

# PEOPLESOFT ENTERPRISE SUCCESSION PLANNING



## SUCCESSION PLANNING

- Succession 360
- Talent Pools
- Configurable rating box

*Oracle's PeopleSoft Enterprise's Succession Planning is part of PeopleSoft's integrated talent management solution. This solution provides the tool for an organization's continued success to determine who will eventually replace employees currently in key positions. The Succession Planning business process enables users to develop and maintain succession plans for individual jobs, employees and positions as well as track and manage employees in talent pools. This enables an organization to develop their plans at the level that they require.*

### Introduction

In the past, succession planning has traditionally occurred very infrequently by a designated group of individuals, which may or may not include line managers. This group typically included core HR professionals and perhaps board and executive staff members. As a result of the focus on talent management, we are finding more organizations recognizing the need to develop succession plans for key positions especially during major changes in an organization such as mergers, acquisitions or loss of key talent. Many organizations are trying to find ways to get managers involved on a more frequent basis in identifying key positions as well as developing plans for these key roles.

As talent shortages emerge due to lack of skilled talent and downsizing, and employers become increasingly concerned about the impending departure of baby boomers from the workforce, succession planning has taken on new importance in organizations. In order to ensure smooth transitions in and out of key roles, organizations are finding it critical to have a detailed succession plan in place for their key jobs and not just executive positions. Providing manager and employee self-service views and transactions to support career and succession planning processes enables this process to be continuous instead of an annual task. Enabling managers and employees with career and succession planning information promotes active participation in the planning process with visibility for all necessary individuals and ensures the right people with the right skills are in the right positions at the right time.

### Best Practices

With the constant search for skilled talent continuing to grow, many organizations are recognizing the benefit of investing in internal development for key positions. By focusing on internal development, organizations are able to develop career and learning paths to align with anticipated talent gaps. Internal development in

conjunction with regular talent reviews ensures the careers of key individuals will match the critical needs of the organization.

Technology is a key factor to the success of any talent management plan. Providing an integrated Succession Planning solution with Human Resources, Career Planning, Performance, and Learning processes enables an organization to use the most accurate information for their succession plans thereby increasing credibility in the application of these plans.

### **Integration**

Process integration plays a key role in the application of any Succession Planning solution. It is critical to align succession plans with potential successor's career paths, performance and goals, as well as assigned learning to meet their goals. PeopleSoft Enterprise Succession Planning provides you with an integrated Talent Management solution to accommodate this process.

New integration points available in Succession Planning include:

- Integration with Enterprise Learning Management to allow the review of learning needs and enroll in related courses, plus associate learning programs with talent pool members.
- Integration with ePerformance to allow the review of development plans.
- Integration with Profile Manager to support the matching and identification of skills gaps between potential job code or position profiles and employee or current job profiles.
- Integration with Recruiting Solutions to support the matching and identification of skills gaps between open job codes or positions and employee or current job profiles.
- Integration with eDevelopment to allow the review of additional items such as mobility preferences, career plans, and experiences

An integrated Talent Management solution ensures the organization's ability to cope with the demands of a changing workforce.

### **Key Features**

Succession Planning can help your organization retain and motivate top talent by managing their careers and succession plans so they better understand their opportunities. By providing access to employees and managers, career and succession planning become a regular activity rather than an annual event. The powerful functionality of PeopleSoft Enterprise Succession Planning will help you realize these benefits.

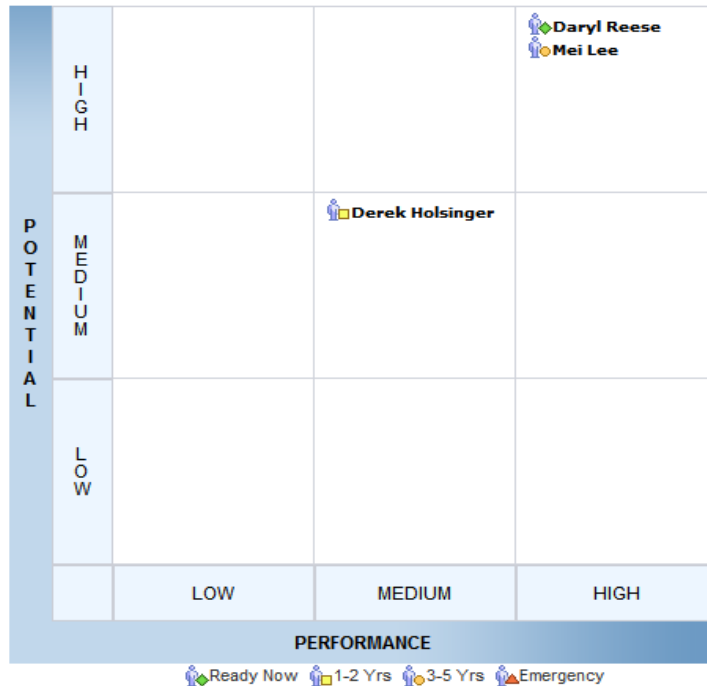
### Succession 360

The Succession 360 pages allow a manager to visually review their organization whilst reviewing individual or job details within the context of the organization.

The screenshot displays the Oracle Succession 360 interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and a breadcrumb trail: 'Organizational Development > Succession Planning > Succession 360'. Below this is a search bar with fields for 'Name', 'Last Name', and 'Empl ID'. A legend indicates icons for 'Key Person', 'Ready Now', '1-2 Yrs', '3-5 Yrs', and 'Emergency'. The main area shows an organizational chart with boxes for Betty Locherty (Director-Finance), Il Chancelor (Manager-Payroll), Rosanna Channing (Senior Manager-Accounting), and Netty Owang (Manager-Accounting). Rosanna Channing's box is highlighted in yellow and shows 'Impact of Loss: High' and 'Risk of Leaving: High'. Below her are boxes for Edmund Donahue (Manager-Accounting), Mei Lee (Accountant), and Shawn (Analyst). To the right, a detailed view for Rosanna Channing is shown, including her photo, personal details (Person ID: KU0046, Department: Corporate Accounting, Location: Corporation Headquarters, Business Address: 4500 Corporate Lane, Pleasanton, CA 94588), and contact information (Business: 925.555.1234, Mobile: 925.555.1111). Below this is a 'Successor Details' section for Rosanna Channing, showing a plan for Rosanna Channing with Plan ID: KUSPLAN02, Plan Type: Person, Plan Effective Date: 01/27/2009, and Plan Status: Draft. A table of 'Succession Candidates' is also visible with columns for Succession Order, Name, Status, Succession Readiness, Impact of Loss, and Risk of Leaving.

In Oracle's PeopleSoft Enterprise Succession Planning, a manager can rate an individual using the configurable X-Y grids for rating boxes (typically a 9-box). These axes are user defined and can be used to rate performance, potential, readiness or other criteria defined by the administrator. Typically, organizations will define their rating box as Performance and Potential. This enables managers to determine when an individual is ready for their next opportunity within the organization.

Drag and drop candidates in the chart below to update ratings. Use the Save button below the chart to save your changes.



## Talent Pools

Creating a talent pool rather than simply choosing one employee with key competencies is more effective and efficient for an organization, as talent pools provide flexibility in the selection of a leadership team.

The screenshot displays the Oracle PeopleSoft Enterprise Succession Planning interface for managing a Talent Pool. The top navigation bar includes 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. The breadcrumb trail is 'Favorites > Main Menu > Organizational Development > Succession Planning > Manage Talent Pool'. The interface is divided into several sections:

- Talent Pool ID:** 2047
- Talent Pool Details:**
  - Effective Date:** 01/20/2009
  - Status:** Active
  - Category:** Emerging Leaders
  - Description:** Track Emerging Leaders, ELM Integration
  - Short Description:**  Used for SP Candidate Searches
  - Position Number:** [Empty]
  - Business Unit:** GIBBU (Global Business Institute BU)
  - Job Code:** [Empty]
  - Job Family:** [Empty]
  - Department:** [Empty]
  - Company:** [Empty]
- Member Selection:**
  - Search Method:** <Select From List>
  - Find Members:** [Button]
- Members Table:**

Person ID	Name	Status	Talent Pool Readiness	Impact of Loss	Risk of Leaving	Notes
KU0044	Carol Reese	Active	[Dropdown]	High	High	[Icon]
KU0046	Bisanna Channino	Active	[Dropdown]	High	High	[Icon]
KU0059	Vicki Zinn	Active	[Dropdown]	Medium	Low	[Icon]
KU0101	Cartha Adams	Active	[Dropdown]	High	Medium	[Icon]

At the bottom, there are buttons for 'Add Person' and 'Add Applicant', and a footer with 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

## Results You Can Count On

Oracle's PeopleSoft Enterprise Succession Planning enables you to:

- Ability to develop succession plans with and without position management; create plans for individual employees, job codes, and positions.
- Ability to identify, track, and manage key employees in talent pools.
- Real-time hierarchical visualization of incumbents and successors, including relevant profile data.
- Configurable X-Y grids for rating box (often designed as 9-box) that can be used to track user-defined criteria such as performance, potential, readiness, and so on, and to rate talent pool members or successors.
- Integration with Profile Manager to support the matching and identification of skills gaps between potential successors and incumbent or job profile.
- Ability to search internal and external candidate pools.

### Why Oracle?

Oracle's PeopleSoft Enterprise talent management solutions can help you maximize the value of your workforce while slashing back-office costs, providing good service to employees, and complying with HR regulations. These solutions enable you to:

- Attract, retain, and motivate top talent with flexible, workflow-driven talent management
- Gain visibility into your workforce with talent management analytics
- Drive a strategic end-to-end talent management strategy with a single, integrated system for all talent related activities

### Contact Us

For more information about PeopleSoft Enterprise Succession Planning, please visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.



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