



Extending SuccessFactors Performance and Goals to Suit Your Business Needs

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About hyperCision – Corporate Facts and Timeline

- Privately held, woman-owned corporation
- Founded in 2001
- Responsible for the 1st US implementation of the SAP Learning Solution in 2003
- Formal SAP Partnership formed in 2006
- SuccessFactors Partnership formed in 2012
- Delivered 1st partner-led validated SuccessFactors LMS implementation

About hyperCision – Our Purpose, Mission and Values

Our Purpose:

To earn the respect and trust of our clients by doing what we say we will do. We've built our business by putting our clients' interests before our own.

Our Mission:

To become our client's trusted HCM technology advisor.

We Highly Value:

- Doing the job right the first time, on time, on budget
- Delivering genuine business impact to our clients
- Achieving uncommon results with world-class software
- Helping each other, our partners and the community

About hyperCision – Our Approach

Our approach is simple: we hire the best people in the industry and give them the foundation, tools, and guidance to allow them to deliver strategic HCM transformation for our clients.



PEOPLE

- Platinum-level consultants
- Passionate about HCM
- Results-oriented
- Knowledge sharing
- Over 8 yrs avg. experience



PROCESSES

- Project mgmt and controls
- Repeatable execution
- Best practice-driven
- Use software accelerators



PRINCIPLES

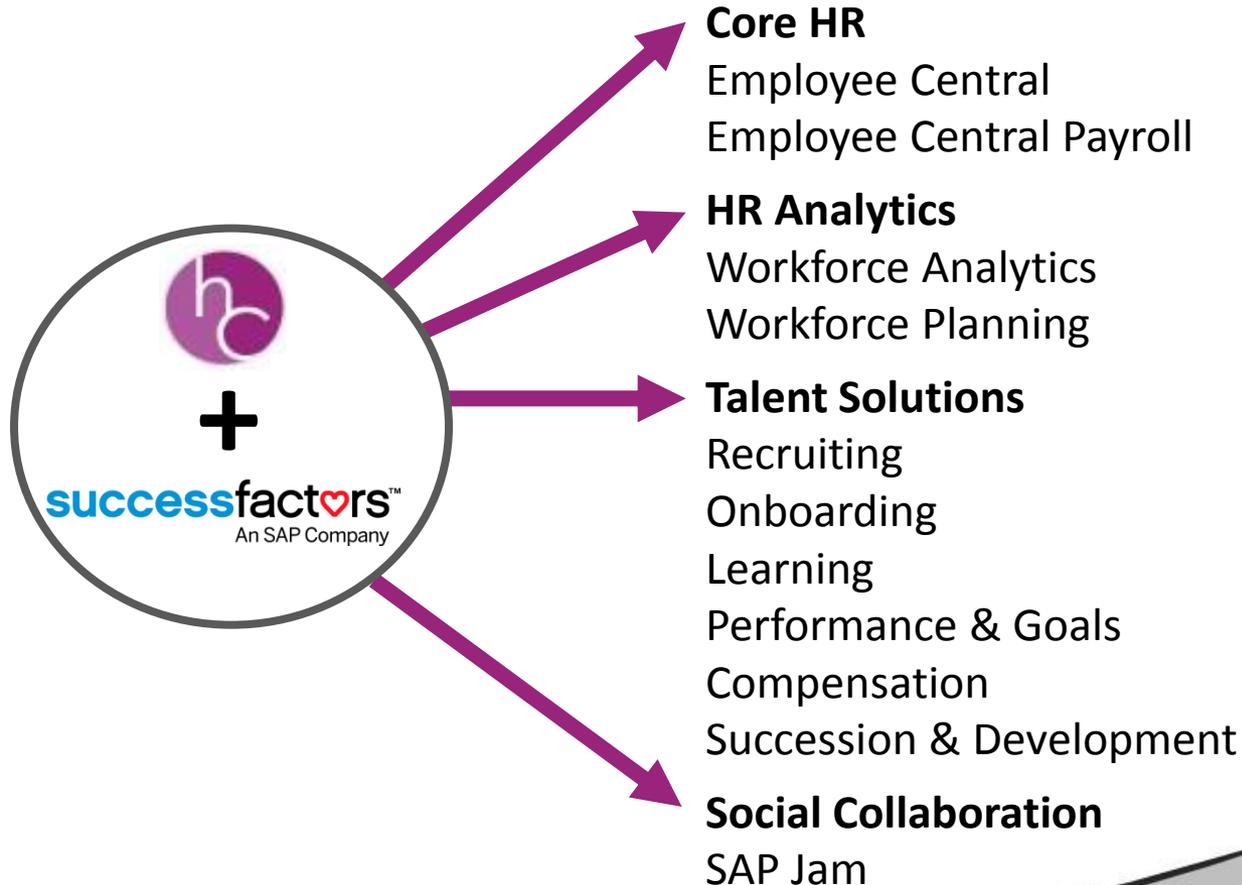
- Put our client's interests 1st
- Become trusted advisors
- 100% project transparency
- Really care about our clients



STRATEGIC HCM TRANSFORMATION

About hyperCision – Our SuccessFactors Expertise

Should your HCM technology roadmap include leveraging the cloud, we have expertise across the SuccessFactors landscape to bring success.



In This Session

- **The sophistication that some organizations require from their performance processes is not always easily handled by all Performance applications**
- **This session will cover some of the more advanced capabilities available from SuccessFactors Goals and Performance**
- **The presentation will take you beyond the use of Success Factory, providing insight into XML that, applied to your Goal Templates and Performance Forms, can give added functionality to meet challenging requirements**

What We'll Cover

- **Goal and Performance Examples that go beyond Success Factory**
- **Solutions Using XML**
- **Managing the Use of XML**
- **Wrap-up**

Customer Requirements

- Organization performance processes and programs vary significantly from organization to organization
- We continue to see organizations manage to that “right” weighting of goals to competencies
- Occasionally, we see requirements that offer a bit of complexity and challenge, so we are sharing some of those today

Success Factory Refresher

- **Success Factory**
 - ◆ **What it is**
 - ▶ **Tool for development of Goal Plans and Performance Templates**
 - ▶ **Easy to use, but limited for complex solutions**
 - ▶ **Gives access to XML**
 - *Not all changes are retained when template XML is edited and uploaded again through Success Factory*



Problem

Success Factory Pros and Cons

- **Pros**

- ♦ **Easy to use**
- ♦ **User does not have to know XML to use Success Factory**

- **Cons**

- ♦ **All capabilities of the product are not supported within Success Factory**
- ♦ **If changes are made via XML, they may not carry back into Success Factory and will be removed from the XML**

What Is XML?

- XML stands for Extensible Markup Language
- XML is designed to carry data
- Unlike HTML, it is not designed to display data
- XML actually does not do anything
 - ♦ It is data wrapped in between tags, used to store and transport information
- Software, like Success Factors, is designed to send, receive, and display the data contained in XML
- Each company is allowed to create their own tags and define their own document structure; this is what makes XML so flexible
- A DTD (Document Type Definition) is used to define the structure and rules that must be followed. The DTD contains the values, elements, and attributes that are valid.

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Customer Scenario 1 — Custom Table

- Customer needed a means to have comments that display with the date the comment was created
- This will allow for easier tracking and support the internal process throughout the review cycle

Solution 1 — Custom Table

- **4 steps required:**
 - ◆ **Create table definition**
 - ◆ **Table Permissions**
 - ◆ **Field Permissions**
 - ◆ **Goal Plan Layout**

Custom Table — XML for Table Definition

```
<field-definition id="milestones" type="table" required="false" detail="false"
viewdefault="on" showlabel="false" field-show-coaching-advisor="false" cascade-
update="push-down">
  <field-label>Custom Comments</field-label>
  <field-description>Custom Comments</field-description>
  <table-row-label>Custom Comments</table-row-label>
  <table-column id="date" type="date" required="false" cascade-update="push-down">
    <column-label>Date</column-label>
    <column-description>Date</column-description>
  </table-column>
  <table-column id="desc" type="textarea" required="false" cascade-update="push-
down">
    <column-label>Comment</column-label>
    <column-description>Comment</column-description>
  </table-column>
</field-definition>
```

Custom Table — XML for Table Permissions

```
<permission for="move-row">
  <description><![CDATA[No one may move goals in a user's plan.]]></description>
  <role-name><![CDATA[]]></role-name>
  <field refid="milestones"/>
</permission>
<permission for="create-row">
  <description><![CDATA[No one may create goals in a user's plan.]]></description>
  <role-name><![CDATA[E]]></role-name>
  <field refid="milestones"/>
</permission>
<permission for="delete-row">
  <description><![CDATA[No one may delete goals in a user's plan.]]></description>
  <role-name><![CDATA[E]]></role-name>
  <field refid="milestones"/>
</permission>
```

Custom Table — XML for “read” Field Permissions

```
<field-permission type="read">  
  <description><![CDATA[Everyone may read these]]></description>  
  <role-name><![CDATA[*]]></role-name>  
  <field refid="name"/>  
  <field refid="start"/>  
  <field refid="due"/>  
  <field refid="weight"/>  
  <field refid="done"/>  
  <field refid="state"/>  
  <field refid="milestones"/>  
</field-permission>
```

Custom Table — XML for “write” Field Permissions

```
<field-permission type="write">  
  <description><![CDATA[The owner, manager and form reviewer may write to all  
fields]]></description>  
  <role-name><![CDATA[E]]></role-name>  
  <role-name><![CDATA[EM]]></role-name>  
  <field refid="start"/>  
  <field refid="due"/>  
  <field refid="done"/>  
  <field refid="state"/>  
  <field refid="tasks"/>  
  <field refid="milestones"/>  
</field-permission>
```

Custom Table — XML for Goal Plan Layout

```
<plan-layout>
  <column weight="50.0">
    <field refid="name"/>
    <field refid="tasks"/>
    <field refid="milestones"/>
  </column>
  <column weight="10.0">
    <field refid="weight"/>
  </column>
  <column weight="10.0">
    <field refid="done"/>
  </column>
```

```
<column weight="10.0">
  <field refid="state"/>
</column>
<column weight="10.0">
  <field refid="due"/>
</column>
<column weight="10.0">
  <field refid="start"/>
</column>
</plan-layout>
```

Customer Scenario 2 — Externally Maintained Goals

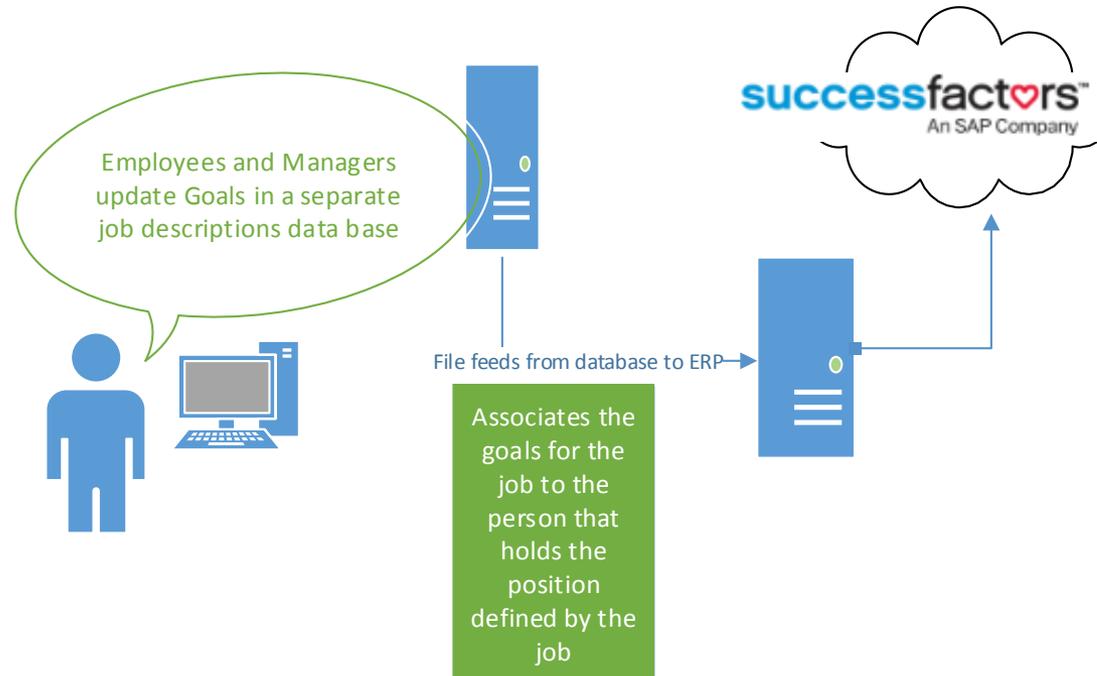
- **Goals are maintained in an external database**
- **The database fulfills multiple purposes for the customer, so there is a need to retain the records as they exist**
- **To avoid duplicate effort, the customer wants to leverage the existing goals**
- **This allows managers and employees to continue to update the goals in the external system, but use SuccessFactors Goals and Performance to actually track individual attainment of goals and rate performance**

Goals Initiated in Other Systems

- Loading of those goals consists of exporting the goals into a .csv file and uploading into SuccessFactors
- Challenges will exist; for example, weights not stored in other system, field lengths may be longer than SuccessFactors can accept, etc.
- The data will need to be verified and agreed to by customer
- GUID/SUBGUID numbering challenges to have goals appear in the correct order

Solution 2 — Externally Maintained Goals

- Goals were first moved to the customer's ERP system to merge with other pertinent employee information
- Data was extracted from the ERP system in the .csv format provided by SuccessFactors
- Extract File loaded into SuccessFactors via import Goal option



Externally Provided Goals and Achievements

- **Load file header layout**

OBJ_PLAN_ID 5

OBJ_PLAN_NAME 2012 Employee Goal Plan

DATE Fri Apr 19 10:59:42 EDT 2012

MAX_ERROR

^TYPE ACTION ID SUBID GUID SUBGUID FILTER_USERNAME FILTER_MGR_ID FILTER_DEPT
 FILTER_DIV FILTER_JOBCODE FILTER_LOC OBJECTIVE_CATEGORY OBJECTIVE_PARENTID
 OBJECTIVE_PUBLIC OBJECTIVE_name OBJECTIVE_desc OBJECTIVE_metric OBJECTIVE_weight
 OBJECTIVE_start OBJECTIVE_due OBJECTIVE_done OBJECTIVE_state TASK_desc

- **As seen in the .csv file for upload ...**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	OBJ_PLAN	9																			
2	OBJ_PLAN	2013 Employee Goal Plan																			
3	DATE	Sun Jan 12 21:37:00 EST 2014																			
4	MAX_ERROR																				
5	^TYPE	ACTION	ID	SUBID	GUID	SUBGUID	FILTER_US	FILTER_M	FILTER_DE	FILTER_DI	FILTER_JO	FILTER_LO	OBJECTIV	OBJECTIV	OBJECTIV	OBJECTIV	OBJECTIV	OBJECTIV	OBJECTIV	OBJECTIV	OBJECTIV
6																					
7																					

Externally Provided Goals and Achievements (cont.)

- **Load file data records – Sample Data**

- OBJECTIVE UPDATE 32863_3 scook categoryID0 Y Planning and Design Determine system design resulting from thorough requirements gathering and application of system knowledge Valid design quality by participating and leading design review meetings To be determined by supervisor and employee 20 1/1/2013 ##### 0 Incomplete
- OBJECTIVE UPDATE 32863_4 scook categoryID0 Y End User Support Address End User questions and support tickets within a timely fashion to customer satisfactions To be determined by supervisor and employee 10 1/1/2013 ##### 0 Incomplete

**Must use
correct
Action**

**ID, SubIDs,
GUIDs, and
SubGUIDs need
to be used**

Externally Provided Goals and Achievements (cont.)

• Load error examples

- Row Number :1
- Successfully Processed.
- Row Number :2
- Successfully Processed.
- Row Number :3
- Successfully Processed.
- Row Number :4
- Successfully Processed.
- Row Number :5
- Successfully Processed.
- Row Number :6
- Processing Error :
- Record does not exist: 1
- scook Cannot update nonexistent goal.
- Row Number :7
- Processing Error :
- Record does not exist: 1
- scook Cannot update nonexistent goal.

- Tips
- Assure for load files that you use the correct direction
 - ◆ **Must Add goal before Goal can be updated**
 - ◆ **Available Actions**
 - ▶ **Add**
 - ▶ **Update**
 - ▶ **Delete**

Customer Scenario 3 — Goals and Sub Goals

- The Customer requires a number of sub goals to actually define the overall goals of the employee
- The rating on each of the sub goals is then used to calculate the overall goal rating
- The sub goals are the granular definition of what the goal needs to be to define the employee's true expected performance for the period

Solution 3 — Goals and Sub Goals

- **Within each goal, a task table was created to house the sub goals**
- **The manager and employee ratings were contained at the sub goal level**
- **The following screen will show the task table that was created for the sub goals**
- **Permissions and plan layout were also modified**
 - ♦ **See details for custom table**

Goals and Sub Goals

```
<field-definition id="tasks" type="table" required="false" detail="true" viewdefault="on" showlabel="false" field-  
show-coaching-advisor="false" cascade-update="push-down">
```

```
<field-label>Sub Goal</field-label>
```

```
<table-row-label>Sub Goal</table-row-label>
```

```
<table-column id="rating" type="number" required="false" width="4" cascade-update="push-down">
```

```
<column-label>Mgr Rating (1-4)</column-label>
```

```
<column-description>Mgr Rating</column-description>
```

```
</table-column>
```

```
<table-column id="desc" type="textarea" required="false" width="90" cascade-update="push-down">
```

```
<column-label>Sub Goal - Click here for Rating Scale detail {enter website here} </column-label>
```

```
<column-description>Sub Goal - Click here for Rating Scale detail</column-description>
```

```
</table-column>
```

```
<table-column id="target" type="text" required="false" width="4" cascade-update="push-down">
```

```
<column-label>EE Rating (1-4)</column-label>
```

```
<column-description>EE Rating</column-description>
```

```
</table-column>
```

```
</field-definition>
```

Customer Scenario 4 — Complex Calculations

- The Customer requires sub-goals to be created within the goal
- The goal rating is calculated based on the ratings of each sub goal
- The sub goals are each rated and then averaged to determine the goal rating, which is then averaged across all the goals to get a final rating

Customer Solution — Complex Calculations

- Customer required the rating on the sub goals to be averaged to create the overall goal rating
- This is achieved utilizing the actual achievement field



Demo

Complex Calculations

Field Definition

```
<field-definition id="actual-achievement" type="number" required="false" detail="true"
viewdefault="on" showlabel="true" reportable="field3" field-show-coaching-
advisor="false" cascade-update="push-down">
  <field-label>Goal Rating</field-label>
  <field-description>actual-achievement</field-description>
  <default-value>0.0</default-value>
  <field-format>0.00</field-format>
</field-definition>
```

Complex Calculations (cont.)

- The calculator operator was then used to average the ratings and this field is the one displayed on the goal

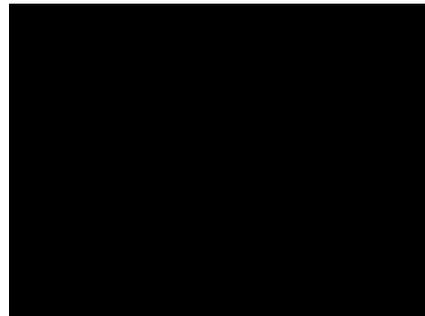
```
<calculator id="average_tasks_rating"><![CDATA[FUNC.avg(tasks.rating)]]></calculator>  
<auto-population field="actual-achievement" mode="auto" calc-type="col">  
  <rule>  
    <calculated-result calculator-id="average_tasks_rating"/>  
  </rule>  
</auto-population>
```

Custom Scenario 5 — Achievements Result in Automatic Scoring

- Customer has goals that are metric-based
- Customer requires a rating based on the metric value
 - ◆ The metric values assigned to a rating must be achieved to reach the next rating
 - ▶ **Example:** Rating 4 has a metric value of 25.00
Rating 3 has a metric value of 20.00
Rating 2 has a metric value of 15.00
Rating 1 has a metric value of 10.00
 - ▶ If the employee achieves a metric value of 19.99, their rating would be a 2

Solution 5 — Using Metric Lookup Tables and Achievement Tables

- This is accomplished by loading the metric data and utilizing the metric lookup table
 - ♦ Once an employee enters the metric value, the system will go and determine the rating based on the associated metric value



Demo

- ♦ The following screens show how the data appeared within the load template to be able to assign the values to ratings

Using Metric Lookup Tables and Achievement Tables

Sample Header Load File

TYPE Goal Library VERSION 2

ACTION ENTRY_TYPE GUID PARENT_GUID LOCALE ENTRY_NAME

HEADER GoalLibraryEntry GUID PARENT_GUID LOCALE name metric desc start due done category weight
state target-baseline goto-url rating achievement bizx-actual bizx-target bizx-pos bizx-strategic goal-score
runrate runrate-forecast target-runrate target-runrate-forecast proposed-runrate

HEADER Milestone GUID PARENT_GUID LOCALE target actual desc start due completed customNum1
customNum2 customNum3 weight rating score actualNumber

HEADER Task GUID PARENT_GUID LOCALE target actual desc start due done

HEADER Target GUID PARENT_GUID LOCALE target actual desc start due done customNum1 customNum2
customNum3 weight rating score actualNumber

HEADER MetricLookupEntry GUID PARENT_GUID LOCALE description rating achievement

Using Metric Lookup Tables and Achievement Tables (cont.)

• Sample Data Load File

- ADD GoalLibraryEntry 810172 810150 en_US Customer Success Effectiveness
- ADD MetricLookupEntry 810173 810172 en_US Does Not Meet Goal 1 0.969
- ADD MetricLookupEntry 810174 810172 en_US Threshold 2 0.97
- ADD MetricLookupEntry 810175 810172 en_US Target 3 0.98
- ADD MetricLookupEntry 810176 810172 en_US Max 4 0.995
- ADD GoalLibraryEntry 810177 810150 en_US Technical Supremecy Effectiveness
- ADD MetricLookupEntry 810178 810177 en_US Does Not Meet Goal 1 0.929
- ADD MetricLookupEntry 810179 810177 en_US Threshold 2 0.93
- ADD MetricLookupEntry 810180 810177 en_US Target 3 0.95
- ADD MetricLookupEntry 810181 810177 en_US Max 4 0.985

Metric Lookup Table

```
<field-definition id="metric-lookup-table" type="table" required="false" detail="true" viewdefault="on" showlabel="true" default-calc-type="step" field-show-coaching-advisor="false" cascade-update="regular" use-min-target-as-rating="true">
  <field-label>Scoring Metrics</field-label>
  <field-description>Scoring Metrics</field-description>
  <table-row-label>Scoring Metrics</table-row-label>
  <table-column id="achievement" type="number" required="false" cascade-update="regular">
    <column-label>Achievement</column-label>
    <column-description>Achievement</column-description>
  </table-column>
  <table-column id="rating" type="number" required="false" cascade-update="regular">
    <column-label>Rating</column-label>
    <column-description>Rating</column-description>
  </table-column>
  <table-column id="description" type="text" required="false" order="asc" cascade-update="regular">
    <column-label>Description</column-label>
    <column-description>Description</column-description>
  </table-column>
  <rating-scale rate-on-form-option="true" default="true">
    <rating-scale-id>HC Leadership Rating Scale</rating-scale-id>
  </rating-scale>
</field-definition>
```

What We'll Cover

- Goal and Performance Examples that go beyond Success Factory
- Solutions Using XML
- **Managing the Use of XML**
- Wrap-up

Managing the Use of XML

- **Folders**

- ♦ Create a folder for each plan/form, i.e., goal plan, performance form, etc.
 - ▶ This will allow you to easily file older versions

- **Versioning**

- ♦ For each change, utilize a version numbering system of your XML templates
 - ▶ If a change does not work and you want to revert back to the last version, this will be easily accomplished



Caution

Managing the Use of XML (cont.)

- **Be sure to have the latest .DTD definition**
 - ◆ This can be obtained on the Partner Portal
- **Once you make changes in XML directly, you should not re-load into Success Factory**
 - ◆ Not all functionality is supported by Success Factory and those changes will be overwritten or removed

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Where to Find More Information

- **SuccessFactors Partner Portal**
 - ♦ <https://partners.successfactors.com>
- **Follow your XML editor Web site**
 - ♦ **XMLPad (free download)**
 - ♦ http://download.cnet.com/XmlIPad/3000-7241_4-10252051.html
- **Steven Holzner, *Sams Teach Yourself XML in 21 Days* (Sams Publishing, 2003).**

7 Key Points to Take Home

- Use of XML allows for more functionality to be incorporated into the Goals and Performance solutions
- It is critical to understand the data elements of Goals – GUIDs, Sub GUIDs, IDs, etc.
- Make sure you plan out your use of XML
 - ♦ Create folder structures to house your files and make sure you are familiar with versioning
- Always get the latest DTD
- Pulling XML back into Success Factory can cause you to lose some of the XML
- Creativity and a little XML knowledge can go a long way to meet the requirements
- Within the XML template, you can utilize HTML for the plan layout

Your Turn!



Questions?

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Please remember to complete your session evaluation

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