



Q4 2019 SuccessFactors Review

**Performance & Goals,
360 Review and Continuous
Performance**

- Helen Dunn

Interestingly this Q4 release has been incredibly light on enhancements for Performance and Goals, with no new enhancements at all for Continuous Performance Management (CPM) and 360 Reviews. However, this is in no way a negative in my opinion as it indicates a large amount of backend engineering is underway, with discussion surrounding a new pilot version of CPM to launch in due time. Across 2019, SuccessFactors' strategic focus has been upon a re-imagining of the end user experience and whilst awaiting to see this in full effect within the Talent suite, there are still a handful of interesting enhancements and fixes applied to the existing functionality.

Performance Management

Fiori Shell Bar

As we have seen for quite some time now SuccessFactors continue to focus their Universal enhancements by way of improvements to the user experience, particularly across their well embedded Talent suite. The latest of which for the Performance module is the adoption of the Fiori Shell Bar. This Fiori feature provides a static header which spans the full width of the performance screen and remains in place as the user scrolls through the page. This feature is enabled through provisioning by simply checking the "Enable Fiori 3 Header" and will match the existing themes defined for each Customer's look and feel. This enhancement further supports the harmonised view and features within Fiori across all modules providing a consistent experience for SuccessFactors users.

Competency Pre-population on Performance Form

The one and only major enhancement seen to Performance and Goals this quarter is an Opt-in enhancement for Competency pre-population. This function will allow the last official Competency rating of a user's performance form to pre-populate to a subsequent performance form, based on the centralised Job Profile Builder Competency repository. The current solution whereby the last competency rating is pulled to the current form from a previously completed performance form, will remain in place, however this improved solution based on JPB competency and its new backend repository, allows for improved efficiency and less form rating step repetition through pre-population.

This Customer Influence based enhancement is called for particularly by those customers who have a large number of competencies, which are infrequently updated from year to year and for customers who utilise performance forms creatively such as for a "role readiness assessments" against Competencies. In allowing a previous years rating to prepopulate against the Competency, the user's review effort is shifted from a manual heavy process more to that of a review and simple update.

It is worth noting here that previously within the JBP framework, competency ratings were stored in a backend legacy table and from Q4 onwards ratings will be stored in the new backend repository. Historical data held within the legacy table will be migrated across to the new repository over a period, as such there will be a slight delay for customers enabling this feature to see the ratings pre-populate to a form right away.

Matrix Managers & Iterative Review Step

Many companies utilise a matrix manager set up and particularly so within Performance review actions. This Universal enhancement applied in Q4 ensures that when any matrix manager is updated and/or added in to review at an iterative review step, the performance form remains with the matrix manager who at that time has the form open and only the list of reviewers are reflected by the matrix manager change. This helps to ensure that the performance form remains with the current and active reviewer, unaffected by matrix manager changes during review and better support customers specifically who have "Document Transfer Off" configured.

Goals Management

Transfer of Goals between Users

When transferring a goal from one user to another user's goal plan via Admin Centre, an administrator previously had access to search for and subsequently send the goal to any user within the organisation. To avoid any potential risk to privacy this universal enhancement ensures that the Goal transfer tool will now check the RBP target populations when searching a user to transfer a goal between. This aligns the goal transfer tool with other administrative tools that already accurately respect RBP configurations.

Continuous Performance Management

New CPM Pilot Version 2020

As discussed already, Continuous Performance Management (CPM) enhancements are notably absent from this Q4 release update. This is due to CPM having been selected as the pilot version of SuccessFactors "re-imagining" of the End user experience. I'm certainly eager to see



the results of this investment, and for a number of Customers engaged with the Early Adopter programme, this pilot version will be available to test by the end of this year 2019. This CPM pilot version will be across all platforms; desktop/browser and mobile (both iOS and Android).

Document Updates

Even with few major enhancements this quarter, there have been an array of document updates within each area. Many of which are worth a review to provide a summary of previous enhancements and a refresher on certain scenarios supported within these modules. My personal selection for a read through, should you have the time are: Example behaviours when document transfer is disabled (KM-7446) explain system performance when transferring performance forms through manager changes, Best practice for adding goal categories (KM-7178) and additional information about detailed 360 Report (KM-6720).

Conclusion

As 2019 draws to an end Q4 brings a little more respite than previous months. With less enhancements to consider enabling this quarter, Customers can take stock of the enhancements that have come, read through and familiarise with the updated documentation and await the improvements to functionality and user experience that is likely to come in 2020.

Further to this 2020 brings with it a change to the release update frequency we have been used to, moving from a quarterly release cycle to a twice-yearly release. The first of which is due in May 2020 and the second November 2020. This change to release frequency won't slow the amount of innovation customers have come to expect, rather it will provide companies with more time to understand, test and adopt opt-in features.



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