



Would Your SuccessFactors Implementation Get a Clean Bill of Health Post-Go-Live?

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In This Session

- **Will your SuccessFactors implementation would get a clean bill of health considering quarterly updates, changes in policies and processes, integration needs, and organizational changes**
- **Review whether your implementation is optimized for your organization, today and in the future:**
 - ♦ **Help identify symptoms that might indicate underlying system health issues**
 - ♦ **Obtain a checklist of items to determine system health**
 - ♦ **Learn best practices to assure your system is ready to take on more of your business challenges**
- **Walk through specific customer examples and practical approaches to either confirm that you have that bill of health or give you a path to recovery**

What We'll Cover

- **System Health Challenges**
- **Signs of System Health Issues**
- **The Road to Recovery**
- **Tips and Best Practices to Keep Your System Healthy**
- **Scenarios**
- **Wrap-up**

System Health Challenges

- **Everyone's challenges**
 - ♦ Quarterly upgrades/universal upgrades
 - ♦ Building and retaining knowledge
 - ♦ Organizational change
 - ♦ Data management practices
 - ♦ Process and system governance
 - ♦ Organization and leadership commitment
 - ♦ Existing system controls and processes



Checklist

System Health Challenges (cont.)

- **Customer specific challenges**
 - ♦ **Design decisions: If we knew then what we know today...**
 - ♦ **Recovering from a less than stellar implementation**

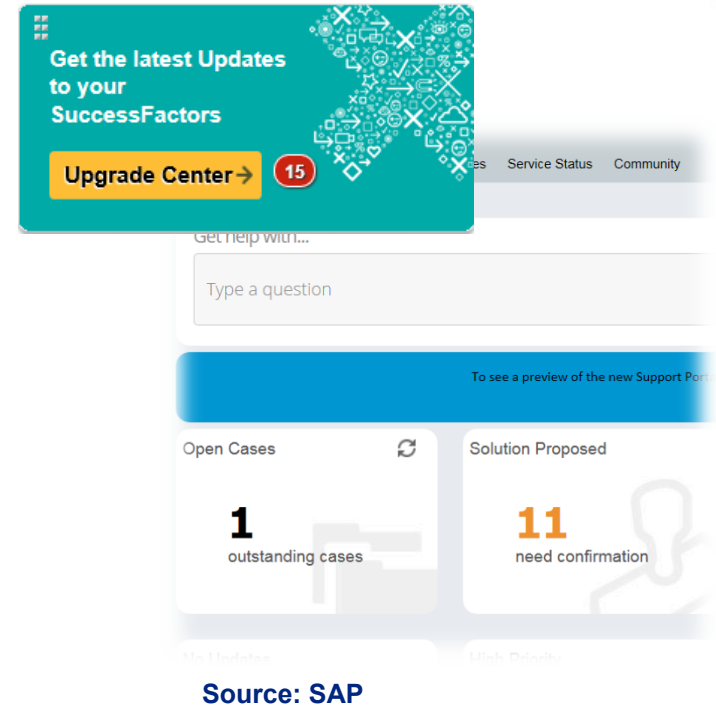


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Signs of System Health Issues

- **Do you have:**
 - ♦ A long list of user issue/requests
 - ♦ Unresolved customer support cases
 - ♦ Production and staging out of sync
 - ♦ Numerous upgrades not activated
 - ♦ Upgrades activated without plan
 - ♦ No vision or plan for future roll-outs?



Sharon: I added the source.
Correct? **Correct (SKC)**

Signs of System Health Issues (cont.)

- **Is your team complaining about:**
 - ◆ **Missing functional capabilities**
 - ◆ **Manual workarounds**
 - ◆ **Incorrect system permissions**
 - ◆ **Reporting problems**
 - ▶ **Data not accurate**
 - ▶ **Perceived lack of reports**
 - ◆ **Not user friendly or intuitive**
 - ◆ **Lack of clarity on administrators' roles**



None of the Above



That Sounds Like Us

Sharon: Could you add a title?



Several of those system health issues sounded a lot like us

Sharon: Great picture, but do you know him? Is he okay with your using his picture?

When you click on the page I got this from the 'Free' Bing Art when you click in on the presentation page... there was no pricing or right notes

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The Road To Recovery

- Build your team
- Kick off your project
- Review your solution
- Plan for execution
- Socialize the health check



Checklist

Build the Team



Checkpoint

- **The health check process requires a team that:**
 - ◆ **Knows your business**
 - ▶ **Understands yours business drivers**
 - ▶ **Recognizes the value of key business processes covered**
 - ▶ **Can empathize with the pain points identified**
 - ▶ **Has a vision and vision horizon for your organization**
 - ◆ **Knows SuccessFactors**
 - ▶ **Is able to perform a system assessment**
 - ▶ **Is knowledgeable and aware of technology best practices**
 - ▶ **Can make the right recommendations for you**

Build the Team (cont.)

- **The health check process requires a team that:**
 - ◆ **Can move your business forward**
 - ▶ **Review recommendations and make needed decisions**
 - ▶ **Have the authority to approve and/or act on these decisions**
 - ▶ **Have time to plan for the action steps needed to succeed**
 - ▶ **And can provide the team to execute on these steps**



Kick Off Your Project

- Align the team on health check goals and objectives
- Review the organization vision and vision horizon
- Review the system health issues that lead to the health check
- Confirm the list is comprehensive
- Review the timeline and plan
- Let leadership show their commitment



Checkpoint

Review Your Solution

- During a system health check, leverage experienced resources to review your system, with a focus on:
 - ◆ Use of available capability
 - ▶ Deliver a comparison of what the system can do against current functionality
 - ◆ Quality of implementation
 - ▶ Review configuration quality, feature activation, whether requirements are met, and if functionality is working
 - ◆ Strength of the foundation
 - ▶ Ensure upgrades are applied and that data models and functionality support expansion into additional modules
 - ▶ Ensure that data models and functionality support immediate vision and vision horizon



Review Your Solution (cont.)

- During a system health check, leverage experienced resources to review your processes, with a focus on:
 - ♦ Fit to organization need
 - ▶ Ensure your processes align with business drivers/ requirements
 - ♦ Organization readiness for use
 - ▶ Ensure support team understands the solution
 - ▶ Address process/system conflicts
 - ▶ Confirm all impacted population needs are addressed and cared for through change management



Plan for Execution

Sharon: I just moved the example up to make more room and elevate the main points. OK? **That's Fine**

symptoms. For example, if many of the identified in an issues list
 into resolution groups

- ▶ **System – configuration, system limitations, bug identification, integrations, etc.**
- ▶ **Process – understanding how the business needs to use the system, what are the business steps, Best Practices, etc.**
- ▶ **People – change management, training, communication, etc.**
- ♦ **Determine the end result**
 - ▶ **What will success look like for your organization**
 - ▶ **Define requirements and manage expectations**



Checkpoint

Plan for Execution (cont.)

- **Form a logical plan of attack**
 - ♦ **For each issue, determine tasks and ownership. For example:**

Key Milestone	Previous Week Status (Red, Amber, Green)	Current week Status (Red, Amber, Green)	Due Date	Owner
Template Update Process				
Schedule Focus Groups for Process Improveent/Alignment	Green	Green	15-Jan	Mary Jones
Document Process	Green	Green	1-Feb	Sharon Cook
Develop Training on Process	Green	Green	1-Mar	John Smith
Deliver Training on Process	Green	Green	1-Apr	Sharon Cook

- ♦sounds like a project plan to me!!!



Checkpoint

Plan for Execution (cont.)

- **Form a logical plan of attack (cont.)**
 - ◆ **Determine and assign common project resource**
 - ▶ **Budget**
 - ▶ **Work space and equipment**
 - ▶ **System availability**
 - ▶ **People**
 - ◆ **Monitor and bulldog progress**
 - ◆ **Communicate progress and manage change**
 - ◆ **Celebrate your wins (measure where practical)**
 - ▶ **KPI example – eliminated 85% of items on issue list**



Checkpoint

Key Points to Keep Your System Healthy After a Health Check

- **Keep in mind what you learned during your health check**
 - ◆ Schedule regular reviews
 - ◆ Keep an eye on your key areas of concern
- **Ensure your team stays aligned**
 - ◆ Create a plan to maintain/grow your knowledge base
 - ◆ Determine if you might want additional external support
 - ▶ **SuccessFactors support**
 - ▶ **Partner support programs**
 - ▶ **Remember – at this point, when changes require provisioning, you may have to have an external resource**
Make sure you plan for this!

SuccessFactors is providing customers with more access, but vendor or partner support is still needed for some changes.



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Best Practices – Methodology

- **Implementation methodology is important**
 - ♦ Remember: minor changes may not be so minor
 - ♦ Following a standard methodology for even small resolutions helps assure necessary details are covered
 - ♦ Keep in mind: External impacts to your processes
 - ▶ **Policy changes**
 - ▶ **Legal changes**
 - ▶ **Terminology changes**
 - ♦ Leveraging prior documentation to assess impacted groups for change management
 - ♦ Defining requirements/iterative and complete testing/update training/awareness of competing or dependent activities



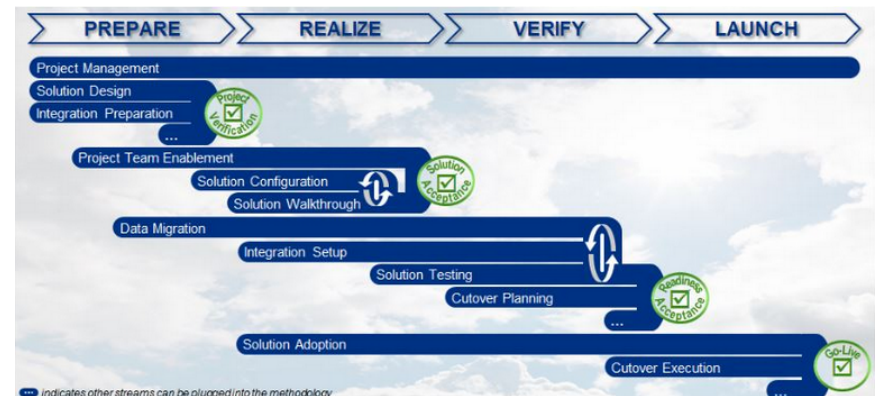
Best Practice

Bottom Line On Methodology

- No matter how big or small the project, don't overlook the value of following a proven methodology
 - ♦ SuccessFactors supports you based on the methodology
 - ♦ Where setting and configuration changes are made, always follow standard methodology steps
 - ♦ Even if the focus is on people and process, assure both align to what must occur in the system
 - ♦ Short cuts may lead to short comings

SAP Launch Methodology

Sharon: I added the source.
Correct? **Correct**



Best Practices – Defining “Success”

- Define what “Success” looks like to your organization
 - ◆ If you don’t know where you are going, odds have it you won’t get there
 - ◆ Identify KPIs or minimally what the end product should achieve
 - ◆ Measure success whenever possible and practical
 - ▶ Example: Hourly performance appraisal process completed on the system with 100% participation and a customer satisfaction survey rating of at least 80%
 - ▶ Example: Reduce the number of SuccessFactors issues/ incidents on list by 50%



Best Practice

Best Practices – Testing

- **Key component of SAP launch**
 - ◆ Iterative configuration/testing process
 - ◆ Ensures business acceptance as well as functional compliance
 - ◆ Allow knowledge of system and changes to grow through each iteration
- **Always warrants added attention**
 - ◆ Testing begins with “what to test”
 - ◆ Don’t assume everyone knows how to test



Best Practice

Best Practices – Testing (cont.)

- **Testing steps**
 - ♦ **Create a test plan**
 - ♦ **Identify test scenarios**
 - ♦ **Create test scripts**
 - ♦ **Build test data**
 - ♦ **Train on testing and results documentation**
 - ♦ **Test execution/documentation**
 - ♦ **Resolution of testing issues**



Don't Forget

Best Practices – Plan for Sustainment



Best Practice

- **System sustainment**
 - ◆ **Change authorization: identify who can approve changes**
 - ◆ **Role and task ownership: create clear definition of roles and permissions**
 - ◆ **Monitor impacted group change: define who is impacted by system and process changes**
 - ▶ **This helps assure future changes work for all covered populations**
 - ◆ **Define a quarterly release management strategy**

Best Practices – Plan for Sustainment (cont.)



Best Practice

- **People sustainment**
 - ♦ **Plan for ongoing education: systemic changes as well as people changes**
 - ♦ **Manage expectations: plan for updates, define process to request change, communicate process/timeline to apply changes**
 - ♦ **Assure continued leadership support past the implementation**

Best Practices – Managing Day In/Day Out

- **Management of identified issues/questions**
 - ◆ **Caring for issues**
 - ▶ **Create a consistent issue resolution process**
 - ▶ **Ensure it is communicated to all impacted team members!**
 - ◆ **Caring for questions**
 - ▶ **Be aware of response time**
 - ▶ **Ensure quality of responses**
 - ◆ **Service level agreement and setting expectations**



Best Practice

Best Practices – Managing Day in/Day out (cont.)

- Offer periodic “state of the system” communications
 - ◆ Identify improvements
 - ◆ Indicate cost and ROI for the system
 - ◆ Discuss roadmap
 - ◆ Celebrate wins
 - ◆ Highlight dedicated people



Best Practice

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Customer Health Check – Scenario 1

- **Public utility organization with hybrid SAP implementation**
- **Issues**
 - ♦ **Data integrity, numerous manual processes, extensive workarounds, disjointed work efforts**
- **Key health check discoveries:**
 - ♦ **Governance and process documents were not followed**
 - ♦ **Existing process did not align with business needs**
 - ♦ **One-off exceptions were supported -> led to data integrity issues**

Customer Health Check – Scenario 1 Results

- **Health check results**
 - ◆ Existing data issue clean-up
 - ◆ Implementation of controls eliminated confusing data decisions
 - ◆ Process improvements provided awareness/approval
 - ◆ Automation added efficiency and accuracy

Customer Health Check – Scenario 2

- **Medium sized manufacturing organization with SAP for financials, SuccessFactors for HR**
- **Issues**
 - ♦ **Leadership felt they were not realizing the gain from their SuccessFactors implementation**
 - ♦ **Large unresolved issues list**
 - ♦ **Unhappy users**
 - ♦ **Extensive manual processes**
 - ♦ **Disconnect between what the system was supposed to deliver and what they actually were able to do with it**

Customer Health Check – Scenario 2 (cont.)

- **Key health check discoveries**

- ◆ **High interest in self sufficiency, but administrators didn't hold necessary understanding of the system**
- ◆ **Process to manage issues not fully identified**
- ◆ **System was not optimally configured**
 - ▶ **Delivered setup didn't support the business processes**
 - ▶ **Common system capabilities were not being utilized**
 - ▶ **Manual processes left lots of work outside the system**
- ◆ **Knowledge transfer was not complete**
 - ▶ **Intended functionality of the system wasn't understood**
 - ▶ **Design decisions were made based on limited understanding**
- ◆ **Organization changes**
 - ▶ **Restructuring and rebranding**

Customer Health Check – Scenario 2 Results

- **Health check results**

- ♦ **Administrators increased knowledge level and ability to be more self reliant -> issues list is much smaller**
- ♦ **Configuration changes in system allowed for the correct functionality to be turned on to address requirements**
- ♦ **Established longer term vision and roadmap to realize ROI and support business drivers**
- ♦ **Clear role definition between IT and HR**
- ♦ **Executive team actively engaged in optimization results**
- ♦ **Planning expanded use to leverage licensing already owned**

Customer Health Check – Scenario 3

- **Healthcare and education customer on-premise SAP HR and SuccessFactors Talent Suite**
- **Issues**
 - ♦ **Concern that they were not aligned with newest release**
 - ♦ **Assure readiness for global upgrades**
- **Health check discoveries**
 - ♦ **No upgrades implemented since initial implementation**
 - ♦ **Opportunities for improved user experience and ability to leverage added functionality to address user requirements**

Customer Health Check – Scenario 3 Results

- **Health check results**
 - ♦ **Proactively planning for implementation of added features and functionality offered from upgrades**
 - ♦ **Plan to avoid future issues with better sustainment planning**

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Where

Sharon: I can't use your general website as a resource. If you have a white paper or something strictly educational relevant to your topic that I can link to, I can use that. Jason does have a whitepaper to post but I don't have the link yet so taking our site off is fine.

- http://www.successfactors.com/en_us/resources.html
 - ♦ Follow Best Practices and Release Information
- <http://support.sap.com>
 - ♦ Keep current by viewing webcast, whitepapers, and product information
 - ♦ The new support link to open incidents and search for solutions

7 Key Points to Take Home

- **Performing a system health check focusses on resolution of current issues and improved sustainment**
- **Points to assess during a health check are use of available capability, quality of implementation, strength of the foundation, fit to organization need, and organization readiness for use**
- **Same practices that are applied as part of a good implementation can be carried over to gain system optimizations**
- **Following a sound methodology and common project planning improves success of planned resolutions**
- **Insufficient planning and testing still surface as key reasons customers are not satisfied with their implementations**

7 Key Points to Take Home (cont.)

- **A sustainment plan is necessary for the long term health of a system**
- **Important that support from leadership remains strong past the implementation**

Your Turn!



Questions?

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Please remember to complete your session evaluation

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