complete.

Learning History

28 items completed in the last 30 days.

My Employees

- Overdue (1)
- Due within a week (0)
- On Time (2)

Components of the SuccessFactors HCM Platform—Workforce Planning & Analytics



- Workforce Planning
 - Helps predict long-term workforce needs and forecast the costs and skills associated with meeting those needs
 - Allows “What-If” scenarios using various data and models to simulate the cost impact of the different scenarios
- Workforce Analytics
 - This is a comprehensive vendor-agnostic analytics and reporting solution that comes with 1000+ pre-defined analytics and key performance indicators (KPIs)
 - Provides a complete and unified view of how various talent-based activities impact metrics such as retention, engagement, and performance

Components of the SuccessFactors HCM Platform—SAP Jam



- A social collaboration platform that's designed to:
 - Enhance communication, sharing, content creation, and collaborative working throughout an organization
 - It's designed to be used by employees from various functions across the organization to:
 - Accelerate on-boarding
 - allow informal learning
 - encourage sharing

Components of the SuccessFactors HCM Platform—SAP Jam



- The Jam Wall displays updates, questions, threaded discussions, documents, etc.

A screenshot of the SAP Jam web interface. At the top, the header shows the user "Luke Marson (admin)" with a notification bell icon showing "2" and a search bar containing "Jam". The SuccessFactors logo is on the right. Below the header is a navigation bar with links: Home, Profile, Groups, Tasks, Events, and Company. The main content area is divided into a left sidebar and a central feed. The sidebar includes a user profile for "Admin User" (Administrative Assistant) and a "Feed Updates" section with links to My Bookmarks, Notifications (with a "2" badge), Messages, and Recommendations. Below this is a "Recently Viewed" section listing "Whats New.pdf" and "Competitive Analysis.pdf". The central feed shows a post by "Sid Morton" titled "Sales Team Meeting Whiteboard" with the subtitle "082710 Mtg Use Cases". The post includes a photo of a whiteboard with handwritten notes and diagrams. Below the photo, it says "about 4 months ago via BlackBerry in Sales Tools" and lists interactions: "You, Alejandro Solis, and 97 people liked this" and "Show 1 more reply". Two replies are visible: one from "Vic Stokes" thanking "@Judy Hoffman" and another from "Thomas Clark" requesting more details for a customer deck.

Components of the SuccessFactors HCM Platform—Foundation (aka Platform)



- Foundation covers non-application or cross-platform functionality such as:
 - Job Profile Builder, Presentations, Home Page Tiles, Upgrade Center, Role-Based Permissions, Notifications, etc.
 - Includes Employee Profile
 - Forms the basis of your SuccessFactors HCM suite and is fed with data from the modules (eg. Viewing performance review scores, Development objectives, and Learning History)

Components of the SuccessFactors HCM Platform—Review



You just learned a bit about each of the components of the SuccessFactors HCM Platform, now let's briefly discuss some best practices...



Best Practices Built into the System Functionality—Employee Central



- Key features and functionality include:
 - Globalization
 - Includes features for 71 countries, more than 37 languages
 - List of countries can be found here:
<http://scn.sap.com/docs/DOC-48497>
 - Covers data fields, regulatory/compliance, validations, and reporting
 - Employee Data
 - Effective-dated employee data can be viewed, updated, edited, or corrected

Best Practices Built into the System

Functionality—Self Service

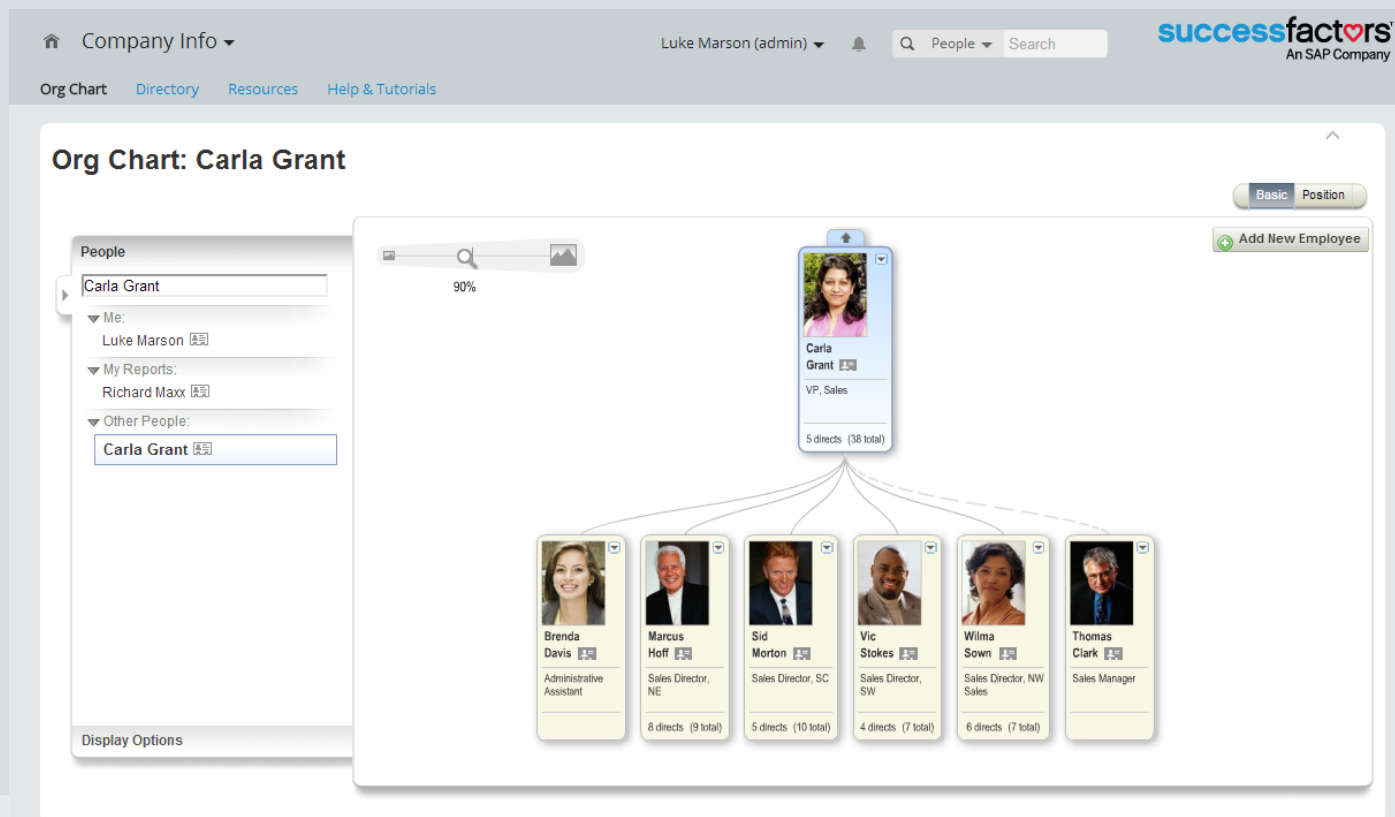


- Self-Service functionality
 - Employee Self-Services (ESS) & Manager Self-Services (MSS) can be configured using Role-Based Permissions
- ♦ **Employees can:**
 - ▶ **Maintain goals**
 - ▶ **Complete performance self-assessments**
 - ▶ **Update employee profile data**
 - ▶ **Search for open jobs**
- ♦ **Managers can:**
 - ▶ **Monitor team's goals**
 - ▶ **Complete performance reviews**
 - ▶ **Plan compensation**
 - ▶ **Maintain succession data**
 - ▶ **Monitor and assign learning**

Best Practices Built into the System Functionality—Organizational Chart



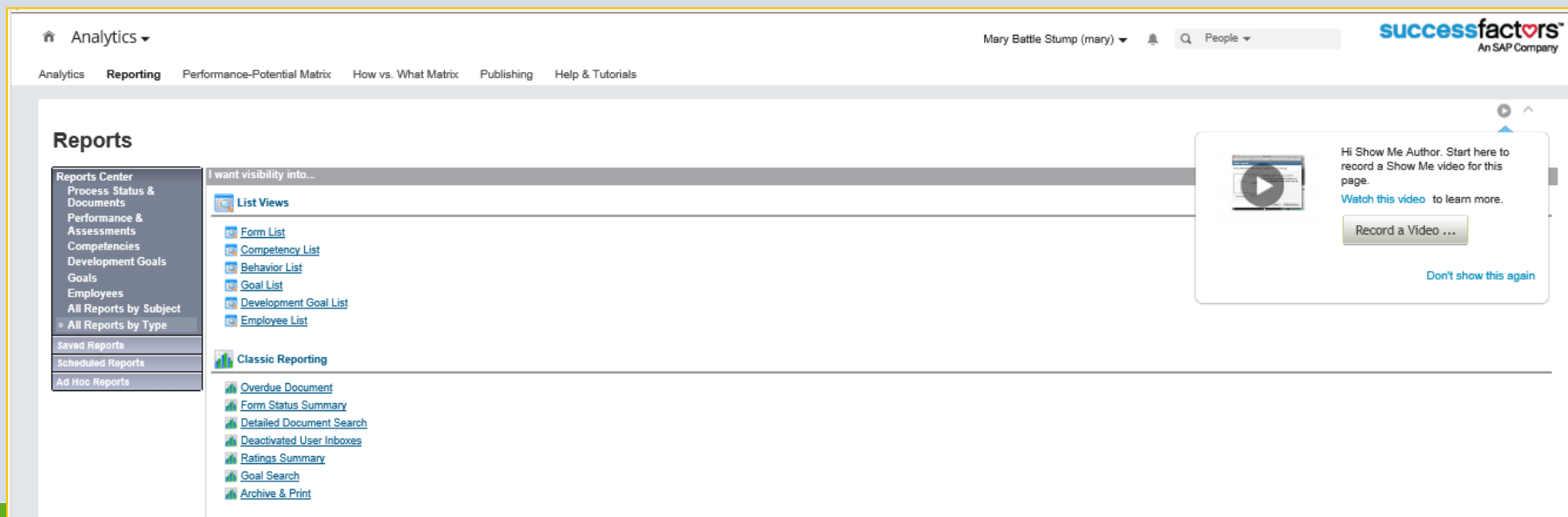
- Basic/standard feature built off of employee data available online or via Mobile



Best Practices Built into the System Functionality—Reporting



- Standard and ad-hoc reports provided for compliance and regulatory requirements
- Easily create, share and generate Ad Hoc reports per requirements



Best Practices Built into the System Functionality—Mobile



- SuccessFactors Mobile enables several key functions within numerous modules accessible from anywhere:
 - View org chart
 - Browse profile
 - Goals
 - Approve reqs, offers, provide feedback
 - Complete learning
 - EC workflow approvals





Key Points to Take Away...

- SuccessFactors HCM talent suite is the best of breed and designed to best practice
- The system is packed with nearly 20,000 pieces of individual content via tools that contribute to immediate ROI and better overall evaluations and feedback
- Goal and Performance tools increase line of sight visibility and qualitative feedback
- Succession and Development provide visibility to bench strength, highlights areas of risk for your key positions, and offer tools to manage development of nominated successors as they grow their readiness



Key Points to Take Away...

- Compensation provides tools to plan salary, bonus and stock increases, referencing ratings from PM to drive guidelines
- LMS allows managers to monitor their teams' learning items, assign/remove learning, record learning events and run reports, providing them up to date information on training completions
- Recruiting Execution provides two very robust modules to increase the value of your recruiting dollars via multiple marketing channels of postings, detailed metrics, and streamlined ATS capabilities

Useful resources

- Amy Grubb, Luke Marson, *SuccessFactors with SAP HCM: Business Processes and Use* (Galileo Press, 2013; ISBN: 978-1-4932-1173-9)
- Planning for Talent Management with SuccessFactors: Q&A with Amy Grubb
 - <http://sapinsider.wispubs.com/Assets/Q-and-As/2014/August/QA-with-Amy-Grubb-on-Talent-Management-with-SuccessFactors>
- SuccessFactors website has helpful data sheets and videos for each module
- SFSF Customer Community for those already customers!



Questions?!



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