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:

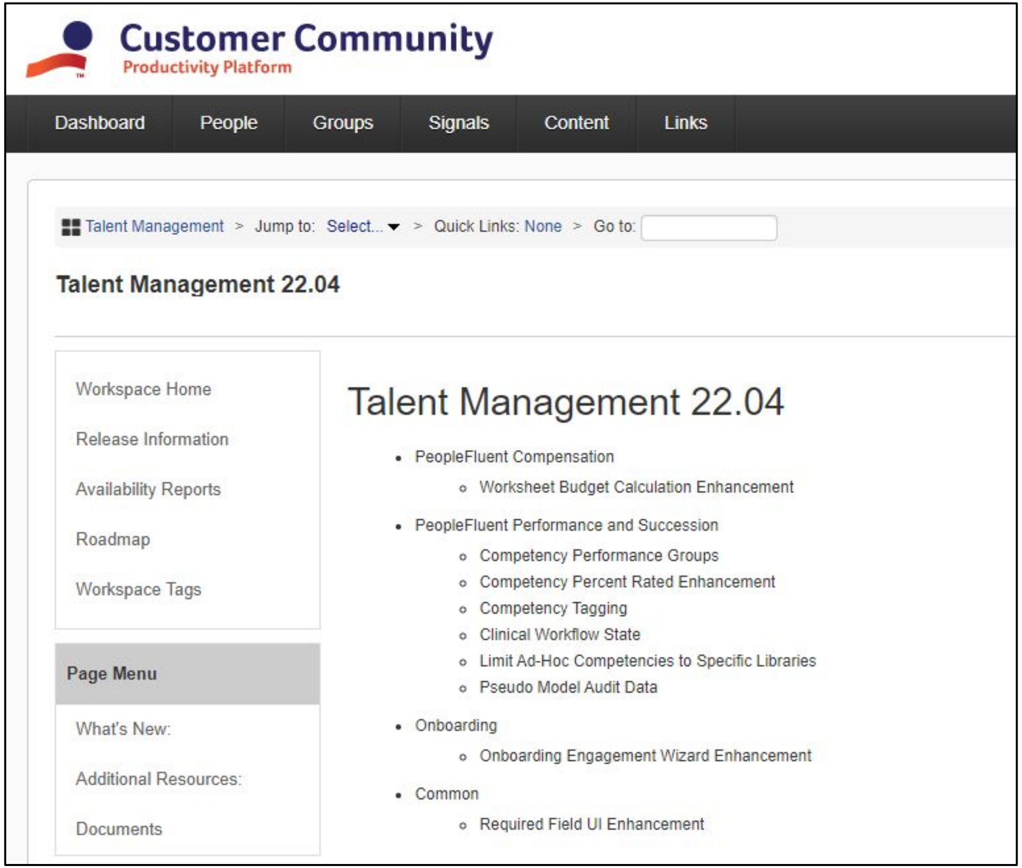
15 March, 2022

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



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

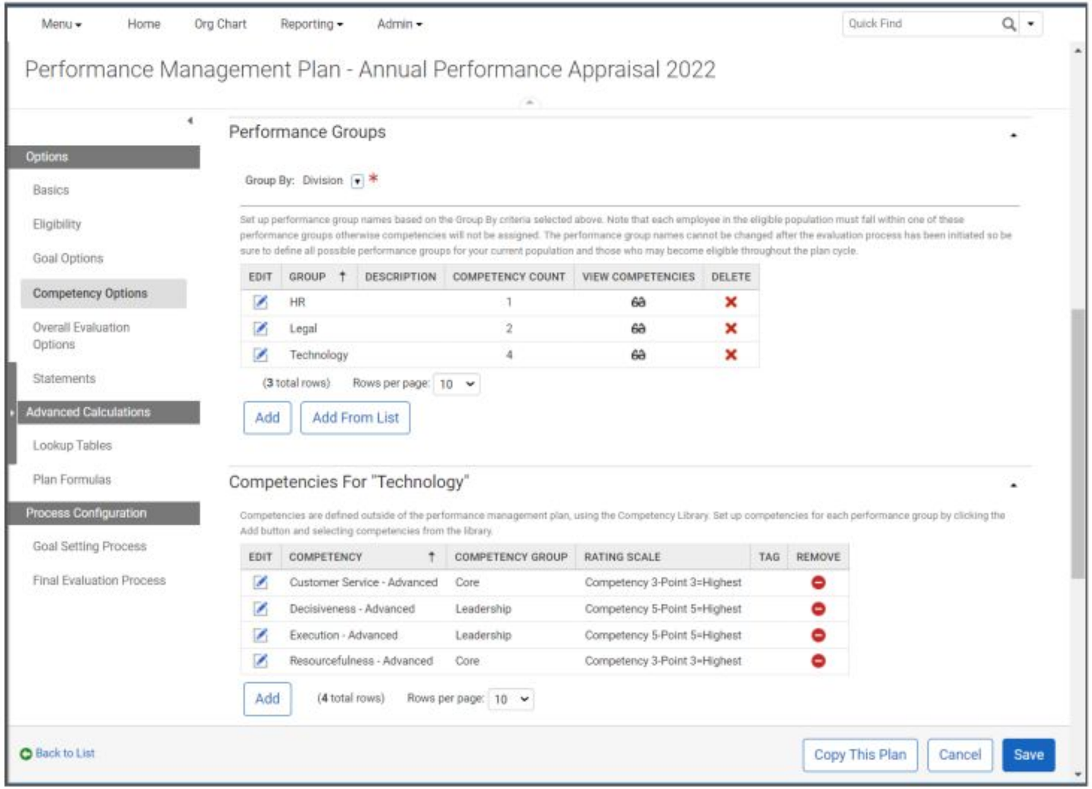
Competency Performance Groups

What was the Problem?

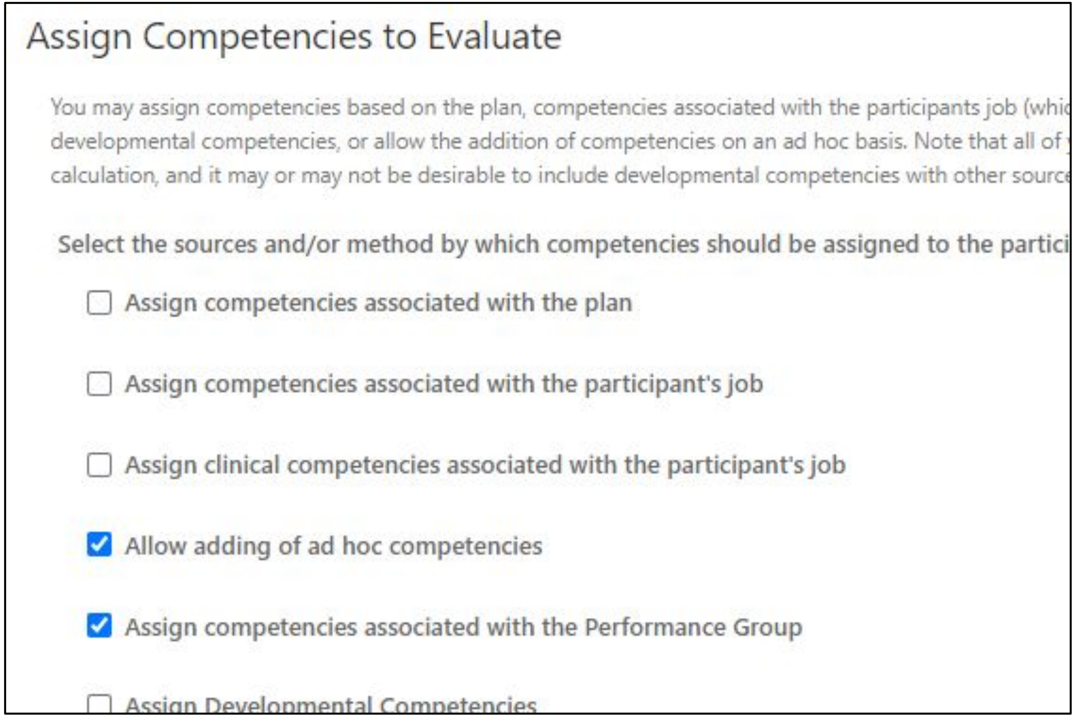
- When automatically assigning competencies to Performance Plan participants, there are two options available
  - A standard set for all participants of a given plan
  - Definition at the job code level
- In cases where additional variability is required (e.g. variations based on organizational assignment, 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)



Enabling Competency Performance Groups



- 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

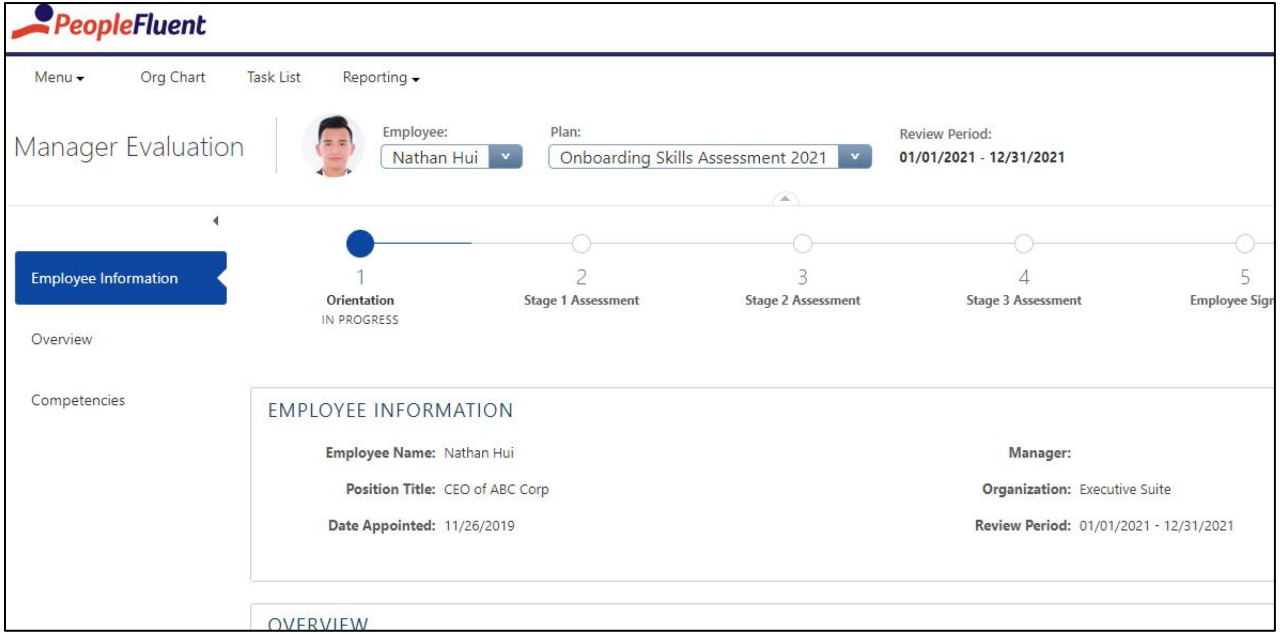
Progressive Skills Assessments

What was the Problem?

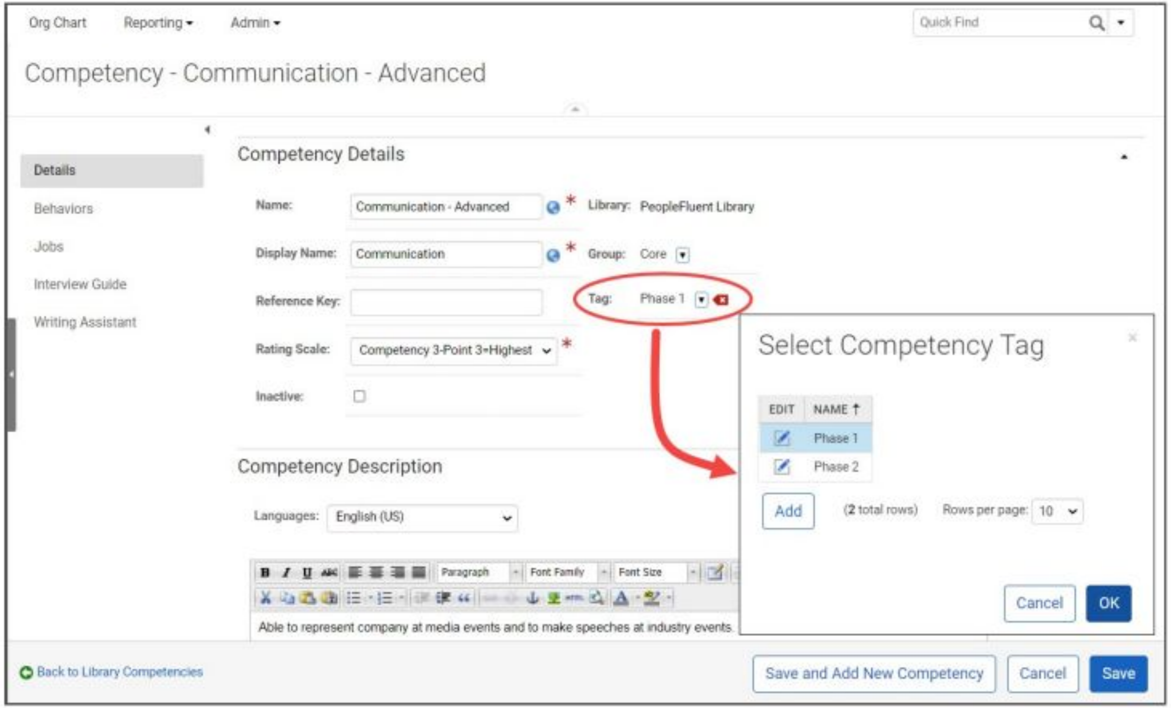
- The need for ongoing observational skills validation (vs. subjective periodic ratings) is growing leading to larger inventories of skills and competencies subject to in-person observational assessments
- Commonplace in regulated industries (healthcare, transportation, energy, etc.) with specific compliance 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?

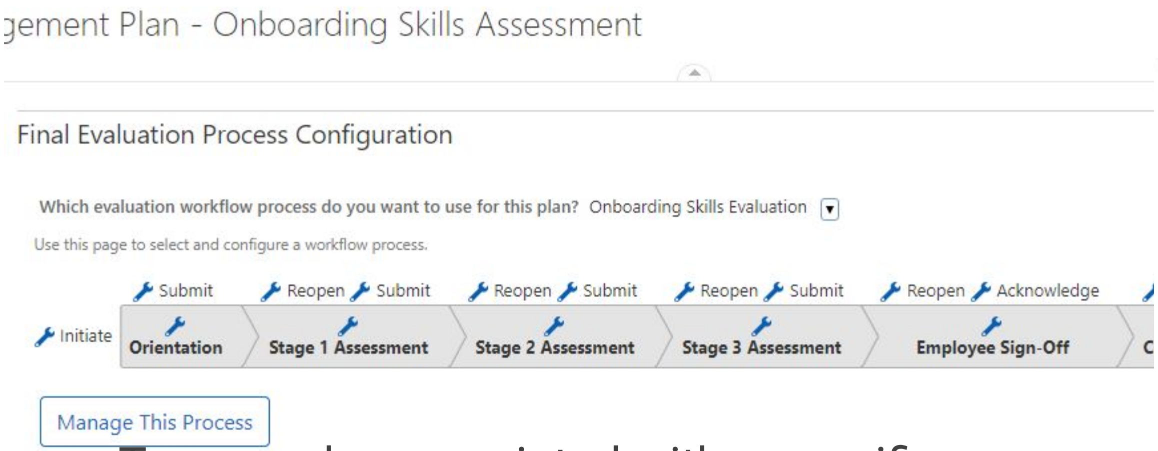
- The Observational Competencies framework has been extended to enable an iterative skills assessment program
- New set of configuration capabilities to support this process design

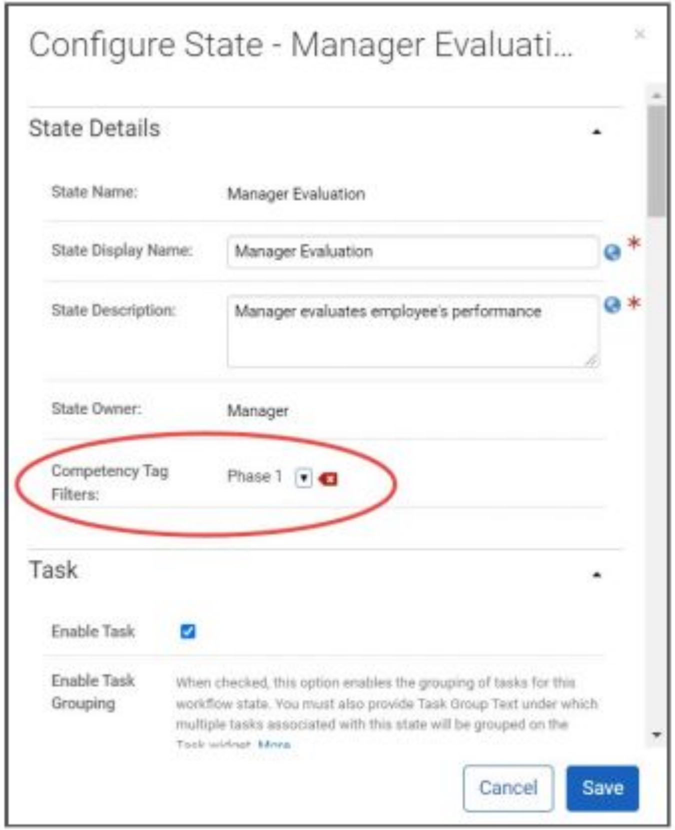


Competency Tags



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

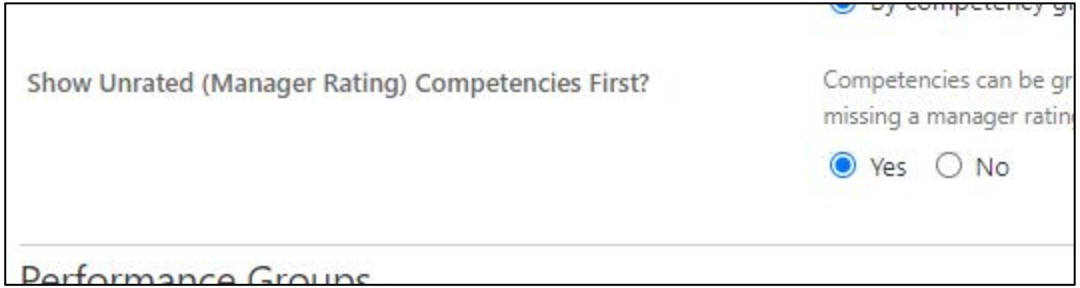




- Tags can be associated with a specific workflow step so that only the competencies with that tag are available for rating during that workflow stage
- This allows for specific competency sets to be based on the prerequisite of demonstrating all competencies or skills with a prior workflow stage

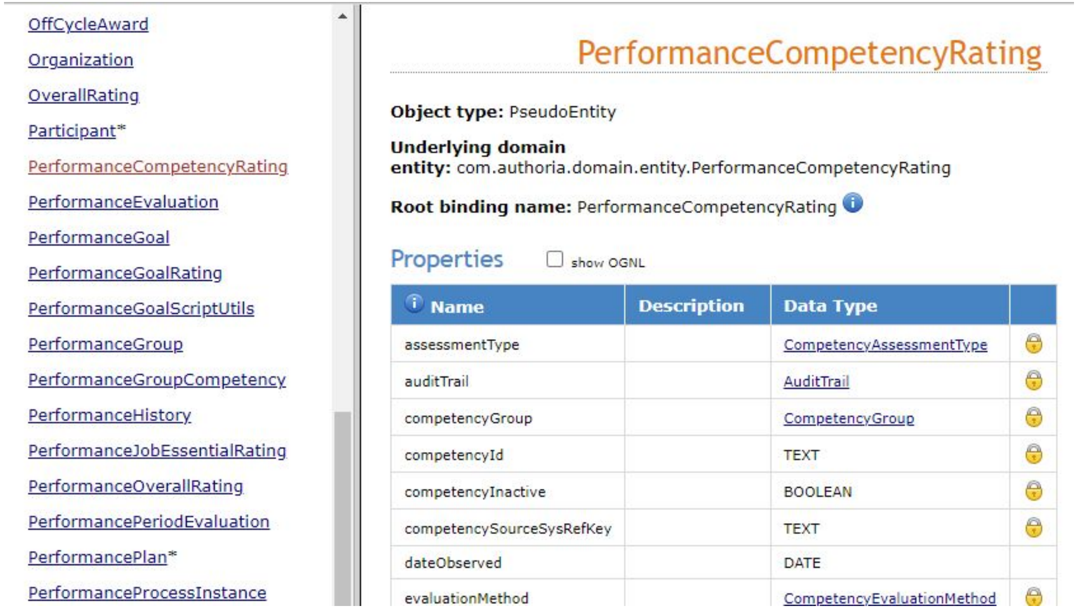
Competency Display Options

- 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

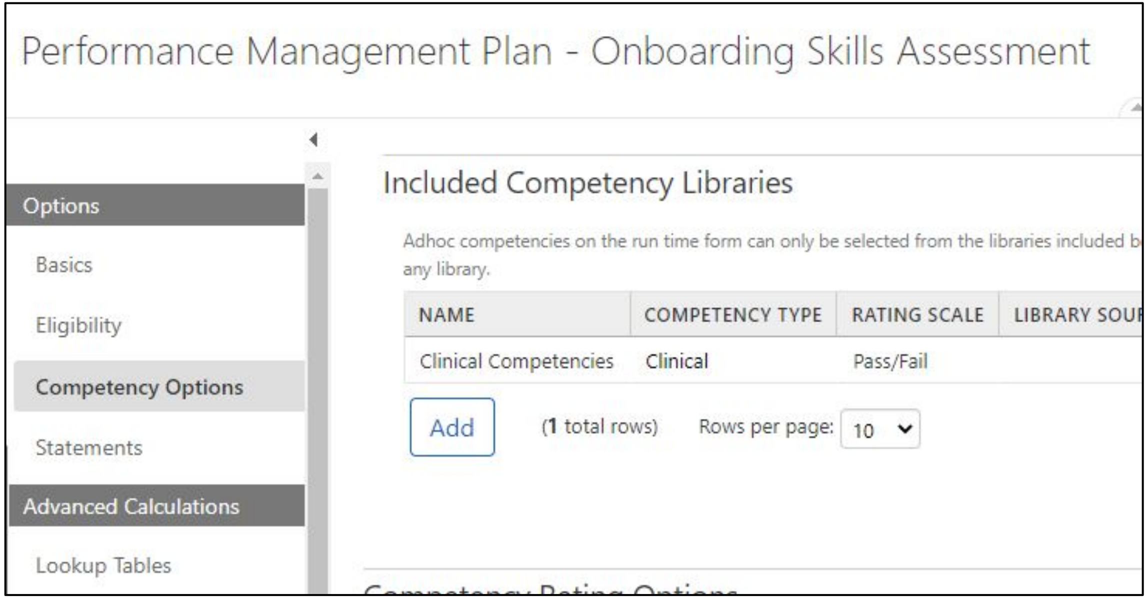


Audit Trail Access

- 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



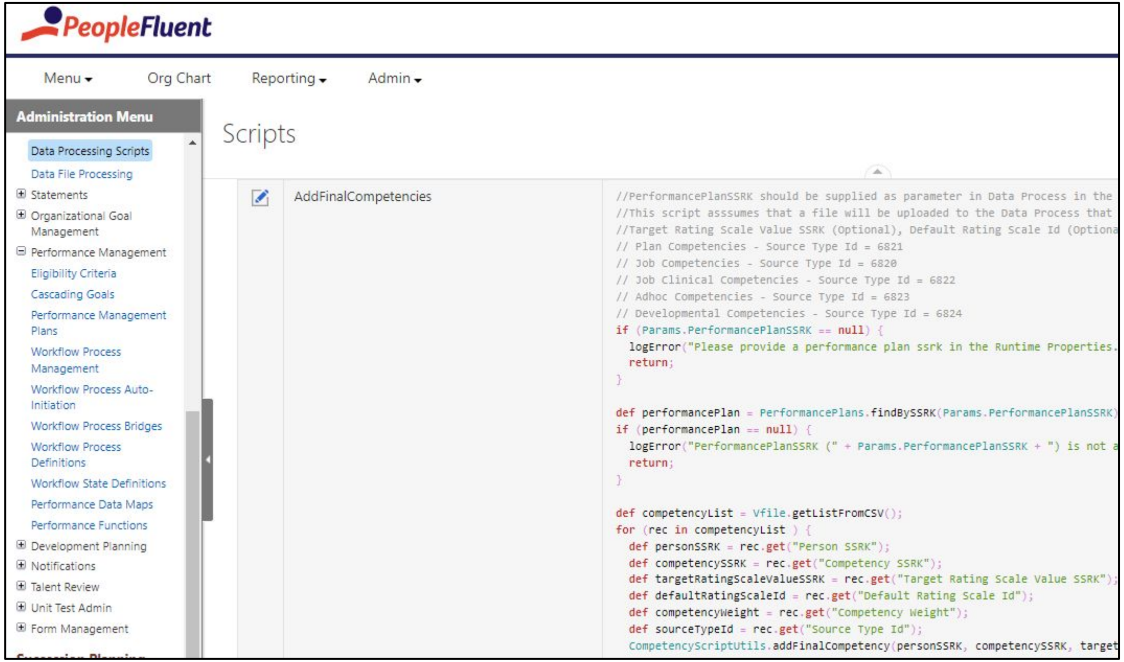
Ad Hoc Competencies



- 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)



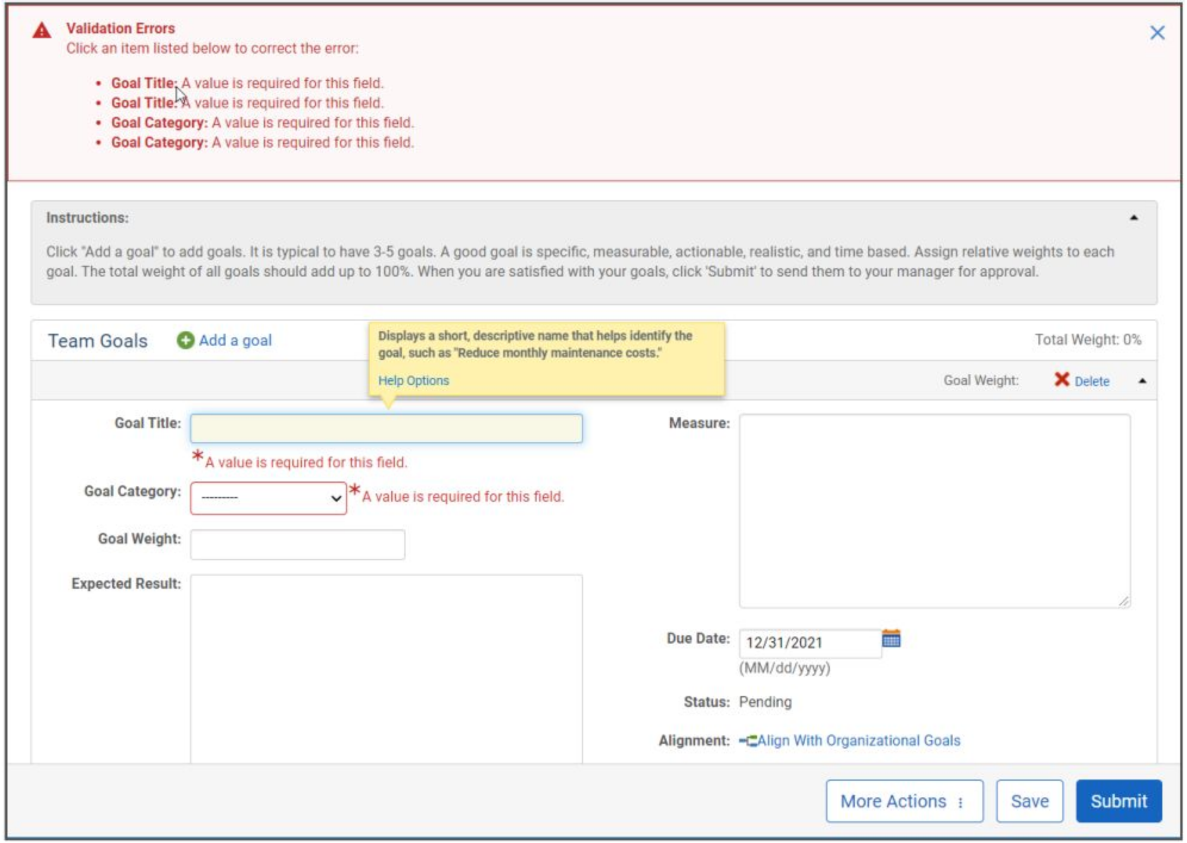
User Experience

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



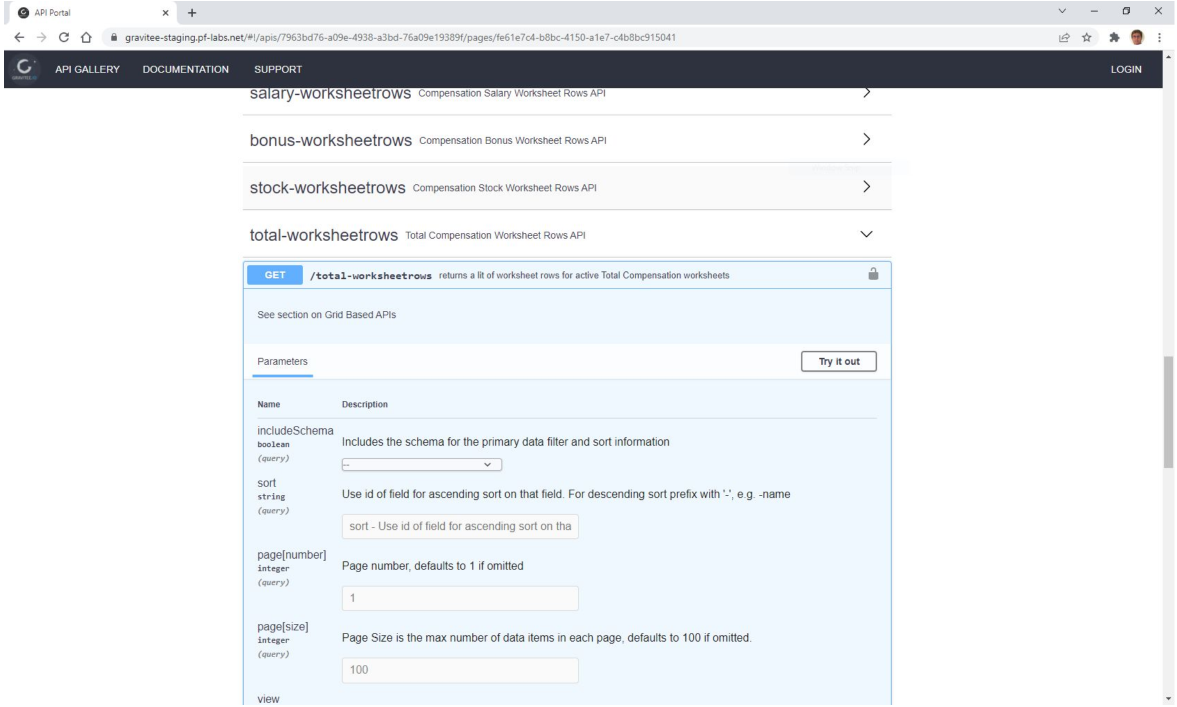
Compensation Administration

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?

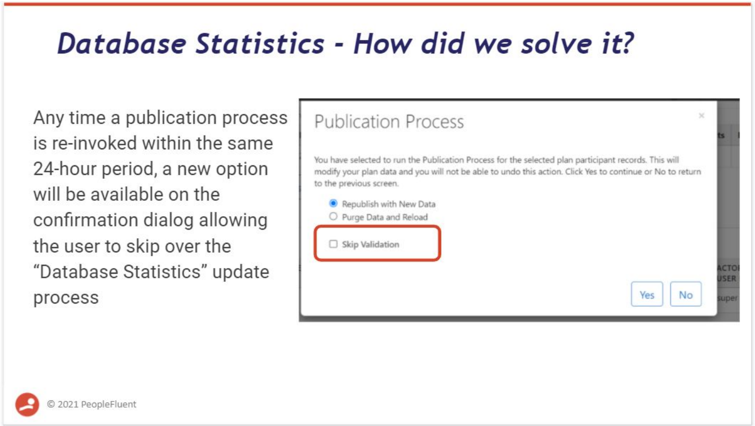


- A new REST API will allow for direct access to worksheet row data
- API utilizes the “grid-backed” framework which will allow for filters to easily pull recent changes, etc.
- API is accessible via the customer API gateway

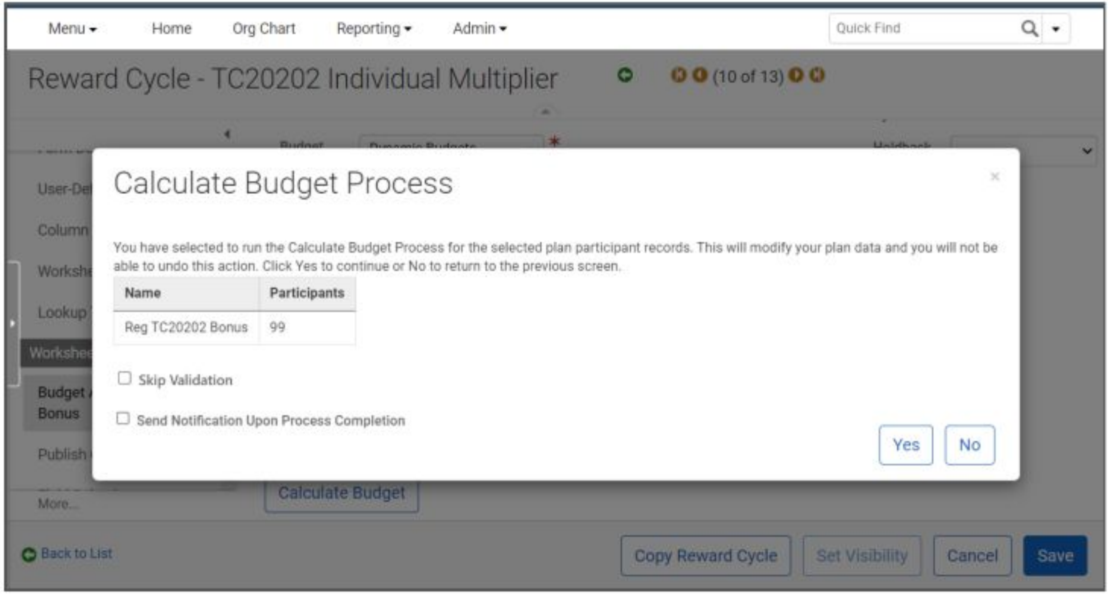
Selective Budget Calculation

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



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 how automatically and allow time savings in cases where multiple iterations of a budget recalc might need to occur outside of the Publication process

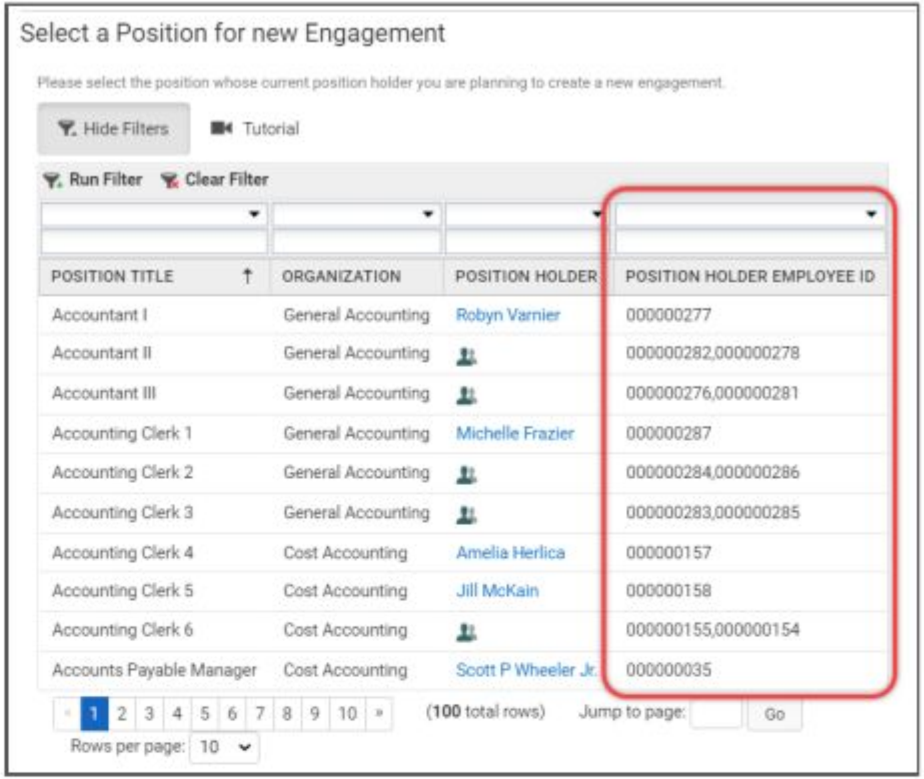
Onboarding

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.

Hide Filters | Tutorial

Run Filter | Clear Filter

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

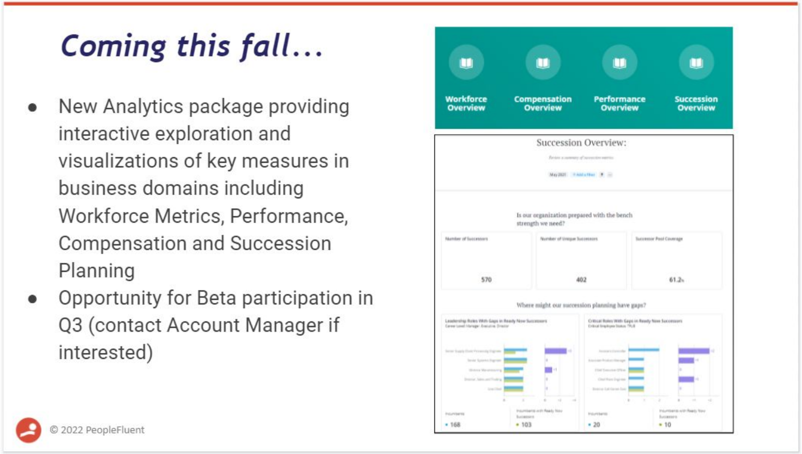
1 2 3 4 5 6 7 8 9 10 » (100 total rows) Jump to page: Go

Rows per page: 10

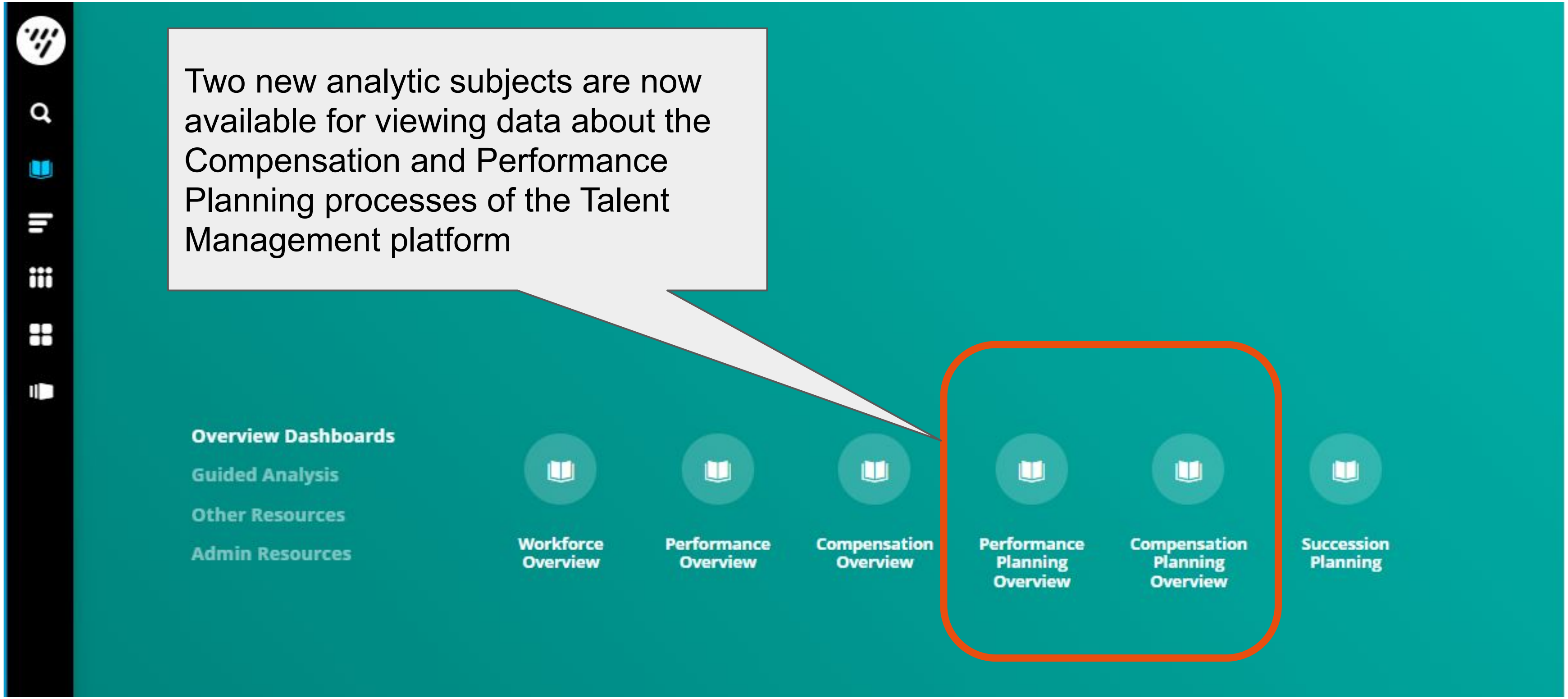
People Analytics

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

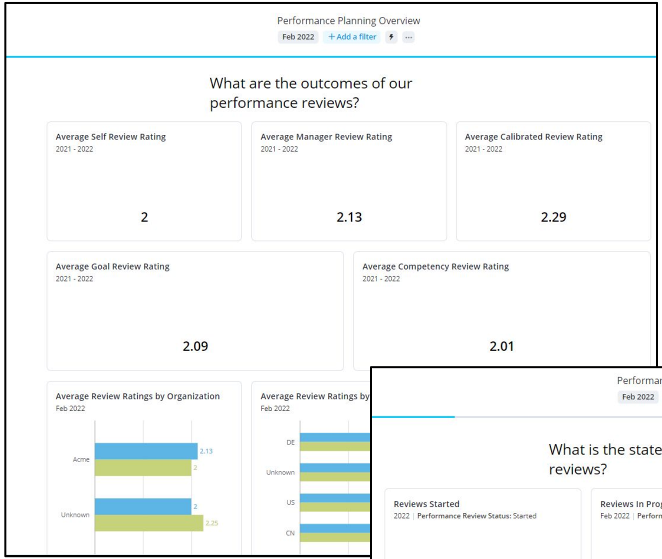


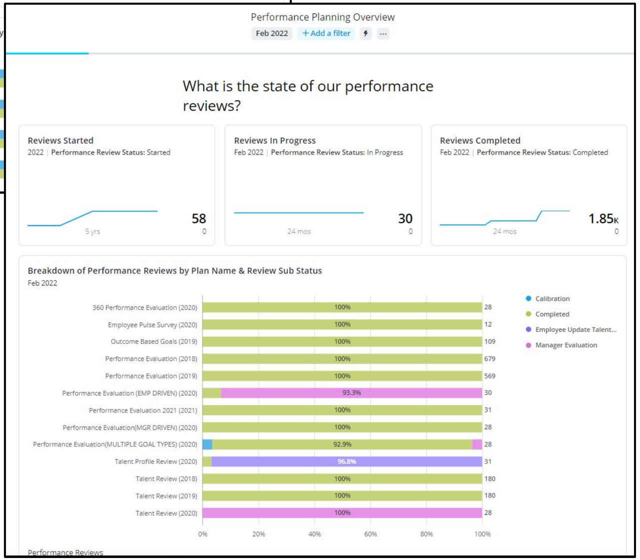
People Analytics



Performance Evaluation

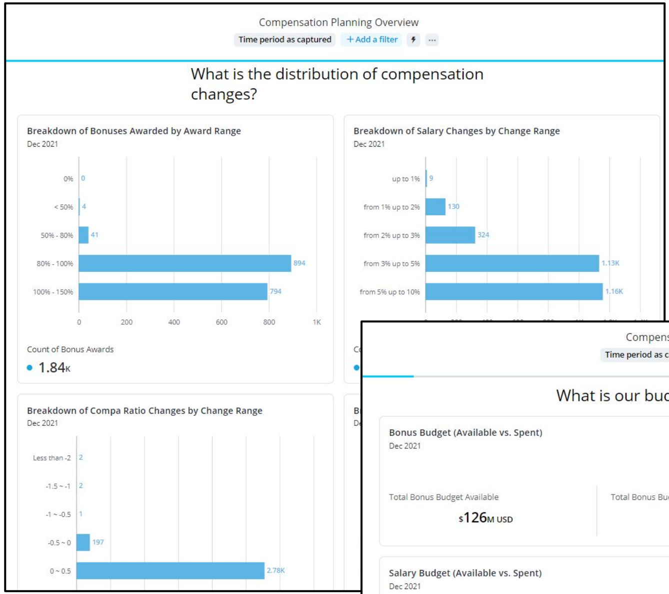
- New subject for viewing analytics for one or more Performance Plans

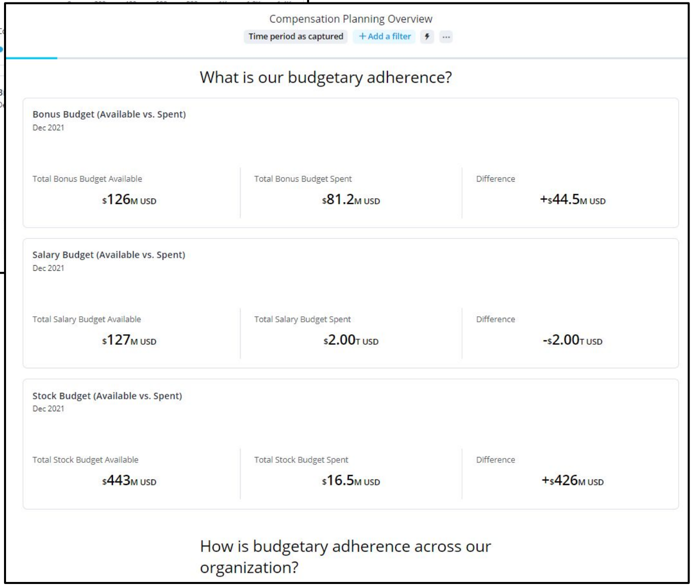




- Provides insights around compliance and participation of the Performance Process as well as analysis of process outcomes (overall scores, distributions and gap analysis)

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