

# SUCCESSFACTORS CORE PRODUCTS REDESIGNED

## PERFORMANCE MANAGEMENT & GOALS MANAGEMENT

Michael Almond, SAP SuccessFactors - January 2016

The screenshot shows the 'Performance' tab for user Wilma Sown. It features a 'Route Map' with stages: Mid-Year Review (1), End of Year Self Assessment (2), End of Year Manager Assessment (3), HR Review (4), Rating Discussion (5), and End of Year (6). The 'Introduction' section explains the performance review process. The 'Objectives (50%)' section shows a financial objective: 'Increase Services Revenue in the West Region' with a 20% total score. It includes a 'Rating of Record' (4 stars) and 'Manager's Rating' (4 stars).

The screenshot shows the 'Goals' tab for user Wilma Sown. It displays a list of goals with progress bars and status indicators. The goals are categorized by Customer (2), Business Process (2), and Learning & Growth (1). The 'Targets' section on the right shows a goal for 'Increase profitability and reduce time to market by consolidating vendors and vendor components across product lines' with a 7% reduction in total # of unique components across products and lines.

# PERFORMANCE MANAGEMENT REDESIGN - BEFORE

SAP SuccessFactors core product needed complete overhaul in order to simulate the new UX for all SAP products (named "SAP Fiori").

This meant updating visual design & branding, interaction design, information design, & front-end technology.

Global header needed updating because it displayed in an old style, while the page contents below displayed in an even older style.

The screenshot displays the SAP SuccessFactors Performance Review interface for Marcus Q. Hoff. The page features a global header with the SuccessFactors logo and navigation links. A left sidebar contains a 'Route Map' with various review stages. The main content area is divided into sections for Employee Information, Review Information, Performance Goals, and Performance Plan for Key Business Results. A 'Progress Meter' indicates 56% completion. The interface uses a mix of styles, with some elements appearing more modern than others, reflecting the 'before' state of the redesign.

**SuccessFactors** Welcome, Carla Grant Suggestions Options Logout

Home Objectives **Performance** Compensation Development Succession Recruiting Careers Company Info Employee Files Reports

Review Help & Tutorials

## Performance Review for Marcus Q. Hoff

**Route Map**

- Employee Information
- Review Information
- Performance Goals
- Core Values
- Job Specific Competencies
- Individual Development Plan
- Mid Year Review
- Mid Year Manager Talent Review
- Overall Performance Summary
- Signatures

**Employee Information**

Last Name: Hoff  
First Name: Marcus  
Title: Senior Sales Director, Northeast  
Department: Sales  
Location: Boston, MA

**Review Information**

Originator: Carla Grant (cgrant)  
Review Period: 02/04/2009 - 10/04/2009  
Due Date: 11/18/2009

**Performance Goals**

**Performance Plan for Key Business Results**

In this section, the manager and employee collaboratively define "WHAT" the employee is going to accomplish on the job. List 2-4 major business performance goals for the employee including the relative weight, specific target date for completion and the results expected.

[less detail](#) | [more detail](#)

Objective:	Status:	Weight:
Increase service revenue in the NORTHEAST REGION	On Track	30.0%

**Rating by Carla Grant:**  
Manager Rating: 4.0 - Exceeds Expectations

**Rating by Marcus Q. Hoff:**  
Employee Rating: unrated

**Managers Comments:**

**Subjects Comments:**

# PERFORMANCE MANAGEMENT REDESIGN - CURRENT

Visual design updated to match SAP Fiori UX (with “Blue Crystal” theme).

Page layout updated to match the “SAP Fiori Object Page”, which then becomes standard across the suite.

UI patterns such as Progressive Disclosure & Details on Demand used to reduce clutter.

Information design updated so that the most important information is emphasized.

Updated interaction design make tasks easier to complete.

HTML Prototype:

<http://v1fwww.axshare.com/rating-record.html>

Password: sfux

(Best viewed at 1440px browser resolution)

The screenshot displays the SAP Performance Management interface for a user named Wilma Sown. The interface is designed in the SAP Fiori 'Blue Crystal' theme. At the top, there's a navigation bar with the SAP logo, a home icon, and a 'Performance' dropdown. A search bar for 'Search Actions or People' and a user profile for 'Carla Grant' are also present. Below the navigation bar, there are tabs for 'Reviews', 'Team Overview', and 'Help & Tutorials'. The main content area is titled '2015 Performance Review for Wilma Sown'. It features a 'Back to Inbox' link, an 'Actions' button, and a 'History' button. The review summary shows an 'Overall Score' of 4.0 and a status of 'Incomplete'. There are three summary cards: '#2 Out of 6 Total', '#3 Supporting Info', and '#1 v0 Gap Analysis'. A 'ROUTE MAP' section shows a sequence of steps: 1. Mid-Year Review, 2. End of Year Self Assessment, 3. End of Year Manager Assessment (current step), 4. HR Review, 5. Rating Discussion, and 6. Em. Ack. An 'Introduction' section provides context about the performance review process. Below this, the 'Objectives (50%)' section is shown, with a '+ Add objective' button. The first objective is 'Financial: Increase Services Revenue in the West Region', which is worth 20% of the total score. It includes a description, a 'Rating of Record' (5 stars), 'Manager's Rating' (5 stars), and 'Wilma's Rating' (5 stars). A 'Manager's Comments' section is also present. At the bottom, there's a table with columns for 'Metric', 'Weight', 'Status', and 'Due Date'. The table shows two metrics: '75% Reduction in Total # of Components' with a weight of 35% and 'Achievements' with a weight of 70%.

Metric	Weight	Status	Due Date
75% Reduction in Total # of Components	35%	On Track	12/31/2013
Achievements	70%		

# PERFORMANCE MANAGEMENT REDESIGN - DETAILS

Page header uses a different background color than page to make it more distinct

Employee photo added to Employee Reviews (this becomes a standard across the suite)

Anchor navigation added to allow users to jump directly to sections below

Route Map design updated to match SAP Fiori visual design standards

This screenshot shows the 'Route Map' section of the '2015 Performance Review for Wilma Sown'. The header includes navigation links for 'Reviews', 'Team Overview', and 'Help & Tutorials'. Below the header, there's a 'Back to: Inbox' link and a '2015 Performance Review for Wilma Sown' title. The main content area features a 'Route Map' section with a progress bar showing six steps: 1. Mid-Year Review, 2. End of Year Self Assessment, 3. End of Year Manager Assessment, 4. HR Review, 5. Rating Discussion, and 6. End of Year Review. The current step is 3, 'End of Year Manager Assessment'. Below the progress bar, there's an 'Introduction' section with a welcome message.

Sections that aren't used frequently placed in collapsable panels to save space

This screenshot shows the 'Introduction' section of the '2015 Performance Review for Wilma Sown'. The header is the same as the previous screenshot. The main content area features an 'Introduction' section with a welcome message: 'Welcome to this year's Performance Review process. This process is designed to help you and your manager identify your accomplishments and goal achievement during the year. At the end of this process, you and your manager will begin the process of identifying next year's goals.'

Header pinned to top of browser and when page scrolls collapses to a shorter version

Navigation label is highlighted when the user scrolls to the target section

This screenshot shows the 'Objectives' section of the '2015 Performance Review for Wilma Sown'. The header is the same as the previous screenshots. The main content area features an 'Objectives (50%)' section with a '+ Add objective' button. Below this, there's a list of objectives, including 'Financial Increase Services Revenue in the West Region' with a '20% of total score' weight.

Information design improved by “chunking”

Typography improved: Goal titles are more prominent than secondary information

Ratings positioned on same horizontal line, making it easier to compare results

Comment area visible (user tests showed people had trouble knowing where to leave comments in earlier versions)

Supplemental goal information placed in tabs below the ratings, saving space vertically

Objectives (50%) [✎](#) [+ Add objective](#)

Financial  
**Increase Services Revenue in the West Region** [✎](#) [🗑](#) 20% of total score

Builds customer confidence, is committed to increasing customer satisfaction, sets achievable expectations, assumes responsibility for solving problems.

Rating of Record [🚩](#) [?](#)  
👤★★★★★ Meets Expectations


Manager's Rating [?](#)  
👤★★★★★ Exceeds Expectations


Manager's Comments  
[Click to add comment](#)


Wilma's Rating [?](#)  
👤★★★★★ Meets Expectations

Wilma's Comments  
Our reports for this year show that we have exceeded this objective by making 55% of revenue from our new product line.

[Other Ratings](#) [Goal Details](#) [Other Details](#)

 Alexander A Thompson's Rating  
★★★★★ Meets Expectations  
No Comments

 Rebecca Atherton's Rating  
★★★★★ Meets Expectations  
No Comments

 Mike Jannsen's Rating  
★★★★★ Meets Expectations  
No Comments

When users click in the comments field, it grows and becomes a rich text editor

Objectives (50%) [✎](#) [+ Add objective](#)

Financial  
**Increase Services Revenue in the West Region** [✎](#) [🗑](#) 20% of total score

Builds customer confidence, is committed to increasing customer satisfaction, sets achievable expectations, assumes responsibility for solving problems.

Rating of Record [🚩](#) [?](#)  
👤★★★★★ Meets Expectations

Manager's Rating [?](#)  
👤★★★★★ Exceeds Expectations

Manager's Comments  
[Click to add comment](#)

Wilma's Rating [?](#)  
👤★★★★★ Meets Expectations

Wilma's Comments  
Our reports for this year show that we have exceeded this objective by making 55% of revenue from our new product line.

[Other Ratings](#) [Goal Details](#) [Other Details](#)

Metric 7% Reduction in Total # of Components Weight  35% Status On Track

Achievements 2 YTD Complete  70% Due Date 12/31/2013

# GOALS MANAGEMENT REDESIGN - BEFORE

SAP SuccessFactors core product needed complete overhaul in order to simulate the UX for all new SAP products (named "SAP Fiori").

This meant updating visual design & branding, interaction design, information design, & front-end technology.

Global header needed updating because it displayed in an old style, while the page contents below displayed in an even older style.

SuccessFactors

Welcome, Carla Grant (cgrant) [Suggestions](#) [Options](#) [Logout](#)

[Home](#) [Objectives](#) [Performance](#) [Compensation](#) [Development](#) [Succession](#) [Recruiting](#) [Careers](#) [Company Info](#) [Employee Files](#) [Reports](#)

[Objective Plan](#) [Help & Tutorials](#)

## 2009 Objectives for Carla Grant

Switch Plan: 2009 Objectives

[Cascade Selected...](#) [Delete Selected](#) [Objective Wizard](#) [Create a New Objective](#) [Copy From Other Objective Plan](#)

[Employee Hierarchy](#)  
[Display Options](#)

Displaying 1-5 of 5 Objectives

### Financial

Visibility	Objective	Last Modified	Type	Link Data	Metric	Actual	Complete	Weight	Start Date	Due Date	Status	Action
<input type="checkbox"/> Public	<a href="#">Ensure that Services Accounts for at least 50% of all New Business</a>	03/02/2010	Add	<a href="#">Sales Results</a>	\$80M of Services	\$61,584,892	77.0%	20.0%	01/01/2009	12/31/2009	Behind	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a>
<input type="checkbox"/> Public	<a href="#">Create a system for communicating and tracking competitive intelligence by (date)</a>	03/02/2010	Add		CI tracking system created		0.0%	0.0%	01/01/2009	12/31/2009	Not Started	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a>

### Customer

Visibility	Objective	Last Modified	Type	Link Data	Metric	Actual	Complete	Weight	Start Date	Due Date	Status	Action
<input type="checkbox"/> Public	<a href="#">Increase Available Customer References</a>	09/01/2009	Add	<a href="#">Reference List</a>	200 Net Promoters	193 Net Promoters	96.5%	10.0%	01/01/2009	12/31/2009	On Track	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a>

Milestones:

Milestone	Start	Due	% Complete
50 Customer References by Q1	01/01/2009	03/31/2009	100.0%

# GOALS MANAGEMENT REDESIGN - CURRENT

Visual design updated to match SAP Fiori UX (with “Blue Crystal” theme).

Page layout updated to match the “SAP Fiori Object Page”, which is then used as a standard across the suite.

UI patterns such as Progressive Disclosure & Details on Demand used to reduce clutter.

Information design updated so that the most important information is emphasized.

Updated interaction design make tasks easier to complete.

HTML Prototype:  
<http://sycqvo.axshare.com/>  
Password: sfux  
(Best viewed at 1440px browser resolution)

The screenshot displays the SAP Fiori Goals Management interface. At the top, there's a navigation bar with the SAP logo, a home icon, and a dropdown menu. A search bar labeled 'Search Actions or People' is on the right. Below the navigation bar, the main header shows 'Goals Plan' and 'Help & Tutorials'. The user profile 'Wilma Sown' and '2013 Goals' are displayed. A toolbar contains icons for 'Mass Assign', 'Cascade', 'Add Goal', 'Display', and a print icon. The main content area is divided into tabs: 'INTRODUCTION', 'CUSTOMER', 'BUSINESS PROCESS', 'LEARNING & GROWTH', and 'FINANCIAL'. The 'INTRODUCTION' tab is active, showing a welcome message and a goal plan for 'Customer'. The goal plan lists a goal: 'Increase profitability and reduce time to market by consolidating vendors & product components across product...'. Below this, the goal details are shown for 'Aligned Down' and 'Aligned Up' sections. Each section lists the goal owner, description, metric, weight, completion status, and due date. The goal status is 'On Track' for 'Aligned Down' and 'Not Started' for 'Aligned Up'.

**Customer**

☐ Increase profitability and reduce time to market by consolidating vendors & product components across product... [Show More](#)

**Goal Details**

Metric: 7% Reduction in Total # of Components Weight: 35% Status: **On Track**  
10 Achievements Complete: 70% Due Date: 12/31/2013

**Aligned Down**

**Robert Allen**  
Design new products for manufacturability by minimizing the number of unique components across products and product lines.

Metric: 7% Reduction in Total # of Components Weight: 35% Status: **On Track**  
3 Achievements Complete: 70% Due Date: 12/31/2013

**Wilma Sown**  
Design new products for manufacturability by minimizing the number of unique components.

Metric: 7% Reduction in Total # of Components Weight: 35% Status: **Not Started**  
1 Achievement Complete: 70% Due Date: 12/31/2013

**Aligned Up**

**Robert Allen**  
Design new products for manufacturability by minimizing the number of unique components across products and product lines.

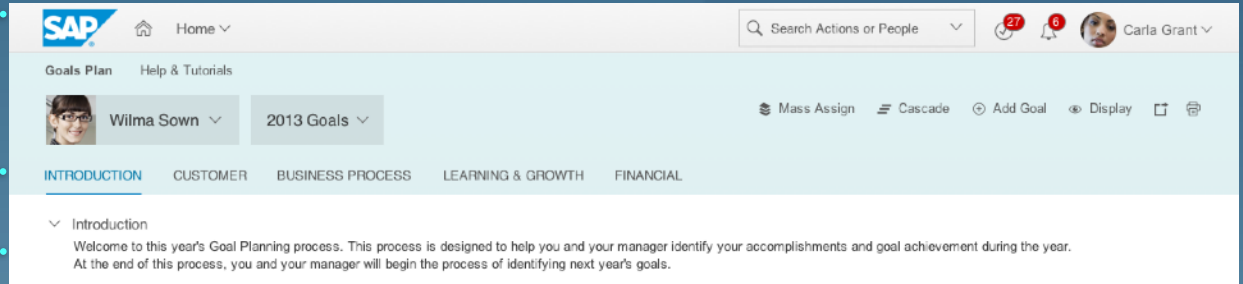
Metric: 7% Reduction in Total # of Components Weight: 35% Status: **High Risk**  
0 Achievements Complete: 0% Due Date: 12/31/2013

# GOALS MANAGEMENT REDESIGN - DETAILS

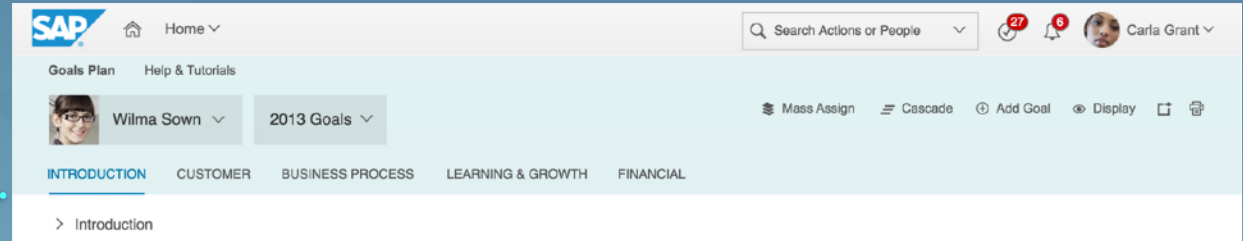
Page header uses a different background color than page to make it more distinct

Anchor navigation added to allow users to jump directly to sections below

Route Map design updated to match SAP Fiori visual design standards



Sections that aren't used frequently placed in collapsable panels to save space





Information design improved by “chunking”

Typography improved: Goal titles are more prominent than secondary information

Goal alignment items include employee photos to help identify sources

Data about the goal is presented in a more appealing way, as graphics or visualizations



Entire sections can be collapsed or expanded to reduce clutter

“More details” displays in tabs below the main goal description, saving vertical space

“Alert” items often reached 20-30 and wasted vertical real estate, so a “Show More” - “Show Less” control was used (Details on Demand)

Tabs organized the supplemental information logically



Customer

☐ Increase profitability and reduce time to market by consolidating vendors & product components across product... [Show More](#)  



▼ Goal Details

Metric	7% Reduction in Total # of Components	Weight	<div><div></div></div> 35%	Status	On Track
	<a href="#">10 Achievements</a>	Complete	<div><div></div></div> 70%	Due Date	12/31/2013

Aligned Down



 **Robert Allen**  
Design new products for manufacturability by minimizing the number of unique components across products and product lines. 

Metric	7% Reduction in Total # of Components	Weight	<div><div></div></div> 35%	Status	On Track
	<a href="#">3 Achievements</a>	Complete	<div><div></div></div> 70%	Due Date	12/31/2013

 **Wilma Sown**  
Design new products for manufacturability by minimizing the number of unique components. 

Metric	7% Reduction in Total # of Components	Weight	<div><div></div></div> 35%	Status	No! Started
	<a href="#">1 Achievement</a>	Complete	<div><div></div></div> 70%	Due Date	12/31/2013



Customer



☐ Increase profitability and reduce time to market by consolidating vendors & product components across product... [Show More](#)  

> Goal Details

More Details


[Alerts](#) [Deliverables](#) [Tasks](#) [Comments](#)


 Aligned Down objective deleted by Sid Mormony 6/30/05 12:41 PM 

 Edited by Alexander Thompson 9/1/09 1:16 PM 

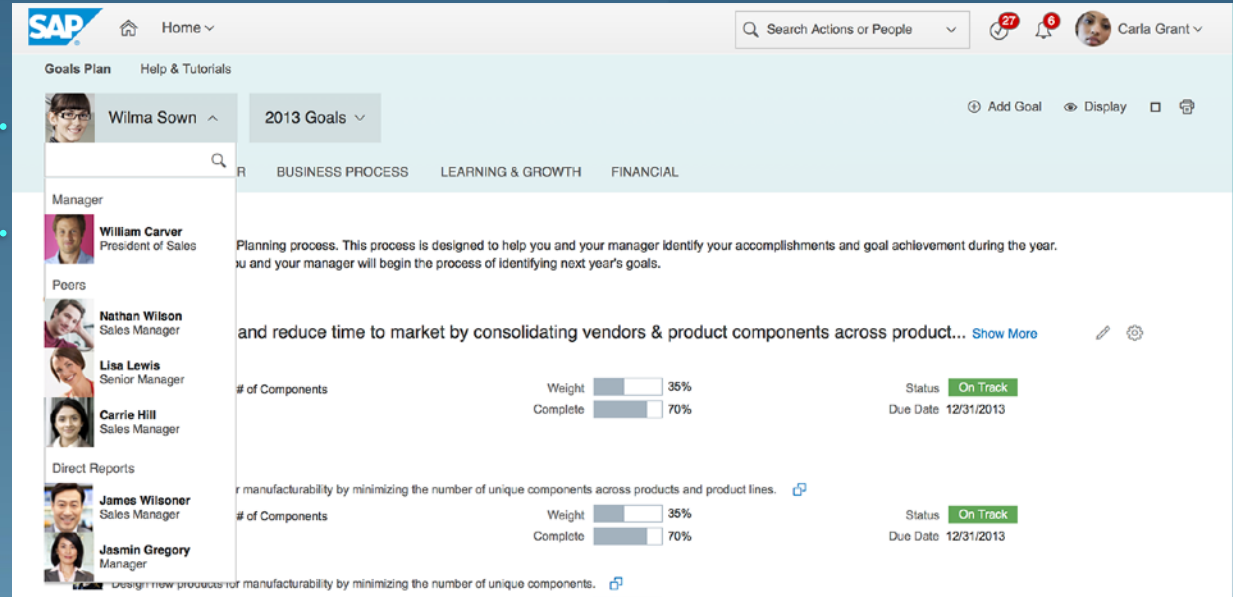
[Show More](#)

[Alerts](#) [Deliverables](#) [Tasks](#) [Comments](#)

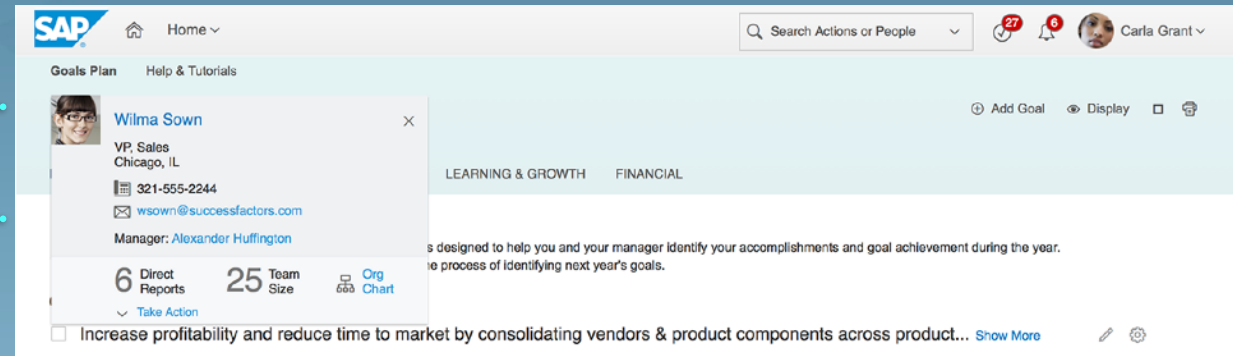
 **Carla Grant:** Lorem ipsum dolor sit amet, consetetur...  
about 1 minute ago



UI Component called the “People Picker” added to the header area. The grey box with the employee’s name is a selector control that drops a menu containing a list of employees. This allows a manager to call up other employee’s Goal Plans by simply selecting from the list or performing a search for an employee from a larger pool.



Another useful tool is added called the Employee Quick Card. This displays when the photo is clicked. The cards contain important information about employees, including contact information, data about their teams and a list of actions that can be taken related to various HR processes.



# GOALS MANAGEMENT FUTURE REDESIGN

Visual design updated to match latest SAP Fiori UX (version 2.0 with “Belize” theme).

Page layout updated to “SAP Fiori Flexible Floorplan”, which allows multiple layouts to be viewed on the same page.

New UI patterns used to dramatically reduce clutter & improve task completion.

HTML Prototype:  
<http://1i5be1.axshare.com/>  
Password: sfux  
(best viewed at 1440px resolution)

The screenshot displays the SAP Fiori Goals Management interface. At the top, there's a header with the SAP logo, a home icon, and a 'Goals' dropdown. On the right, there's a search icon, a notification bell, and a user profile for 'Carla Grant'. Below the header, there's a section for 'Wilma Sown' with a '2015 Goals' dropdown. A navigation bar contains tabs for 'INTRODUCTION', 'CUSTOMER', 'BUSINESS PROCESS', 'LEARNING & GROWTH', and 'FINANCIAL'. The main content area starts with a welcome message: 'Welcome to this year's Goal Planning process. This process is designed to help you and your manager identify your accomplishments and goal achievement during the year. At the end of this process, you and your manager will begin the process of identifying next year's goals.' Below this, there are three sections of goals, each with a table-like structure. The first section is 'Customer (2)', the second is 'Business Process (2)', and the third is 'Learning & Growth (1)'. Each section has a 'Complete' status, a 'Status' column, a 'Due Date', a 'Weight', and an 'Achievements' column. The goals are listed with checkboxes, progress bars, and status indicators (On Track, Postponed, Behind). Each goal entry includes a description, a progress bar, a status, a due date, a weight, and a number of achievements. There are also icons for editing, deleting, and expanding each goal.

Customer (2)	Complete	Status	Due Date	Weight	Achievements
<input type="checkbox"/> Increase profitability and reduce time to market by consolidating vendors and vendor components across product lines... <a href="#">See more</a>	63%	On Track	12/31/2015	45%	3
<input type="checkbox"/> Complete sales compensation plan	50%	On Track	12/31/2015	45%	3

Business Process (2)	Complete	Status	Due Date	Weight	Achievements
<input type="checkbox"/> Increase Revenue and Profitability through Manager Support of Negotiations	75%	Postponed	12/31/2015	45%	3
<input type="checkbox"/> Attend Key Customer Negotiation Sessions with my Team	55%	On Track	12/31/2015	30%	3

Learning & Growth (1)	Complete	Status	Due Date	Weight	Achievements
<input type="checkbox"/> Present at Key Industry and Technical Conferences to Build Awareness of Innovation and Brand	13%	Behind	12/31/2015	25%	1

# GOALS MANAGEMENT FUTURE REDESIGN - DETAILS

Page template changed to the “SAP Fiori 2.0 Flexible Floorplan”, which allows multiple layouts to be viewed on the same page.

This means that important information and data about an employee's Goal Plan can be accessed and interacted with in a much better way. In earlier versions, a user had to leave the Goal Plan and navigate to a different module (product) or open multiple modal windows on top of each other in order to perform actions such as editing a goal or just viewing detailed information.

Instead, the page allows to user to toggle different areas of a three column grid in order to make a certain area the primary work space.

The screenshot displays the SAP Fiori 2.0 Flexible Floorplan for Goals Management. The interface is divided into three main sections: a top navigation bar, a left sidebar, and a main content area.

**Top Navigation Bar:** Includes a search icon, a notification bell, a user profile picture of Carla Grant, and a dropdown arrow.

**Left Sidebar:** Contains two tabs: "LEARNING & GROWTH" and "FINANCIAL". Below the tabs is a description: "designed to help you and your manager identify your accomplishments and you and your manager will begin the process of identifying next year's goals." The sidebar also features a table with columns "Complete" and "Status".

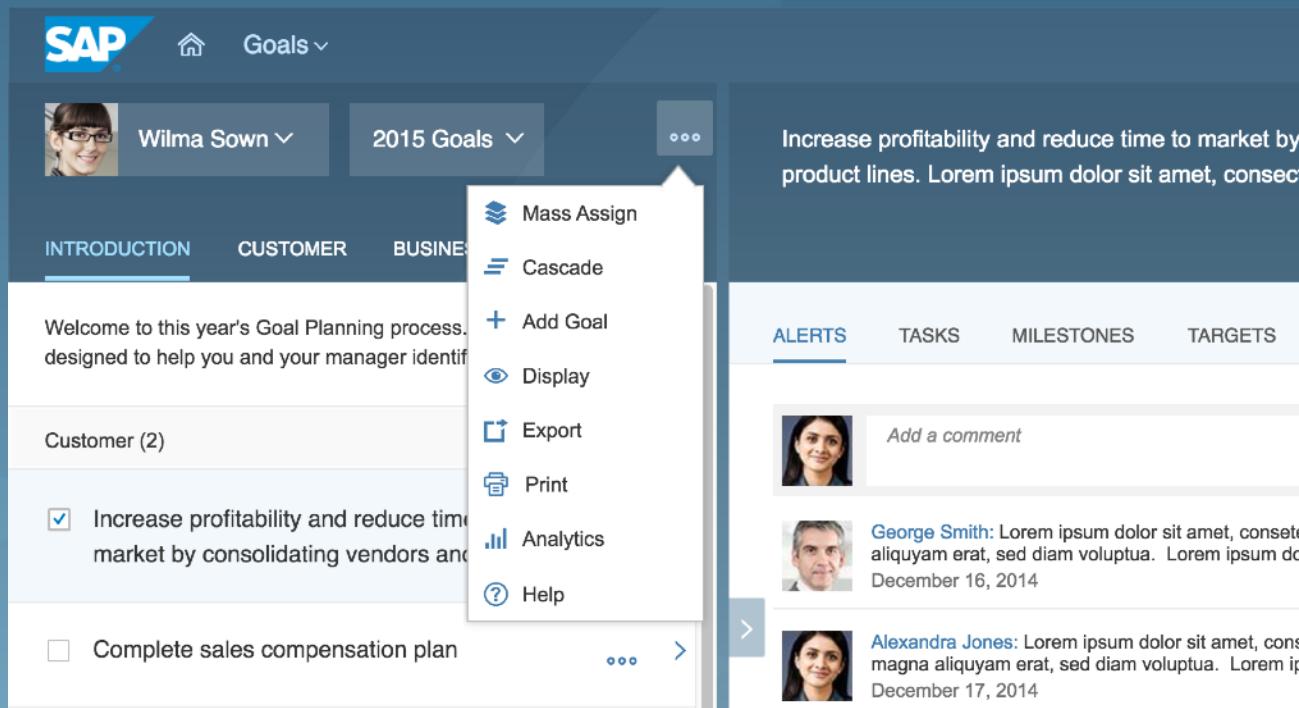
**Main Content Area:** The top section displays a goal description: "Increase profitability and reduce time to market by consolidating vendors and vendor components across product lines. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet." Below this is a tabbed interface with four tabs: "TARGETS", "COMMENTS", "CASCADE", and "RATINGS". The "RATINGS" tab is currently selected.

**RATINGS Tab Content:** Shows a profile picture of Robert Allen, his name, and the status "Aligned Up". Below this is a description: "Design new products for manufacturability by minimizing the number of unique components across products and lines." The ratings section includes a table with the following data:

Metric	Value
Metric	7% Reduction in Total #
Status	On Track
Due Date	12/31/2015
Weight	35%
Complete	70%
Achievements	3

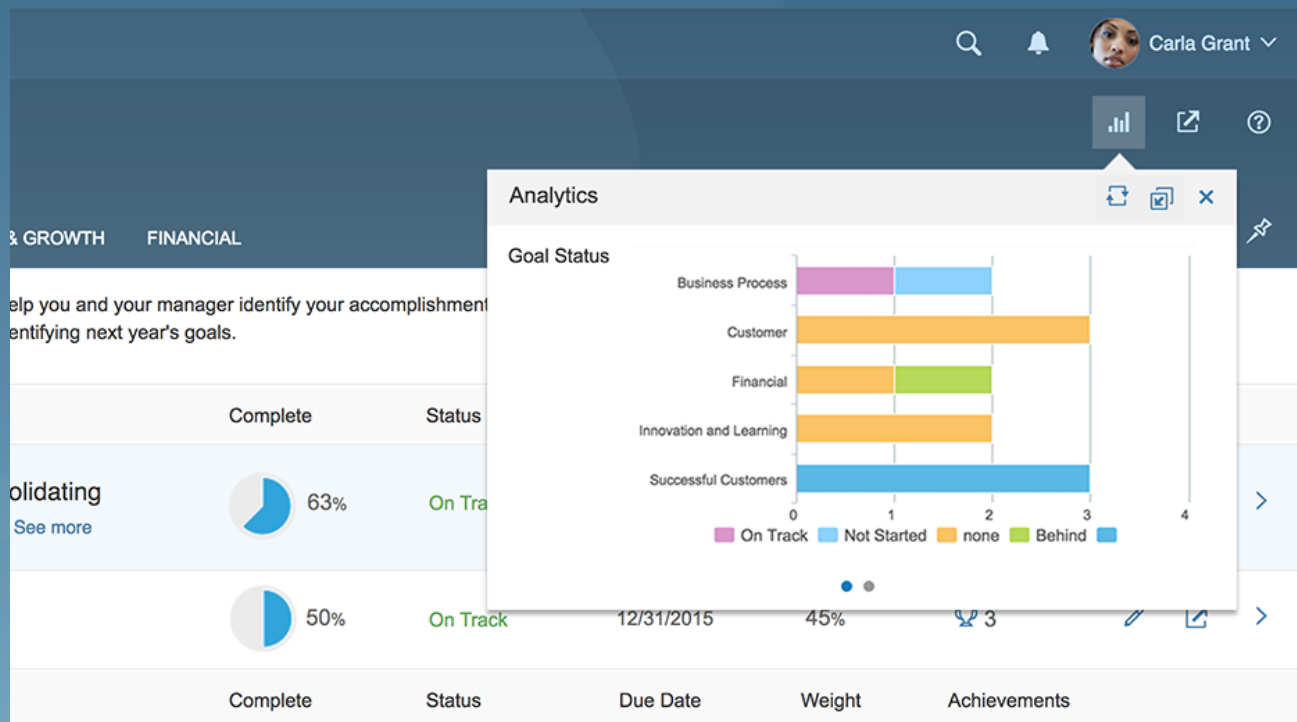
# GOALS MANAGEMENT FUTURE REDESIGN - DETAILS

New UI patterns used that help the user being able to select controls and menus that might otherwise be lost when views are changed in the Flexible Layout.



# GOALS MANAGEMENT FUTURE REDESIGN - DETAILS

An “Analytics On Call” panel displays when the user clicks an icon control in the header area. This includes useful data visualizations based on the content presented by different views.



# GOALS MANAGEMENT FUTURE REDESIGN - DETAILS

An “Employee Quick Card” displays when the user clicks the Employee photo. The cards contain important information about employees, including contact information, data about their teams and a list of actions that can be taken related to various HR processes.

The screenshot displays the SAP Goals Management interface. At the top, the SAP logo is on the left, and a home icon and a 'Goals' dropdown menu are on the right. Below the header, there are two tabs: 'LEARNING & GROWTH' and 'FINANCIAL'. The main content area shows a list of goals. One goal is partially visible: 'Customer (2)' with a status of 'Complete'. Below this, a goal is listed: 'Increase profitability and reduce time to market by consolidating vendors and vendor components across product lines...' with a 'See more' link. To the right of this goal is a progress indicator consisting of a blue circular gauge showing 63% completion.

**Employee Quick Card for Wilma Sown:**

- Name:** Wilma Sown
- Title:** VP, Sales
- Location:** Chicago, IL
- Phone:** 321-555-2244
- Email:** [wsown@successfactors.com](mailto:wsown@successfactors.com)
- Manager:** [Alexander Huffington](#)
- Direct Reports:** 6
- Team Size:** 25
- Org Chart:** [Org Chart](#)
- Action:** [Take Action](#)

