



Best Practices for Preparing for a SuccessFactors Succession Management Implementation

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In This Session

- **Uncover best practices for implementing SuccessFactors Succession Management and look at functionalities available within the module**
- **Discuss current HR trends to consider**
- **Determine what your implementation team should consist of**
- **Discuss the benefits of using the Metadata Framework (MDF)**
- **See a demo of Succession Management with MDF**
- **Look at security specific to Succession Management**
- **Cover the business strategies and details needed to layout a successful succession planning program including key system information that allow those plans to become operational**

What We'll Cover

- **Introduction**
- **Current trends in succession management and the impact on your succession management implementation**
- **The succession management team**
- **SuccessFactors Succession Management and the benefits of using metadata framework**
- **Security and succession**
- **Wrap-up**

Introduction

- For some companies, succession management is a strategic process that minimizes leadership gaps for critical positions and provides opportunities for top talent to develop the skills necessary for future roles
- Wikipedia says: Succession planning is a process for identifying and developing internal people with the potential to fill key business leadership positions in the company
 - **Succession planning increases the availability of experienced and capable employees that are prepared to assume these roles**
- The U.S. Office of Personnel Management is identifying jobs considered to be at the core of the organization – too critical to be left vacant or filled by any but the best qualified persons – and then creating a strategic plan to fill them with experienced and capable employees

Why Succession Now?

- In “What’s in Store for HR in 2015?”, published in the January/February issue of HR Magazine, Bersin wrote that many organizations struggle to facilitate internal talent mobility
 - ♦ Fewer than one-third have formal succession plans for all but the very top levels, according to research conducted by Bersin by Deloitte and published in November 2014
- With talent shortages being a critical factor in today’s economy can we really afford to not look at the best pool of talent we have today – our own employees?

Where Does That Leave Your Organization?

- **What is your overall strategy?**
- **Key roles to one organization may just mean executive or leadership roles**
- **Other organizations look at key roles from the sense that the role is critical to the operation of the business; to the pharmacy chain that might be pharmacists and to the mining company that might be geologists**
- **Identifying how Succession Management fits into your overall operation is critical to define the strategy**
- **Why is Talent Management not treated the same as putting product out the shipping door – part of our everyday business process?**

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Trends

- **Employees don't expect to spend a lifetime with an employer; leaving when a better opportunity arises and returning again if situations are right to do so**
- **With visibility into the market place, individuals that possess "in demand" skills and knowledge have ready access to employment opportunities creating the need to make internal opportunities as appealing**
- **What impact do current trends play on your outlook for succession planning and management?**

Human Capital Trends

- If you already read “Global Human Capital Trends 2014 Engaging the 21st-century workforce,” the information on the next three slides will sound familiar
 - ♦ If you haven’t read the article by Jeff Schwartz, Josh Bersin, and Bill Pelster, you can find it at:
<http://www2.deloitte.com/global/en/pages/human-capital/articles/human-capital-trends-2014.html>
- The results of the survey of 2500+ leaders in 90+ countries highlights 12 critical trends for Human Capital
- Trends fall into three categories:
 - ♦ Lead and Develop
 - ♦ Attract and Engage
 - ♦ Transform and Reinvent

Lead and Develop

- Leaders at all levels: Close the gap between hype and readiness
- Corporate learning redefined: Prepare for a revolution
- Performance management is broken: Replace “rank and yank” with coaching and development
- The quest for workforce capability: Create a global skills supply chain

Source: Jeff Schwartz, Josh Bersin, and Bill Pelster , “Global Human Capital Trends 2014 Engaging the 21st-century workforce”

Attract and Engage

- Talent acquisition revisited: Deploy new approaches for the new battlefield
- Beyond retention: Build passion and purpose
- From diversity to inclusion: Shift from compliance to diversity as a business strategy
- The overwhelmed employee: Simplify the work environment

Source: Jeff Schwartz, Josh Bersin, and Bill Pelster , “Global Human Capital Trends 2014 Engaging the 21st-century workforce”

Transform and Reinvent

- The reskilled HR team: Transform HR professionals into skilled business consultants
- Talent analytics in practice: Move from talking to delivering on big data
- Race to the cloud: Integrate talent, HR, and business technologies
- The global and local HR function: Balance scale and agility

Source: Jeff Schwartz, Josh Bersin, and Bill Pelster , “Global Human Capital Trends 2014 Engaging the 21st-century workforce”

Trends Impacting Succession

- The majority of companies today do not feel they do a good job of developing global leaders. Defining what is needed to be a good leader and the necessary steps require a strategy and a commitment to a timeframe
- Succession allows for the identification of key roles and successors for those roles, perhaps the easier of the challenges when an organization then looks at means to develop the capabilities of the individual to be ready for their next role
- Making information available for employees to help identify their preferred career directions, providing career coaching to align expectations and make available meaningful development opportunities allowing high potentials and others to see a future with their current employer

Trends Impacting Succession (cont.)

- The alignment of performance programs to drive towards company goals by informing employees, coaching individuals and teams to be successful, and removing dread from this process can go a long way in retaining the employees and grow skill sets
- Succession planning is not a process that flourishes in a vacuum
 - ♦ Identification of succession needs, organization alignment, getting the right resources, and developing in alignment with the company direction and individual career goals all hold many dependencies
- Defining the right tools to support the interdependencies seems to be the simpler step in the overall process but none the less critical to make the program manageable and not a once or twice a year effort that sits on the self until the next round

Tactical Decisions of Succession Management

- Who will allowed to determine successors?
- Can managers identify their own successors?
- How will key positions be identified?
- What attributes will support the succession planning process?
 - ♦ Risk of loss, impact of loss, successor readiness, etc.
- Typically there are two means to identify successors:
 - ♦ Discrete position – Successors for a given position
 - ♦ Pool succession – A pool of potential successors is defined, e.g., executives. An existing job code is then associated with this pool creating a pool of talent that will apply to all positions with that given job code.



Decision Point

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Given Strategy, Trends, and Tactics

- **Team participants should be represented from:**
 - ♦ Leadership sponsorship/participation to set strategy and vision
 - ♦ Organization development and planning to put strategy and vision to an operational plan
 - ♦ Management and key knowledge holders to identify critical roles and skills
 - ♦ HR to provide guidance and tactical process – HR may need to develop career coaching skills
 - ♦ Systems staff to implement and facilitate the succession tool
 - ♦ Change management, communications, training
 - ♦ Succession managers/administrators/process facilitators
 - ♦ Employee participation

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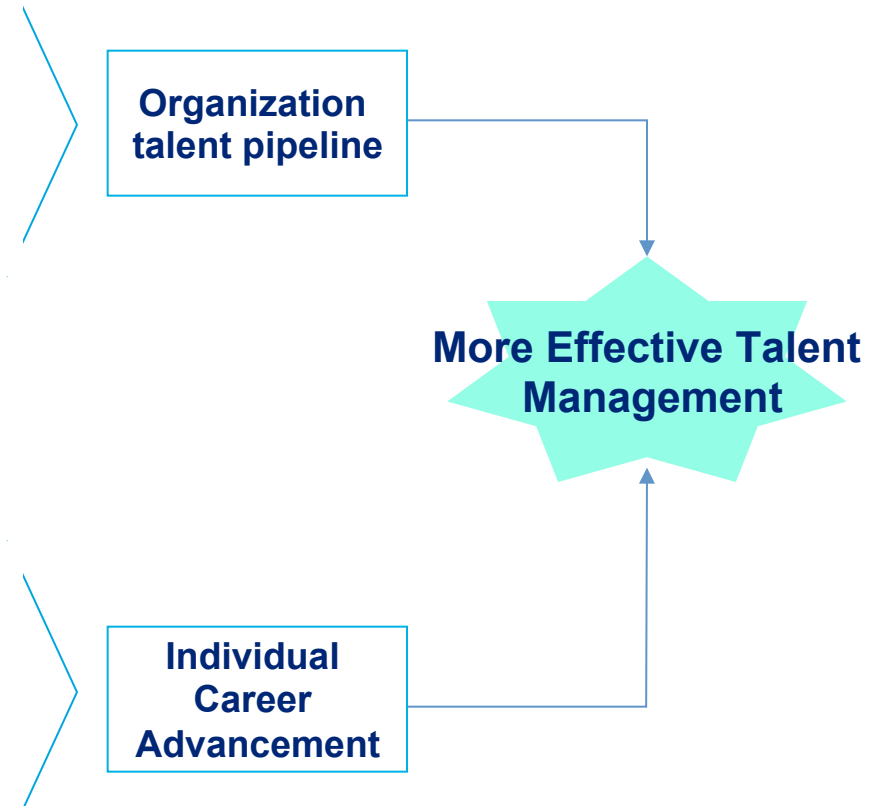
Succession and Development Is a Holistic Process That Benefits the Entire Company

For Managers and HR Leaders

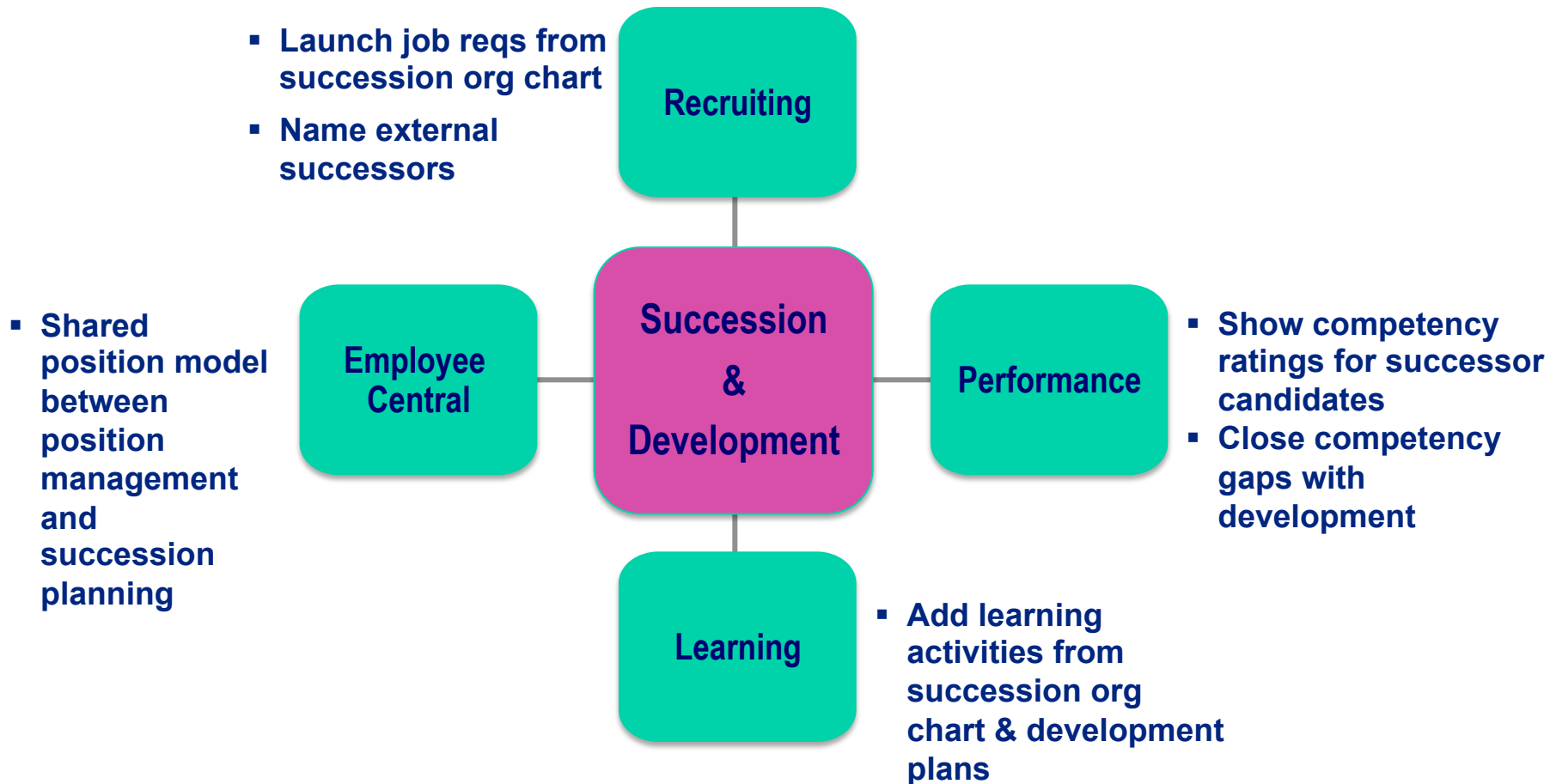
- ✓ Rate potential, risk of loss, & impact of loss
- ✓ Chart employees on 9-boxes
- ✓ Build talent pools
- ✓ Identify key positions
- ✓ Find, nominate & approve successors
- ✓ Visualize impact of succession plans
- ✓ Analyze bench strength & successor demographics
- ✓ Monitor effectiveness of succession plans

For Employees

- ✓ Select future roles
- ✓ Chart a career path
- ✓ See competency & skill gaps
- ✓ Create a development plan
- ✓ Find the best learning activities
- ✓ Do I stay or do I go



Succession and Development and SuccessFactors Suite Integration



Use of Metadata Framework – Key Advantages

- **Permissions can be applied to the position objects directly, eliminating the need for a “placeholder” user record behind the position record**
 - ♦ **The position must have the attributes and values to support effective permission definitions, such as department, division, etc.**
- **MDF positions support up to 200 custom fields of various types**
 - ♦ **Text, date, number, picklist, etc**
- **Effective dating (the capture and tracking of past and future changes to position records) will be supported for position records**
- **Search by position title on the Succession org chart**

Use of Metadata Framework – Key Advantages (cont.)

- **Editing position records from the Succession org chart**
 - **Users need appropriate read/write position management RBP permissions**
- **Succession planning for target populations based on position attributes with RBP**
- **Effective end date attribute for positions exposed in ad hoc reports for precise record retrieval**

Employee Central not Required ... but ...

- As part of the product expansion for the Employee Central module, which offers core HRIS data management and integration capabilities, a new succession planning option has been introduced which leverages a new, more robust position model
- The MDF position model is available to all customers, not just Employee Central customers
- With Employee Central the following capabilities exist:
 - ♦ Support for multiple incumbents per position
 - ♦ Usage of a Position org chart (similar to the Succession org chart, but designed around position management capabilities)
 - ♦ Workflow support for position changes



System Requirements/Limitations

- **System requirements**

- ♦ This feature requires v12 UI
- ♦ The feature requires use of Role-Based Permissions (RBP)



- **Current limitations**

- ♦ For customers without an EC license, multi-incumbent positions are not supported
- ♦ Customers have to import those positions with only one incumbent
- ♦ A workaround could be to add other “user fields” on position

Metadata Framework Demo



Demo

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Provisioning Steps Are Necessary

- **SuccessFactors or an implementation partner can make necessary provisioning changes**
 - ◆ **Ensure v12 and Role Based Permissions are enabled**
 - ◆ **Enable Generic Objects (the Metadata Framework)**
 - ◆ **Change Succession Nomination method to “MDF Position”**
 - ◆ **Optional Background Element Position Portlet can be included**

Metadata Framework Administrator RBP Setting

Permission settings

Specify what permissions users in this role should have. ?

[Manage Mass Changes](#)

[Manage Goals](#)

[Manage Question Library](#)

[Manage Recruiting](#)

[Manage Succession](#)

[Manage System Properties](#)

[Manage User](#)

[Manage Time Off](#)

[Manage Mass Changes](#)

[Manage Variable Pay](#)

[Manage Foundation Objects](#)

[Manage Foundation Objects Types](#)

[Metadata Framework](#)

[Manage Data Purge](#)

[Manage Presentations](#)

[Manage Talent Card](#)

Metadata Framework †= Target needs to be defined. ?

- Select All
- Configure Object Definitions
- Manage Data
- Configure Business Rules
- Read/Write Permission on Metadata Framework
- Import Permission on Metadata Framework
- Manage Configuration UI
- Manage Positions
- Manage Sequence

Done Cancel



Work Within Admin Tools

- **Configure MDF position object and define field labels, visibility, and custom fields**
- **Define associations, searchable fields, and RBP Config on the position object**
- **Define picklist, if used for change reasons and for employee class, job level, and/or regular temporary only if corresponding fields on position are being used**
- **Configure RBP permissions rules and roles**
 - ♦ **Verify field visibility based on EC or non EC implementation**
- **Understand position target concept**
 - ♦ **The permissions are independent of the position's incumbent; thus, if a user has access to a position, that access continues even if the incumbent changes on the position**

Controls Access Down to the Position

Grant this role to...

2: Specify the target population whom the above granted users have permission to access. [Why](#)

  Target population

Granted User's Direct Reports

Only the Direct Reports in these groups below:

None Selected

Include access to the Reports of the Granted User

1 level(s) down

Include access to Granted User (Self).

Exclude Granted User from having the permission access to him/herself.

3: Specify the target population for the other objects.

Position All Restrict target population to:

Include access to Position with the following criteria

Q [] = []

Include access to Position in the hierarchy below the Granted User's Position

Q Parent Position = All level(s) down

Exclude access to Granted User's Position

Done Cancel

Use this option to refine target population of Positions

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Where to Find More Information

- www.opm.gov/
 - ♦ United States Office of Personnel Management
- <http://www2.deloitte.com/global/en/pages/human-capital/articles/human-capital-trends-2014.html>
 - ♦ Global Human Capital Trends 2014: Engaging the 21st-century workforce, Deloitte Consulting LLP and Bersin By Deloitte, Deloitte University Press, April 2014.
- <http://community.successfactors.com/>
 - ♦ Follow best practices and release information
- http://www.successfactors.com/en_us/resources.html
 - ♦ Keep current by viewing webcast, whitepapers, and product information

7 Key Points to Take Home

- **Vision, strategy, and some key tactical decisions are needed prior to system solution decisions**
- **Succession Management won't be a success if it is done once a year and then put on a shelf for the other 360+ days**
- **System options vary depending if Employee Central is used or not**
- **Many aspect of Succession are controlled via Admin Tools so strong administrators are key**
- **Metadata Framework for Succession can used with or without Employee Central**
- **Looking how Succession fits into the “big picture” of an organizations talent needs and programs is necessary**
- **Without the right tools, Succession is likely to fail**

Your Turn!



Questions?

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Please remember to complete your session evaluation

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