Transcript

October 8, 2024, 4:00PM

Kelly Sotelo 0:08

Good morning, everyone.
My name is Kelly Sotelo.
I'm the marketing manager for Aspire HR and I'm here to welcome everyone to the Aspire HR Webinar Tips and Tricks for SuccessFactors Goals and development updates.
I also want to let you know that we do have AQ and a section that will happen after market presentation.
You'll find the Q&A button at the top toolbar of your of your webinar.
You can submit questions throughout the presentation and then once we are complete with that section, we will.
Read them off and and let our consultants answer them.
And and we will also be providing a webinar recording and transcription along with apdf of the presentation you'll see today as a follow up and I will go ahead and let our President and CEO Kevin Chase kick things off and introduce his fire.

Kevin Chase 0:55

Thanks Kelly.
So for those of you that are on the call that are already aspire customers, we're glad to have you on. If you have not worked with us before, we would love the opportunity. I want to just give a quick two-minute overview first.
Fire if you're not familiar with us as firefighters, we're a gold partner with SAP.
We focus exclusively in the HR space and more specifically with SAP and workforce software.
We've got a lot of strategic partnerships from ADP and.
In S2, because we are an NS-2 certified shop, we provide three different areas of capability to all of our clients, and we love to join them on the front end of the journey to implement the full wave of different systems. And then on the back end.
We love to then help them support the systems and we have a a number of different ways to do that, whether it's ad hoc support or full AM SBPO, and we do both.
We have about 85.

Customers that use us for long term support over the last 25 years.
We've worked with over 300 different clients and done over 700 implementations across Aspire.
We put a lot of focus on not only serving in the US, but many of our clients also have a strong presence in other parts of the world. And so we've we've done implementations in well over 180 different countries over the history of the company.
And so as we talk today, I know that Margaret and Diane are going to talk about.
Some tips and tricks in one specific area.
This is something that we're going to continue to do more going forward.
So we look forward to.
You hearing more from our team about some of the the thought leadership and and again if you're not working with us today, we'd love the opportunity. Kelly is gonna show the content info on the back end.
For who you can reach out to and give us a chance, we look forward to being your partner. And with that, Diane, I want to hand it over to you.


Diane Caruso 2:45
Sounds great.
Thanks Kevin.
Hi everyone.
I'm Diane Caruso and I'm the senior practice lead with talent recruiting change management.
It's great to be on the call with all of you.
I see some old friends and hopefully some new friends in the coming months.
Our presenter today is Margaret Black.
Margaret is a principal consultant with us.
She has 18 years of experience with SuccessFactors, extensive experience with multiple clients and industries.
It's wonderful that Margaret's presenting today, 'cause. She's an expert in many modules, especially performance and goals and career development.
We also have on the call with us a couple of folks from our leadership team, Kelsey Cooper, who's our Vice President of Delivery Solutions, Kevin Bonderschmidt is our Vice President for commercial sales and alliances and Allison Shelton, who is our Vice President for product and managed services and.
And Kevin mentioned some of those managed services that we do with clients.

Go to the next slide.
So what's the session about today?
SuccessFactors recently made some changes to the goal and development plans.
So today's session is designed to give you a better understanding of those changes and to help you to navigate that environment. We hope by the end of the session, you'll be better prepared to address the updates what's being covered.
Kind of what's new in goal and development planning?
You'll see some demos of the new features, get better information on how it will benefit you, and a couple of demos on how to manage the upgrade center and converting your plan so you can work with it.
You'll have a couple of tips and tricks to make it easier.
Things that have been discovered that can really kind of hold you up unless you know what you're looking for.
And finally we'll do AQ and A and show you some contact information.
So thanks for being with us today and I'll pass it over to Margaret, who will.
Share the info.

Margaret Black 4:35
OK. Hi, everyone on Margaret black. Can you hear me OK?

Kevin Chase 4:41
Yes, you feel good, margar.

Kelsey Cooper 4:41
Yes, we can. Yes we can.

Kelly Sotelo 4:41
Hear you.

Margaret Black 4:42
OK, wonderful.
Just want to check that first.
So we're gonna talk about the upgrade in gold management, the differences in the look and feel and the benefits because it's it's really a a wonderful upgrade.
One of the main things we'll talk about is the differences between where you find

everything.
Now we have unified goals now, so it used to be before that you had under the home button at the top left of your screen.
Normally you had goal management and you had development and your development plan was under the the goal, the development area.
But now we have a goals area where the goals for both performance goals and development goals are together in one area.
This makes it unified easy to find, easy to see, and.
I show you that as well, and it's a little bit focused I think on people who haven't upgraded yet, but stay with us because at the end, if you're getting close to upgrading or if you have upgraded, you might find something out that you don't know if you.
Just upgraded.
It is really important to understand that development goal, even though it's on the goals page.
Is still gathers the goals for both your current role and your future role.
So you put all the development goals in that one goal plan and course your business goals, the things that you have to do to get your current job completed, you you have on your performance plan and then the development area that I'm going to show you is that.
Really focused for more for future roles to be able to show you the career worksheet which allows you to work on.
Assessing yourself against the competencies.
More skills for a future role.
The career path so you can see.
Options for where you can grow into without having to think about that yourself and.
The mentoring programs.
So those are all I think set up now for.
More beneficial for AI suggested roles. The role readyness assessments the competencies for future roles.
So let's let's look at that in the system.
I am actually peroxide over as a user Jasper Jones.
My home page and we're going to go look at the goals area first.
So I'm looking.
I'm selected as Jasper Jones and I'm looking at my own gold plan.

Below myself I can see my manager, Cindy Clarkson.
And if you were a manager logging in, you would see your all of your direct reports listed here.
That makes it a lot easier because you had to search for your direct reports before, but now they're all listed under the people selector and people selector can be collapsed.
And you see you have your business goal plan and your development goal plan.
And this really helps. I think some customers in the past I've seen them where?
The people were adding development goals into the business goal plan and vice versa, and you know it was just kind of confusing sometimes where which goal plan to use. But these two goal plans side by side, help really put a focus on the independence of each one you.
Could see easily with goal plan you're on if you've had multiple years.
After a while you you have multiple years ago business goal plans, so you can easily select a different one if you want to see some of your old goals.
Easy to see how many goals and the status for each one of the goals and how many goals you have in each status. If you never I I often say this to customers when I'm implementing goal management. If you didn't give your users any training except you told.
Them.
Go to goals and create your new goals.
Would you have to really spend a lot of time training them or could they figure out how to create a new goal? If you look around the screen easy, it's very easy to button there says create goal.
You can easily see the weight, the total weight of all of your goals, and have your employees focus on what you want the total weight to be, most often 100%, so that'll start adding up.
And then what I really like about the gold plan now is the fact that the goals are all on cards.
Because if you already have goal management, it was basically kind of sort of like an Excel spreadsheet of your goals.
So a list of goals and all the details.
Now they're all on cards.
You can easily collapse the category if you want and just focus on one category, but it's just easy to see all the details about a goal you click on it.

And you can see the milestones connected to the to those goals.
The linked activities that are linked to continuous performance management, CPM. If you've implemented that all your activities link to that goal are right here and you can easily create new activities that then automatically sync to CPM.
And then of course your your comments area. The threaded comments that was in the legacy goal plan, but it doesn't.
This wasn't, you know, as prominent as it is now.
So I just really like the setup. It's one of the upgrades that I've been most impressed by the the goal upgrade.
Now when I switch over to development goal, one of the things that you can immediately see when you're looking at the goals, the differences between the two kinds of goals, developing goals don't always have a metric. Development goals don't always have some of the other fields that the.
Performance goals have, like milestones and percent complete, and and fields like that. So there's a difference between them and you can easily tell.
Difference.
I think that that puts a nice focus on the development goals versus performance goals just as easy to create them.
You have to create goal button.
So just to sort of summarize some of the benefits, the goals are pre E presented in cards. I think it makes it so much easier to to really focus on one goal or another.
It's sort of a one stop shop area with business and development goals right on the same page and allows you to focus on the difference between those two types of goals.
It's easier to spot critical information.
And easier to view and manage activities.
So I'm sure that all of you are very familiar with the upgrade center in Admin Center upgrade center. So to you can do this upgrade on your own and I'm going to go to the system to show you a little bit about this, but you just go to.
Upgrade center the latest goal management. There's a big red note from SAP here that you cannot reverse this.
So of course you want to make sure you do it in your tester develop.
And make sure that.
You're very focused on.
Not being able to reverse it, let me just become myself now because I'm an

administrator.
Then in the action.
Search. Oh, I can spell.
Go to the upgrade center.
And I'm not actually going to do this upgrade because we've already done it here in our test instance.
Right. I'm going to open it here.
This is the one that we did.
And I just wanted to point out here, when you go to the upgrade center that you get all that good information from SAP, more information to understand about the latest goal management. If you go to the help portal, you can download the admin guide and the admin Gu.
Will have some things in it that you can't do in yourselves in provisioning, but that's where you have SAP or.
Your partner like Aspire to help you.
And they again have some really nice.
Latest goal management benefits here for you, so it's it's easy to do it, but once you do it then there's something that you need to understand and that is that every goal plan that you have will need to be converted.
So let's just take a look at a slide about that.
I'm not gonna read this whole entire thing, but.
The important thing is.
Once you do the upgrade, you're gonna see on all of your gold plans both business and development, the green up arrows, and you open the plan.
Click on the plan to open it and you're gonna see the CONVERT button and I'm gonna show you this in the system as well.
But this is just so that you have a slide with some details here.
And then there's a three-step process to go through to do the conversion. Oops.
And once you do the conversion, if you look at the bottom of this slide here, you will have a new plan now that says back up on the name of the plan.
So your your old plan will be there.
It'll be converted.
The important thing is.
That SAP says to you here that they recommend that you upload a new gold plan and you can get it from the success story.

That is possible and and you know easy if that's. If you're just starting with a new plan. But if you don't convert and use the same plan, then the new plan that if you downloaded one from the success store wouldn't be connected anymore to your performance review for.
And other other areas you would have to make sure that you make those connections again.
So.
To keep the connections, all you really need to do is convert.
I'm gonna show you that.
So both the goal plans, your business goal plans under manage templates and your development plans.
Here we can see if I just look even at my inactive ones that there's two plans here with the up arrow. If you have converted them.
There will be a green check box and you'll have an extra plan that says backup. So to convert it all you have to do is click the plan and click the CONVERT button.
And read the directions.
It's really pretty simple, and you're gonna read the introduction, validate, and convert, so I'm not gonna do that today because I wanna save those non converted for other demos, but it's it's really pretty simple.
Here's the caveat, though, and here's where your tips and tricks come in.
Let me remind you that.
I wouldn't wait until March of 2025. This is a screenshot from the release notes directly from SAP that they're going to universally push.
The the upgrade in late March of 2025.
The only exception?
All customers will get the automatic push, but The only exception is if you've never turned on the new job profile builder.
There's a few customers that haven't done that, but most customers have because it's really essential as part of the backbone to so much of the new features that they're building.
Within the system so.
Do start to think about it sooner rather than later.
To do the upgrade, the next two things I'm going to show you, you might need their simple easy.
You might need a little help from SAP or your partner like Spire.

The first trick and tip.
I'm gonna show you this in the system.
I can show you the first one.
And basically.
What it is is that the status field.
On the goal plan, which in this case has six statuses.
This is the correct version of it.
Where they all have white backgrounds now.
You used to have different colors before and if you already have gold management, when you look at the statuses, you probably remember seeing the colors.
Now all the statuses have white backgrounds and if there are no goals in that status then it says 0.
So you're supposed to see a zero everywhere, unless you have a goal in that status.
But after the upgrade.
If you have any statuses in the XML of your plan, then and if that text color says White then you have a white text or a white number.
On a white background and you can't see it.
So you can see in the incorrect one that on track and completed have white text color and you can't see them.
Let me show you how that looks like in the system.
So here in the goal plan, we see properly.
All the goals.
But in the development goal plan, that's why these two are blank and it's easy to miss because took me awhile to get it. When I was looking at it was like OK.
There's no goals in those, but that's not the case.
This this goal is an on track goal and it should have a one there and it should have a 0 here.
So all your partner has to do.
Is open up the XML of each one of your plans.
Most companies have more than one business goal plan.
A lot of companies have one developing goal plan, but they might have other developing goals, plans for leadership programs and things of that nature.
So, but however many you have that are active, you obviously don't have to update the ones that are inactive.
And I forgot to mention, when you're doing the upgrade and it creates the backup,

then you wanna go ahead and inactivate that backup.
You don't have to change that one anymore.
Just make it inactive, but you can see here it's a simple change. The colour in this XML says White and all your partner or SAP has to do is change it to black.
So.
I think that.
This is something that might get fixed in the next release, but I wanted to just make you aware if you're seeing those blank.
No zeros or nothing in the status then this is what has to be done and you know that they can get in there and do that very quickly and test and then move it to production for you.
The last slide that I'm going to talk about or the last topic is.
Tip and trick #2.
And this has to do with customers that have custom learning activities.
In the XML of their learning activity template.
So, but they're not integrated with learning yet.
The learning module from SuccessFactors so.
You have career development, you want to use custom learning activities to attach to a goal, but you don't have the integration yet.
With the integration transcript is turned on and this is in provisioning. Your partner will help you get the integration completed, but if you don't have learning at all, or if you're not integrated yet, then transcript is not turned on.
So two things.
Some fields.
You have them in the XML, might be hidden.
Sometimes we do that when we're doing configuration.
We just use the right coding XML coding at the beginning and at the end of that field. That makes it hidden.
It's like it doesn't exist, but it's there.
There's also permissioning to say who can read or write to that field, so.
If you have hidden fields that are really meant to be used for the integration.
Or if your fields that you have there are not permissioned, what's going to happen is.
Once your user goes to create a custom learning activity, then you might have it renamed to something else.
I have a customer that calls it custom development activities, but once a user goes to

create that.
Then upon saving, when they're trying to save, so you unfortunately they don't find out about it until they've done the work to add in the name of the learning activity, the start date and so forth. Once they go to save, they're gonna get an error.
And if there's more than one field that's hidden, they'll get an error for the first time if that one was fixed.
But there's another one that's hidden.
We'll get an error again and this I only have found out through.
One of our customers that came to us and said, hey, why are we getting this error?
And it took me a while to get it configured properly to 'cause. They had three hidden fields so.
I had to get all three of them out.
So that's all I have for you today and those two tips if you're getting ready to upgrade.
Are just something good to know in case you see them.
And I'll turn it over to Kelly again.

Kelly Sotelo 25:15
Great. Thank you so much, Margaret.
That was really great.
So we are now gonna move to the Q&A section. We did get a couple of questions in our chat box here.
While we are chatting to the questions, you'll also see some contact information here for Kevin Vonderschmidt.
He is our VP of commercial Sales and alliances.
We also have our contact us at aspireh-r.com e-mail address for general questions.
Let's get started with some of these questions.
The first one that came in, Margaret, was, did we?
We did the upgrade in our test environment and all goals in performance goals.
How do we enable development goals?
It is it. Is it as simple as creating a new goal plan for development goals?

Margaret Black 25:55
No, you have to have the license. First of all, 'cause, it's a separate license from goal management.

It's part of succession and career development planning and you do need SCP or a partner to help you get that. Those that functionality turned on.
But if you already have the license and.
If there if those that functionality is already turned on and you can see it as an administrator. So I had showed you manage templates and there was a tab there for development. If you have that you would you could create a new development plan from that tab and.
Then you would have to go through the role based permissioning to be able to use it. But.
You don't know what you don't know, so I would recommend it's not a long long term.
Implementation, but I would recommend getting some help just to get started with it and.
Yeah.

Kelly Sotelo 26:58
OK.
Great. Thank you.
Next question, do customers have access to XML or is this a partner only thing?

Margaret Black 27:07
Customers like there is a way in admin tools to download, let's say the performance review form and when you download it you get an XML template so you can look at it.
Read it if you understand it, change things.
But you can't go into provisioning so it's provisioning that customers don't have, only a certified consultants have provisioning.

Kelly Sotelo 27:33
Great. Thank you so much.

Margaret Black 27:34
And I'll just add one more thing.
You can download the admin guides and everywhere in the admin guide where it

takes some provisioning work to do it. It tells you that in the guide, so you you should be able to know from the guide what you need help with.

Kelly Sotelo 27:51
Great. Thank you so much.
When will the upgrade be pushed out to all customers?

Margaret Black 27:58
That is March of 2025.
But even though there's simple changes, I worked with our customer where we made both of those changes for the one customer and it's not like it needs to take a couple of weeks to do it.
But you know you have to test and you do it in test 1st and you know people have to have time to do it.
So it takes takes a little time.
I wouldn't recommend waiting until March.

Kelly Sotelo 28:30
Sure. OK, great.
Our next question is, are all goals maintained in the upgraded plans?

Margaret Black 28:39
So I think the question is if you already have goal management and then you go to upgrade and you already had a whole bunch of goals in goal management, then yes, all of those goals are already there.
They're in the back end tables and the upgrade puts them right where they're supposed to be.

Kelly Sotelo 28:59
Great. Thank you.
Will the next release address the two tips that you shared today?

Margaret Black 29:06
I hope so.
I will find out soon because the release is coming soon for.

In October, Diane, do you know the the October date? I think it's the 14th or 17th or something.

Diane Caruso 29:25
Yep, it's the. It's the 17th.
It's live in preview and then November 15th I think it is in production or just around that that Monday anyway.

Margaret Black 29:35
OK.
Well, what I would recommend I think, unless you have another idea, Diane is to if you're getting ready to upgrade, just wait.

Diane Caruso 29:37
Mm hmm.

Margaret Black 29:45
Wait until after the preview release is out, then do the upgrade and see if you you'll be able to tell quickly because you just it takes maybe 10 minutes to do the upgrade.

Diane Caruso 29:45
Mm hmm.

Margaret Black 29:59
You log out.
Make sure you log all the way out.
I had a customer testing their upgrade just yesterday.
And they were like, oh, we don't see the new stuff.
Well, you have to close all your browser windows.
Give it a little bit, maybe wait 30 minutes or so and then log back in.
So do you think that's best, Diane, to wait until the after the upgrade and then after the release and then upgrade?

Diane Caruso 30:25
I think we're so close.

It's probably good to wait because you know what?
Those releases.
Even a preview, there is often some things that you you'll see, and so I would wait if I was you as well.
We're so close. Almost there.

Margaret Black 30:40
Right, right.

Kelly Sotelo 30:41
OK. Is the new GM able to do everything the same as the old GM?

Margaret Black 30:48
I did my best to.
Look through the what's new viewer?
Where you can see the new stuff that's coming out and then also the newest admin guide down in the newest admin guide, you can see all the supported and unsupported.
Functionality. So I did my best to try to find some unsupported functionality and I couldn't find any so but I could find all the new things that they've added in.
I think we're finally we're to the point.
With this release, where all the legacy functionality is supported, so I don't think you should have any worries.
About trying the upgrade in test.
Should whatever kind of goal plan you have.
Even if you have a complex goal, plan with targets and milestones and calculations then.
And rating if you have that, I think that's all supported.

Kelly Sotelo 31:56
Great. Thank you.
What does it take to implement job profile builder?

Margaret Black 32:03
Diane, you want to take that one?

Diane Caruso 32:04

Sarah, I'll take that.

Yeah, I've actually done quite a few job profile builder implementations for aspire.

So what it takes?

Is it?

There's a couple of steps for it.

Wonderful thing to do when you're if, because it actually is going to be feeding a lot of the new features like talent, intelligence, hub and opportunity marketplace.

So there's three different steps.

The first one is setting up a job architecture.

So what we do is we work with clients to figure out what's the best, what I mean by an architecture is a family, which.

There's a cluster of roles, and then a series of roles that are usually that are mapped to your job codes.

So we look at what your current information and either an employee central or your HRIS and we identify your job codes and the role names associated with those job codes and then a higher level function or sub function depending on what you're working with. Once those are ident.

We then work with you, help you kind of figure out what do you want.

Your job description template to look like.

Because this is the time of standardizing your job descriptions across a lot of times, you know there's job descriptions get stored in many different places, and so you'll be gathering them and then make your decisions on what you want your job descriptions to look like, and then the.

Next phase is loading that job description data in there. So in the job descriptions.

Are are loaded in the profile. The job profile is loaded in at the role level.

So that's why we match the role in the job code.

So think about it.

You'll have a job description for each job code.

And then we work with you.

There's a couple of methods for loading it in and based on the size your organization, the complexity, what your job descriptions look like, we work with you to determine the best way to import those and then copy and I would do it in preview 1st and then you.

Copy it all over and you put it in production.
So this way you get to work out all the kinks in preview.

Kelly Sotelo 34:01
Well, thank you, Diane.
Our next question is, is there any downtime during the upgrade?

Margaret Black 34:08
No, it literally only takes.
Of course you're doing it.
Test first, but it only takes like 10 minutes and then log out of everything and log back in and you'll see all the goals there that were already there before. And then you want to look at the statuses and make sure you don't see any blanks in the.
White spaces for the statuses, but you don't have to stop anything.
I mean, usually most of my our customers will do it after hours.
But if you're a global organization and you have a time that that works.
I would recommend that, but there's really no stoppage.

Kelly Sotelo 34:49
Wonderful. Thank you so much. It looks like that was the last question that was that was asked.
So I'm going to wrap up our webinar today and say thank you so much to all of our attendees for joining us today.
You will get a follow up e-mail that will have the on demand recording of our session as well as the PDF of the presentation so you can look at that in a little more detail if you have any questions beyond this, please don't hesitate to reach out to.
Information provided here and we look forward to the next one and seeing you all there.
Thank you so much.

Margaret Black 35:19
Thank you. Bye.

Kelly Sotelo 35:21
Thank you, Margaret. Thank you, Diane.

Diane Caruso 35:21
Have a good day.

Kelly Sotelo 35:23
Bye bye.

Kelly Sotelo stopped transcription