

# SAP SuccessFactors Performance and Goals

## Technical and Functional Specifications

CUSTOMER



# TABLE OF CONTENTS

KEY FEATURES AND FUNCTIONALITIES .....	3
GOAL MANAGEMENT .....	3
PERFORMANCE MANAGEMENT .....	4
360 DEGREE REVIEWS/MULTIRATER ASSESSMENTS .....	5
CALIBRATION FOR PERFORMANCE .....	6
CONTINUOUS PERFORMANCE MANAGEMENT .....	6
TRADEMARK INFORMATION .....	7
DISCLAIMER .....	7

[www.sap.com/contactsap](http://www.sap.com/contactsap)

© 2018 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

The information contained herein may be changed without prior notice. Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, and they should not be relied upon in making purchasing decisions.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies. See <https://www.sap.com/copyright> for additional trademark information and notices.

This specifications document describes key features and functionalities of SAP SuccessFactors Performance & Goals, as of the Q2 2018 Release.

## KEY FEATURES AND FUNCTIONALITIES

- Goal Management
- Performance Management
- 360 Degree Reviews/Multirater Assessments
- Calibration for Performance
- Continuous Performance Management

## GOAL MANAGEMENT

Goal Management facilitates and automates the process of creating, aligning, monitoring and measuring organizational and individual goals. With Goal Management, managers can break down broad organizational objectives into specific, manageable and measurable components that can be assigned to Users in the form of clear, visible and actionable goal plans.

Key Feature	Description
Goal Categories	Facilitates to report and track goals and help support the Balanced Scorecard methodology.
Align Goals	Fosters organizational objectives throughout business units, departments and workgroups by cascading goals from top business strategies through individual goals and objectives, and by linking goals from one goal plan to another.
SMART Goal Wizard	Gives Users step-by-step guidance on how to create goals that are "Specific, Measurable, Attainable, Relevant and Time-bound" (SMART).
Goal Library	Provides over 500 ready-to-use, role-specific goals based on research and industry experience.
Group Goals and Team Goals	Allows for a common goal that multiple individuals, as a team, can achieve together. The main difference between group goals and team goals is that everyone sharing the group goal is responsible for achieving it; however, the person assigning the team goals only monitors the goals, but does not share the responsibility of achieving it.
Initiatives	Allows creation of departmental, corporate, and division level initiatives, to which the Users can actively associate their personal goals. It greatly helps to work with goals that are specific to departments and divisions.
Goal Alignment Spotlight	Provides full line-of-sight visibility from the most strategic goal down to the most tactical one.

Key Feature	Description
Dashboard & Spotlights	Gives managers and leaders visibility into how the organization is progressing against goals, to track whether everyone is executing against the business strategy.
Goal Feedback and notifications	Allows managers and employees to have a collaborative, threaded online dialogue about goal(s) and how best to achieve it. Recipients of the feedback can also receive real-time notifications if someone comments on their goal plan.
Reporting	Create and run reports to learn things such as the number of departments that have aligned goals to broader corporate initiatives, or gauge the completion rate of a goal within one or multiple divisions in an organization.
Mobile (iOS and Android)	Create and update goals from within the SAP SF mobile application. Users can access their goal data, including tasks, targets and milestones as well as goal feedback.

## PERFORMANCE MANAGEMENT

Performance Reviews help organizations measure individual contributions so that they can decide who to keep, reward or single out for targeted development. In addition, Performance Reviews help applying best practices for the entire performance management process.

Key Feature	Description
Writing Assistant & Coaching Advisor	<p>Writing Assistant is a content development tool with an extensive library of development and mentoring recommendations. These recommendations help Managers to provide targeted, effective, and meaningful feedback to Users.</p> <p>Customer can use Coaching Advisor (Give Advice) alone as a mentoring reference, or use it along with Writing Assistant to provide holistic feedback.</p>
Route Maps	<p>Route Maps define the workflow that all Users should follow during the performance review process.</p> <p>Customer can specify the personnel involved in the process and the sequence in which they will be acting on the form.</p>
Legal Scan	<p>Legal Scan is a tool that helps screening the comments Users have entered in a form for potentially improper or discriminatory language. It uses a customizable library to check for potentially improper or discriminatory language in form comments.</p> <p>Legal Scan works much like a spell-checker. Once comments have been entered, the User can opt to use Legal Scan to review comments and flag any words that are potentially improper or discriminatory. If a word is flagged, Legal Scan will also suggest actions or alternative terminology to correct the issue.</p>

Key Feature	Description
Email Notifications	<p>Provides a list of email notifications that get triggered when specific activities or events occur, e.g. when a form is created, routed, or overdue.</p> <p>Email notifications can be turned on or off. When any of these email notifications are enabled, Users will receive a notification when the related actions occur. The content of email notifications can be customized.</p>
Analytics	Provides insight into overall performance management, and about employee strengths and capabilities.
Team Overview	The Team Overview feature provides a one page status summary of each direct reports' performance to monitor the progress of Performance forms.
Ask for Feedback	Ability to Ask for Feedback, which is an integrated approach to solicit feedback from both internal and external Users via email.
Team Rater (Stack Ranker)	<p>The Team Rater, also known as Stack Ranker, allows raters to quickly review the ratings of the Users being evaluated, and to visualize how they compare with, or stack up against, one another.</p> <p>The Stack Ranker can also be used to view and update competency ratings, add comments, and view how Users are rated overall.</p>
Rating Scales	A rating scale is a tool used during the evaluation process to quantify reviewers' perspective on performance.

### 360 DEGREE REVIEWS/MULTIRATER ASSESSMENTS

360 Degree Reviews helps organizations collect feedback on employee performance and behavior from everyone, both inside and outside an organization. Quantitative and qualitative data from 360 Developmental Surveys & Multi-Rater Assessments can be collected and graphically displayed by various categories.

- 360 Developmental Surveys - Gives employees a balanced view of strengths and weaknesses as perceived by their key constituents both inside and outside an organization
- Multirater Assessments – Captures input from multiple raters, including numeric ratings for competencies and objectives.

Key Feature	Description
Support for Internal & External Raters	Incorporates named or anonymous feedback from peers, managers, direct reports and external constituents, such as customers or partners. An assignment tool also allows managers to select the assessment criteria for each reviewer. Note that external raters providing feedback as described

Key Feature	Description
	above are not charged as Users under the current SAP SuccessFactors price list.
Configurable Workflow	Workflow engine can mirror an organization-specific routing process and send email reminders.
Detailed Reporting	Helps to reveal any blind spots and hidden strengths.
Writing Assistant	Helps raters write concise, meaningful feedback.
Microsoft Outlook Integration	Enables Outlook reminders so that Users don't miss a 360 developmental survey or multirater assessment.

## CALIBRATION FOR PERFORMANCE

Calibration helps to bring objectivity to performance, pay and succession decisions.

Key Feature	Description
Visual Comparison of Employees	Allows to view rating elements in bin and matrix grid views; stack rank Users.
Comprehensive View	Allows to select from four different data sources (Performance, Compensation, Succession, Talent Profile) to calibrate ratings.
GUI-Driven Calibration	Supports drag-and-drop to calibrate Users.
Calibration Dashboards	Provides simple charts with an aggregate view of the specific subset of Users being calibrated.
Calibration Setup & Admin	Allows to set up calibration and manage security through simple clicks; to select people within an organizational chart; and to specify distribution curve guidelines.
Executive Reviews	Gives HR and business executives visibility into the aggregate of all sessions' behavior for analysis of company-wide calibration results. The executive review is usually handy when sessions are in-progress or being finalized.

## CONTINUOUS PERFORMANCE MANAGEMENT

Continuous Performance Management is a solution that enables quick feedback on work through frequent and structured conversations between employee and manager. A manager can track team members' progress and offers a simple way to provide coaching advice. Along with the web application, Continuous Performance Management is also available on the SAP SuccessFactors application for iPhone, iPad and Android phones (subject to standard mobile app terms and conditions, as applicable).

Key Feature	Description
Activities & Topics	Allows to capture and track activities in real-time to let managers get a better visibility of what employees are working on. Users can also discuss topics, related or unrelated to work, that may be relevant to User's engagement and performance.
Links activities and achievements to performance and development goal plan	Users can directly link activities and achievements to performance and development goals, to help aligning work to performance and/or development objectives.
Coach team members	Coaching helps improving employees' performance. A manager can use the feature to coach employees and boost their professional growth.
Configure notifications	Customer can configure a number of notifications that the employees and managers can receive on the home page of the web application, on the SAP SuccessFactors mobile app, and through e-mails.
Achievements	With this view, Users can capture achievements when they actually occur – in real time.
Give and Request ad-hoc feedback	Users can request feedback from others about themselves. Managers can request ad-hoc feedback about direct reports from people in their organization. Once received, Users can manage all their feedback from one single place, and optionally it can be linked and aligned to the activities or achievements.
Request Feedback on Achievements and activities	Users can request feedback on achievements and activities from their manager, peers, or any other employee. A manager can request feedback on the achievements and activities of direct reports, or from anyone within the Customer organization.
Ad-hoc Reporting	Allows to create ad-hoc reports to track details such as list of completed activities, achievements year to date, total number of 1:1 meetings between employee and manager, etc.
Integration with SAP SuccessFactors Goal Management, Career Development Planning, Performance Management, Calibration, and Compensation	These integrations, available if Customer has subscribed to such products, enable managers and other stakeholders to get direct to access achievements and feedback received on achievements, while making decisions.

## TRADEMARK INFORMATION

- Outlook® is a registered trademark of Microsoft Inc.
- iOS®, iPhone® and iPad® are registered trademarks of Apple, Inc.

## DISCLAIMER

SAP retains the right to change, at any time in its sole discretion, the Cloud Service as set forth in the Agreement between SAP and Customer.