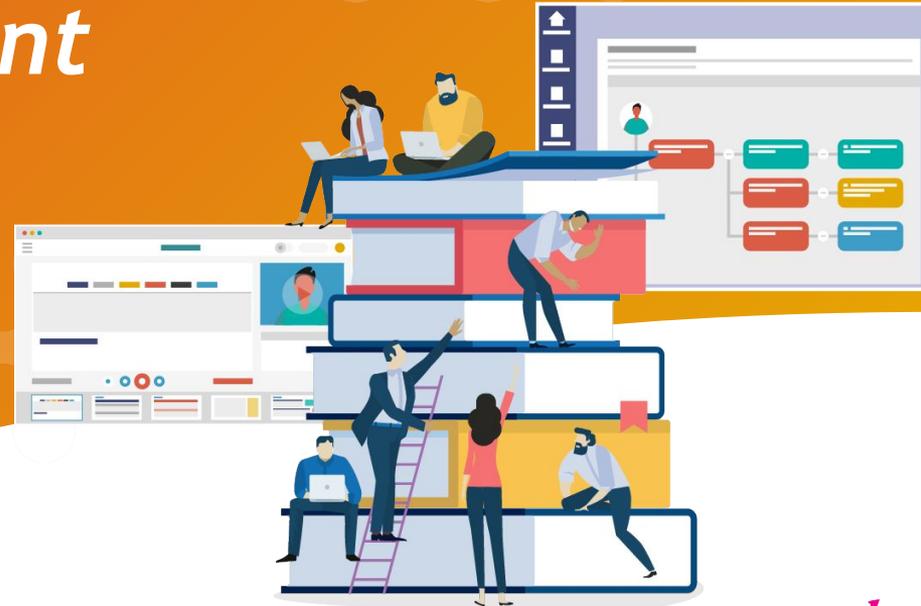




What's New in Talent Management

TM 22.04 - March 2022



Today's Presenters



Dawn Baron
Director of Marketing



Tom Sykes
Director, Product Management

Important Dates

Staging Updates:

15 March, 2022

Prod Updates:

London: 5 April, 2022

Toronto: 8 April, 2022

Atlanta: 8 April, 2022



For more information...

Customer Community

https://customers.peoplefluent.com/tms/talent_management_22_04

The screenshot displays the Customer Community Productivity Platform interface. At the top, there is a navigation bar with the following items: Dashboard, People, Groups, Signals, Content, and Links. Below the navigation bar, there is a breadcrumb trail: Talent Management > Jump to: Select... > Quick Links: None > Go to: [input field]. The main content area is titled "Talent Management 22.04". On the left side, there is a sidebar menu with the following items: Workspace Home, Release Information, Availability Reports, Roadmap, and Workspace Tags. Below the sidebar menu, there is a "Page Menu" section with the following items: What's New:, Additional Resources:, and Documents. The main content area on the right side is titled "Talent Management 22.04" and contains a list of items:

- PeopleFluent Compensation
 - Worksheet Budget Calculation Enhancement
- PeopleFluent Performance and Succession
 - Competency Performance Groups
 - Competency Percent Rated Enhancement
 - Competency Tagging
 - Clinical Workflow State
 - Limit Ad-Hoc Competencies to Specific Libraries
 - Pseudo Model Audit Data
- Onboarding
 - Onboarding Engagement Wizard Enhancement
- Common
 - Required Field UI Enhancement



22.04 Release Summary

- Employee Performance/Development
 - Competency Performance Groups
 - Progressive Skills Assessments
 - Competency Tagging
 - Workflow Competency Filters
 - Ad-Hoc Library Configuration
 - Audit Data in Pseudomodel
 - Processing Script for Competency Additions
- Compensation
 - Worksheet Budget Calculation
 - Worksheet API
- User Experience/Usability
 - Required Fields Warning
- Onboarding
 - Onboarding Engagement Wizard
- People Analytics
 - New Performance Evaluation subject
 - New Compensation Planning subject



Employee Performance & Development

Competency Performance Groups

What was the Problem?

- When automatically assigning competencies to Performance Plan participants, there are two options available
 - A standard set for all participants of a given plan
 - Definition at the job code level
- In cases where additional variability is required (e.g. variations based on organizational assignment, seniority level, etc.) these two options may not cleanly support those use cases
- This leads to inconvenient workarounds like extra plans or a proliferation of “false” job codes
- Presents an efficiency challenge as well as downstream impacts for things like reporting and integrations



How did we solve it?

- A new “Performance Group” option will allow more granular definition of competency assignment for an identified group of plan participants
- Similar functionality to Performance Group for Goal assignment and can be based on any data point (or combination)

The screenshot displays the 'Performance Management Plan - Annual Performance Appraisal 2022' interface. The left sidebar contains navigation options: Options (selected), Basics, Eligibility, Goal Options, Competency Options, Overall Evaluation Options, Statements, Advanced Calculations, Lookup Tables, Plan Formulas, Process Configuration, Goal Setting Process, and Final Evaluation Process.

Performance Groups

Group By: Division

Set up performance group names based on the Group By criteria selected above. Note that each employee in the eligible population must fall within one of these performance groups otherwise competencies will not be assigned. The performance group names cannot be changed after the evaluation process has been initiated so be sure to define all possible performance groups for your current population and those who may become eligible throughout the plan cycle.

EDIT	GROUP	DESCRIPTION	COMPETENCY COUNT	VIEW COMPETENCIES	DELETE
<input checked="" type="checkbox"/>	HR		1	66	✖
<input checked="" type="checkbox"/>	Legal		2	66	✖
<input checked="" type="checkbox"/>	Technology		4	66	✖

(3 total rows) Rows per page: 10

[Add](#) [Add From List](#)

Competencies For "Technology"

Competencies are defined outside of the performance management plan, using the Competency Library. Set up competencies for each performance group by clicking the Add button and selecting competencies from the library.

EDIT	COMPETENCY	COMPETENCY GROUP	RATING SCALE	TAG	REMOVE
<input checked="" type="checkbox"/>	Customer Service - Advanced	Core	Competency 3-Point 3=Highest		✖
<input checked="" type="checkbox"/>	Decisiveness - Advanced	Leadership	Competency 5-Point 5=Highest		✖
<input checked="" type="checkbox"/>	Execution - Advanced	Leadership	Competency 5-Point 5=Highest		✖
<input checked="" type="checkbox"/>	Resourcefulness - Advanced	Core	Competency 3-Point 3=Highest		✖

[Add](#) (4 total rows) Rows per page: 10

[Back to List](#) [Copy This Plan](#) [Cancel](#) [Save](#)



Enabling Competency Performance Groups

Assign Competencies to Evaluate

You may assign competencies based on the plan, competencies associated with the participants job (which includes developmental competencies), or allow the addition of competencies on an ad hoc basis. Note that all of these options are subject to the calculation, and it may or may not be desirable to include developmental competencies with other sources.

Select the sources and/or method by which competencies should be assigned to the participant.

- Assign competencies associated with the plan
- Assign competencies associated with the participant's job
- Assign clinical competencies associated with the participant's job
- Allow adding of ad hoc competencies
- Assign competencies associated with the Performance Group
- Assign Developmental Competencies

- There is a new selection available on the Competency Options page to enable the use of Performance Groups
- This can be used in concert with Plan and Job level assignments



Progressive Skills Assessments

What was the Problem?

- The need for ongoing observational skills validation (vs. subjective periodic ratings) is growing leading to larger inventories of skills and competencies subject to in-person observational assessments
- Commonplace in regulated industries (healthcare, transportation, energy, etc.) with specific compliance requirements
- Frequent scenarios (new employee onboarding/orientation, etc.) where a guided approach is required, ensuring that employees are meeting all prerequisite and dependent requirements prior to advancing to the next level of validation/demonstration



How did we solve it?

- The Observational Competencies framework has been extended to enable an iterative skills assessment program
- New set of configuration capabilities to support this process design

The screenshot displays the PeopleFluent Manager Evaluation interface. At the top, the PeopleFluent logo is visible. Below it, navigation options include Menu, Org Chart, Task List, and Reporting. The main header shows 'Manager Evaluation' with a profile picture of Nathan Hui, 'Employee: Nathan Hui', 'Plan: Onboarding Skills Assessment 2021', and 'Review Period: 01/01/2021 - 12/31/2021'. A progress bar below the header shows five stages: 1 Orientation (IN PROGRESS), 2 Stage 1 Assessment, 3 Stage 2 Assessment, 4 Stage 3 Assessment, and 5 Employee Sign-off. A sidebar on the left contains 'Employee Information' (selected), 'Overview', and 'Competencies'. The main content area shows 'EMPLOYEE INFORMATION' with details: Employee Name: Nathan Hui, Position Title: CEO of ABC Corp, Date Appointed: 11/26/2019, Manager, Organization: Executive Suite, and Review Period: 01/01/2021 - 12/31/2021. The 'OVERVIEW' section is partially visible at the bottom.



Competency Tags

Org Chart Reporting Admin Quick Find

Competency - Communication - Advanced

Details

Behaviors

Jobs

Interview Guide

Writing Assistant

Competency Details

Name: Communication - Advanced * Library: PeopleFluent Library

Display Name: Communication * Group: Core

Reference Key: Tag: Phase 1

Rating Scale: Competency 3-Point 3-Highest *

Inactive:

Competency Description

Languages: English (US)

Back to Library Competencies

Save and Add New Competency Cancel Save

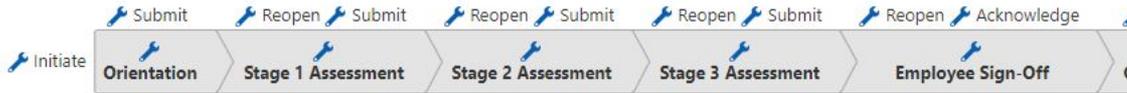
- A new “Competency Tag” element has been added for further grouping of skills and competencies within a library



Final Evaluation Process Configuration

Which evaluation workflow process do you want to use for this plan? Onboarding Skills Evaluation

Use this page to select and configure a workflow process.



[Manage This Process](#)

- Tags can be associated with a specific workflow step so that only the competencies with that tag are available for rating during that workflow stage
- This allows for specific competency sets to be based on the prerequisite of demonstrating all competencies or skills with a prior workflow stage

Configure State - Manager Evaluati...

State Details

State Name: Manager Evaluation

State Display Name:

State Description:

State Owner: Manager

Competency Tag Filters:

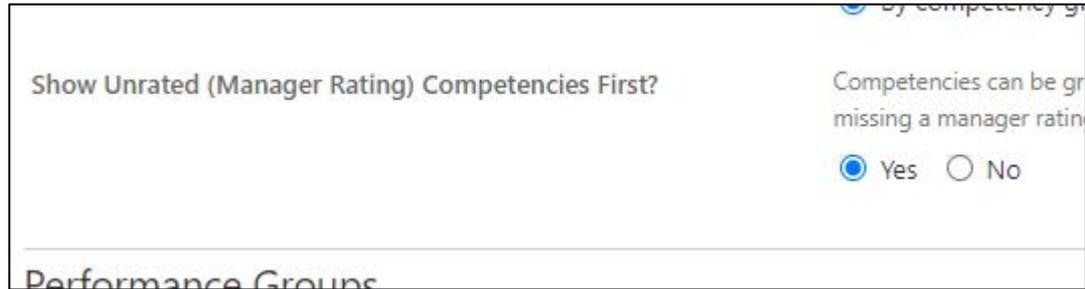
Task

Enable Task

Enable Task Grouping When checked, this option enables the grouping of tasks for this workflow state. You must also provide Task Group Text under which multiple tasks associated with this state will be grouped on the Task widget. [More](#)

Competency Display Options

- A new display option will automatically show any non-rated skills or competencies at the top of the Performance Form
- This will help users with a large list of skills to more easily keep track of any open items related to their skills assessment



by competency g

Show Unrated (Manager Rating) Competencies First?

Competencies can be gr
missing a manager ratin

Yes No

Performance Groups



Audit Trail Access

- Audit trail data is now available for use in Performance Plan Formulas
- This will allow for capturing user and timestamp information for a specific rating entry so that it can be recorded as part of the competency rating record and more easily reported upon in SmartGrids

[OffCycleAward](#)

[Organization](#)

[OverallRating](#)

[Participant*](#)

[PerformanceCompetencyRating](#)

[PerformanceEvaluation](#)

[PerformanceGoal](#)

[PerformanceGoalRating](#)

[PerformanceGoalScriptUtils](#)

[PerformanceGroup](#)

[PerformanceGroupCompetency](#)

[PerformanceHistory](#)

[PerformanceJobEssentialRating](#)

[PerformanceOverallRating](#)

[PerformancePeriodEvaluation](#)

[PerformancePlan*](#)

[PerformanceProcessInstance](#)

PerformanceCompetencyRating

Object type: PseudoEntity

Underlying domain entity: com.authoria.domain.entity.PerformanceCompetencyRating

Root binding name: PerformanceCompetencyRating ⓘ

Properties show OGNL

Name	Description	Data Type	
assessmentType		CompetencyAssessmentType	🔒
auditTrail		AuditTrail	🔒
competencyGroup		CompetencyGroup	🔒
competencyId		TEXT	🔒
competencyInactive		BOOLEAN	🔒
competencySourceSysRefKey		TEXT	🔒
dateObserved		DATE	
evaluationMethod		CompetencyEvaluationMethod	🔒



Ad Hoc Competencies

Performance Management Plan - Onboarding Skills Assessment

Options

- Basics
- Eligibility
- Competency Options
- Statements
- Advanced Calculations
- Lookup Tables

Included Competency Libraries

Adhoc competencies on the run time form can only be selected from the libraries included by any library.

NAME	COMPETENCY TYPE	RATING SCALE	LIBRARY SOURCE
Clinical Competencies	Clinical	Pass/Fail	

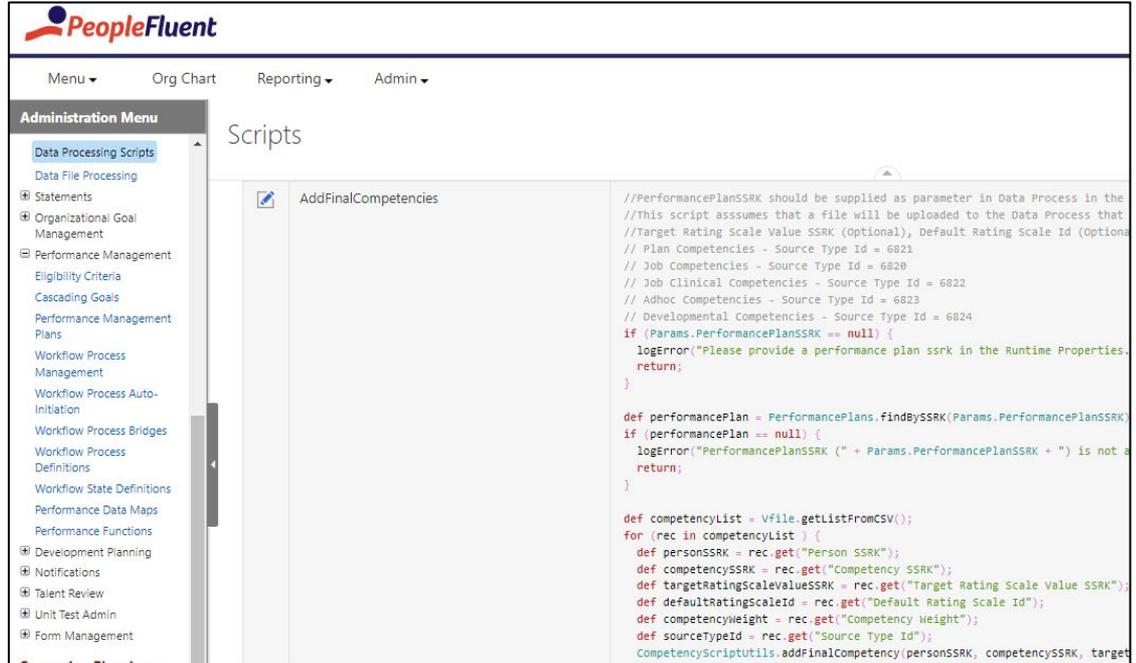
[Add](#) (1 total rows) Rows per page: 10

- When a Performance Plan has been configured to allow selection of Ad Hoc Competencies from within the Performance Form, a new option will allow for limiting the list of Competency Libraries available to the user



Data Processing Script - Add Competencies

- A new data file processing script will allow for individual competency assignments via a .csv file
- Competencies can be “inserted” onto an individual employee plan while the plan is live (no need for any reassignment efforts)



The screenshot displays the PeopleFluent Administration Menu. The 'Scripts' section is active, showing a list of scripts. The 'AddFinalCompetencies' script is selected, and its code is visible in the main area. The code is a Groovy script that processes a CSV file to add competencies to a performance plan. It includes comments and logic for error handling and data retrieval.

```
//PerformancePlanSSRK should be supplied as parameter in Data Process in the
//This script assumes that a file will be uploaded to the Data Process that
//Target Rating Scale Value SSRK (Optional), Default Rating Scale Id (Optional)
// Plan Competencies - Source Type Id = 6821
// Job Competencies - Source Type Id = 6820
// Job Clinical Competencies - Source Type Id = 6822
// Adhoc Competencies - Source Type Id = 6823
// Developmental Competencies - Source Type Id = 6824
if (Params.PerformancePlansSSRK == null) {
    logError("Please provide a performance plan ssrk in the Runtime Properties.");
    return;
}

def performancePlan = PerformancePlans.findBySSRK(Params.PerformancePlansSSRK);
if (performancePlan == null) {
    logError("PerformancePlansSSRK (" + Params.PerformancePlansSSRK + ") is not a");
    return;
}

def competencyList = vfile.getListFromCSV();
for (rec in competencyList) {
    def personSSRK = rec.get("Person SSRK");
    def competencySSRK = rec.get("Competency SSRK");
    def targetRatingScaleValueSSRK = rec.get("Target Rating Scale Value SSRK");
    def defaultRatingScaleId = rec.get("Default Rating Scale Id");
    def competencyWeight = rec.get("Competency Weight");
    def sourceTypeId = rec.get("Source Type Id");
    CompetencyScriptUtils.addFinalCompetency(personSSRK, competencySSRK, target
```



User Experience

What was the Problem?

- Performance Forms contain a number of “required fields” which must be filled out before performing subsequent process steps
- When required field data was missing, the user was presented with a generic dialog informing them that “required data” needed to be provided before moving further
- In cases where Performance Forms were lengthy or contained a lot of collapsible containers, it was difficult to locate any and all instances where required data might have been missing



Required Field Warning

- A new banner has been added to Performance Forms which will enumerate any and all instances where required data is missing
- The banner is interactive and clicking on a given item will set the cursor focus on the field in question

Validation Errors
Click an item listed below to correct the error:

- **Goal Title:** A value is required for this field.
- **Goal Title:** A value is required for this field.
- **Goal Category:** A value is required for this field.
- **Goal Category:** A value is required for this field.

Instructions:

Click "Add a goal" to add goals. It is typical to have 3-5 goals. A good goal is specific, measurable, actionable, realistic, and time based. Assign relative weights to each goal. The total weight of all goals should add up to 100%. When you are satisfied with your goals, click 'Submit' to send them to your manager for approval.

Team Goals [+ Add a goal](#) Total Weight: 0%

Goal Weight: [✖ Delete](#)

Goal Title: *A value is required for this field.

Goal Category: *A value is required for this field.

Goal Weight:

Expected Result:

Measure:

Due Date: (MM/dd/yyyy)

Status: Pending

Alignment: Align With Organizational Goals

[More Actions :](#) [Save](#) [Submit](#)

Displays a short, descriptive name that helps identify the goal, such as "Reduce monthly maintenance costs."

[Help Options](#)



Compensation Administration

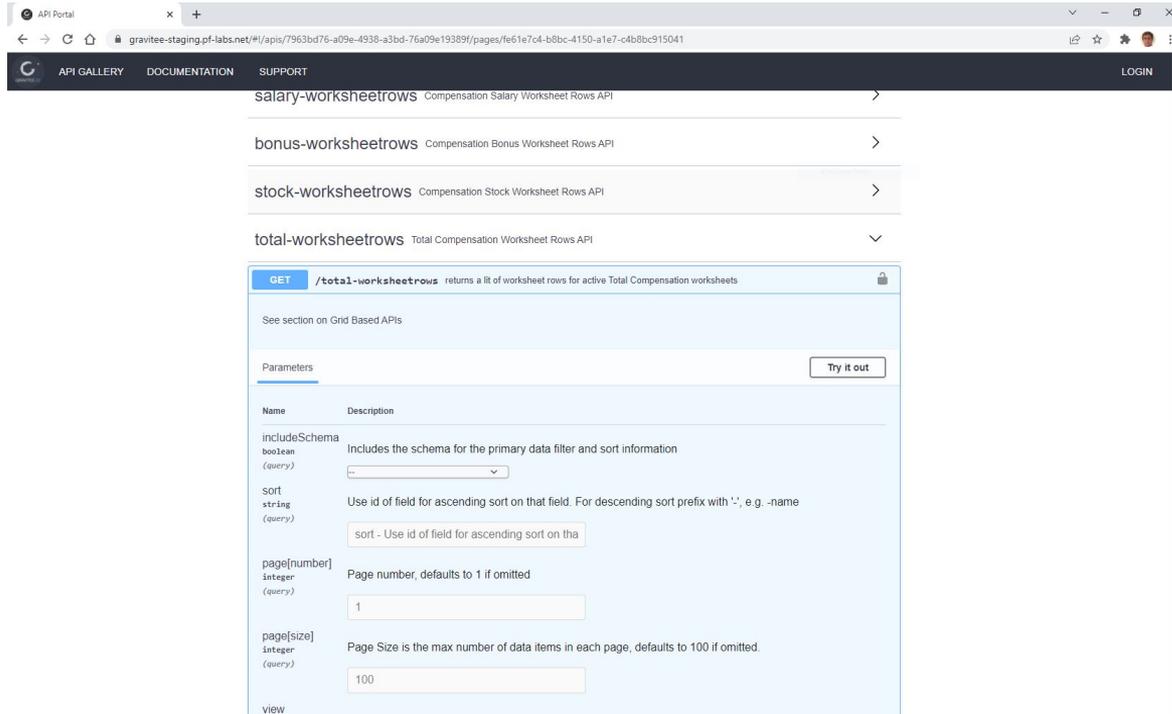
Worksheet API

What was the Problem?

- It's a common practice to utilize the compensation worksheet data in some kind of downstream process (like a data warehouse or other reporting solution) and to utilize the offline report request function in order to retrieve this data on an iterative and ongoing basis
- Limitations with the offline reporting process typically lead to situation where data can only be updated once a day
- The file-based nature of the offline reporting process also requires work on the customer's part to manage the file handling and processing in order to support their integration



How did we solve it?



The screenshot shows a web browser window displaying an API Portal. The browser's address bar shows a URL from 'gravitee-staging.pf-labs.net'. The page has a dark navigation bar with 'API GALLERY', 'DOCUMENTATION', 'SUPPORT', and 'LOGIN' links. Below the navigation, there is a list of API endpoints: 'salary-worksheetrows', 'bonus-worksheetrows', 'stock-worksheetrows', and 'total-worksheetrows'. The 'total-worksheetrows' endpoint is selected and expanded, showing its details. The endpoint is a GET request to '/total-worksheetrows' that returns a list of worksheet rows for active Total Compensation worksheets. A 'Parameters' section is visible, containing a table with the following details:

Name	Description
includeSchema boolean (query)	Includes the schema for the primary data filter and sort information <input type="checkbox"/>
sort string (query)	Use id of field for ascending sort on that field. For descending sort prefix with '-', e.g. -name <input type="text" value="sort - Use id of field for ascending sort on tha"/>
page[number] integer (query)	Page number, defaults to 1 if omitted <input type="text" value="1"/>
page[size] integer (query)	Page Size is the max number of data items in each page, defaults to 100 if omitted. <input type="text" value="100"/>

- A new REST API will allow for direct access to worksheet row data
- API utilizes the “grid-backed” framework which will allow for filters to easily pull recent changes, etc.
- API is accessible via the customer API gateway



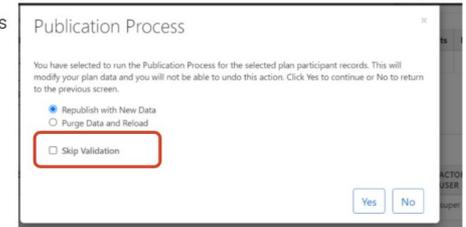
Selective Budget Calculation

What was the Problem?

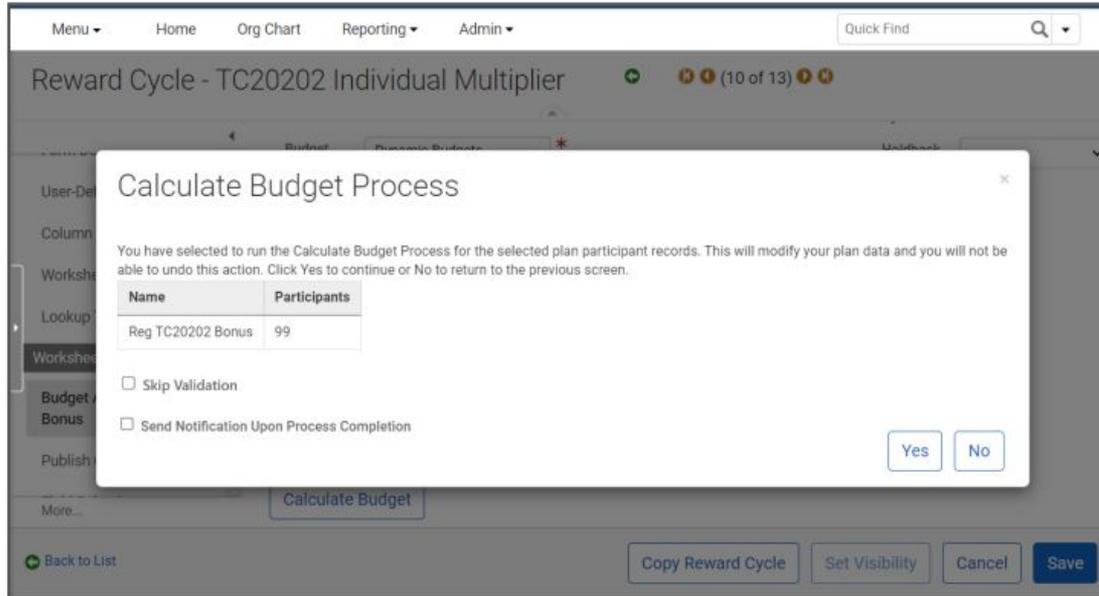
- In the 21.07 release, a new capability was introduced to allow the skipping of database statistics in cases where multiple publications were occurring on the same day
- This option was only available from the “Publish Options” page but not the “Budget Allocations” page
- When admins were leveraging the convenience of the Budget Allocation page to update worksheet budgets, this option was not available

Database Statistics - How did we solve it?

Any time a publication process is re-invoked within the same 24-hour period, a new option will be available on the confirmation dialog allowing the user to skip over the “Database Statistics” update process



How did we solve it?



- The Budget Allocations page will now provide the same prompt whenever a budget recalculation is performed more than once on the same day
- No configuration is required, the prompt will now automatically allow time savings in cases where multiple iterations of a budget recalc might need to occur outside of the Publication process



Onboarding

What was the Problem?

- In situations where there are a large number of active engagements going on, it can be difficult to effectively locate information for a specific engagement of interest
- This can get more difficult in situations where multiple individuals have engagement management responsibilities and may not have first hand familiarity with all active onboarding participants



Onboarding Engagement Subject Wizard

- Additional identifying information has been added to the engagement subject wizard
- Will allow for standard SmartGrid filtering to be used to more easily identify a specific employee for a new onboarding engagement

Select a Position for new Engagement

Please select the position whose current position holder you are planning to create a new engagement.

POSITION TITLE	ORGANIZATION	POSITION HOLDER	POSITION HOLDER EMPLOYEE ID
Accountant I	General Accounting	Robyn Varnier	000000277
Accountant II	General Accounting		000000282,000000278
Accountant III	General Accounting		000000276,000000281
Accounting Clerk 1	General Accounting	Michelle Frazier	000000287
Accounting Clerk 2	General Accounting		000000284,000000286
Accounting Clerk 3	General Accounting		000000283,000000285
Accounting Clerk 4	Cost Accounting	Amelia Herlica	000000157
Accounting Clerk 5	Cost Accounting	Jill McKain	000000158
Accounting Clerk 6	Cost Accounting		000000155,000000154
Accounts Payable Manager	Cost Accounting	Scott P Wheeler Jr.	000000035

1 2 3 4 5 6 7 8 9 10 » (100 total rows) Jump to page: Go

Rows per page: 10



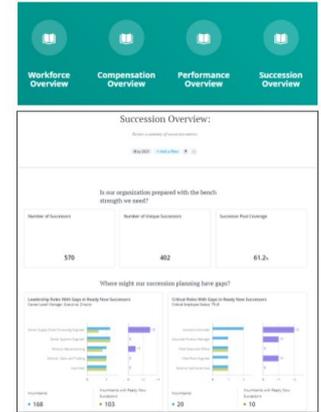
People Analytics

People Analytics

- In the 21.11 release, we announced the availability of our new People Analytics product providing a best-in-class library of analytic visualizations based on core data from the Talent Management platform
- We've continued to extend the data universe for this product by adding in new visualizations focused specifically on the planning processes that are managed with the Talent Management system

Coming this fall...

- New Analytics package providing interactive exploration and visualizations of key measures in business domains including Workforce Metrics, Performance, Compensation and Succession Planning
- Opportunity for Beta participation in Q3 (contact Account Manager if interested)



People Analytics

Two new analytic subjects are now available for viewing data about the Compensation and Performance Planning processes of the Talent Management platform

Overview Dashboards

- Guided Analysis
- Other Resources
- Admin Resources

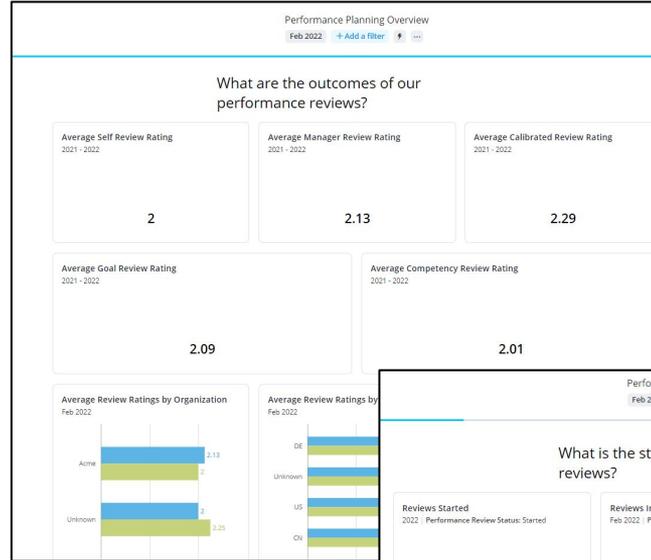
Workforce Overview **Performance Overview** **Compensation Overview** **Performance Planning Overview** **Compensation Planning Overview** **Succession Planning**

The screenshot shows a teal dashboard with a dark sidebar on the left containing navigation icons. A callout box points to two new tiles, 'Performance Planning Overview' and 'Compensation Planning Overview', which are highlighted with an orange rounded rectangle. The other tiles are 'Workforce Overview', 'Performance Overview', 'Compensation Overview', and 'Succession Planning'. On the left, there are links for 'Overview Dashboards', 'Guided Analysis', 'Other Resources', and 'Admin Resources'.

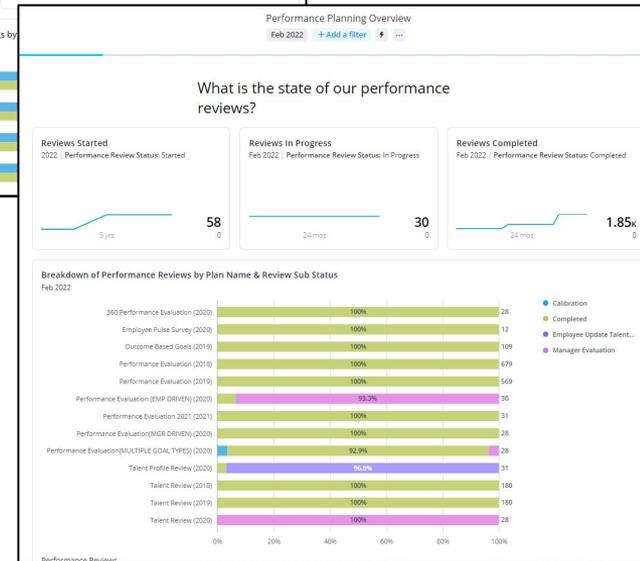


Performance Evaluation

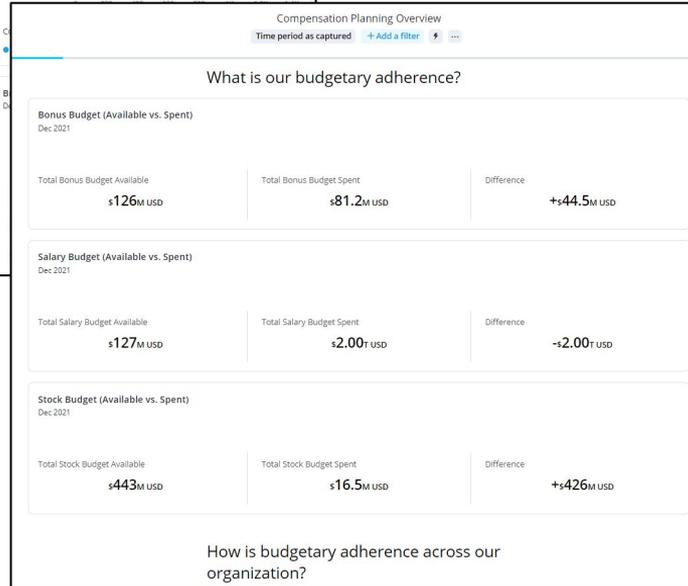
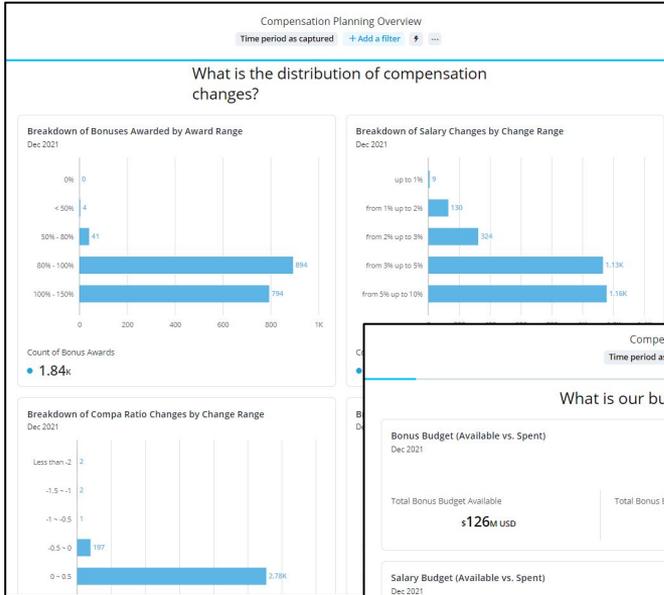
- New subject for viewing analytics for one or more Performance Plans



- Provides insights around compliance and participation of the Performance Process as well as analysis of process outcomes (overall scores, distributions and gap analysis)



Compensation Planning



- New subject for viewing analytics for one or more Compensation Reward Cycles
- Provides insights around budgetary adherence and well as compensation decision outcomes (comparatio movement, bonus achievement relative to target, etc.)





Any Questions



Thank You