



Performance and Goals

The H1 2020 release for Performance and Goals has brought in several new features and changes to existing functionality, which will have a positive impact on user experience, data recording and review. There is a new user interface for Continuous Performance Management (CPM), and Performance reviews have been chosen as one of the first places to have [Qualtrics](#) surveys embedded. But I will start with some minor updates in Goals.



Stephen Burr

Head of Professional Services

Goals

There have been two new Goals features in this release:

Mobile

The SuccessFactors Mobile app, both for iOS/iPadOS and Android, now enables a user to enter a value exceeding 100% in the goal percentage field, on the Goal Plan template.

This change ensures alignment between the desktop application and mobile applications.

Goal Alignment

The Goal Alignment Chart can now be used as a substitute for the Execution Map, enabling employees and managers with an intuitive and easy way to track goal progression. Notably, the Goal Alignment Chart has been built using non-Flash components to support [the future retirement of this technology](#). Administrators should configure the opt-in to enable this feature.

Performance

In this release, there is a small selection of features available that affect the performance form and the performance review process – all of them require some “opt-in” action to utilise.

Most notably for Qualtrics subscribers is the ability to embed a feedback survey at the end of the performance cycle (when an employee signs their form). To activate this feature, you’ll need a Qualtrics licence and a Provisioning setting to activate the feature.

Edit Integration

Target Page

BestRun

Performance

Search for actions or people

...

My Forms

All Forms

In Progress

En Route

Completed

Form Status

Items per page 10

Page 1 of 1

Showing 1-1 of 1

All

My Direct Reports

Create New Form

Mass Route Options

GO

Search

Templates: 2020 Performance Review

Steps: All Steps (ALL)

Groups: Type group name or click the arrow to browse

Employee:

Divisions: All Divisions

Departments: All Departments

Locations: All Locations

Search

Reset

Display Options

Form Title

Employee

Step

Date Assigned

Step Due Date

Form Start Date

Form End Date

Form Due Date

Last Modified

Start From

Form Title

Employee

Step

Date Assigned

Form Start Date

Form End Date

Form Due Date

Last Modified

Action

2020 Performance Review for Janya Singh

E - Goal Setting

01/03/2020

02/03/2020

02/09/2020

03/09/2020

02/04/2020

Items per page 10

Page 1 of 1

Showing 1-1 of 1

All

My Direct Reports

*Integration Name:

Performance Integration

Product Area:

Talent

Page:

Performance review signatu...

Template:

Annual Review

*Intercept ID:

6sgahgagew-aW

*Intercept URL:

https://mysampleintercept.qualtri...

Delete

Archive

Update

Close

Editing the Qualtrics integration in Performance Management

A few changes are affecting the performance review process in this release. The only outright new feature is that you can now configure business rules to define weights for steps and roles in the route map. In previous versions, the final rating was the only one considered. Now, ratings at different steps and/or from different

people can form part of the final score. This isn’t a single step activation to utilise, and will take some thought to implement, but it is offering a more flexible way to calculate overall form ratings. It involves activating the features and configuring business rules, a demo of how this is configured is available [here](#).



Customized Weighted Rating

* Customized Form Rating ?

Exceeds Expectations

Calculated Form Rating

4.59

Previous Ratings

Rating	Name	Role	Routing Step	Weight
4.2	Alan Brady	E	E	0.2
4.47	Charisma Dillon	EM	EM	0.3
4.85	Erica Farnham	EX	EX	0.4

Customizing the weighting of Form ratings

The two remaining features affect the performance form process. Firstly during rating, if a competency was rated in the last performance review as Too New to Rate, the rating is now shown in the Last Rating section, as Too New to Rate, rather than being filtered out. Make sure that you configure the “Unable to Rate” field in the General Settings of the form template for this.

Finally, in this Goals feature update, is the ability to add/remove signers when a form is “en route”. This option is particularly useful if a form has been simply assigned to the wrong person and needs to be corrected. SAP produced a diagram that I think outlines this clearly.



Add/Remove Signers

To enable the feature, go to the Form Template Settings and deselect “Hide Add/Remove

Signer buttons.” Once enabled, it is accessed via the Actions in the form.



Accessing Add/Remove Signer functions



Continuous Performance Management

There have been several features upgrading the Continuous Performance Management experience for this release, which has received a redesign in line with the Human Experience Management (HXM) reimagining focus of 2020.

Customers will only benefit from these enhancements if they are using the upgraded CPM user interface (UI). The new components are as follows:

Meeting Notes

The previous release notes referenced a new feature for meeting notes, whereby the manager or employee can make personal notes while the 1:1 meeting is taking place in the system, without the need for third-party software. These notes are private to the individual: managers are unable to see what the employee writes and vice versa. The notes remain attached to the Meeting History,


where they can be reviewed. This facilitates streamlining the process and removing the need for additional tools. Moreover, only administrators will have the ability to generate reports.

Please note that this feature was previously marked as Universal, but this has been corrected as an Admin Opt-In feature. To enable, access the Continuous Performance Management Configuration in the Admin Center and check the box “Enable Meeting Notes”.


Discussion Topics

This feature will give the user the ability to list topics that they want to include for discussion in 1:1’s and meetings. Full functionality is delivered with the ability to create, view, edit and delete as required. Previously this was available as Other Topics which, if added, have been automatically converted to Discussion Topics. Completed topics will be archived and can be viewed in the meeting history.


Details




Aanya Singh
test 1
Edited - January 7, 2020





Aanya Singh
test
January 7, 2020






Attend Regional Engineering Conference





Discussion Topics
Add other topics to discuss during your next 1:1

☐ something we should discuss



OK

Cancel

Discussion Topics



Activities View

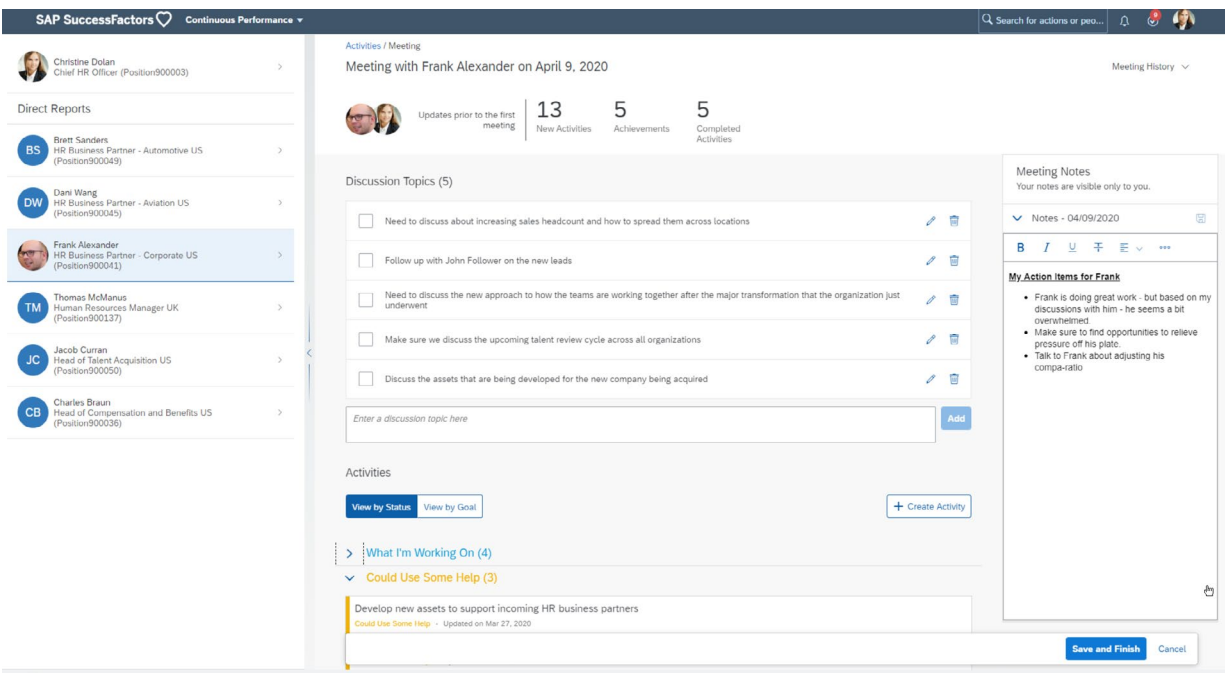
Users had previously encountered challenges when managing activities: this impacted the activity-view redesign. This update has addressed this with the introduction of a separation of views. Whereby the management of activities, and the screen in which meetings are conducted and recorded, sit distinctly.

Activities are now grouped by status rather than stacked as one, with the ability to toggle

activities and break down by a related goal. Additionally, goals can be created directly from an activity.

Meeting View

The new meeting view includes a descriptive, analytic summary in the header as well as a clear view of discussion topics and activities. You can also see the Meeting Notes (as explained above) in this screenshot.



Meeting View with Meeting Notes

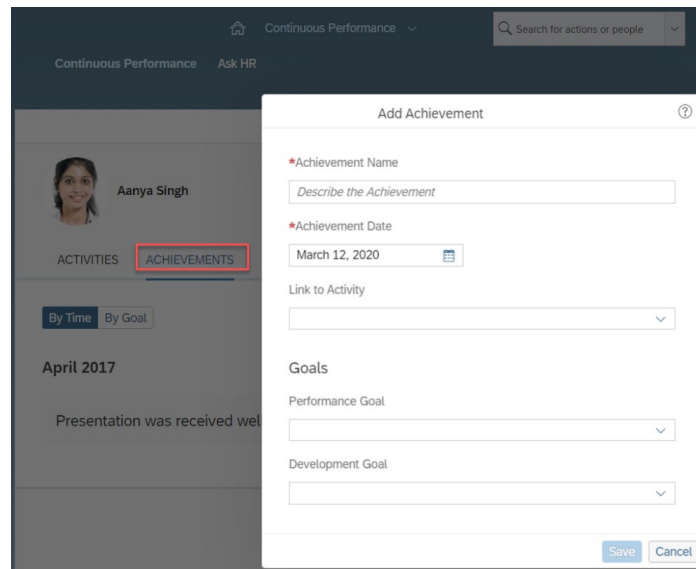
Achievements View

This enhancement allows users to view, search and filter any activities which have been tagged as an achievement on their record. If the user has multiple achievements linked to a single activity, these will be with the most recent at the top. The view will not just show current achievements, but also any that have been

archived to the meeting history. This feature will allow users to view all achievements and activities attached to them in a single, convenient view.

SAP had initially marked this as a universal update, but it is actually an opt-in feature available for administrators to enable.





Achievements View

Disabled Features in new CPM User Interface

As well as introducing the new features, the redesigned restricted version will disable some of the current features:

- Activity Feedback.
- Coaching.
- Achievement Goal linking.
- Achievement Development Goal linking.
- Continuous Feedback.
- Achievement Feedback.

It is recommended that organisations consider the new features against the disabled features, before deciding whether or not to enable the new Continuous Performance Management user interface. If the decision is to go with the redesigned, restricted availability version, then the following switches are recommended to improve the end-user experience:

- Fiori 3 theme enabled.
- Fiori 3 header enabled.

To enable the latest version, first enable the Continuous Performance Management feature via the Performance Management Feature Settings page. Then in the Continuous

Performance Management Configuration, scroll down to the Latest Version of Continuous Performance Management section and check the Enable Latest Continuous Performance Management [Restricted Availability] setting.

Note that once you enable the latest version of Continuous Performance Management, you cannot revert to the previous version. Therefore, I would strongly recommend that you consider the pros and cons of the currently available features of each version. If you are in any doubt, I'd say hold off for now.

Disabling Deleting Feedback Option

Aside from the new CPM user interface, this option gives administrators the ability, via a checkbox, to prevent end-users from deleting any feedback that they receive. The checkbox can be found within the Admin Centre (Feature Configuration section of CPM Configuration) and is unchecked by default.

It should be noted that if the new CPM user interface is activated, then access to the Feedback functions will be lost until a future release resurrects the option.



360 Reviews

All the features in this release are universal, so you will benefit directly from them as soon as the release is live in June, without needing to enable or configure anything to make the feature available.

Fiori 360 Updates

In this release the following 360 Fiori version updates are delivered:

- External Rater.
- Send Copy.
- Auto Save.
- Executive Review.

All these features bring the 360 Fiori version up to date with features that were in v11.

- **External Rater** – External participants can now be invited to a 360 review ([demo](#)) as well as add ratings and comments to a 360 form ([demo](#)).
- **Send Copy** – You can now send a copy of a completed 360 form in 360 Reviews. Demo available [here](#).
- **Auto Save** – The comments box will now save every 5 seconds.
- **Executive Review** – The Executive Review feature is now available in the 360 Fiori version so you can monitor form status and access 360 forms. Demo available [here](#).

As a minor user interface update, the width of custom text boxes has been increased on the 360 Fiori form to give more space for text to be

entered by the user (and for them to be able to read it more clearly).

Looking ahead on the roadmap for 360 Fiori, we should see the following in H2 2020 release:

- 360 Detailed Report.
- Development Goals.
- Print Preview/HTML/PDF.

Integration

Finally, in the 360 Review section, there is a new OData API (complete360) that provides 360 form submission functionality.

Conclusion

The new CPM user interface looks exciting and fresh, but I can't help feeling it is a little early to be activating just yet. As a minimum, I'd like to see the feedback functions available in it before giving it any serious consideration.

It is also great to see the 360 Fiori version improving with features bringing parity to the previous version. I'm particularly looking forward to seeing where SAP takes this next, and with any luck, we'll see some of that beginning to come in with the H2 release later this year.



How Can We Help?

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- **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.