# SuccessFactors Overview Session
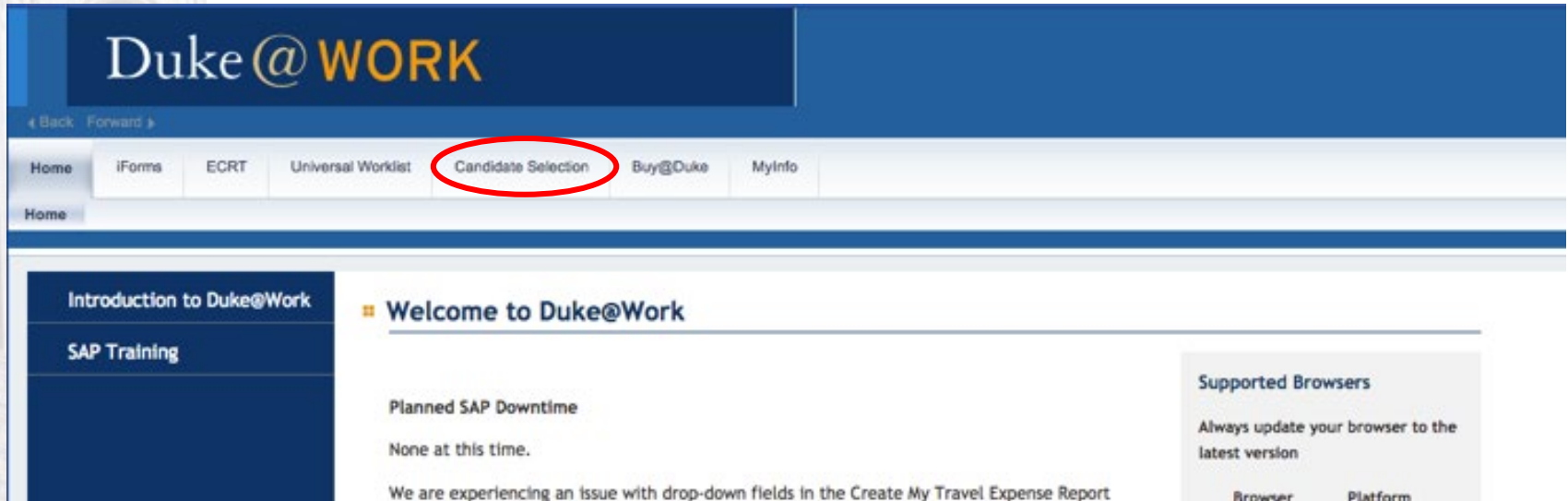
**SAP SuccessFactors** ♡

# Agenda

- Background

- SuccessFactors Key Points

- Demo

- Questions

# Replacement of BrassRing with SuccessFactors
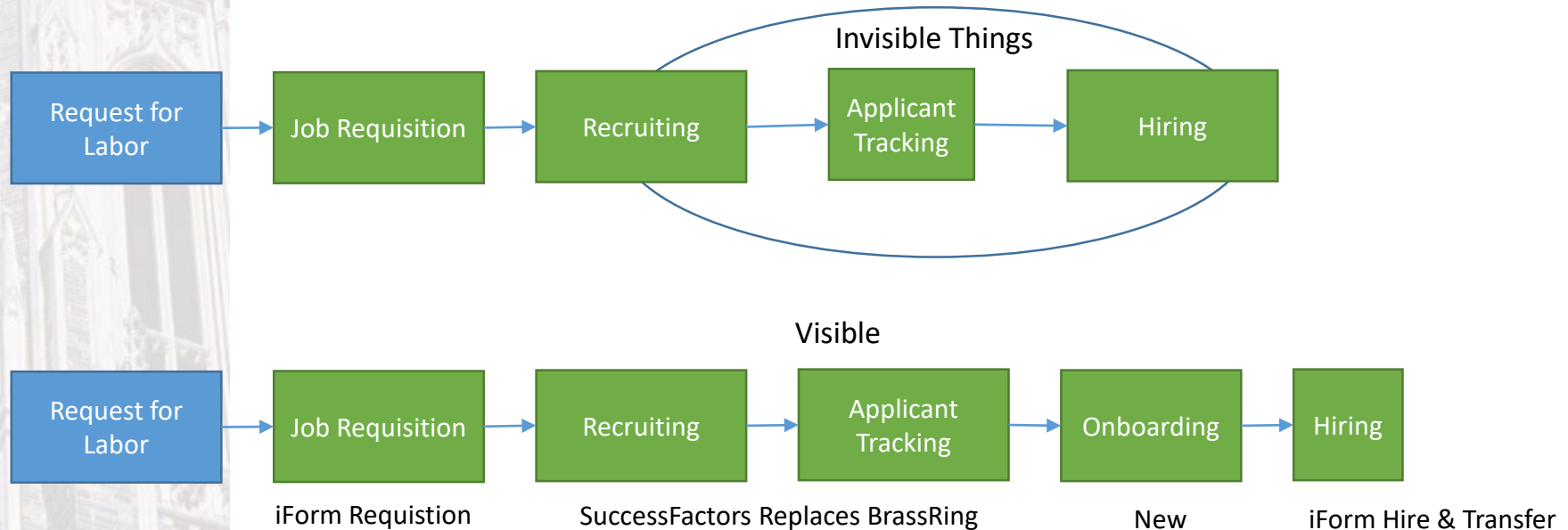
- The applicant tracking system used since 2006

# SuccessFactor was chosen after a Multi-Step Evaluation in 2017

- Reviewed the Market
  - Gartner Group Evaluations
- Sent RFP to list a long list of vendors and narrowed to the following:
  - Taleo
  - PeopleAdmin
  - ICIMS
  - IBM / BrassRing
  - SAP / SuccessFactors

# Leading to a project to

- Incorporate industry leading recruiting practices
- Simplify and extend the process to include onboarding
- Provide process transparency
- Improve user experience for the candidate, recruiter and hiring manager
- Integrate third party technologies
- Build a talent community for passive job seekers

# The project began with the process ...

Invisible Things

| Request for Labor | Job Requisition | Recruiting | Applicant Tracking | Hiring |

Visible

| Request for Labor | Job Requisition | Recruiting | Applicant Tracking | Onboarding | Hiring |

iForm Requisition            SuccessFactors Replaces BrassRing          New          iForm Hire & Transfer

# ... and a need for broader participation.

Today

- Hiring Manager
- Recruiter

Tomorrow

- Hiring Manager / Hiring Manager Team
- Recruiter / Recruiter Team
- HR Representative
- HR Team
- Onboarding Coordinator

*Assigned on the iForm Requisition but can be updated later.*

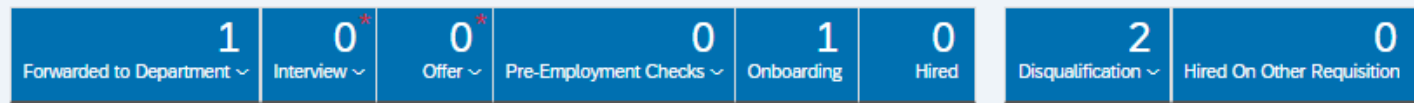# Participants view the process in the Talent Pipeline

- Breaks the process into logical steps

- Access is controlled by roles assigned to the requisition

- Provides all Hiring Team participants with visibility to where candidates are in the process

- Includes participation of previously invisible groups such as Visa Services, Background Check Center, Identity Management and EOHW

- Completion of the Hire or Transfer iForm updates the talent pipeline and closes the loop

# Using Simple steps ...

# ... with sub statuses providing more detail



*Making the invisible visible.*

# SuccessFactors will be used to recruit for:

- All Staff positions in the University and Health System

- Job Family 27 positions in the School of Medicine and Nursing

- Excluded:
  - All Faculty positions
  - All student positions
  - JF 27 in the University
  - Others

*Everyone will use SuccessFactors for Onboarding*

# Three differences

- Offer Letters are completed and saved in SuccessFactors
  - Offer Approval and Offer Letters using templates
  - Online Offer and Acceptance

- Pre-employment steps occur in SuccessFactors
  - Background Checks / Educational Checks
  - Duke Unique ID / NetID Request
  - Pre-Employment Capacity Test and Health Screen

- Onboarding
  New application with candidate participation
  Collect pre-hire paperwork including the I9

# The Offer Process

- It does not replace interaction with HR in determining the appropriate offer details
- It does not replace the interaction with the candidate regarding verbal offers
- It provides a place to enter the offer details and provide an optional approval of information that flows to the Hire or Transfer iForm
- It provides standardized letter templates
- The Offer information saved with the candidate

# Pre-employment checks

- All are steps are happening today but now will be visible
- The Hiring Team can see the progress
- Emails are sent when steps are completed
- Requires only initiating the background check request
- EOHW will schedule based on candidates being in specific status
  - The scheduling of the candidates is unchanged.  There is now an authoritative list of who needs to be scheduled.

# What is Onboarding

- A standard interaction for all hires and transfers
- Duke-branded welcome letter
- Includes a link to a wizard that steps employee through the necessary forms prior to the start date
- The candidate reviews the data before it is updated in SAP
- Provides a manager task list to complete

# Candidate Onboarding: Process Steps

**1. Manager/HR Activities**
- Review of information

**2. Employee Activities**
- Confidentiality agreement
- Race/ethnicity
- Veteran status
- Disability declaration
- Tax forms
- W-2 Online Election
- Foreign National Form
- Direct Deposit
- I-9 (Part 1)

**3. Orientation Activities**
- I-9 (Part 2 & E-verify)

# Planning Dates

- The videos are available now: https://hr.duke.edu/managers/recruitment/successfactors
- The new iForm requisition will move to production on May 28 to support conversion to SuccessFactors.
- Critical hires for July should be completed in BrassRing by June 12
- Candidates will not be able to apply to jobs during the transition period from June 13 – June 16
  - Noted on the website
  - Informing LinkedIn and others who scrape jobs of the transition period
- SuccessFactors is live on June 17
- The job requisitions remaining in BrassRing must be completed by June 28

# Demo

# The Basics

- Everyone will have access to SuccessFactors

- Access from the Duke@Work
  - Candidate Selection
  - Careers tab

- Roles on requisition will determine if you have recruiting tab

# Three components

- Duke@Work

- SuccessFactors

- careers.duke.edu

# Process Options

- Focused on what happens in SuccessFactors
  - Who initiates the iForms Requisition, Hire and Transfer is unchanged
- Support centralized and decentralized options
- Not limited to these four options
- The software will not enforce an option. It will enforces steps have occurred within the overall process
- The departments can choose which option that fits their needs

SuccessFactors Process Flow – Version 1 - Distributed

**Generic Steps**
Fowarded to Department → Interview → Offer → Pre-Employment Checks → Onboarding → Manager & HR Activites → Orientation Activities

**Hiring Manager**
Fowarded to Department → Interview

**Recruiter**
Candidates

**HR Representative**
Offer

**Onboading Coordinator**
Pre-Employment Checks → Onboarding → Manager & HR Activites → Orientation Activities
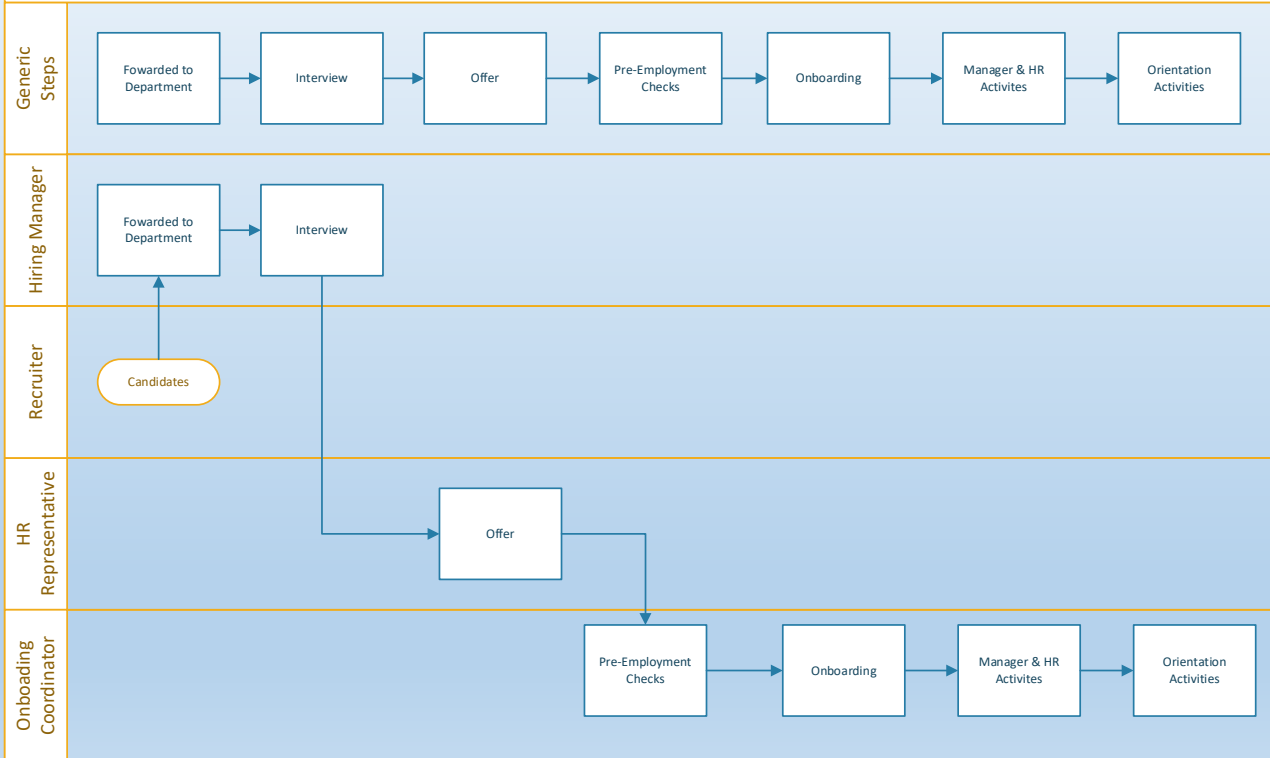
SuccessFactors Process Flow – Version 2 - Recruiter

**Generic Steps**
Fowarded to Department → Interview → Offer → Pre-Employment Checks → Onboarding → Manager & HR Activites → Orientation Activities

**Hiring Manager**
Fowarded to Department → Interview

**Recruiter**
Candidates → Offer

**HR Representative**

**Onboading Coordinator**
Pre-Employment Checks → Onboarding → Manager & HR Activites → Orientation Activities
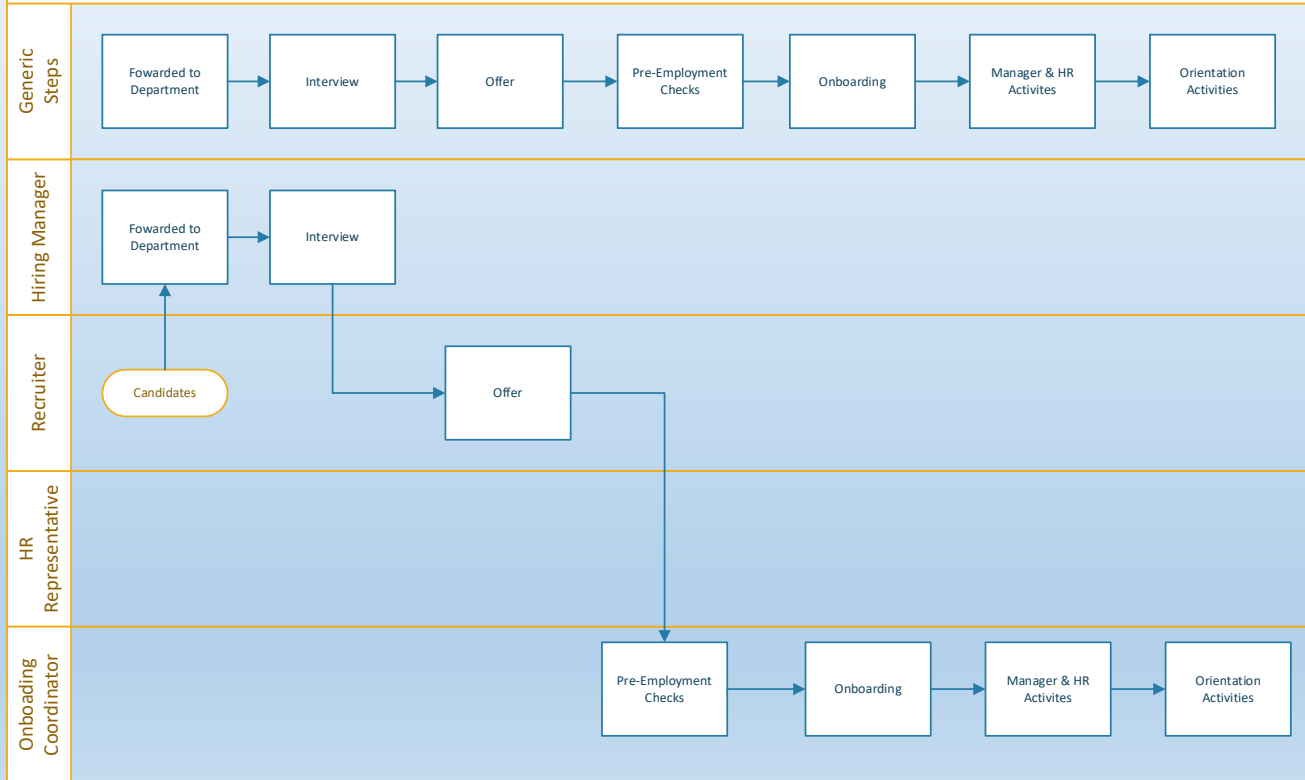
SuccessFactors Process Flow – Version 4 No Hiring Manager

**Generic Steps:** Fowarded to Department → Interview → Offer → Pre-Employment Checks → Onboarding → Manager & HR Activites → Orientation Activities

**Hiring Manager:**

**Recruiter:** Candidates

**HR Representative:** Fowarded to Department → Interview → Offer

**Onboading Coordinator:** Pre-Employment Checks → Onboarding → Manager & HR Activites → Orientation Activities
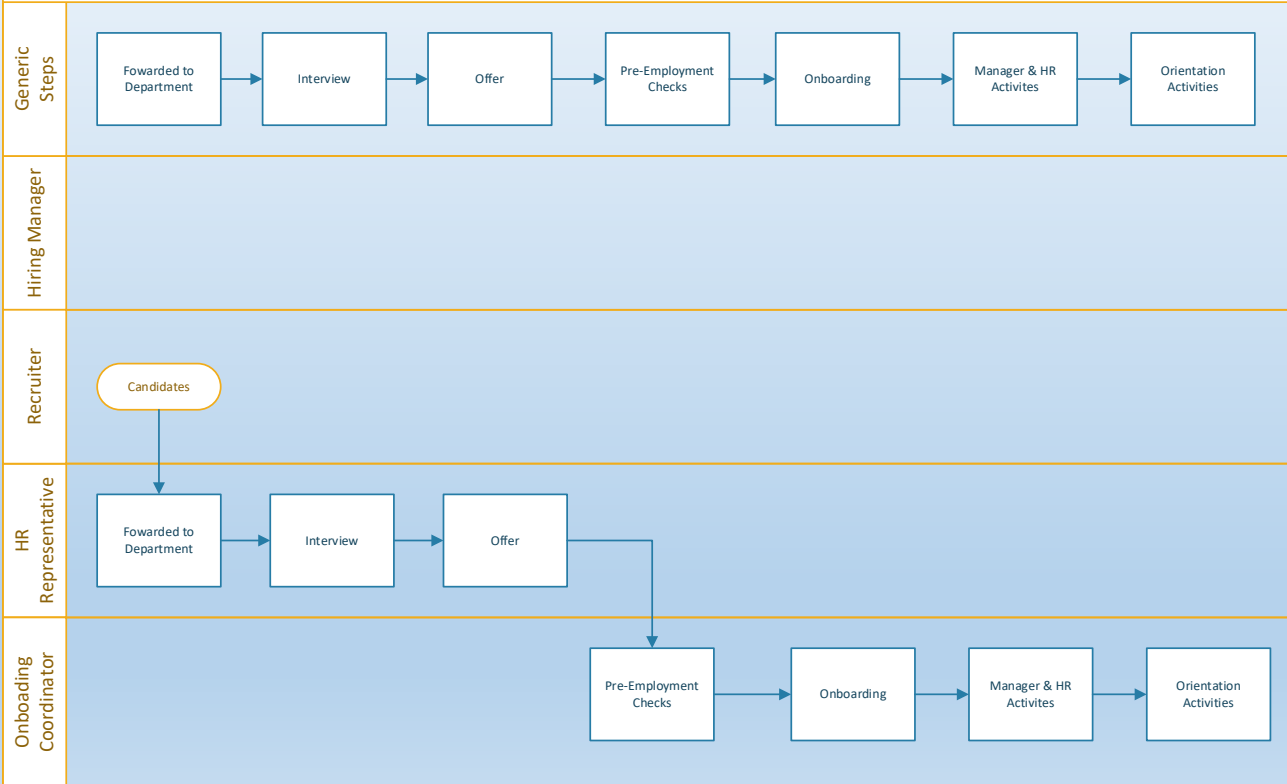
SuccessFactors Process Flow – Version 3 – Hiring Manager

**Generic Steps:** Fowarded to Department → Interview → Offer → Pre-Employment Checks → Onboarding → Manager & HR Activites → Orientation Activities

**Hiring Manager:** Fowarded to Department → Interview → Offer → Pre-Employment Checks

**Recruiter:** Candidates

**HR Representative:**

**Onboading Coordinator:** Onboarding → Manager & HR Activites → Orientation Activities

# Questions