

iProConference 2015

Amy Grubb



Talent Management in 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



Agenda

- Discuss Overview of Talent Management tools in SuccessFactors including:
 - Goal and Performance Management
 - Succession and Development
- Review processes in the system and view a demo
- Discuss data flow between modules

Completing a Performance Process in the System



It Begins With The Goal Plan

The Performance Process in SuccessFactors HCM



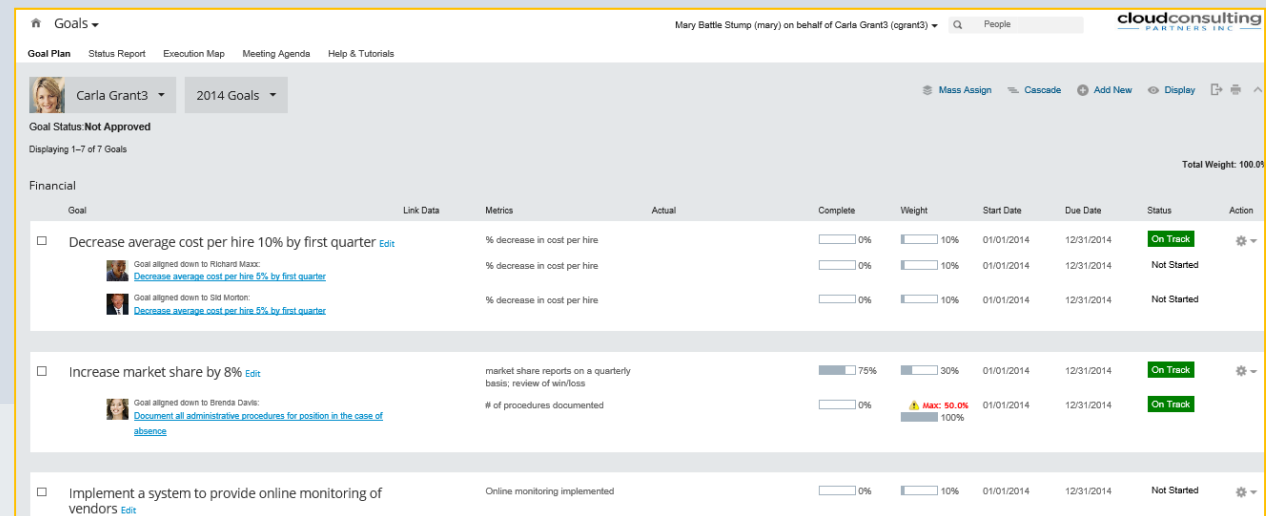
- The process begins with setting goals using the Goal Plan
- The Goal Plan is comprised of:
 - Goal Categories
 - Align and Cascade Goals
 - SMART Goal Wizard
 - Best-Practice Goal Library
 - Goal Alignment Spotlight
 - Dashboards and Spotlights

First we'll briefly talk about each item of the Goal Plan...then, we'll work to create and align goals in the system....

Completing a Performance Process in the System—Goal Plan



- Goal Plan
 - Standard goal categories based on Balanced Scorecard are used to organize goals
 - Customers may configure additional or different goal categories to meet their tracking and reporting requirements



The screenshot shows the 'Goals' section of the iProCon system. At the top, there's a navigation bar with 'Goals' selected, and a user dropdown for 'Mary Battle Stump (mary) on behalf of Carla Grant3 (cgrant3)'. Below this, a sidebar shows 'Carla Grant3' and '2014 Goals'. The main area displays a table of goals. The first goal is 'Decrease average cost per hire 10% by first quarter', which is expanded to show three sub-goals aligned with different users. The second goal is 'Increase market share by 8%', also expanded to show two sub-goals. The third goal is 'Implement a system to provide online monitoring of vendors'. Each goal row includes columns for 'Goal', 'Link Data', 'Metrics', 'Actual', 'Complete', 'Weight', 'Start Date', 'Due Date', 'Status', and 'Action'.

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	Settings
 Goal aligned down to Richard Maize: 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 Sid 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	Settings
 Goal aligned down to Brenda Davis: Document all administrative procedures for position in the case of absence		# of procedures documented		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	Settings

Completing a Performance Process in the System—Goal Plan



- Aligning and Cascading Goals encourages organizational goal adoption throughout business units, departments, and other organizational groups
 - Cascading goals ensures company alignment
 - Allows linkages and tracking across the organization

The screenshot displays the SuccessFactors Goals application. On the left, a sidebar shows a goal list for "Carla Grant3" with a status of "Not Approved". The main area shows a "Cascade Goal" dialog box. This dialog has a table for selecting recipients, with columns for Name, Title, Number of Team Members, Cascaded, and Goal Plan State. Below this is a table for the cascaded goals, with columns for Weight, Start Date, Due Date, Status, and Action. The dialog also includes a "Find Other Employees" button.

Name	Title	Number of Team Members	Cascaded	Goal Plan State
Alexander Thompson	President	6		Not Approved
Carla Grant3	VP, Sales	6		Not Approved
Brenda Davis	Administrative Assistant	0		Not Approved
Marcus Hoff	Sales Director, NE	9		Approved
Richard Maxx	Sales Director, HC	4	cascaded	Not Approved
Sid Morton	Sales Director, SC	7	cascaded	Not Approved
Wilma Sown	Senior Director, Sales	6		Not Approved
Vic Stokes	Sales Director, SW	4		Not Approved

Weight	Start Date	Due Date	Status	Action
10%	01/01/2014	12/31/2014	On Track	
10%	01/01/2014	12/31/2014	Not Started	
10%	01/01/2014	12/31/2014	Not Started	
30%	01/01/2014	12/31/2014	On Track	
50.0%	01/01/2014	12/31/2014	On Track	
100%	01/01/2014	12/31/2014	Not Started	

Completing a Performance Process in the System—Goal Plan



- SMART Goal Wizard
 - This is a step-by-step wizard to create goals that are:
 - Specific
 - Measureable
 - Attainable
 - Relevant
 - Time bound

The image displays four sequential screenshots of the SMART Goal Wizard interface, numbered 1 through 8. Step 1: 'What is your goal?' with a dropdown for 'Category' (Behavioral Goals) and a text input for the goal description. Step 2: 'How will you measure this goal?' with a text input for the measurement. Step 3: 'Attainable' step with a mountain icon. Step 4: 'Relevant' step with a target icon. Step 5: 'Time-bound' step with a large green arrow icon. Step 6: 'Confirm and Save' step with a confirmation message and a 'Save' button. Step 7: 'Confirm your SMART goal' step with a summary of the goal. Step 8: Final confirmation screen.

Completing a Performance Process in the System—Goal Plan

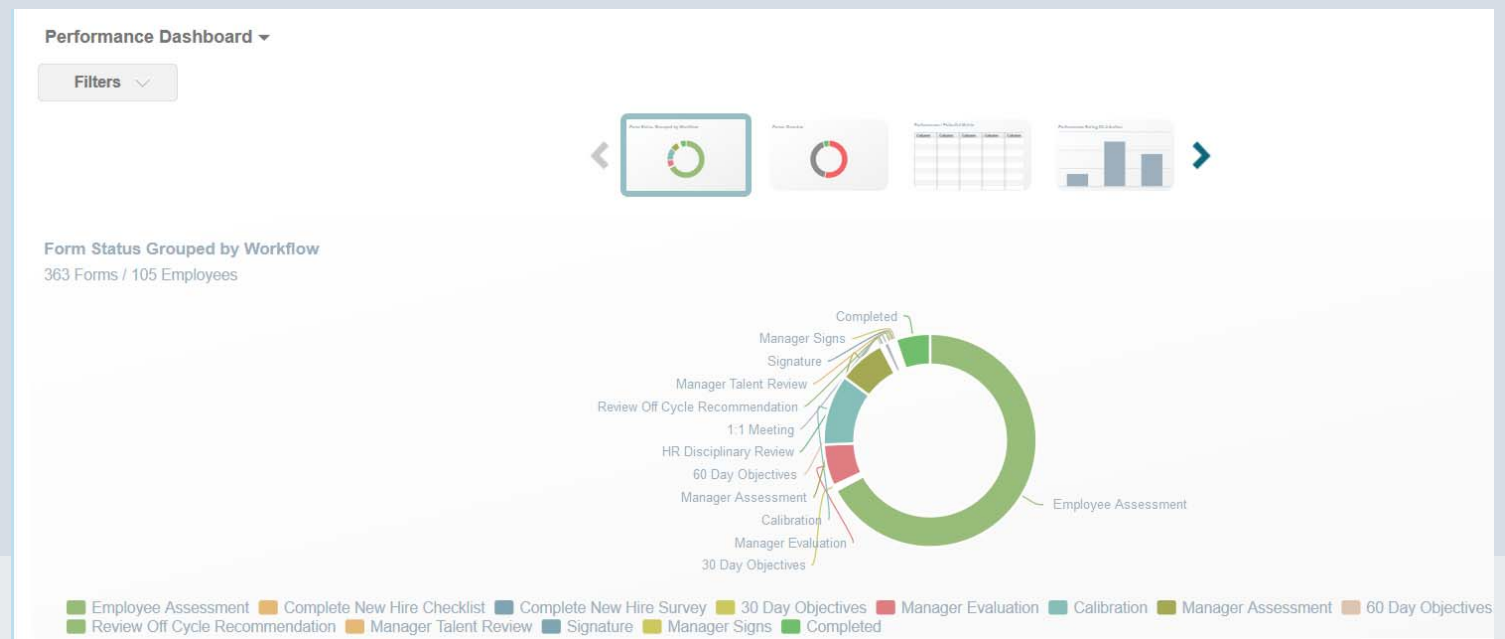


- Best Practice Goal Library
 - Is a best-practice collection of goals that organizations can leverage
 - More than 500 ready-to-use, role-specific goals for:
 - Corporate goals
 - Individual goals

Completing a Performance Process in the System—Goal Plan



- Dashboards and Spotlights provides managers and other organizational leaders dashboard visibility into progression of the organization against corporate goals
- Managers can track how their team is performing against corporate strategy



Completing a Performance Process in the System...



It Continues With The
Performance Evaluation

Completing a Performance Process in the System—Performance Management



Let's discuss the performance evaluation:

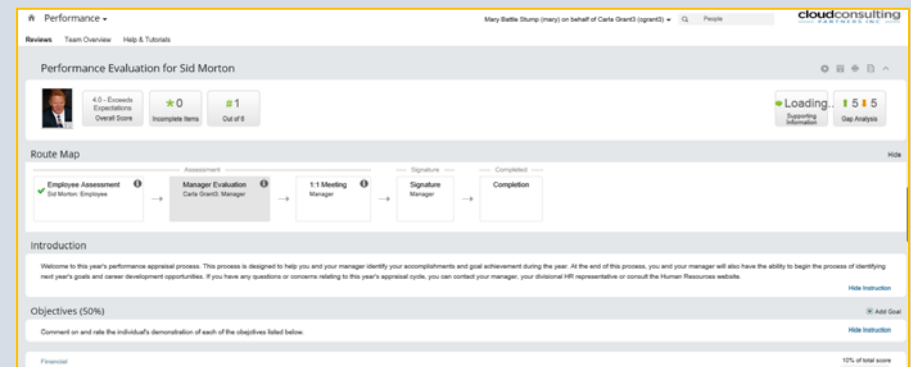
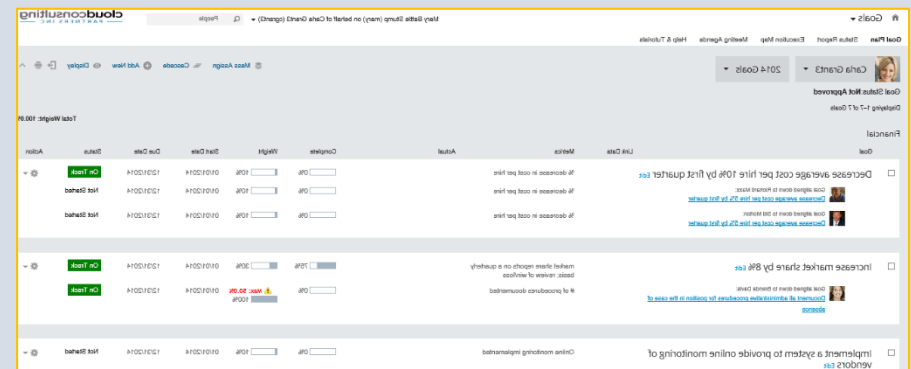
First, from the **employee's** perspective,
Then, from a **manager's** perspective....

Completing a Performance Process in the System—Performance Management



- Completing a performance evaluation – **Employee** perspective

- Goals are created and maintained on the Goal Plan
- Goals are rated on the Performance Review Forms



Completing a Performance Process in the System—Performance Management



- Completing a performance evaluation – **Employee** perspective
 - ♦ An employee can:
 - ▶ **Add/Edit job responsibilities**
 - ▶ **Complete required forms**
 - ▶ **Add overall comments**
 - ▶ **Add comments to Goal and Development sections**
 - ▶ **Signoff on the evaluation**

Completing a Performance Process in the System—Performance Management



- Employees manage and access their performance review and 360 Multi-Rater forms from their Performance Inbox

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

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Reviews Team Overview Help & Tutorials

My Forms

All Forms
In Progress
Inbox
En Route
Completed
Form Status

Items per page: 10 Showing 1–4 of 4 ☒ All ☐ My Direct Reports

Create New Form Send to Next Step

Search

Display Options

☒ Form Title ☒ Employee ☒ Step ☒ Date Assigned ☒ Step Due Date ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Last Modified ☒ Sent From

	Form Title	Employee	Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Sent From	Action
☐	★ Performance Evaluation for Sid Morton	Sid Morton	Manager Evaluation	11/10/2014		09/19/2014	10/19/2014	10/19/2014	11/19/2014	Sid Morton	ⓘ ⚙ ⚠
☐	★ Performance Evaluation for Vic Stokes	Vic Stokes	Manager Evaluation	10/10/2014		09/19/2014	10/19/2014	10/19/2014	11/19/2014	Vic Stokes	ⓘ ⚙ ⚠
☐	★ Performance Evaluation for Brenda Davis	Brenda Davis	Signature	10/10/2014		09/19/2014	10/19/2014	10/19/2014	10/10/2014	Carla Grant3	ⓘ ⚙ ⚠
☐	★ Team Evaluation for Carla Grant3	Carla Grant3	Employee Assessment	10/20/2014	10/31/2013	10/20/2014	11/19/2014	11/19/2014	11/10/2014	Amy Grubb	ⓘ ⚙ ⚠

Items per page: 10 Showing 1–4 of 4 ☒ All ☐ My Direct Reports

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Completing a Performance Process in the System—Performance Review



- Completing a performance evaluation – **Employee** perspective
 - ♦ **Performance Management (PM) Forms:**
 - ▶ **Here, the employee completes their self-assessment based on the goals that has been cascaded to them**

The screenshot shows the iProCon Performance Evaluation interface. At the top, there's a header with "Performance" and a user dropdown "Mary Battle Stump (mary) on behalf of Carla Grant3 (cgrant3)". Below this is a navigation bar with "Reviews", "Team Overview", and "Help & Tutorials". The main section is titled "Performance Evaluation for Vic Stokes". It includes a profile picture of Vic Stokes, an "unrated Overall Score", "0 Incomplete Items", and "#-- Out of 6". There are also buttons for "Loading.. Supporting Information" and "8 0 Gap Analysis". Below this is a "Route Map" section showing a sequence of steps: "Employee Assessment" (highlighted with a green checkmark and an orange border), "Manager Evaluation", "1:1 Meeting Manager", "Signature Manager", and "Completion". The "Employee Assessment" step is currently active, and the "Manager Evaluation" step is also highlighted with an orange border.

Completing a Performance Process in the System—Performance Management



- Completing a performance evaluation – **Employee & Managers**
 - ♦ **Performance management tools:**
 - ▶ **Writing Assistant and Coaching Advisor contains Best Practice content for commenting on competency feedback**
 - ▶ **Flexible Workflows enable forms to be routed through the system based on hierarchical reporting structure (E, EM, EM+, etc)**
 - ▶ **Legal Scan is a tool that works similar to spell check and reviews/flags potentially inappropriate language within a performance review**

Completing a Performance Process in the System—Performance Management



- ♦ **Performance Management (PM) Forms:**
 - ▶ **Optional 360 Multi-Rater – Facilitates gathering performance feedback on goals and competencies from everyone**
 - *Internal employees*
 - *External people*

The screenshot displays the SuccessFactors Performance Management interface. At the top, there's a navigation bar with "Performance" and a user dropdown "Mary Battle Stump (mary) on behalf of Carla Grant3 (cgrant3)". The main content area is titled "360 Degree / Multi-Rater Review for Richard Maxx". Below this, there's a section for "Employee Information" with details for Richard Maxx, Sales Director, NC. The "Evaluation Summary" section shows an "Overall Rating: 2.8/5.0" and a table of evaluations from anonymous users.

Username	Category	Status	Rating
Anonymous	Manager	Completed	2.8/5.0
Anonymous	Peer	Completed	2.8/5.0

Completing a Performance Process in the System—360 Multi Rater



- 360 Multi-Rater can enhance the performance process by gathering feedback from many others such as peers, direct reports and even external users
- Manager can access this feedback from within the PM form
- 360 reviews provide ratings against role-specific competencies

Completing a Performance Process in the System—Performance Management



Now, let's talk about the Performance Reviews
from
a **Manager's** Perspective....

Completing a Performance Process in the System—Performance Management



- Completing a Performance Evaluation – **Manager** Perspective
 - ♦ A Manager Can:
 - ▶ Ask internal or external team members for feedback on an individual
 - ▶ Track responses
 - ▶ Send and review email messages
 - ▶ Edit job responsibilities, goals, development plans
 - ▶ Provide overall rating and comments
 - ▶ Confirms manager meeting with the individual

Completing a Performance Process in the System—Performance Management



- ♦ Performance Management (PM) Forms—Manager View
 - ▶ **Team Overview – a “one-stop-shop” for managers to manage the reviews of their entire team in one place**

The screenshot shows the "Performance" section of the iProCon system, specifically the "Team Overview" view. The user is logged in as Amy Grubb (adminag) on behalf of Alexander Thompson (athompson). The interface includes a navigation bar with "Reviews", "Team Overview" (highlighted), and "Help & Tutorials". Below this is a "Performance Evaluation" section with a sub-header "Performance Evaluation". The main content is a table with columns: "My Team", "Feedback from Others", "Employee Assessment", "Manager Evaluation", "1:1 Meeting", and "Signatures". The table lists three team members: Shirley Neilson, Ashley N Brooks, and Carla. Each row shows their profile picture, a feedback icon, their assessment status ("In Progress"), a "Review" button, and empty cells for the meeting and signatures.

My Team	Feedback from Others	Employee Assessment	Manager Evaluation	1:1 Meeting	Signatures
 Shirley Neilson		In Progress	Review Shirley		
 Ashley N Brooks		In Progress	Review Ashley		
 Carla	Ask for Feedback Recommended Now	In Progress	Review Carla		

Completing a Performance Process in the System—Performance Management



- ◆ **Performance Management (PM) tools**

- ▶ **Team Overview – allows managers a dashboard-like view of their team's review status**
- ▶ **Ask For Feedback – requests for feedback are sent and respondent can reply via email**
 - *The responses are visible from within the performance review form*

My Team	Feedback from Others	Employee Assessment	Team Evaluation	1:1 Meeting	Signatures
 Jennifer Lo		In Progress	1.84 Review Jennifer		
 Sid Mamorny		In Progress	3.33 Review Sid		
 Richard		In Progress	3.67 Review Richard		

My Team	Feedback from Others	Employee Assessment	Team Evaluation	1:1 Meeting	Signatures
 Vic Stokes	Feedback from Others Ask for feedback about the person you are reviewing.			Confirm 1:1 meeting and send to Vic	
 Sid Mamorny		3.45	3.45	Confirm 1:1 meeting and send to Sid	

Completing a Performance Process in the System—Performance Management



- ♦ Performance Management (PM) forms
 - ▶ **Team Rater** – allows managers to rate team members against one another and calibrate ratings against the entire team.
 - *This leads to more objective ratings & feeds into other processes like Compensation and Succession Planning*

The screenshot shows the "Team Evaluation" interface in the iProCon system. At the top, there's a navigation bar with "Performance" and "Team Overview". Below this, a "Team Evaluation" section displays a table of competency ratings for six team members: Brenda Davis, Marcus Hoff, Richard Maxx, Sid Morton, Wilma Sown, and Vic Stokes. The competencies listed are Accepting Direction, Communication, Customer Focus, Hiring, Integrity/Ethics, Productivity, Project Management, Sense of Urgency, and Teamwork. A "Team Rater" sidebar on the right shows a summary of ratings for each team member. The interface includes "Save", "Cancel", and "Print Preview" buttons at the top left of the table.

	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	3.70	3.50	3.50	3.50	3.58	3.50

Team Rater Summary

Rank	Name	Score
1	Brenda Davis	3.70
2	Wilma Sown	3.58
3	Marcus Hoff	3.50
3	Richard Maxx	3.50
3	Sid Morton	3.50
3	Vic Stokes	3.50



And, the Performance Process Continues with Reviewing Merit/Bonus Increases

Completing a Merit Process in the System

- Reviewing and planning merit/bonus increases becomes easier and more efficient

Compensation Adjustment Form

Salary

Use this grid to provide pay adjustment recommendations.

For more assistance, please contact your Human Resources Business Partner.

[Display](#) [Filter Options](#) [Employees I can edit](#)

Total number of employees: 1

Employee Information		Current Information			Pay Increase Recommendation								
Employee		Current Base Rate	Current Compa Ratio	Job Title	Pay Grade	Rating	Adjustment Amount	Adjustment Reason	Promotion Amount	Effective Date	Final Pay Grade	Final Job Role	
 Marcus Hoff		\$162,500.00	N/A	Sales Director, NE	GR-16	Exceeds Expectations	\$ 0.00	0.00 %	None Selected	\$ 0.00	0.00 %	MM/DD/YYYY	GR-16
Group Total:							\$0.00	0.00%	\$0.00	0.00%			

Items per page: 5 | Page 1 of 1

☐ Send email notification to original planner/manager of the affected compensation form

☐ Send email notification to current reviewer of the affected compensation form

[Import](#) [Export](#) [Cancel](#) [Save](#)

My Forms: 2012 Comp and Bonus Plan for Carla Grant (cgrant3)

Summary

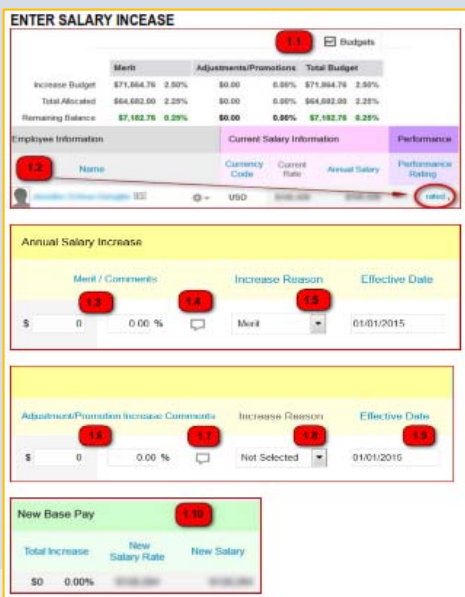
Category	2011 Salary	2012 Salary	Merit Increase	Merit %
Merit	\$162,500.00	\$162,500.00	\$0.00	0.00%
Bonus	\$0.00	\$0.00	\$0.00	0.00%
Total	\$162,500.00	\$162,500.00	\$0.00	0.00%

Items per page: 15 | Showing 1-6 of 6

Merit	Job Title	Pay Grade	Current Salary	Merit Increase	Merit %	Merit	Adjustment	Lump Sum
Merit	Sales Director, NE	GR-16	\$162,500.00	\$0.00	0.00%	Merit	\$0.00	\$0.00
Merit	Sales Director, NE	GR-16	\$162,500.00	\$0.00	0.00%	Merit	\$0.00	\$0.00
Merit	Sales Director, NE	GR-16	\$162,500.00	\$0.00	0.00%	Merit	\$0.00	\$0.00
Merit	Sales Director, NE	GR-16	\$162,500.00	\$0.00	0.00%	Merit	\$0.00	\$0.00
Merit	Sales Director, NE	GR-16	\$162,500.00	\$0.00	0.00%	Merit	\$0.00	\$0.00
Merit	Sales Director, NE	GR-16	\$162,500.00	\$0.00	0.00%	Merit	\$0.00	\$0.00

Completing a Merit Process in the System

- Reviewing merit/bonus increases
 - Display relevant salary planning budget worksheet
 - Make salary adjustments/promotion increases
 - View merit guidelines and merit eligibility
 - Make merit recommendations based on viewable performance ratings
 - Plan equity, calculate new base pay, convert currency
 - Give promotions
 - Submit for approval



Now, let's switch gears and talk about how to
Nominate Successors and Set Development
Goals....

Succession Management and Development

- Succession planning is a critical process for protecting key positions
- Career and Development planning is a critical process for nurturing key talent within your organization
- SuccessFactors leverages the following applications for both these aforementioned processes
 - Employee Profile
 - Performance and Goals
 - Presentations



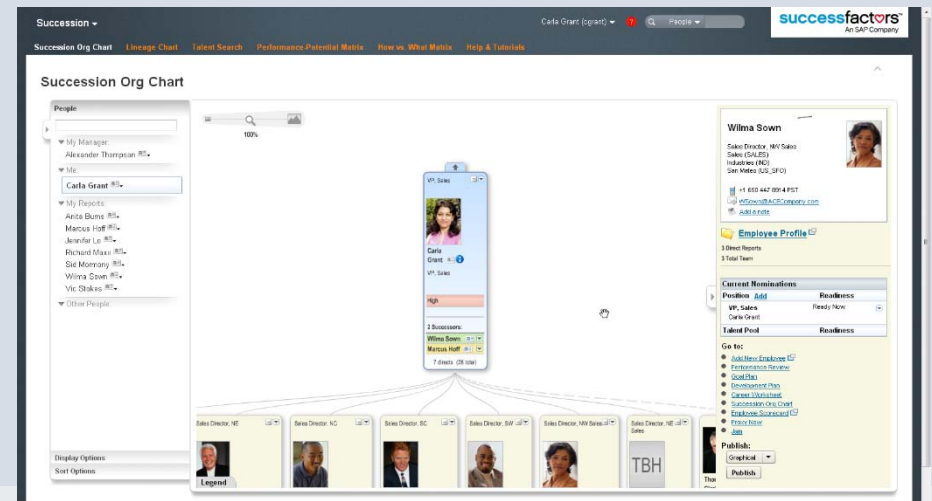
Succession Management and Development

- SuccessFactors offers two best-in-class solutions to support Succession Planning and Career Development Planning (CDP)
 - ♦ **Succession Planning functionality covers:**
 - ▶ **Succession Plans**
 - ▶ **Org Charts**
 - ▶ **Talent Pools**
 - ▶ **9-Box Matrices**
 - ▶ **Talent Search**
 - ♦ **CDP functionality covers:**
 - ▶ **Career Plans**
 - ▶ **Development Plans**
 - ▶ **Integration with Learning**
- **SuccessFactors leverages data from Employee Profile, Scorecard, and Talent Info. It is also integrated with Metadata Framework and Position Management.**

Succession Management and Development



- Nominating successors
 - The Succession Org Chart provides a graphical view of talent related data such as risk of loss, impact of loss, reason for leaving, etc.
 - This helps to highlight gaps in succession plans and facilitates making nominations



Succession Management and Development

- Setting development goals
 - Development Goals are identified at several points in the performance-talent process:
 - During Performance Reviews
 - During Succession Meetings
 - During regular Manager-Employee discussions
 - What's the difference between performance goals and development goals?
 - Development goals are not rated
 - Development goals can span more than a performance year

Natural Integration Points



- When we speak of Natural Integration Points, we are referring to:
 - The applications you use within the SuccessFactors Modules that were designed to leverage data across the BizX suite to provide a holistic talent management solution



Natural Integration Points (cont.)

- The Employee Profile, Goal Management, and Performance Management Modules run throughout the entire BizX suite.



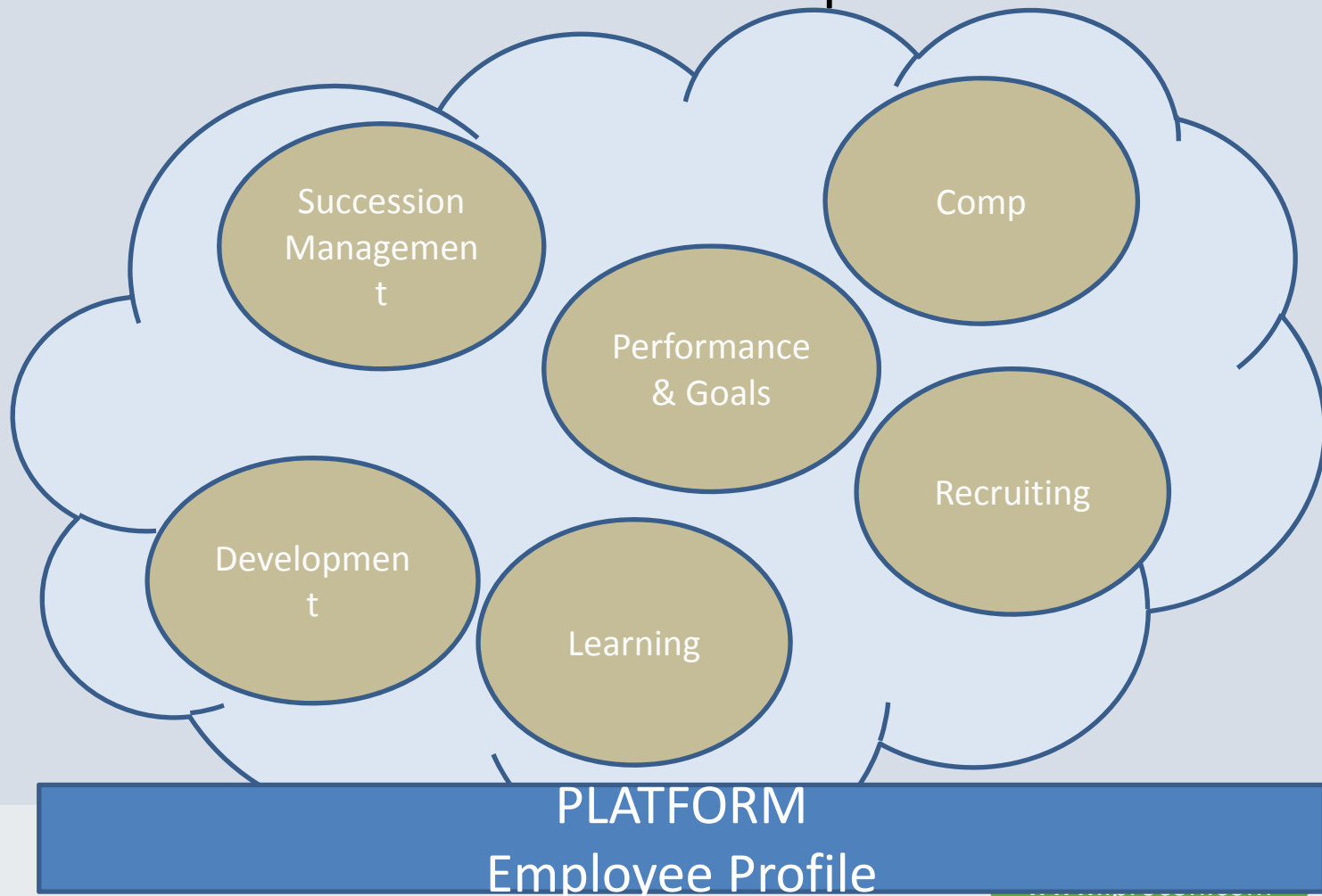
You can easily say that they are the **common thread** throughout the system.

Let's take a closer look at the BizX suite....
We'll begin with the Employee Profile.

Natural Integration Points: Employee Profile



- Employee Profile feeds all BizX modules and LMS to provide consistent data across the platform



Natural Integration Points: Employee Profile (cont.)



- The Employee Profile becomes the repository for all connected employee data that:
 - Helps manage the talent pool by matching organizational needs with employee skillsets
 - Encourages engagement by providing employees a place to connect with their colleagues
 - Provides up-to-date employee talent related data at the manager's finger tips



Natural Integration Points: Employee Profile (cont.)



- The Employee Profile integrates with:
 - Goal Management — display goal progress on the Scorecard
 - Performance Management — display competency ratings on the Scorecard
 - Development Plan — display development goal progress on Scorecard and/or Employee Profile
 - Succession Management — Manage talent flags and Succession data that feeds the Succession Org Chart and 9-box
 - Learning — Display last 10 learning completed learning items on Profile
 - Recruiting — Maps Employee Profile data to Candidate Profile



Natural Integration Points: Goals and Performance



- Performance Management (PM) and Goal Management (GM) are two separate modules in the BizX Suite that work hand-in-hand to support the talent development process to:
 - Drive alignment across the organization thru a series of goals that are cascaded to every employee.
 - Track the progress toward executing the organizational strategy.
 - Drive the focus toward the right things and heighten accountability.
- These modules integrate with:
 - Compensation
 - Succession Planning
 - Development



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Natural Integration Points: Goals and Performance



- As goals are established and tracked, they become part of the performance review process
- They can then be maintained either on the goal plan or through the performance review form, depending on the customer's process and when forms are generated
- This information feeds into a number of talent processes within SuccessFactors, such as:
 - Compensation Management
 - Succession Planning
 - Learning
 - Career Development



Natural Integration Points: Goals and Performance



- Goals are maintained on the Goal Plan; goals are rated on the Performance Review

The screenshot displays the iProCon interface. On the left, a sidebar titled "2013 Goals for Marcus Hoff" shows a list of goals categorized by "Financial", "Customer", "Business Process", and "Innovation and Learning". Each category has a "Visibility" and "Commitment" dropdown, and a "Public" checkbox. The main content area shows a "Team Evaluation for Marcus Hoff" with an overall score of 3.54, 0 incomplete items, and 1 out of 4 goals. Below this, there's an "Introduction" section and a "Goals (50%)" section. The "Goals (50%)" section shows a goal: "Align marketing and distribution so that 50% of total revenue comes from new products". The goal has a rating of 5 stars (Exceeds Expectations) and a comment from Carla: "Our reports for this year show that we have exceeded this objective by making 55% of revenue from our new product line." The interface also includes a "Performance" dropdown, a "Reviews" tab, and a "Switch Plan" button.

Natural Integration Points: Goals, Performance and Compensation



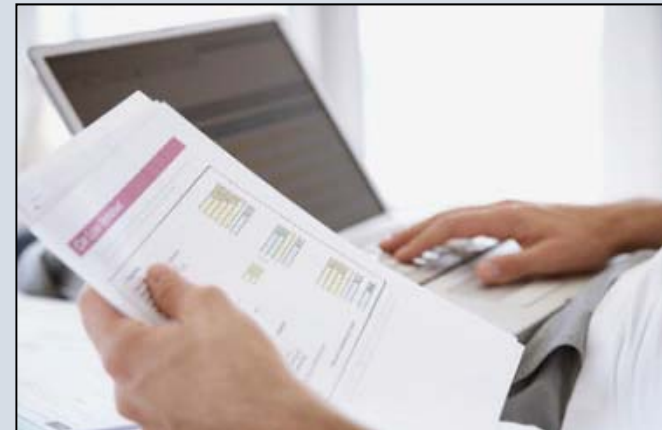
- Organizations are adopting pay-for performance strategies that tie employee pay to actual business results; which in turn:
 - Provides more visibility and control into the compensation payout
 - Improves budget accuracy
 - Reduces risk



Natural Integration Points: Goals, Performance and Compensation



- SuccessFactors Compensation enables an organization to streamline and integrate data between HRIS and Compensation systems:
 - Base pay
 - Long-term incentive pay
 - Short-term incentive pay
 - Variable pay
- SuccessFactors provides a single source of all employee data to be used to calculate compensation components



Integration Points: Goals, Performance and Compensation



- Goals from the Goal Plan can be populated onto the Compensation Planning sheet for input to bonus decisions
- Performance Ratings are displayed as hyperlinks on the Compensation Planning sheet and the review form can be referenced directly to drill down on ratings on specific items
 - This can provide critical data when deciding how to compensate each team member

Natural Integration Points: Succession Planning and Development



- SuccessFactors Succession and Development modules offer core features, functionality, and best practices for:
 - Succession planning
 - Career development planning
- These modules facilitate the management of:
 - Key positions
 - Successors (nominated and assigned)
 - Bench strength
 - Key talent data such as performance, potential, and risks
 - Career plans/paths
 - Development plans



Natural Integration Points: Development, Learning, and Performance Management



- This module allows both the employee and the manager to take an active role in assigning and completing learning activities that are tied to the Employee's Development Plan
 - Employees can create and track Learning Activities and link them to Development Goals by browsing the learning catalog and adding items to their learning plan
 - Managers can manage their own learning activities and their employees' activities; and, run reports regarding the learning progress of their team



Natural Integration Points: Development, Learning, and Performance Management (cont.)



- Often, Development Goals are linked to the Performance Management form
- Existing Development Goals can be updated from the Performance form and these updates reflected on the Development Plan
- New Development Goals can also be created directly on the Performance form and also be reflected on the Development Plan
- Development Goals are typically not rated and are not included in the overall performance rating, but their inclusion on the Performance form provide a single place to view and manage them for each



Process Considerations and Best Practices



- SuccessFactors modules are designed to best practices so it's advised to adopt the best practice configuration options as much as possible (i.e., Performance v12 Route Map and template configuration)
- Take the opportunity to review and challenge your talent processes and redesign to increase efficiencies
- Leverage the Goal Wizard and Goal Library to reinforce the SMART goal structure
- Consider enabling Goal Execution to monitor and maintain goal probability of success and level of effort

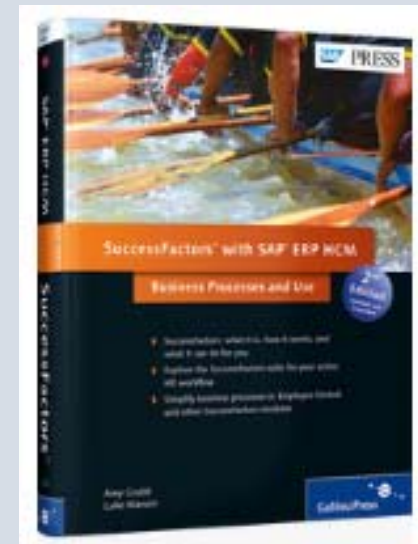
Process Considerations and Best Practices (cont.)



- Empower your managers to own the performance process
 - Train them on the process and expectations of them
 - Encourage regular manager-employee discussions throughout the year, using the system to facilitate talking points
 - Make tools such as Writing Assistant and Coaching Advisor available so employees and managers can provide meaningful feedback on reviews
 - Remove HR and second level managers from the process and provide information via Dashboards and Reports to streamline the process

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!



Your Turn!



Questions?

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