A review of the SuccessFactors Job Profile Builder
Lessons learned and analysis of functionality following three deployments of the SAP/SuccessFactors Job Profile Builder
This white paper seeks to provide insight into the value and limitations of the SAP/SuccessFactors Job Profile Builder functionality. We will review case studies from Salt River Project, LINN Energy and EY client PNC Bank, focusing on deployment lessons, value added and functional gaps.

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Introduction

When deploying enterprise software solutions, we often seek “one version of the truth.” A system of record that feeds all related systems and processes is critical to effective business execution and analytics.

For human capital management (HCM) and talent management (TM), we focus on two types of data: people data and job data. People data represents the granular information we know about the people who work for and support the enterprise. Job data helps us organize and quantify all the roles, positions and expectations across the enterprise. Comprehensive job data that fluidly feeds into and supports all aspects of HCM and TM operations has long been difficult to define and integrate.

In this paper, we will review functionality built into the SAP/SuccessFactors cloud HCM solution called Job Profile Builder (JPB). We will start with a functional overview before looking at three case studies where JPB was deployed: Salt River Project, LINN Energy and EY client PNC Bank. Insights and lessons learned from these examples can help SuccessFactors customers make more informed decisions as they prepare to leverage the Job Profile Builder functionality.
The SAP/SuccessFactors talent management suite has historically leveraged user-specific demographic data to drive intelligent workflow and content delivery. With the expansion of its Employee Central HRIS, the broader human capital management suite needed a more efficient and robust way to centralize job-related functionality.

Building upon the Employee Central metadata framework, Job Profile Builder (JPB) was released early in 2014. This feature set replaced an older job description tool called Job Description Management.

JPB sought to centralize job data into a flexible, consistent format that could be leveraged by other modules – from recruiting and onboarding to performance, compensation and training – and for both tactical headcount and strategic workforce planning.

How does JPB work?

Job Profile Builder is an adaptable and instinctive tool used to identify the essentials of a job. It is a component within the SAP SuccessFactors suite that permits clients to recognize and define job descriptions, including qualifications, skills, experiences, education, certification, competencies and behaviors required for each job or position within an organization.

In addition to providing more detailed job descriptions, the data within Job Profile Builder helps clients identify suitable candidates for promotions, advancements and new positions, as well as development strengths and opportunities among their employees.

Within SAP SuccessFactors, the Metadata Framework (MDF) allows clients to easily extend and modify the behavior or change the logic and structures of the application. JPB was built on the MDF and, as such, can leverage other modules within SuccessFactors.

Additional to JPB is a feature called Skills Management, an optional element that allows clients to assess, designate and monitor employees’ skills, levels and proficiencies. Skills Management also leverages those attributes for resourcing, employee development, succession planning, and workforce and analytics.

Skills Management is part of the Job Profile that can directly impact all aspects of human capital management programs, including training, career development, workforce planning, recruitment, succession planning and performance. Incorporating Skills Management with JPB allows employees to view their skills and assess their need for training and development. It also lets managers and supervisors assess and inventory those same skills.

Why is JPB valuable?

It has been said that one of the most important factors of business success is having the right people with the right skills in the right jobs. Clearly understanding which jobs are within an organization and which skills are required for those jobs is an essential part of an impactful talent management.

As such, JPB:

▶ Offers a central reference point of all job descriptions, responsibilities and performance expectations
▶ Presents a customizable way to structure job-related data
▶ Addresses the threat of underqualified staff, while developing the skills the organization needs
▶ Allows visibility into a talent pool, so it can be mobilized to capitalize on growth opportunities
▶ Provides consistent job references for nuanced headcount planning and thoughtful workforce planning
How do you set up JPB?

Prerequisites to using Job Profile Builder are that the client must be a platform customer, using role-based permissions (and not legacy permission) and on the v12 user interface.

Along with the prerequisites, some decisions to consider include:

- Which value will be used as a job code?
- How do you map job structures and competencies?
- Which other modules could possibly leverage competency mappings?

Answering these questions helps identify required information needed to properly set up the tool for use.

Once the configuration decisions have been made, the following would occur to formally set up JPB:

- **Build content libraries** – Populate tables with content (family and job roles, education, competencies, skills, physical requirements, etc.)
- **Create profile templates** – Define the various formats and sections in the job profiles for your enterprise (content types, order of sections, required sections, formatting, etc.)
- **Create job profile** – Tie the profiles themselves to specific roles and job codes, presenting according to the defined templates and populated using either text or the library content

Once configured, job profiles are set up and mapped to job roles in SuccessFactors. A user’s profile would then be associated through his or her job code and visible from an employee’s talent profile. Additionally within the employee’s talent profile, the Skills Profile Portlet can be viewed. If configured, the Skills Profile Portlet will populate skills from the job profile.

Which modules benefit from JPB?

JPB integrations throughout the SuccessFactors suite are still being expanded. However, there are several modules that JPB impacts directly as of this paper’s release. They include:

<table>
<thead>
<tr>
<th>Employee Profile</th>
<th>Succession</th>
<th>Career Development</th>
<th>Performance</th>
<th>Recruiting</th>
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<tr>
<td>Users can access an employee’s job profile information through the employee profile. Users can also search skills from the company directory, allowing a user to search and find people who have certain skills.</td>
<td>Position profiles allow users to manage profiles by position instead of just by role as skills, competencies and job descriptions vary per position. Also, positions are now considered single instances of a role.</td>
<td>Within the career worksheet, users can view job profiles when viewing career path or suggested role information.</td>
<td>The competency portion of Job Profile Builder can be integrated into Performance Reviews. Including competency into the Performance Review also brings in the associated behaviors of that competency.</td>
<td>The Recruiting JPB integration can populate job requisitions with pre-defined job profile content that aids in consistency within the job requisitions. Also, a user within Recruiting can edit competencies or skills within the requisition without affecting the job profile library.</td>
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Furthermore, the metadata structure of JPB feeds into other aspects of talent data management that can impact onboarding, performance management and learning management. This functionality is driven from the JPB competency library and job-related data that flows back into the employee profile.
Salt River Project (SRP) is one of the nation's largest public power utilities, providing electricity and water to more than 2 million people. The SRP power district is one of the nation's largest public power utilities and provides electricity to approximately 1 million retail customers in a 2,900-square-mile service area that spans three Arizona counties. SRP is an integrated utility, providing generation, transmission and distribution services, as well as metering and billing services.

Project summary

SRP began its Job Profile Builder journey while implementing Succession and Career Development in 2014. This was early in the SuccessFactors deployment of JPB 2.0, which was released in January of that year. SRP decided to implement Job Profile Builder 2.0 to take advantage of building a centralized job description and competency library and to leverage the MDF infrastructure being built by SuccessFactors. SRP also lacked a tool that could bring together job description and competency data and then use that data as part of the infrastructure of SuccessFactors.

SRP first embarked on a yearlong effort to standardize and simplify the job description and competency identification process. This effort involved representatives from Compensation, Talent Management, Talent Acquisition and the SRP SuccessFactors team. The project reduced the number of job descriptions from over 2,500 to about 600. It has created new job codes to properly identify the unique situations where the more generic job description did not adequately describe the essential duties of the job.

SRP also used competencies as a way of redefining job descriptions for leadership positions. SRP typically promotes leaders in the company based on their characteristics and behaviors. After reviewing the current job descriptions for these positions, SRP adopted a leadership “role” in Job Profile Builder where leadership competencies define the uniqueness of the role. This allowed SRP to dramatically reduce the number of leadership job descriptions by combining many leadership jobs into a single job profile. Managers can still further define requirements when a requisition is posted, but the standard leadership job description is based on leadership behaviors.

Overall, the implementation of Job Profile Builder 2.0 has been a success for SRP, but a number of product deficiencies and integration gaps that have resulted in less functionality than SRP had planned for and frustration on the part of those using Job Profile Builder. SRP has an excellent working partnership with SuccessFactors and is working with Product Development to close the gaps and enhance both the Job Profile Builder product and the integrations of JPB into other SuccessFactors modules.

Value added

Some very powerful features of Job Profile Builder were missing from SRP's current processes and systems. The implementation also required discussion and agreement within the HR organizations responsible for compensation, talent acquisition and talent management.

Implementing Job Profile Builder has provided SRP with a number of improvements and capabilities:

1. Centralized management of job descriptions and competencies
2. Dramatically simplified job descriptions
3. A focus on leadership behaviors and competencies for management positions
4. Pre-filled requisitions
5. Identification of job-specific competencies to be used in performance management, career development and succession planning
6. A new process for evaluating new jobs, which should better align to market pricing
7. A platform to integrate with future SuccessFactors development efforts
Lessons learned

The current Job Profile Builder has a number of shortcomings. SRP is actively working with SuccessFactors Product Development to address these needs. In addition to desired product enhancements, SRP discovered a number of issues with its own processes that needed to be fixed and/or revised in order to work more effectively with the JPB products:

1. Process-based lessons learned:
   a. Keep it simple – remember that the more generic the job description is, the more likely it can be used effectively in Job Profile Builder
   b. Combine job codes into a single JPB role whenever possible
   c. Limit the number of competencies identified in each role
   d. Involve the business – in this instance, due to time constraints, since SRP was unable to involve stakeholders in the business as needed, JPB families and roles continue to change, which could have been avoided with more business involvement
   e. Consider using an already supported Competency Library like Lominger or SHL, which both support out-of-the-box “integrations”

2. Product-based lessons learned:
   a. JPB security needs to be more fully developed with more granular security supported in Roles Based Permissions.
   b. There are character limitations for certain JPB field types.
   c. The “Questions” section of JPB does not currently integrate with the “Questions” feature in Recruiting.
Case study: LINN Energy
(Source: SAP)

LINN Energy is an independent oil and natural gas limited liability company that focuses on developing and acquiring long-life properties to complement its asset profile in producing basins within the United States. Founded in 2003, LINN Energy is a top-20 publicly traded, multibillion-dollar exploration and production company with approximately 1,800 employees across the US.

Project summary

LINN Energy began its Job Profile Builder journey while implementing Recruiting Management in 2014. This was early in the SuccessFactors deployment of Job Profile Builder 2.0, which was released in January of that year.

LINN Energy later incorporated JPB in its performance management process. The performance documents were prepopulated with profile-aligned competencies from JPB.

LINN Energy’s primary purpose for deploying JPB was to standardize job descriptions, foster collaboration with the compensation team, and increase efficiency and quality of its recruiting processes. Key values included the following:

1. Standardized and centralized the creation and management of job descriptions
2. Improved requisition quality and consistency
3. Reduced the time it took to post job requisitions through process automation

LINN Energy’s deployment of JPB went with an admin-owned job profile management, with no creation or updating of request workflows. However, in order to allow hiring managers to view and feed job profile data into new requisitions, JPB required granting some administrative permission to managers.

Value added

After creating the foundation and library of profiles in JPB, LINN Energy looked to expand into performance management. It was able to tap into Job Profile Builder as a source of populating job-specific data in an employee’s performance document. Employees and managers could then rate and track information related to those competencies.

This required LINN Energy to build a competency library and map job-specific competencies to each role. LINN Energy ultimately structured its competency library into three categories: core, leadership and functional.

LINN Energy plans to roll out succession and development planning to enhance processes focused on attracting, developing and retaining the right people.
Lessons learned

In leveraging Job Profile Builder for both recruiting and performance purposes, LINN Energy learned a variety of lessons:

1. **Importing and managing data** — Setting up job families, roles and competencies to support JPB required a substantial internal effort outside of the tool and generated a great deal of data. The JPB import process has many components, templates and steps. Organizing and managing changes via the data imports took some effort and creative workarounds.

2. **Consolidation is key** — Redundancy (even similarity) between multiple competencies and job profiles reduces their value. Every effort should be made to consolidate and streamline roles and competencies.

3. **Accessing job profiles** — To allow hiring managers to see any job profiles for creating requisitions requires giving access to all job profiles or creating role-based permissions at the job profile level. Giving access to all profiles required LINN Energy to hide sensitive data that was prepopulated on the requisition, such as market points and short-term incentive percentages.

4. **An unexpected user experience** — In order for hiring managers to search job profiles when creating a requisition request, they must have admin-level access to view job profiles. This meant giving visibility to admin tools navigation and functionality, which is not typical for this end-user population.

Seeking to build upon their deployment, LINN Energy has sought partnerships with SAP Product Management and other client communities to promote enhancements and understand some of the tool’s more complex capabilities.
Case study: PNC Bank

For more than 160 years, PNC Bank (PNC) has been committed to providing clients with notable service and influential financial knowledge to help them meet their financial goals. PNC offers a wide range of services for all customers, from individuals and small businesses to corporations and government entities. PNC provides deposit, lending, cash management and investment services to more than 6 million consumer and small business customers across 19 states and the District of Columbia.

Project summary

In early 2015, PNC Bank deployed Job Profile Builder 2.0 as a driver of the SuccessFactors Succession module. This came on the heels of deploying Performance Management, Career Development Planning and Goal Management. The purpose of PNC's deployment of JPB was to enrich enterprise succession quality and efficiency. Specific values the client targeted included:

1. Career path clarity and succession nomination to drive development planning
2. Suggested jobs driven by competency matching
3. Succession planning based on competency matching

PNC collaborated with EY to facilitate extensive line-of-business workshops to review all job descriptions and their related career paths. The workshops were grouped into four phases and resulted in up-to-date job data in Kenexa.

One challenge PNC encountered was data conversion. During its job profile and career path workshops, PNC identified nearly 1,500 job profiles. With all the profile section data and complex competency proficiency data, PNC faced a mountain of data transformation as well as the need to load it into SuccessFactors. Leveraging the expanding MDF data import tools, EY developed a tool for systematic data ETL (extraction, transformation, load), building foundational job profile references and deriving a series of section-by-section JPB import files.

The result turned an estimated effort of 1,000 person-hours into less than 200 hours of tool development and data ETL.

Value added

Overall, PNC has found JPB an important tool in driving its succession, performance and development activities. While rolling out performance, succession and development functionality to different lines of business throughout 2015, having a comprehensive source of job data has been very valuable.

New, more efficient business processes now allow managers and HR business partners to more fluidly integrate performance, development and succession processes.

Lessons learned

During earlier deployments of Performance Management and Goal Management, only a set of core competencies had been used to support 360 reviews. However, an extensive library of competencies was incorporated into the job profile and career path workshops, wherein all jobs had 8 to 13 related competencies and proficiencies.

Understanding that the competency and employee proficiencies heavily influence much of the succession job and nomination suggestions, PNC decided to import the new competency library (with nearly 1,400 competencies) and incorporate those proficiency levels with PNC's new job profile data. Furthermore, the presence of competencies within the job profile created a gap in its performance management. PNC needed some way to rate employee proficiency against this new library, particularly for those associated with their current job. Consequently, PNC chose to create a new competency assessment form in CDP to assess competencies associated with an employee's current or target position.

Recognizing the need to hold project delivery dates, EY pulled in SuccessFactors product specialists aligned tightly with PNC leadership and PMO resources. As a result, EY developed an innovative ETL solution for the Job Profile Builder functionality that kept the work on time and under budget, despite the change in design direction.

EY also leveraged our global SAP alliance to bring SuccessFactors product management to the table over concerns over functional gaps. In the case of PNC, most of these related to the display and view of profiles from within Succession. On one occasion, product support even push an enhancement into the immediate quarterly release.
Conclusion

Looking across these three case studies, we find consistent themes to their deployment challenges and lessons learned.

Plan ahead … but stay flexible

SRP and LINN Energy encountered a limitation in how job data is managed between JPB and Recruiting. EY has encountered similar frustrations with other clients related to leveraging job profile data and maintaining recruiting data. In most cases, the ability to see these limitations ahead of time has helped customers with thoughtful reviews of their business process and helped them move toward a more consistent, leading practice. When these implications are not discussed early on, the project can be put at risk. The client must make in-flight decisions about its future processes to accommodate both its requirements and the system capabilities.

Less is more

PNC, SRP and LINN Energy discovered that the more their job data could be consolidated, the more effective they could manage their development and succession processes. Overly descriptive job profiles resulted in less overlap and more fragmented talent pools. When competencies were grouped in core and leadership buckets (shared across the organizations), they gained a better sense of their shared workforce capabilities and its potential flexibility. This efficiency flows into other areas of learning management and workforce analytics, where a core set of required capabilities makes training and workforce planning much more manageable.

Build and maintain a good partnership

PNC, SRP and LINN Energy all had to make difficult process and system deployment decisions. In some cases, the customer wasn’t completely satisfied with the current system capabilities. The strength of its implementation partnership and its ongoing support partnership proved critical.

Working together, PNC and EY mitigated the data import and Performance Management rework required to keep PNC’s project on time. SRP and LINN Energy relied upon a direct SAP/SuccessFactors partnership to understand options and relied upon continued product enhancement.

Final thoughts

The Job Profile Builder represents a critical piece in highly effective, holistic human capital management. For this reason, it adds significant functional value and cohesion across the SuccessFactors product suite. The data set required, though, is often new to HR operations, particularly as a shared definition for global clients. For this reason, EY takes care to help clients coherently describe these critical roles at the start of a JBP implementation. That exercise has become a hallmark of our JBP engagements for both US and internationally based clients.

Recognizing the likelihood that clients leverage third-party roll descriptions (as with PNC utilizing Kenexa), we have been working with SAP to design standard interfaces from more common industry sources.
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EYG no. 00766-161US

BMC Agency
BACS 1003656

ED None

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