Q3 2019
SuccessFactors Review

Succession, Development and Calibration

- Bharath Katam

SuccessFactors has delivered enhancements and updates in the Q3 2019 product release across the SAP SuccessFactors HCM Suite; here are a few key updates you should consider in Talent areas of Succession Planning, Calibration, Career Development Planning and Mentoring.

ZALARIS

— Value people

Succession Planning

Consistent Sorting of Successors

SuccessFactors have introduced an option called "consistent sorting of successors", whereby the sort setting which is configured for Succession will also be consistently reflected across all Succession pages; Succession Org Chart, Lineage Chart, Position Tile and in Talent Presentations.

Add/Edit Options

Previously it was not possible to add or edit talent pool nominations and succession nominations directly from Calibration or from within a Talent Presentation. However, in this release an update is applied to these areas allowing users to now add an employee to any talent pool from Calibration and Talent Presentations.

Talent Search Export

In Succession Talent Search the user would need to scroll down to the very bottom of the search page to access the export link

for their matching search results. With this enhancement, an "Export All" link has been placed in the static header bar within the search view, allowing the user to export all available results without having to scroll through the full screen. This Customer Influence request brings a small yet welcomed navigation adjustment that will continue to improve ease of use functionality for users.

Calibration

Firstly, please note that Calibration v11 has now reached end of life and with this Q3 release the new UI will automatically be activated for customers who have not yet activated it. Calibration Org Chart v11 has now reached end of maintenance and will reach end of life in Q1 2020.

Mass Actions: Mass Finalization

With this enhancement SAP have introduced a new feature so the user no longer needs to go to each Calibration session and manually finalize one by one. Now users have an option to bulk finalize Calibration sessions on the session list page.

This feature, especially for those customers which have a large amount of sessions in one cycle, will reduce the time spent by HR Business Partners on completing the calibration process.

For performance reasons, the mass finalization feature will support only 25 sessions at one time. Once the user has selected the session(s), the Finalize button will be active. Only users with Finalize permissions can finalize "In-progress" and "Approving" sessions.

Once this action is processed the finalized sessions screen will display a clear note to confirm the session has finalized successfully. Following this action, the user can send or choose to cancel the notification email.
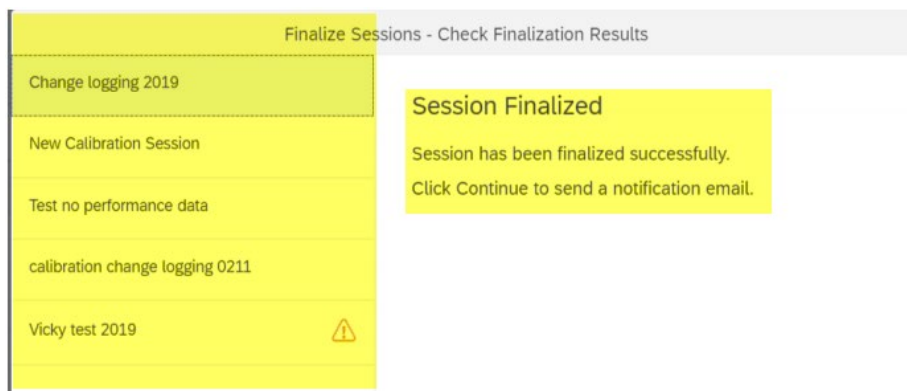
Open Talent Card from List and Bin views

To better support a consistent experience to the user across all Calibration views, SuccessFactors have now made it possible to open a subject's talent card from the List and Bin views. Where previously, users could only access an employee Talent card in matrix view, this created difficulty when trying

to manage an employee and needing to switch views to access. With access to the talent card available from any view, users can minimise the navigation steps required to do so.

Add/Edit Nomination Options in Talent Card

It is now possible with this latest universal enhancement for users to take action in the

nomination section of a person's talent card during calibration. With the option to add or edit a nomination for Succession and a nomination to Talent pool directly from the employees Talent card, Talent review users will reduce their navigation efforts and take

nomination action during a talent review process without needing to exit the calibration session. This better allows users to take immediate action on nominations in real time during the talent review.
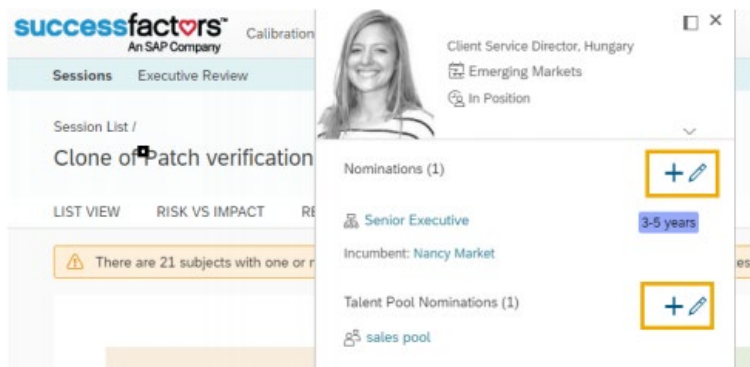
Talent Presentations

There are several usability improvements applied in Presentations in this Q3 release:

- Edit Slide Settings and Edit Slide Content replacing the "Edit Slide" option in Sorter and Timeline Mode

- A refresh button has been added to the matrix grid slide to update with the latest data

- You can now "Add Hotspots" in a static slide (and position anywhere on the slide)

- Show/Hide person button can be added in Edit Slide Content/Settings

- It is now possible to print all slide types (including customised slides) and People Grid slides will paginate when printing

- Assignment ID can now be displayed in Talent Cards and customised slides

Mentoring

Enhanced Performance on Matches / Not Matched pages

The mentoring functionality helps drive employee engagement and retention by enabling organizations to take a comprehensive and automated approach to mentoring programs. Previous Mentoring programmes which exceed the maximum number of mentor matches would not display any results and as such running and Ad-hoc report was the only way to gather this data but without option to action. The enhancement made in Q3 will now display the first 200 matches automatically and the admin can manually search for mentor or mentee by name display a filtered list by matching level (for supervised programs only).
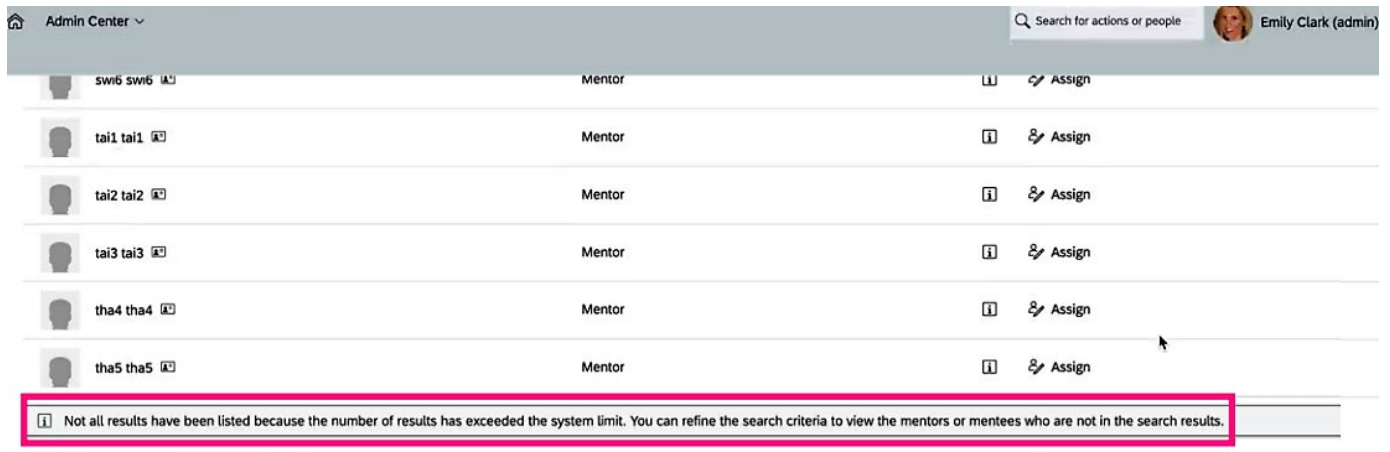
Autosave on Matches Tab

For all mentoring program types, rather than having to click save, adjustments that Admins make in the matches overview page will be saved immediately. While a small change, this really helps the end user experience by taking out unnecessary actions.

Search Result Limit in the Assign Mentor/ Mentee Popup

During the assigning mentor or mentee process, previously there was no limit on the number of search results which could displayed. This led to performance issues. Now there is limit of 200 results which will be displayed, and if the search returns more than 200 results then the system will ask the user to refine the search criteria.

Limit Supervised Mentoring Program Size

Mentoring programs are mostly unsupervised, where mentors and mentees find each other. But in some cases, they are supervised by a mentoring program manager or administrator who does matchmaking and retains oversight of the program.

Supervised mentoring program can only support 3,000 mentors and 3,000 mentees without causing performances issues so the create program wizard will now validate the number of invitees and prevent the saving and launching of a program with too many invitees.
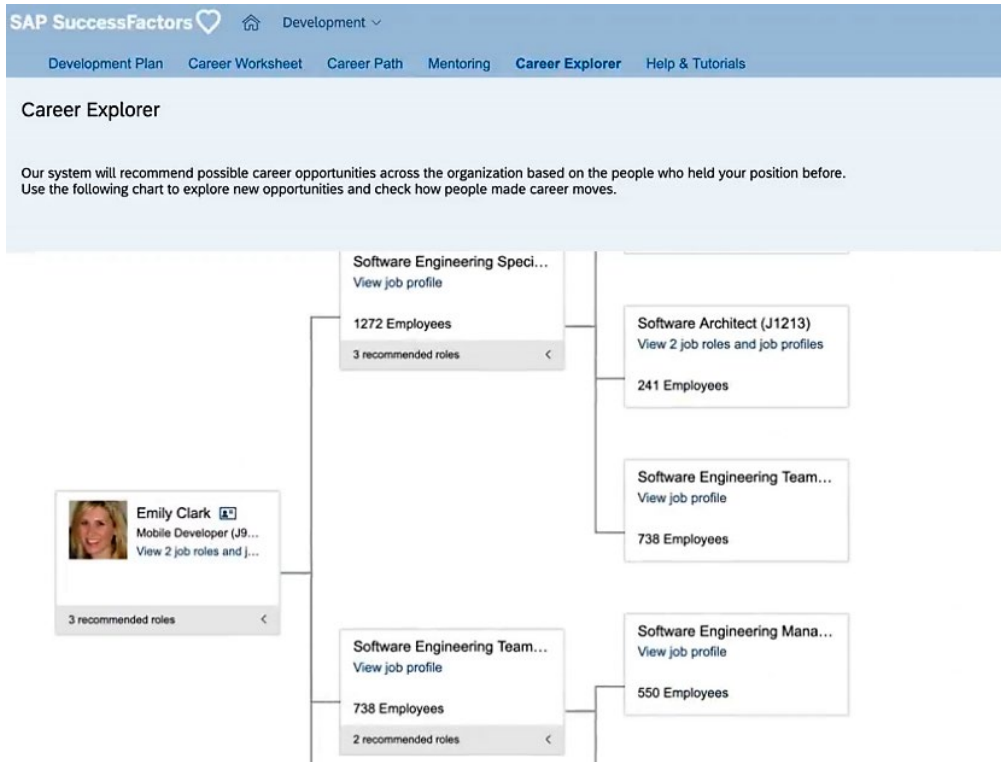
Career Development Planning

Career Development Plan Lite is now past its end of maintenance and will go to end of life in Q2 2020. An alternative approach is to use a second Goal Plan in the same Performance Management form for the purposes of maintaining development goals.

Career Explorer

In this release, SAP also announced a Beta program for a new feature called "Career Explorer" which utilises SAP Leonardo Machine Learning Technology to provide career recommendations to employees based on the career paths of those who have been in the same position previously. Employees will be able to consider future roles that are outside of the traditional career path and set these roles as targets within their career development actions. This helps to re-engage employees with their own progression and provide more focused steps towards the actions needed to reach this future role.

This looks like an innovative development which is utilizes SAP technology to provide some exciting functionality to SAP SuccessFactors customers.

SAP SuccessFactors ♡   🏠   Development ⌄

Development Plan   Career Worksheet   Career Path   Mentoring   **Career Explorer**   Help & Tutorials

Career Explorer

Our system will recommend possible career opportunities across the organization based on the people who held your position before.
Use the following chart to explore new opportunities and check how people made career moves.

Software Engineering Speci...
View job profile

1272 Employees

3 recommended roles   〈

Software Architect (J1213)
View 2 job roles and job profiles

241 Employees

Emily Clark 🔲
Mobile Developer (J9...
View 2 job roles and j...

3 recommended roles   〈

Software Engineering Team...
View job profile

738 Employees

Software Engineering Team...
View job profile

738 Employees

2 recommended roles   〈

Software Engineering Mana...
View job profile

550 Employees

Conclusion

This release has an increased number of changes in the Succession, Mentoring, Career Development & Calibration areas over the previous quarterly releases this year. In addition to my summary above there are some minor fixes and documentation updates as well as enhancements to the Check Tool.

All these changes will benefit users across all functional levels, and I find it particularly interesting to see the use of SAP Leonardo within the Career Explorer feature.

How Can We Help?

Zalaris excels in delivering comprehensive HR and payroll services across the UK, Northern Europe, the Baltics and Poland. Our industry leadership position, however, goes beyond the borders and constraints of other providers to enable what matters most to our clients: maximising the value of human capital through excellence in HR processes.

- **Scoping Services** - for if you are thinking of moving to the HCM Cloud but are unsure of where to start.
- **Support Services** - for if you are already using SAP SuccessFactors and want a flexible support partner.
- **Release Management Services** - for if you are struggling to take advantage of the quarterly innovations in SAP SuccessFactors.
- **Business Process Services** - for if you are looking for operational support with your HCM processes.
- **Training Services** - for if you are not getting the most out your SuccessFactors system.