effective people

SAP SuccessFactors

Performance & Goals

2H 2024 Release Briefing

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A GPStrategies Company

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SuccessFactors Experience: Since 2014

Jesper Nielsen is a highly experienced consultant with 10+ years of experience with SAP HCM and SuccessFactors.

Jesper holds a professional certification in SAP SuccessFactors Performance & Goals. He also has a Technology Consultant certification for Qualtrics EX.

Agenda

SAP SuccessFactors Performance & Goals

- Most Important Topics
- Other Release Features
- Deep Dive Topic
- Product Road Map

Most Important Topics

Delete Channels in Continuous Performance Management

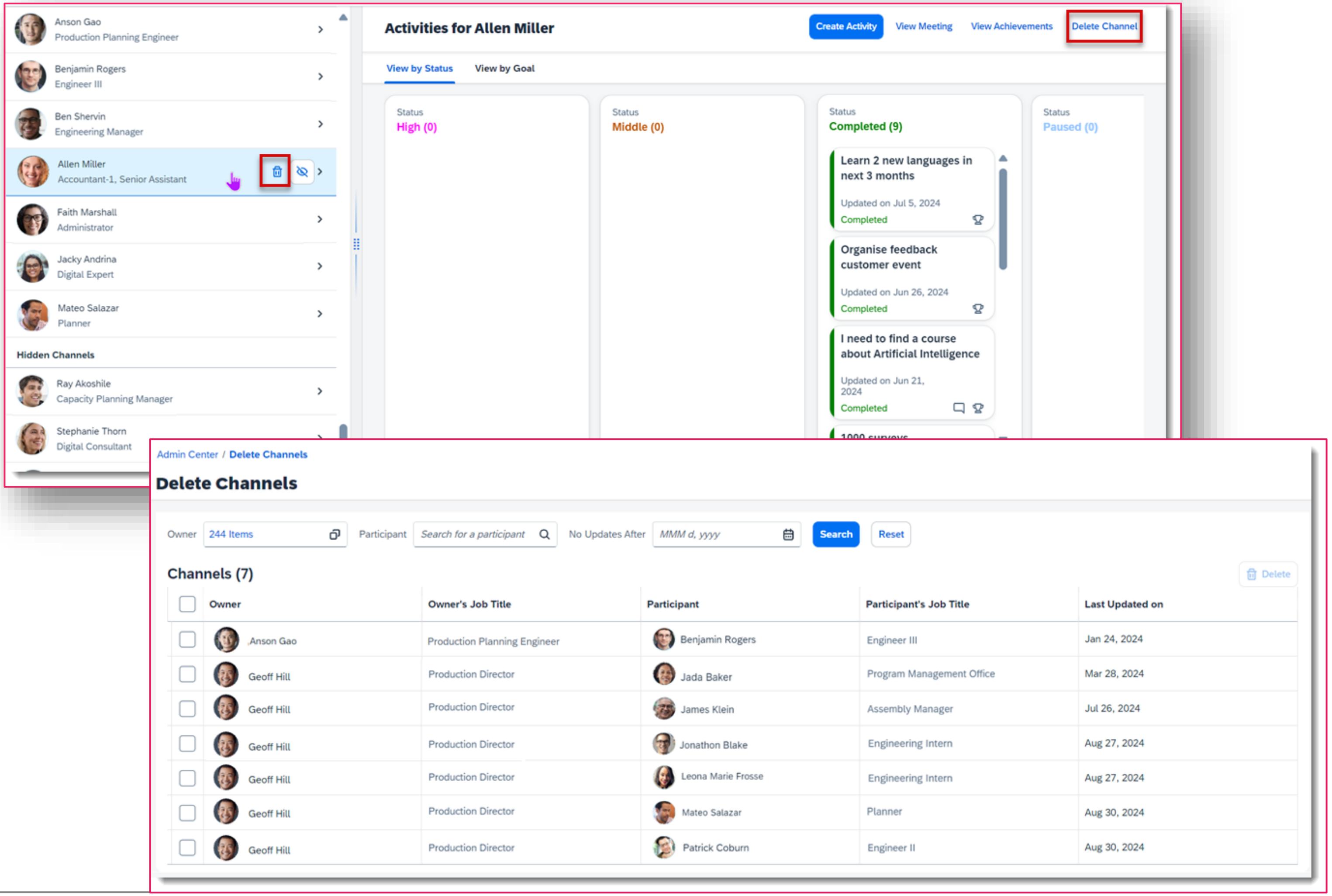
Type: New

Lifecycle: General Availability

Enablement: Automatically on

- The option to Delete Channels is now available for users. The owners of a channel can now delete it either one-by-one or via bulk deletion.
- Permission can be granted to admins as well, to delete channels for users.
- Only channels that where manually created can be deleted (i.e. channels with Manager and possibly Matrix Manager are not removable).

The level of impact is High. We recommed testing this feature and prepare for its adoption.



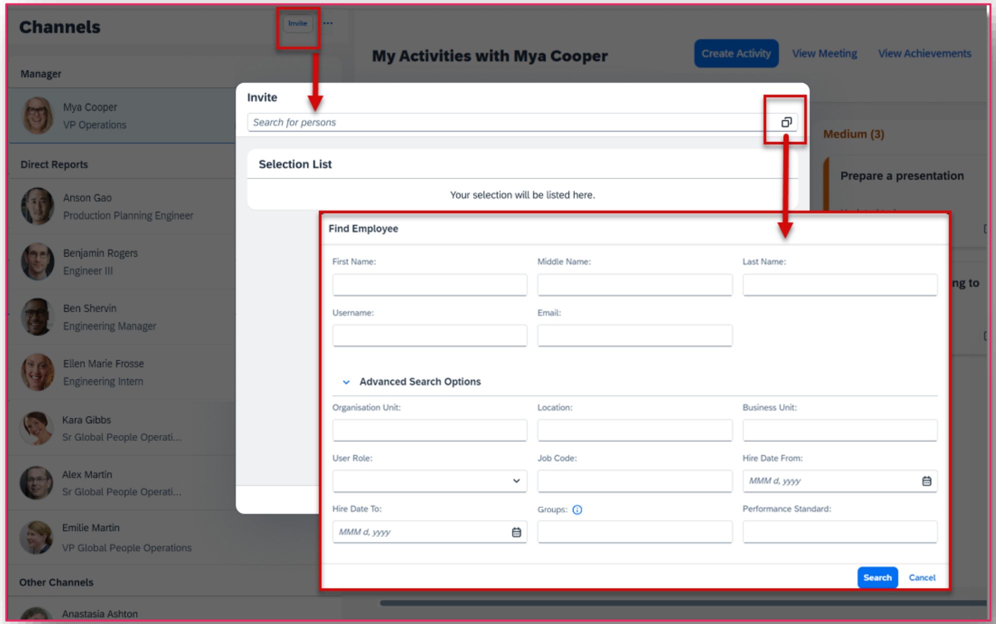
Bulk Channel Invitations Now Supported in Continuous Performance Management

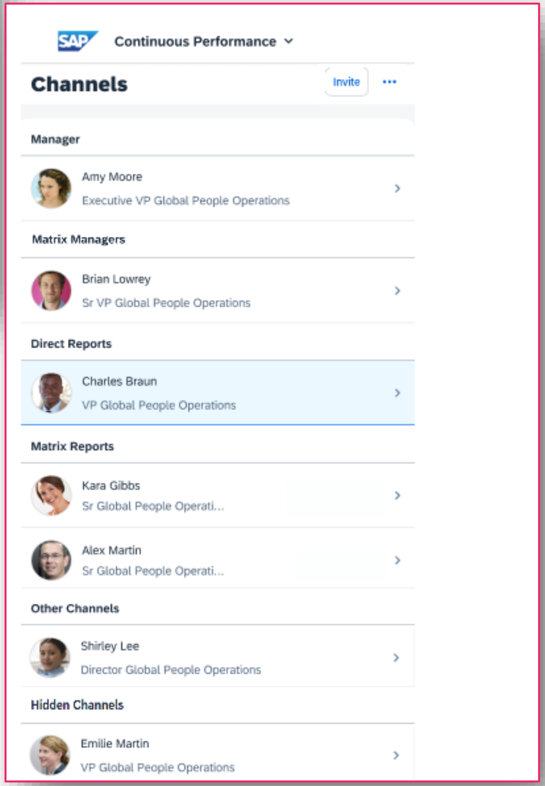
Type: New

Lifecycle: General Availability

Enablement: Automatically on

- Users can now bulk create / delete channels to invite/delete multiple channels in one go instead of individually.
- Channels are now grouped by relation type for easier overview.
- Various UI upgrades to navigation, Texts and Icons, etc.





The level of impact is Medium. We recommed testing this feature and prepare for its' adoption.

Continuous Performance Improvements – Automatic Matrix Manager channel creation

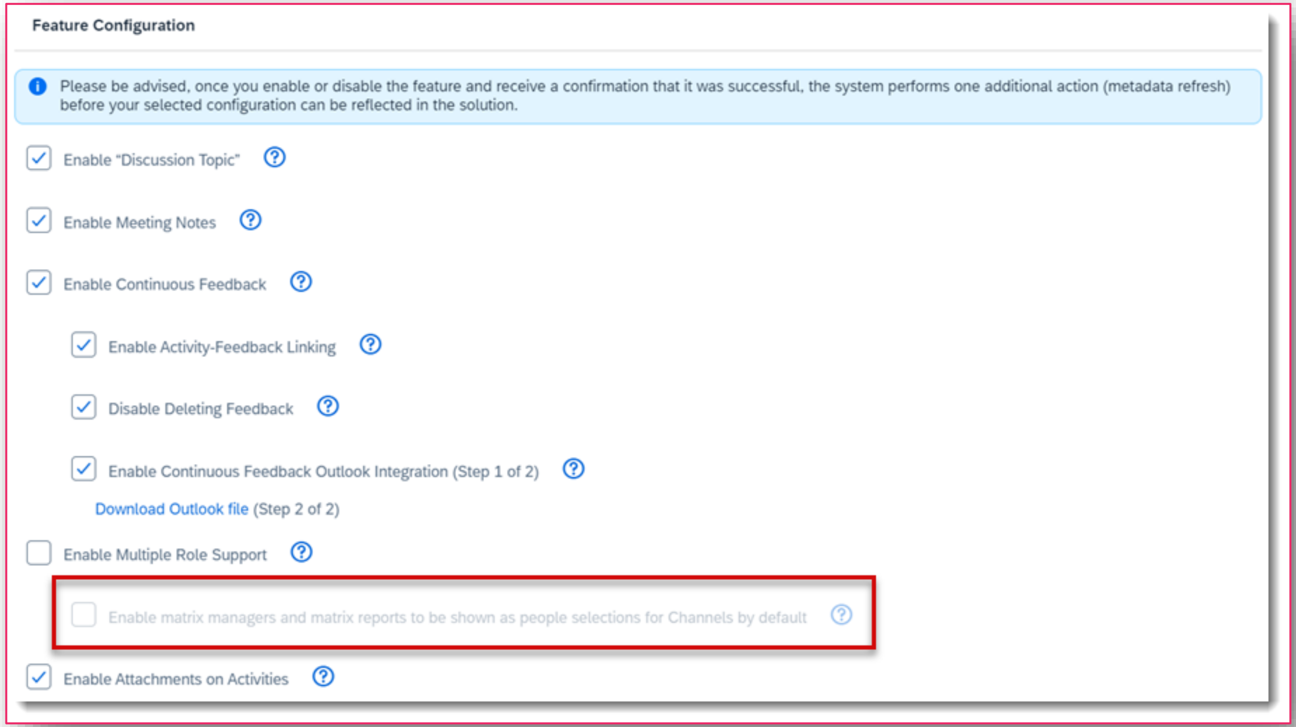
- A new switch in Manage Continuous Performance Management is now available, for automatically creating a channel with Matrix Manager(s).
- The options is disabled by default – on enabling it will create channels between all Matrix Managers and their Matrix reports.

The level of impact is Medium. You can test this feature and decide if you would like to enable in your instance.

Type: New

Lifecycle: General Availability

Enablement: Customer configured



Delegation is now available for Performance Forms

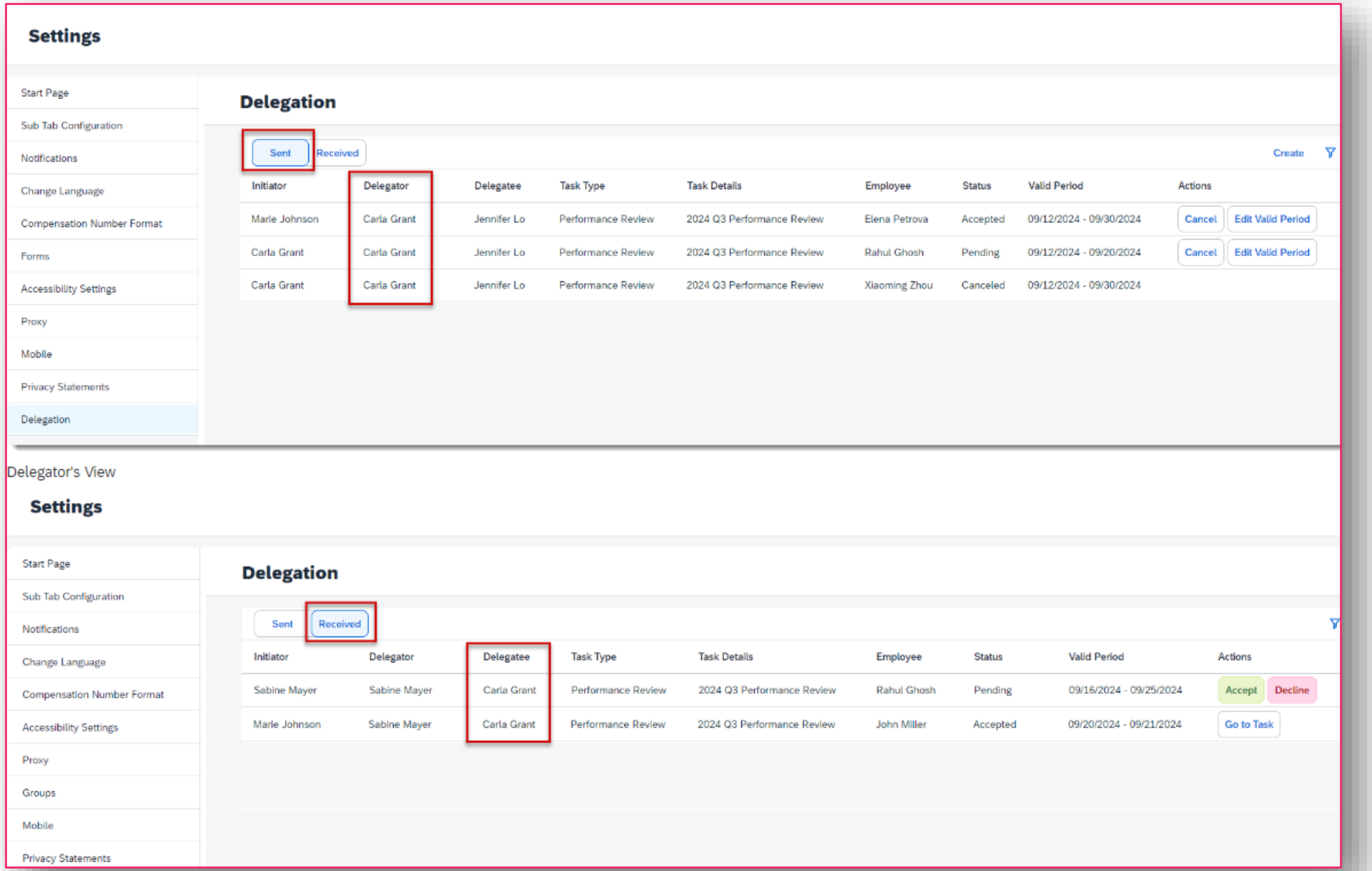
- A new delegation feature can now be enabled to allow Managers to delegate Performance Forms to others, effectively replacing them in the route map.
- The same feature can be granted for admins, to allow for managing delegations on behalf of users.
- <u>Be aware that this feature is planned to be released in prod on Dec. 13th, 2024!</u>

The level of impact is High. Test this functionality and decide if it's useful to your organization.

Type: New

Lifecycle: General Availability

Enablement: Customer configured



Other Release Features

General UX Enhancements to Latest Goal Management

Type: New

Lifecycle: General Availability

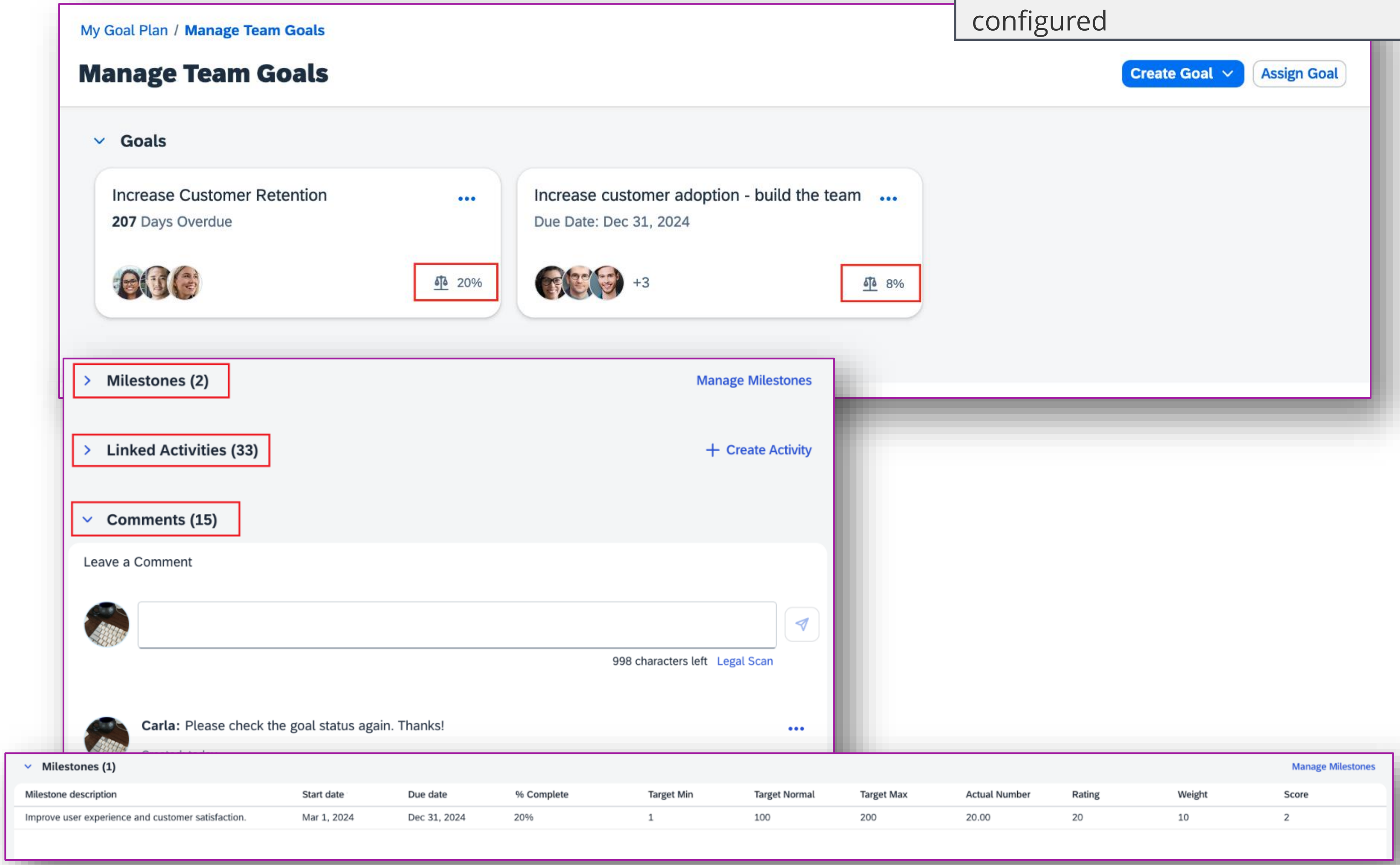
Enablement: Customer configured

Several UI/UX enhancements are coming with this release. Below are some highlights:

Weights are now displayed for Team Goals.

Activities, Milestones and Comments areas are now collapsable in the Goal Details view.

- And Milestones now show the full details (all columns) without needing to edit.



The level of impact is Low.

Copy Goals on Behalf of Others

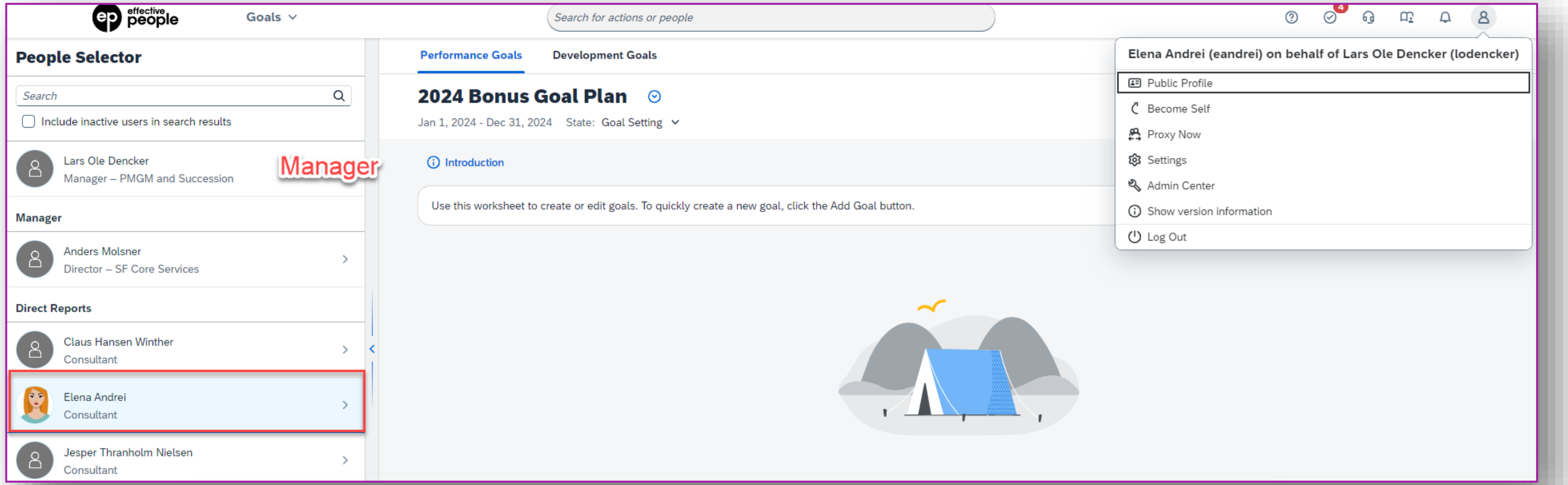
Type: New

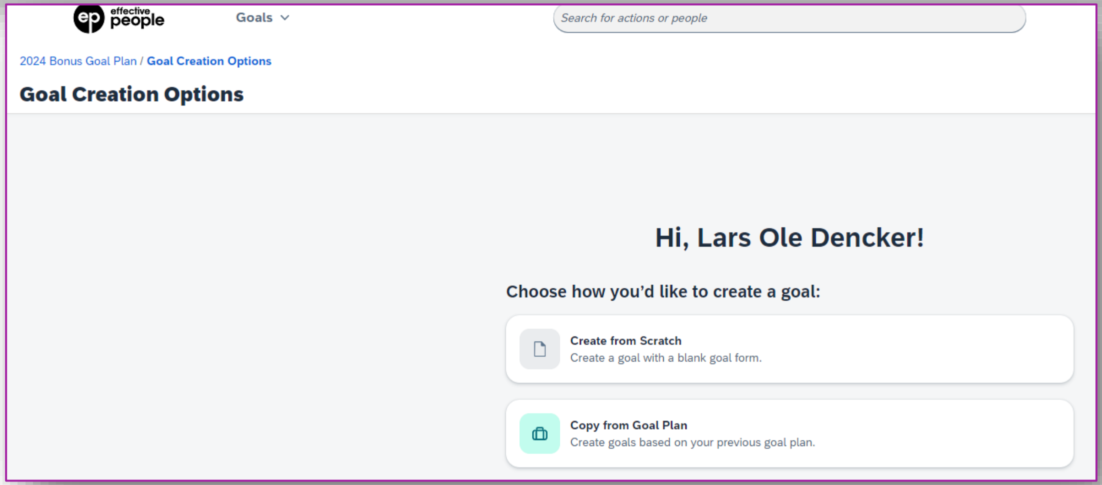
Lifecycle: General Availability

Enablement: Customer configured

Managers can now navigate to an employee's Goal Plan and copy personal Goals on behalf of that Employee.

The source goal plan can be either a legacy or latest goal plan, but the target goal plan must be a latest one. This means the Copy from Goal Plan option is available only for latest goal plans.





The level of impact is Low.

User Experience Enhancements to Continuous Performance Management

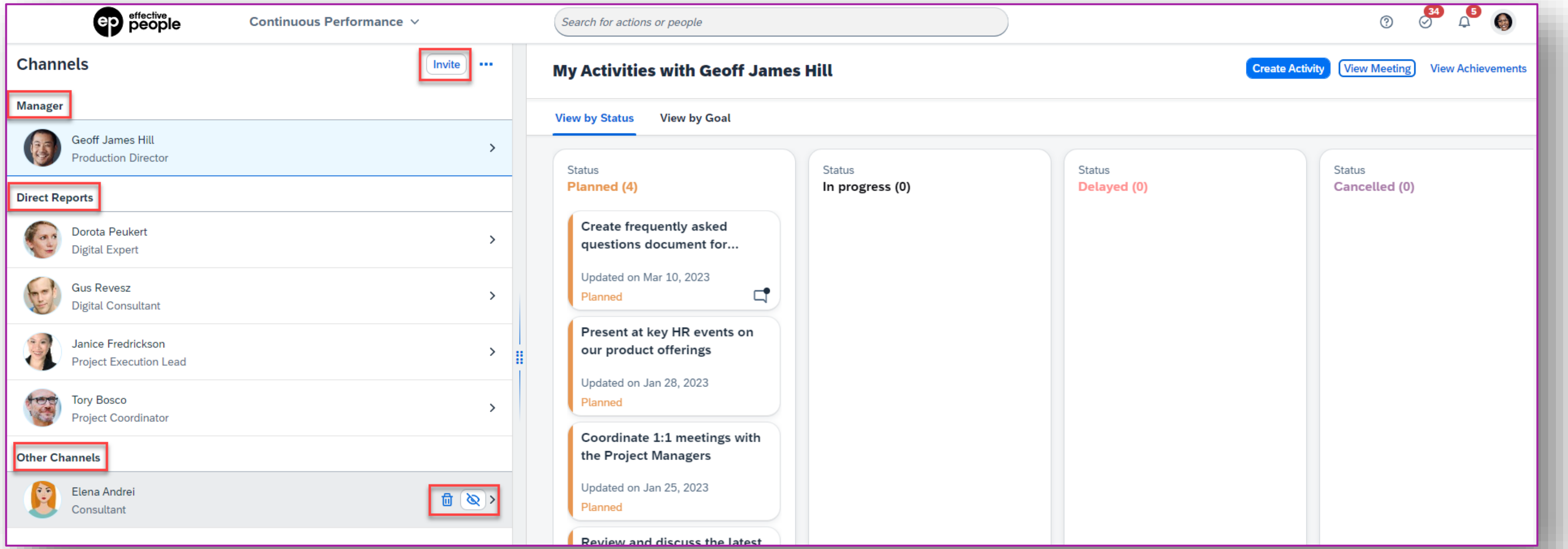
- More organized channel list: There's a header Channels to label the list. Within the list, channels can fall into up to six categories
- More consistent avatar experience: Now, the users who have no access to the channel list can see their manager's avatar on the header of Activities view, together with their own one.
- Better-designed navigation: All items on the Channels list are clickable and provide a unified navigation experience.
- Text and icon changes: The icon for deletion of the Declined channel invitations is now a trash bin & the channel invitation icon button is replaced by the text button Invite.

The level of impact is Low. We recommending testing the changes.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on



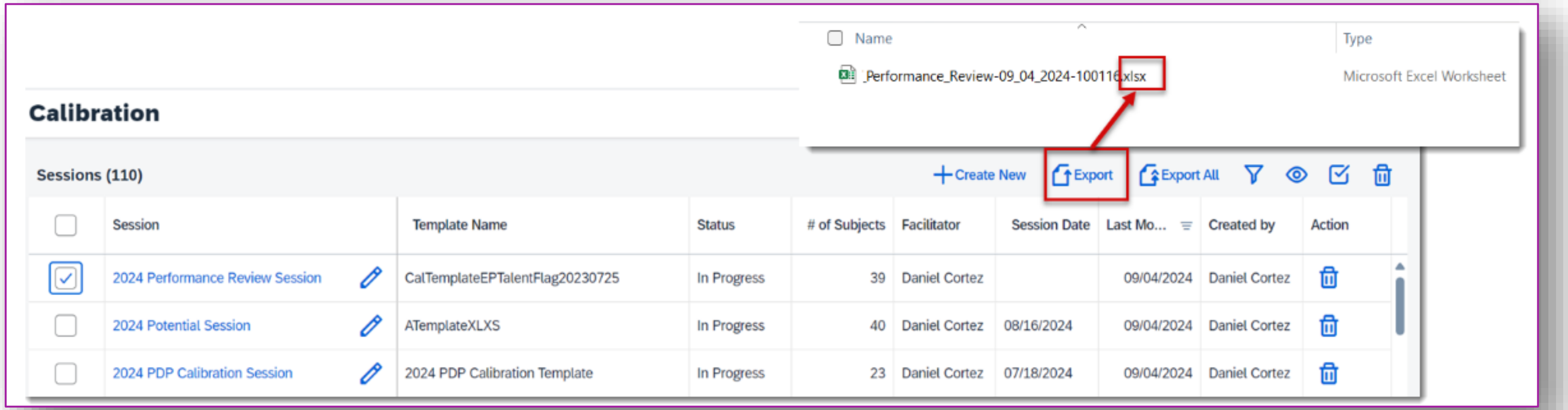
Export Calibration Sessions to an XLSX File

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

You can now export calibration sessions to an XLSX file, which supports up to 16,384 columns. Previously, the exported file was in XLS format, which was limited to 256 columns.



The level of impact is Low.

New Setting for Configuring Autosave

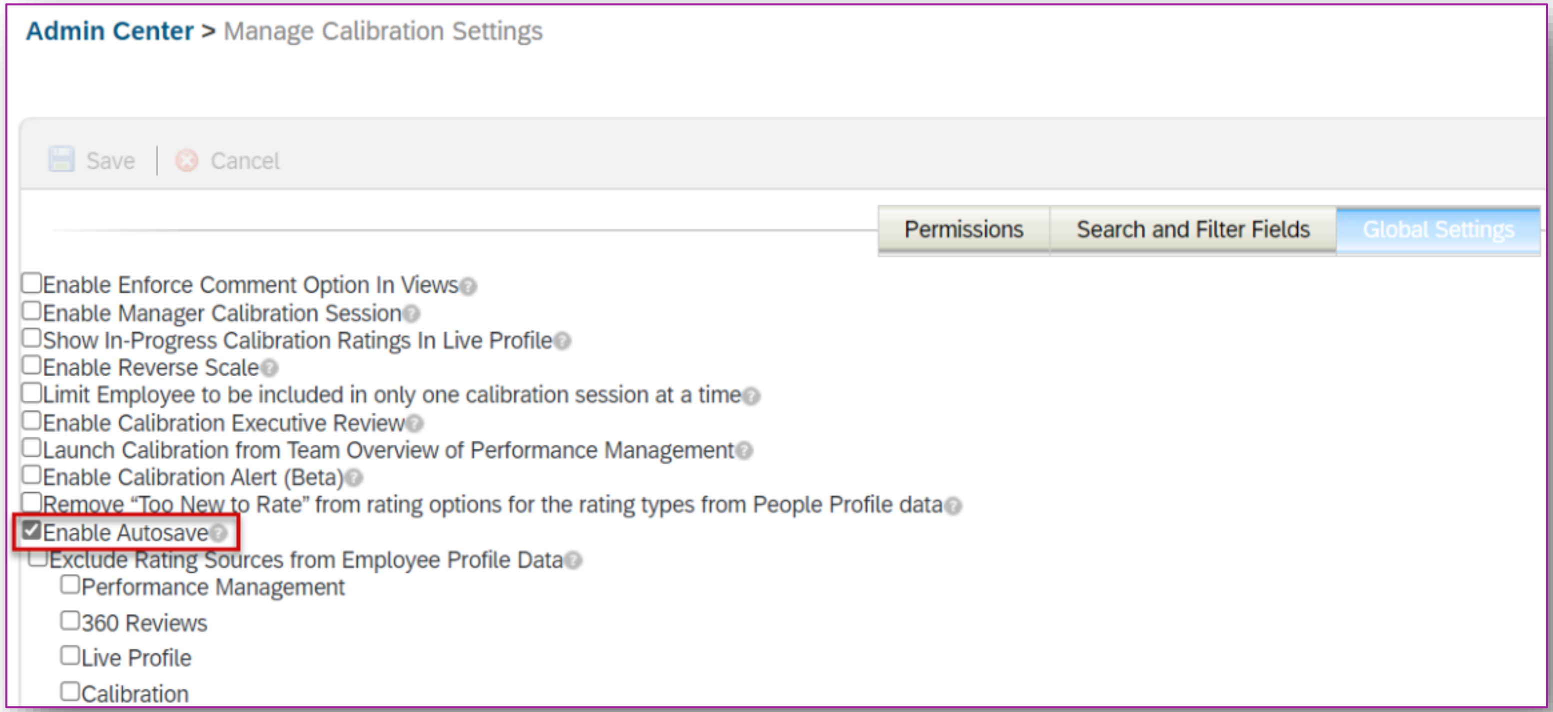
Type: New

Lifecycle: General Availability

Enablement: Customer configured

You can now choose to enable or disable the autosave feature in Calibration by changing the new setting, Enable Autosave, in the Manage Calibration Settings admin tool.

When the option is enabled, changes made in Calibration will be automatically saved after 30 seconds of inactivity. If disabled, users need to manually save any unsaved changes.



The level of impact is Low.

Turn Off Email Notification for Rating Changes During Session Finalization

Type: New

Lifecycle: General Availability

Enablement: Customer configured

You can now turn off the email notification Notify Calibration Rating Changes during Session Finalization under Admin Center → Email Notification Templates Settings.

When you disable this notification, managers will no longer receive emails about changes to their employees' ratings after sessions are finalized.

How it looks now (before it was greyed out:

The level of impact is Low. The notification is disabled at a template level. You should verify that the same applies in Email Notif. Template Settings.

Set Numerical Distribution in Calibration Templates

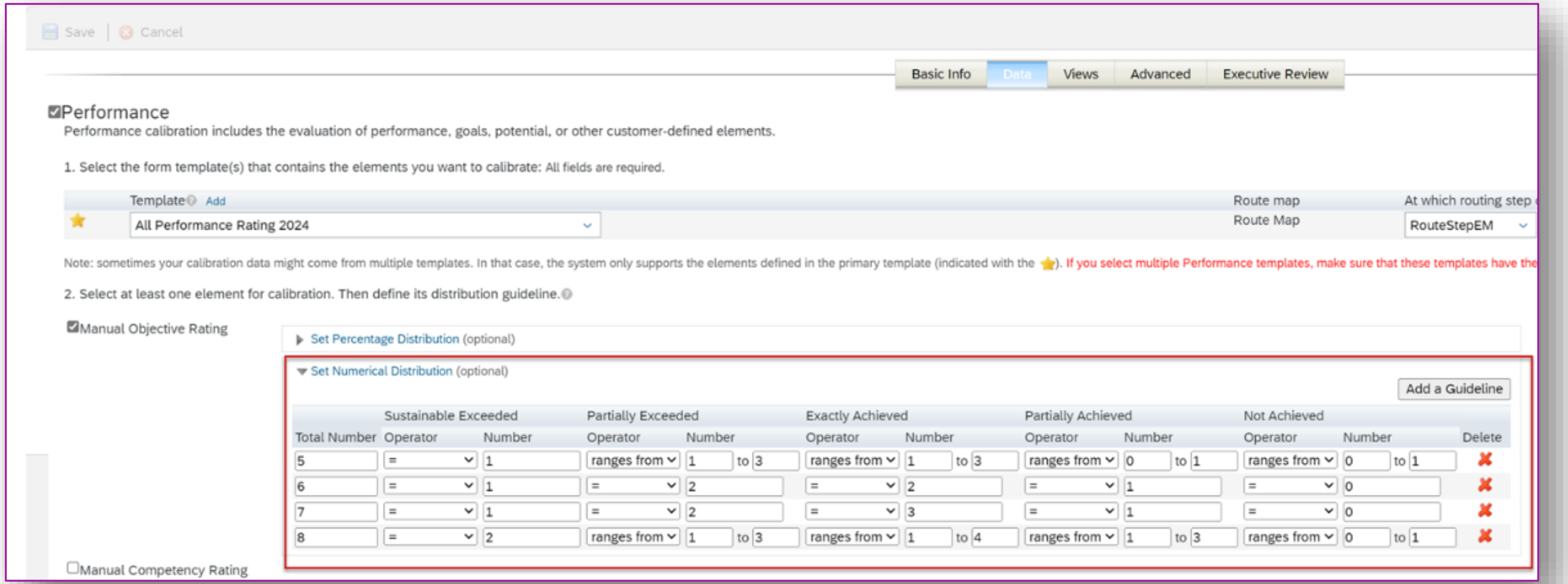
Type: New

Lifecycle: General Availability

Enablement: Customer configured

You can now set numerical distribution guidelines in Calibration templates for ratings from Performance Management forms. Previously, you could only define percentage-based distribution guidelines for ratings.

This feature allows you to specify the target number of subjects you want to assign to each rating.



The level of impact is Low. Consider if relevant to your organization.

Link and Unalign Goals

Goal Linking between Goal Plans is now available, allowing users to link Goals on their plan to other users Goals.

Once created these links are displayed on the Goal Alignment Chart.

This feature increases visibility on collaboration by highlighting connection between users Goals.

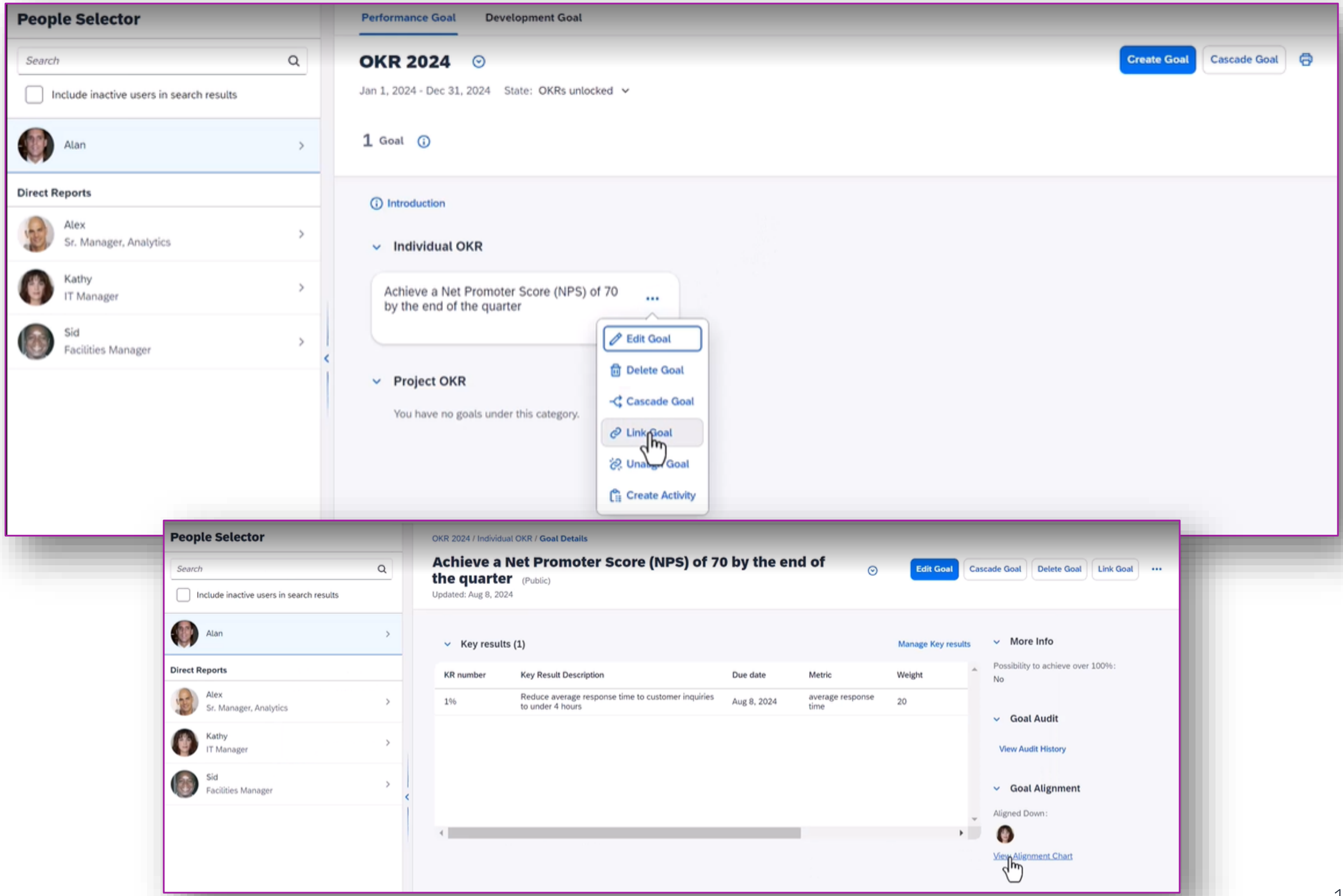
If you are using the Goal Alignment Chart this feature is a great enhancement to further visibility on Goal collaboration across the organization.

The level of impact is Low. If Goal Alignment Chart is already in use consider enabling this feature.

Type: New

Lifecycle: General Availability

Enablement: Contact Enablement Partner



Setup Goal Modification Email Jobs in Admin Center

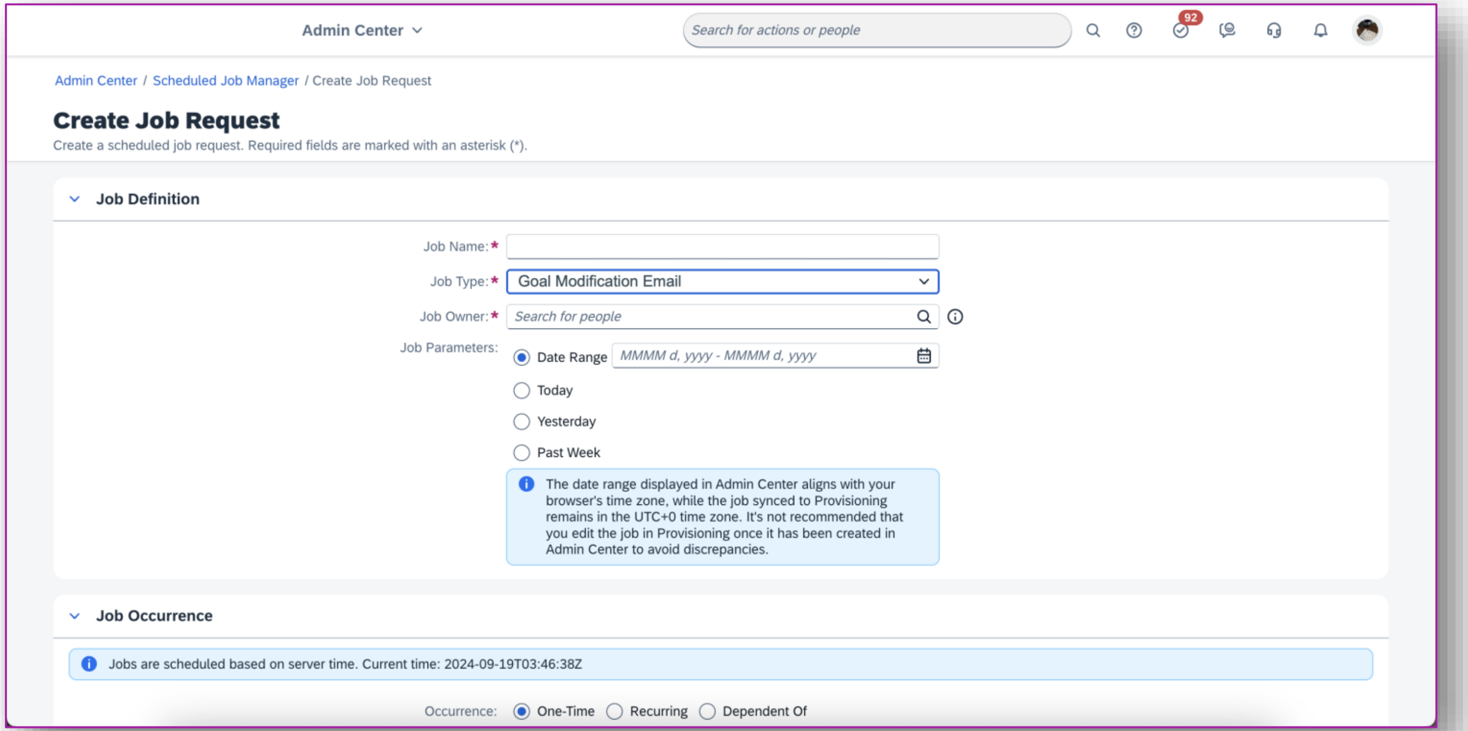
Type: New

Lifecycle: General Availability

Enablement: Customer configured

You can now create the job for Goal Modification (for sending mails on Goal Creation, Deletion and Modification), via Scheduled Job Manager.

When you enable one of the Goal Modification Email notifications, this job needs to be scheduled for any emails to be sent.



The level of impact is Low. Only relevant when enabling/diabling the Goal modification emails.

Type: Changed

Lifecycle: General Availability

Enablement: Contact Customer Engagement Executive or Account Manager

Enhancements to AI-Assisted Goal Creation

- Here are the enhancements to AI-assisted goal creation in the latest Goal Management:
  - **Updated AI tag:** On the goal creation page, the tag for fields with content generated by AI is now "AI-generated content", replacing the previous "AI-enhanced content".
  - **Streamlined content comparison:** The Compare Generated Content page has been removed, making the process more efficient by eliminating the step where users had to choose between two versions of goal content. Instead, the AI-assisted writing tool is now in place to enhance content directly at the field level.
  - **Improved prompt template:** The prompt template is now optimized to automatically apply goal plan configurations, such as start, due, and “maxlength”, to AI-generated goals.
  - **Support for custom fields:** Custom fields of text and “textarea” types are now supported for performance goals. By providing meaningful text for <field-description>, you specify the context, which in turn helps improve the quality of AI-generated content. This ensures that the AI can generate more accurate and relevant suggestions for your goals.

The level of impact is Low. If AI is used, these enhancements should be considered.

Roll-up Calculation Supported for Cascaded and Linked Goals

Type: New

Lifecycle: General Availability

Enablement: Contact Enablement Partner

- Roll-up calculation is now supported for cascaded and linked goals in the latest Goal Management.
- With support for the rollup-calc-type attribute, you can set it to avg or sum for the bizx-actual, bizx-target, and bizx-pos fields. Depending on your configuration, the sum or average values for these fields are automatically calculated across cascaded and linked goals. These values are then reflected in source goal details.
- Once roll-up calculation is configured, each time a parent goal is cascaded or linked, two audit records are generated for it. One record indicates the action type, either "Cascaded" or "Linked," based on the action taken. The other record shows "Modified" due to changes in the roll-up fields.

- This feature improves goal tracking by providing goal owners with a clear and accurate view of overall progress.

The level of impact is Low. If feature is used we recommend testing these changes.

Type: New

Lifecycle: General Availability

Enablement: Contact Enablement Partner

Hide "Create from Scratch" Option for Goal Creation

- The turnoff-add-personal-goal-button switch is now supported in the latest Goal Management, allowing you to hide the Create from Scratch goal creation option for performance goals.

- Once you set it to on in the goal plan template, the option to create goals from scratch becomes unavailable, and users will be guided to use other predefined options, such as Copy from Goal Plan or Create from Library, depending on your configurations.

The level of impact is Low. If it is desired to only work with e.g. Library Goals, consider this feature.

Person-Based Background Information Displayed for Concurrent Employment in Talent Card

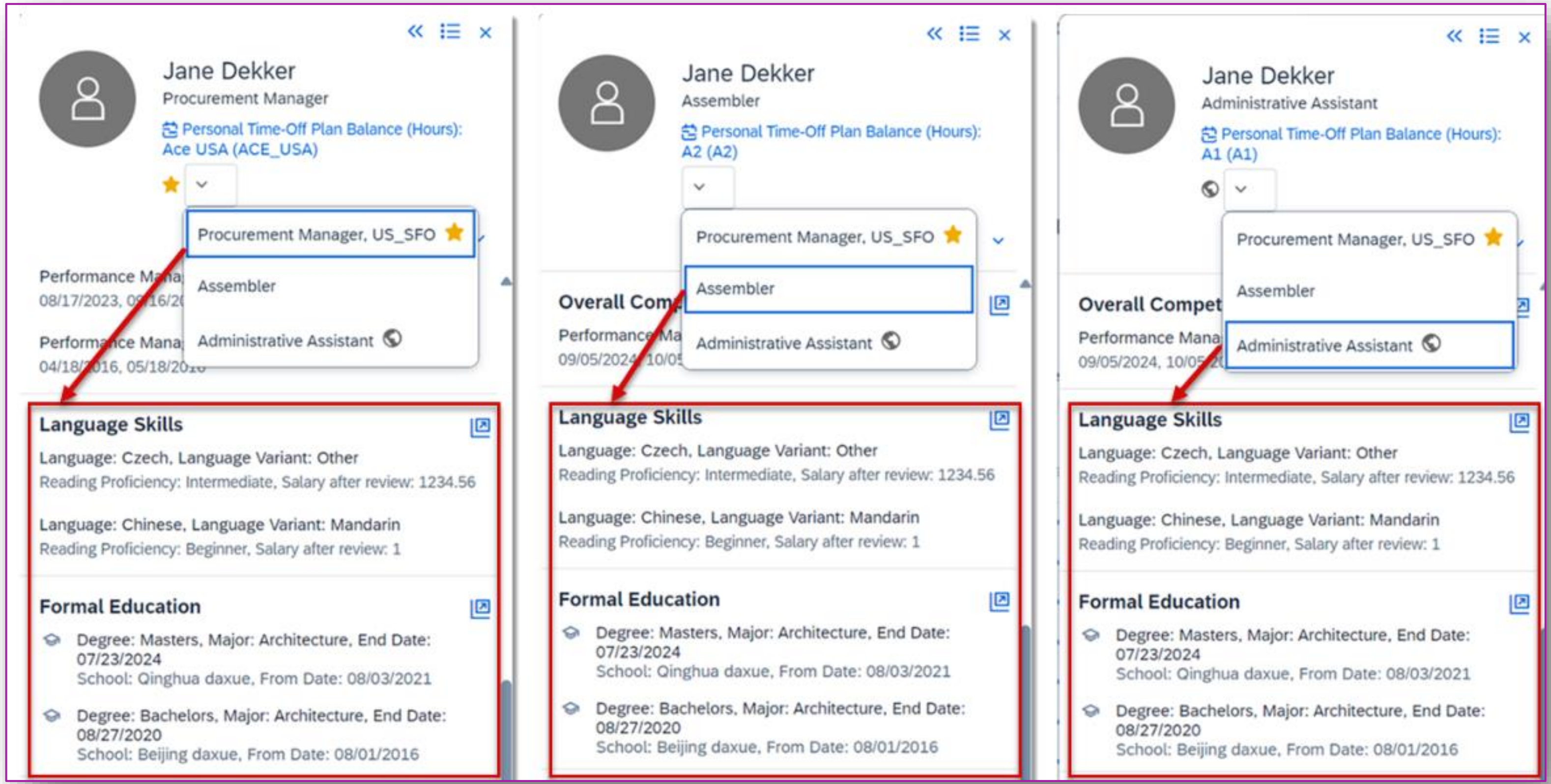
Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

The talent card now displays background information for employees with concurrent employments based on persons rather than users.

When you've selected the option Enable Person-Based Background Information Blocks under Admin Center Company System and Logo Settings, all the background information records related to an employee with concurrent employments are displayed consistently across employments in the talent card. This data is the same as what appears on People Profile.



The level of impact is Low. If talent cards and Concurrent Employment is used we recommend testing these changes.

Type: Changed

Lifecycle: General Availability

Enablement: Contact Customer Engagement Executive or Account Manager

AI-Assisted Skill Recommendations from Continuous Performance Management Data

- Talent Intelligence Hub can now use AI-assisted capabilities to infer and recommend skills to employees in their Growth Portfolio using Continuous Performance Management data.
- When an employee enters details in the achievements, activities, or feedback section in Continuous Performance Management, this feature infers skills based on the employee's inputs.
- If the inferred skill exists in the Attributes Library of Talent Intelligence Hub, it is displayed as a recommended skill in the employee's Growth Portfolio. Employees can either add the recommended skill to their Growth Portfolio or reject the recommendation. If the inferred skill doesn't exist in the Attributes Library, the skill will be added to the Attributes Library and can be confirmed by Administrators for organizational use.

The level of impact is Low. If TIH and AI capabilities are enabled, we recommend to test.

Enhancements to the Latest My Forms Page for Performance Management and 360 Reviews

Type: New

Lifecycle: General Availability

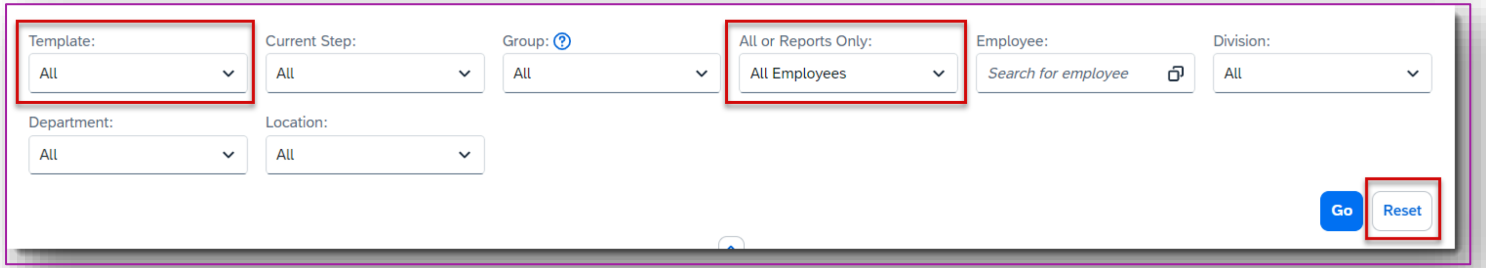
Enablement: Customer configured

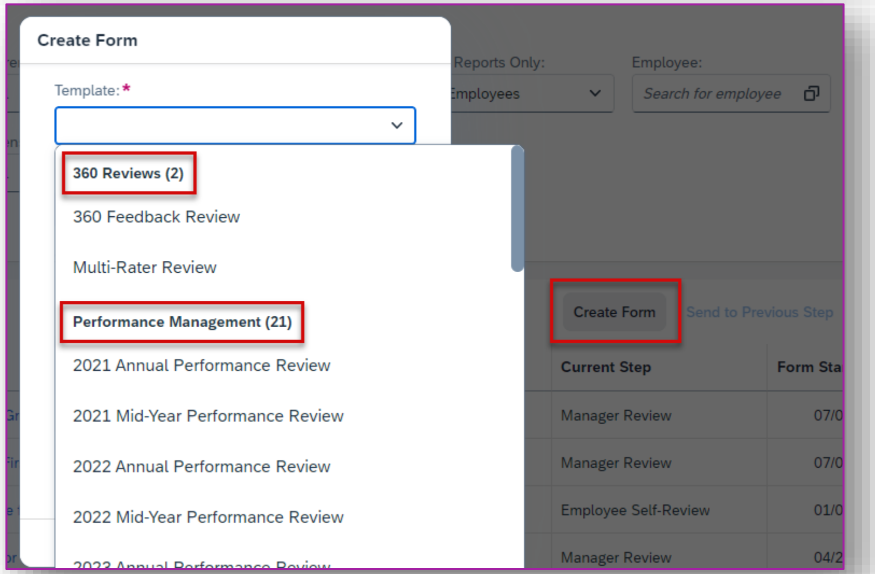
SAP made several enhancements related to filters, form lists, and form creation on the latest My Forms page. Those are attributed to:

- Filters
- Forms List
- Form Creation

Please have a look at the detailed changes here. They are considered minor but good to be analyzed.

The level of impact is Low. Consider if relevant to your organization.





Type: Changed

Lifecycle: General Availability

Enablement: Different per item

Changes to 360 Reviews

Here are some release items which are relevant to 360 Reviews. Navigate to “What’s New Viewer” to see more details.

- Enhanced AI-Assisted Writing in 360 Reviews
- Custom Learning Supported on 360 Reviews Forms
- AI-Assisted Insights into Detailed 360 Report
- Exclude Process Owners of 360 Reviews from Inactive User Purges

The level of impact is Low. If 360 reviews are enabled, we recommend to test.

Deep Dive Topic

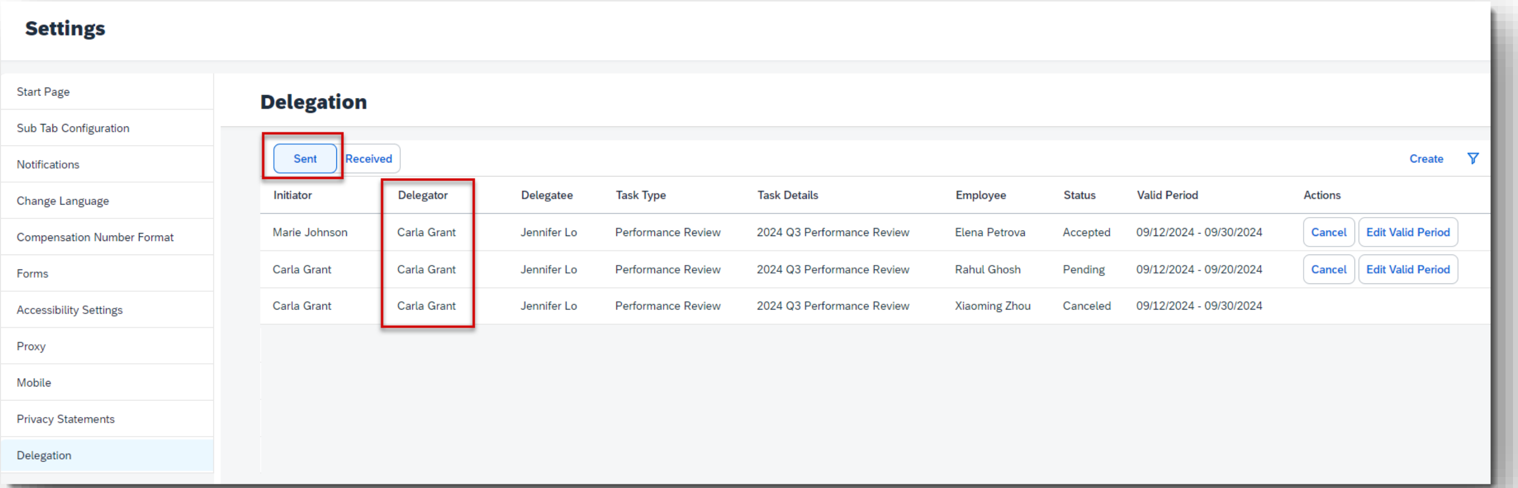
Delegation feature for Performance Forms

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

- With the delegation feature, users, usually managers, can delegate their performance review tasks to other people within a specified period. It also allows administrators to create delegations on behalf of managers.



The level of impact is High.

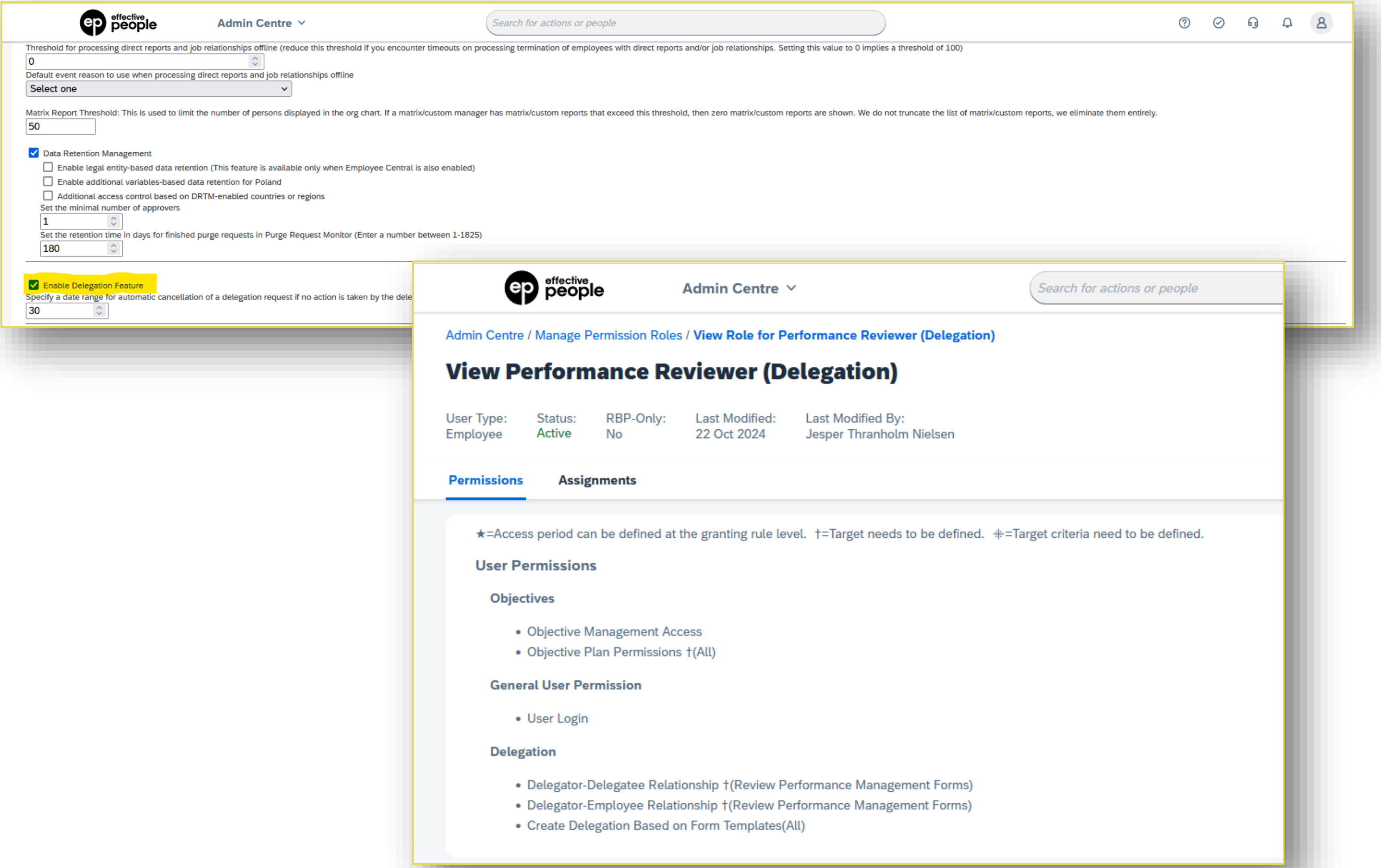
Delegation feature for Performance Forms

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

- Delegation is disabled by default, so must first be enabled in Company System and Logo Settings.
- Secondly the feature must be permissioned via Role Based Permissions, allowing you to decide whom to grant access to delegation.



The level of impact is High.

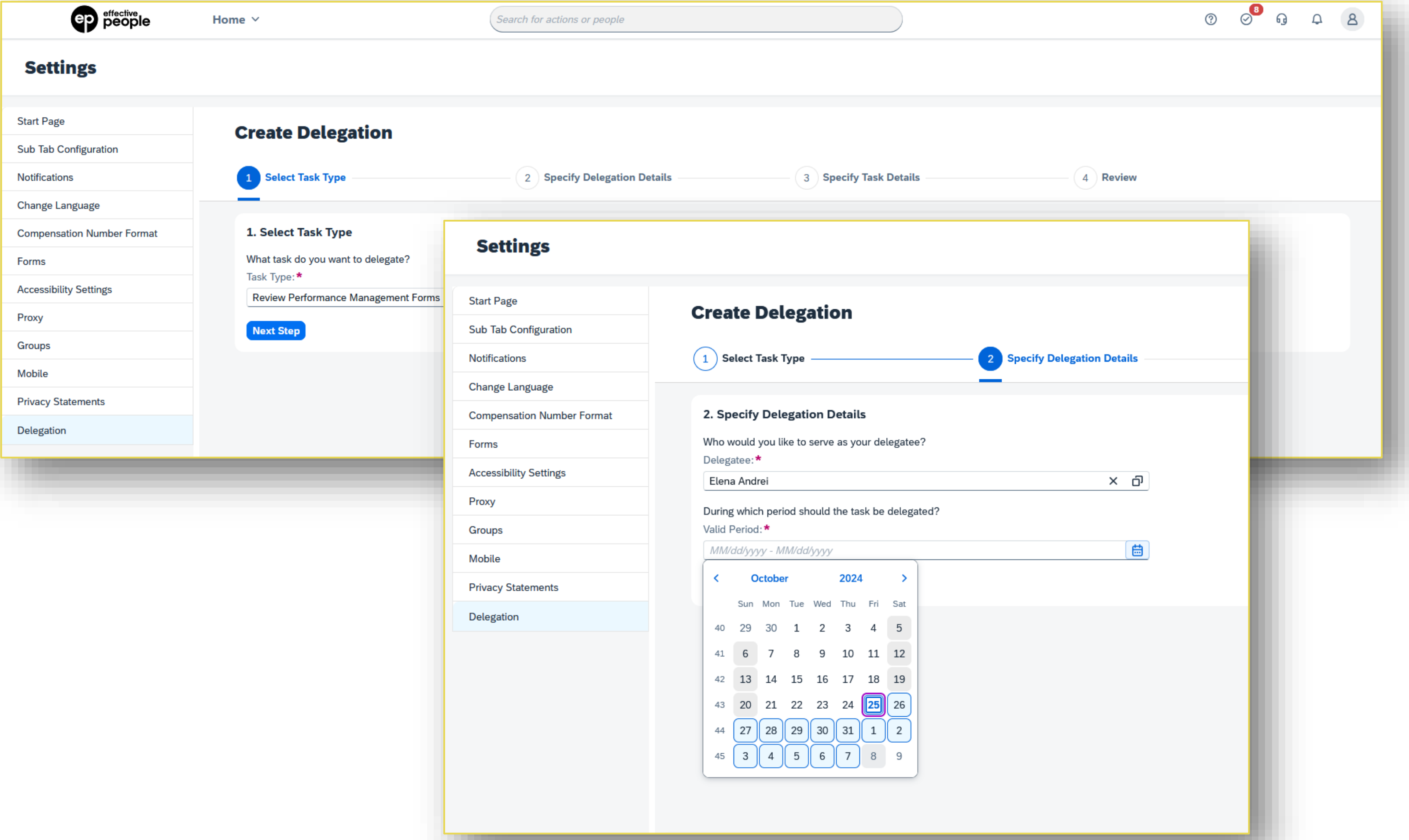
Delegation feature for Performance Forms

- Once enabled and permissioned the Delegation feature will appear under the Settings menu.
- Here users can create new Delegations by first selecting the type of task to delegate – Performance Management forms.
- Next selecting the Delegatee whom the delegation goes to and the Start- and End Dates for the delegation.
- The users that can be selected for delegation is controlled by the target population set in the permission role.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured



The level of impact is High.

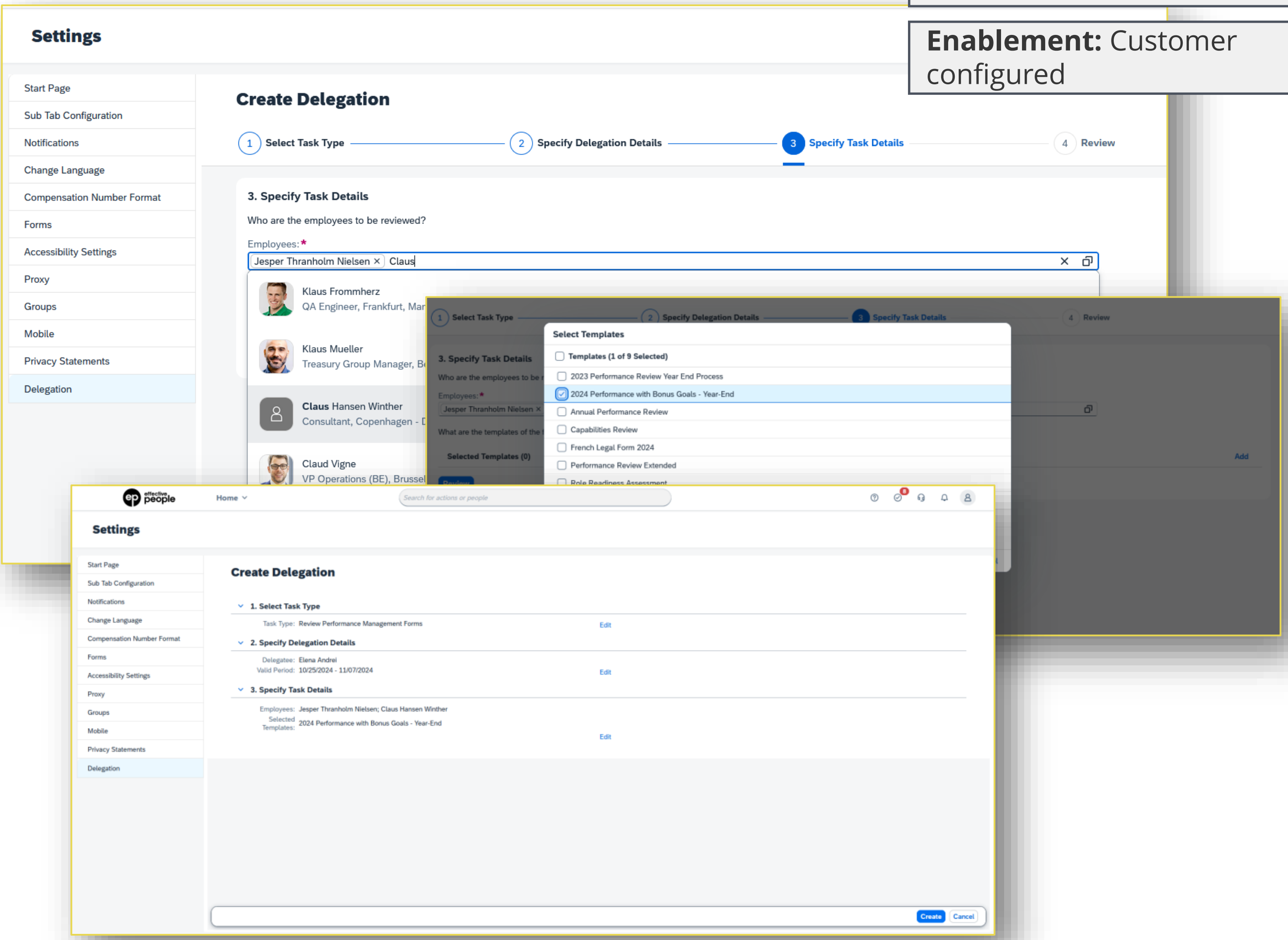
Delegation feature for Performance Forms

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

- Next select the Employees who are to be delegated – more than one employee can be selected at a time.
- Then select the Form Template to be delegated for these employee.
- Last, review the Delegation task and Create.



The level of impact is High.

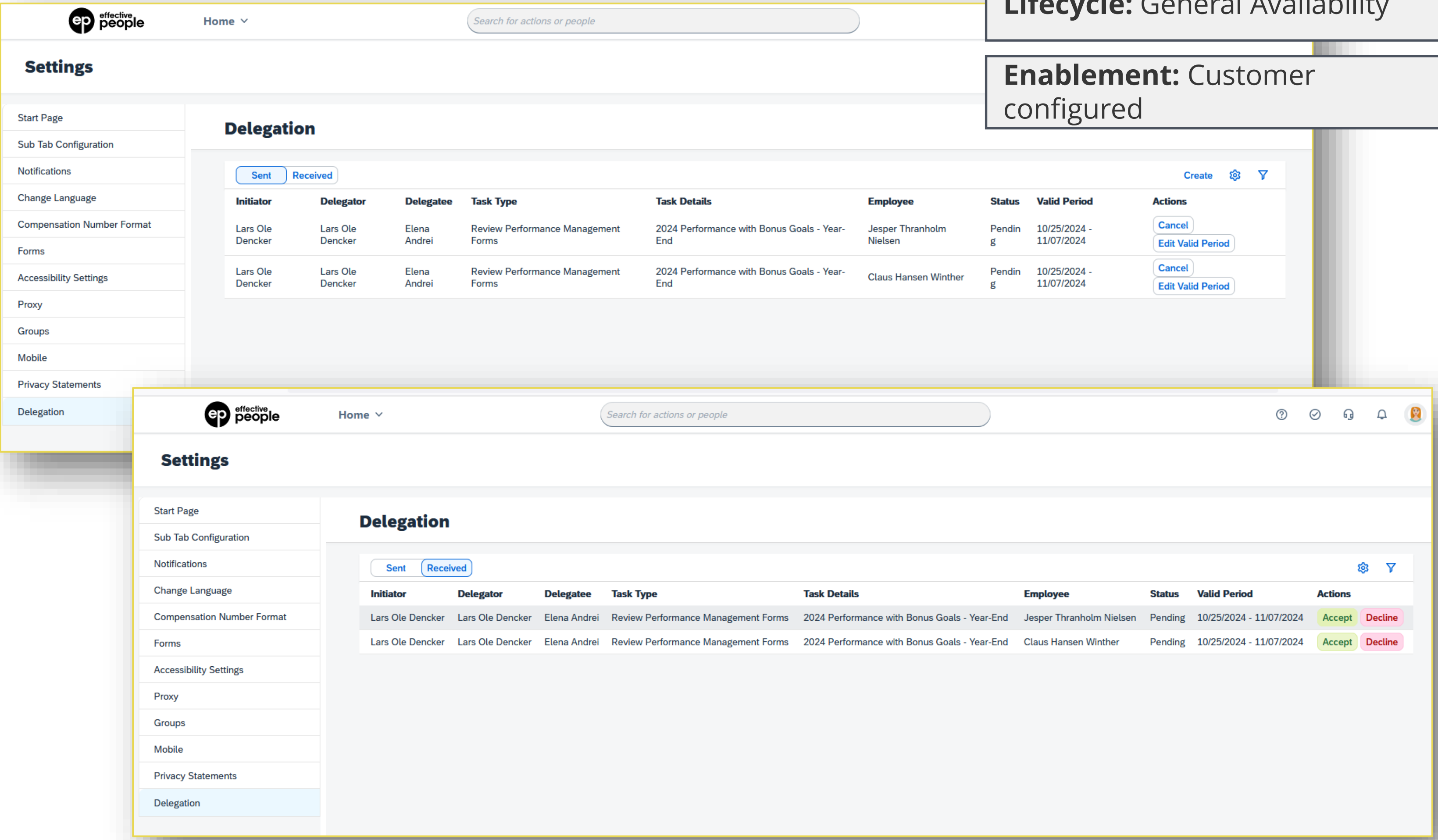
Delegation feature for Performance Forms

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

- On the Delegation page, you can review tasks that you have created or received.
- Here you can Cancel, Edit and Create new tasks.
- Notice the Status column here – once a Delegation request is send, it must be Accepted by the recipient before it takes effect.
- Logging in as the recipient we can accept or decline the request.



The level of impact is High.

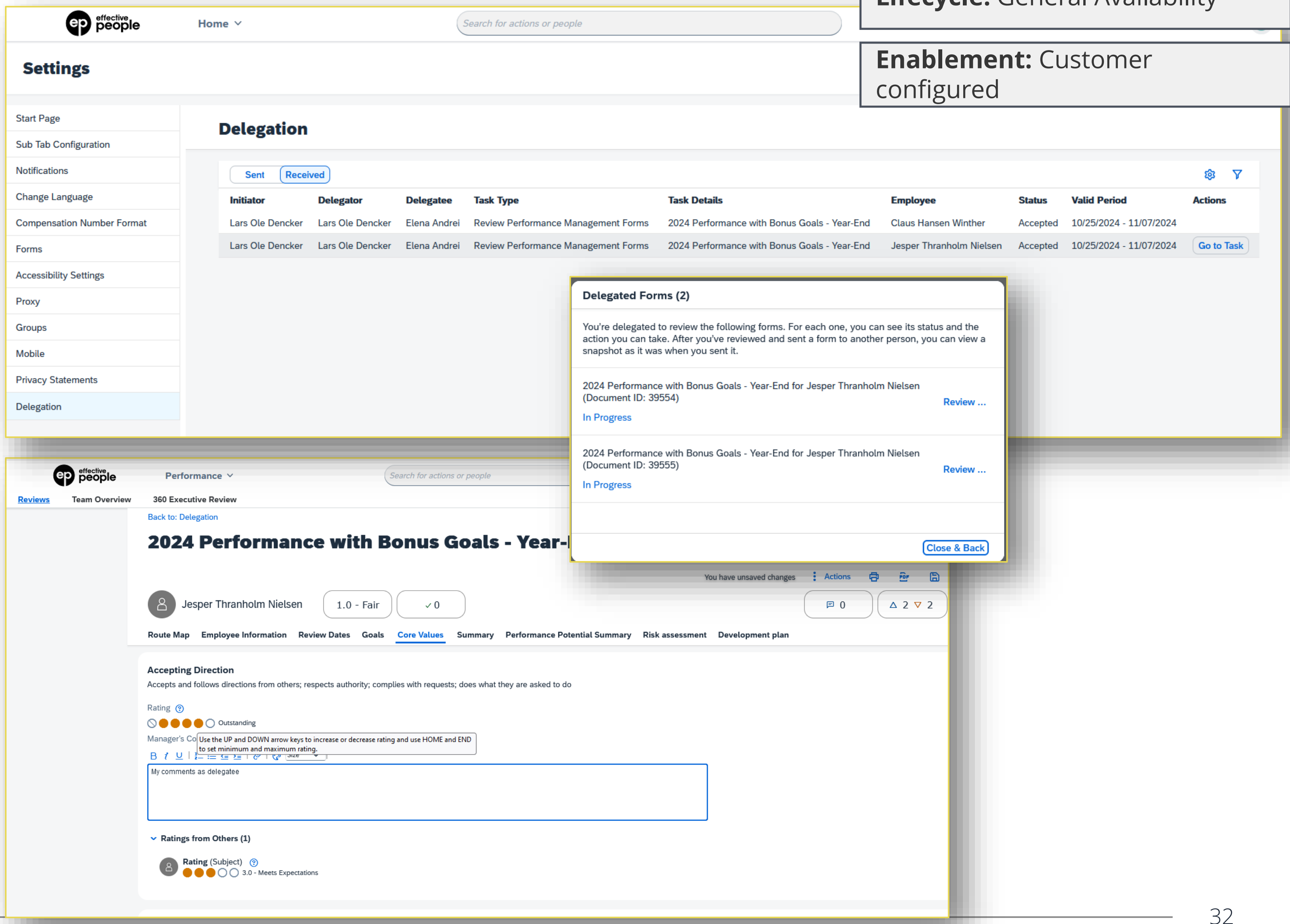
Delegation feature for Performance Forms

- Once accepted the recipient can access the form(s) from the Delegation menu.
- Within the forms, the Delegatee inherits the permissions of the delegating Manager and can perform ratings, comments, etc.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured



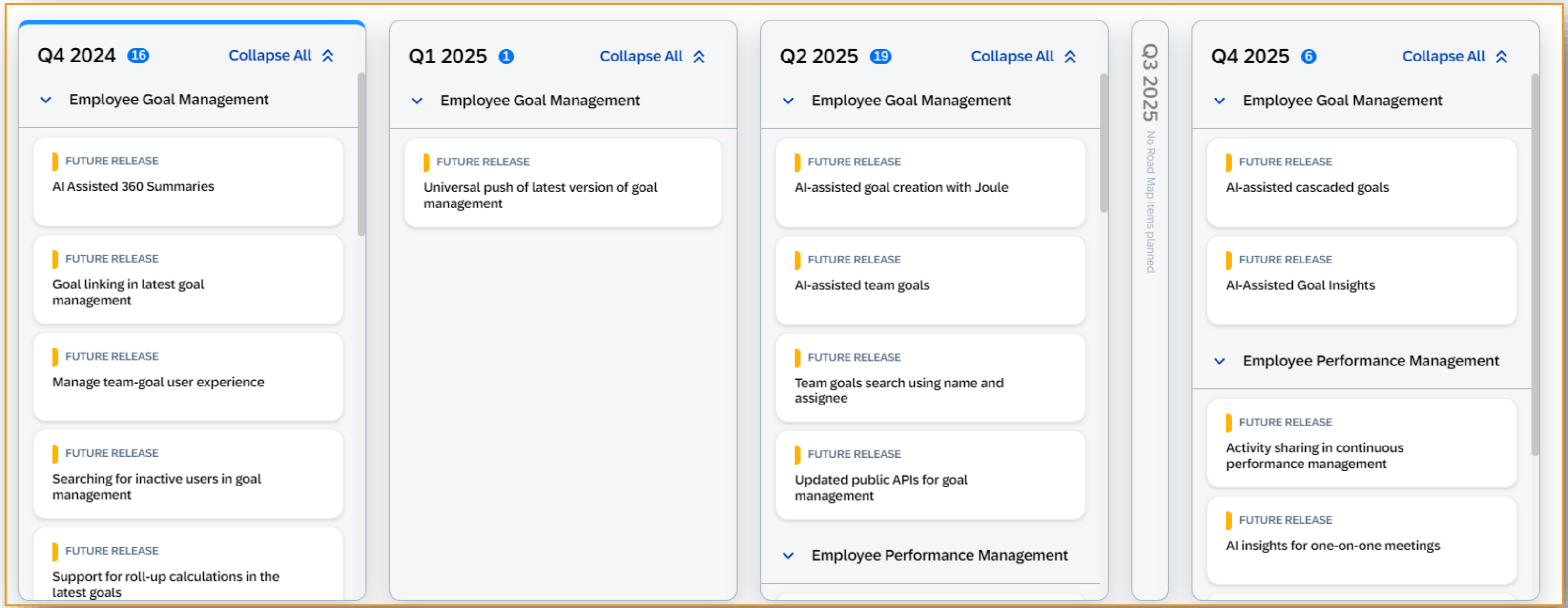
The level of impact is High.

Product Road Map

Product Road Map

There are a quite a few items related to Performance & Goals currently on the roadmap which can be checked in detail here:

[SAP Road Map Explorer]



Thank You.

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