Manage Career and Succession Planning in your organization through PeopleSoft HCM

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Agenda

- Career Planning
- Creating Career Plans
- Career Progression Chart
- Career Reports
- Succession Planning
- Succession Trees
- Succession 360
- Succession Reports

Career Planning

Career Planning

Career planning enables organization to assess and rank employees, record job preferences, create career paths, develop long-term goals, assign mentors, identify competencies, devise training plans and create development plans

Pre Requisites for Plan Careers business process

- Set up HCM basic data, such as department codes, business units and geographic locations

- Set up HR job data for employees

- Set up job and employee profiles

- Set up training programs for employees

Creating Career Paths

Default career paths enables organization to :

- Create a hierarchy or network of jobs
- Identify logical career progressions and relationships between jobs
- Save time when developing employee career plans
- Save time when planning employee successions

Career Move Level shows a hierarchical job progression in a career path

E.g. Default career path for Job Code, PS001, Manager

Career-Move Level	Job Move	Job Code	Role
	Current job	PS001	Manager
1	First move from current job	PS002	Senior Manager
2	Second move from current job	PS003	Director
3	Third move from current job	PS004	Senior Director

Career Path Table

Define default career paths for job codes

Creating Career Plans

- Enter employee job, location, and availability preferences
- Define an employee career path
- Rank employee potential
- Enter career goals
- Enter career mentoring data
- Evaluate employee strengths and developmental areas
- Synchronize competency data
- Enter and update training programs

Creating Career Plans

Use the Create Career Plan component to enter information about an employee's current position, abilities, strengths, and career desires for the future

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Employee Career Data

Career Assignments : View employee's job paths through an organization

Career Progression

Career progression chart page enables users to see a graphical representation of an employee's career path and perform a profile comparison between the employee and any role selected in the career path

An employee, manager or administrator can perform the following actions:

- Search for career paths.
- View a graphical representation of career paths.
- View role profile summaries for a position or job code.
- View a gap/fit analysis of an employee's competency for any job in his or her career path.
- View and compare competency list for a job code with that of any job in the same career path
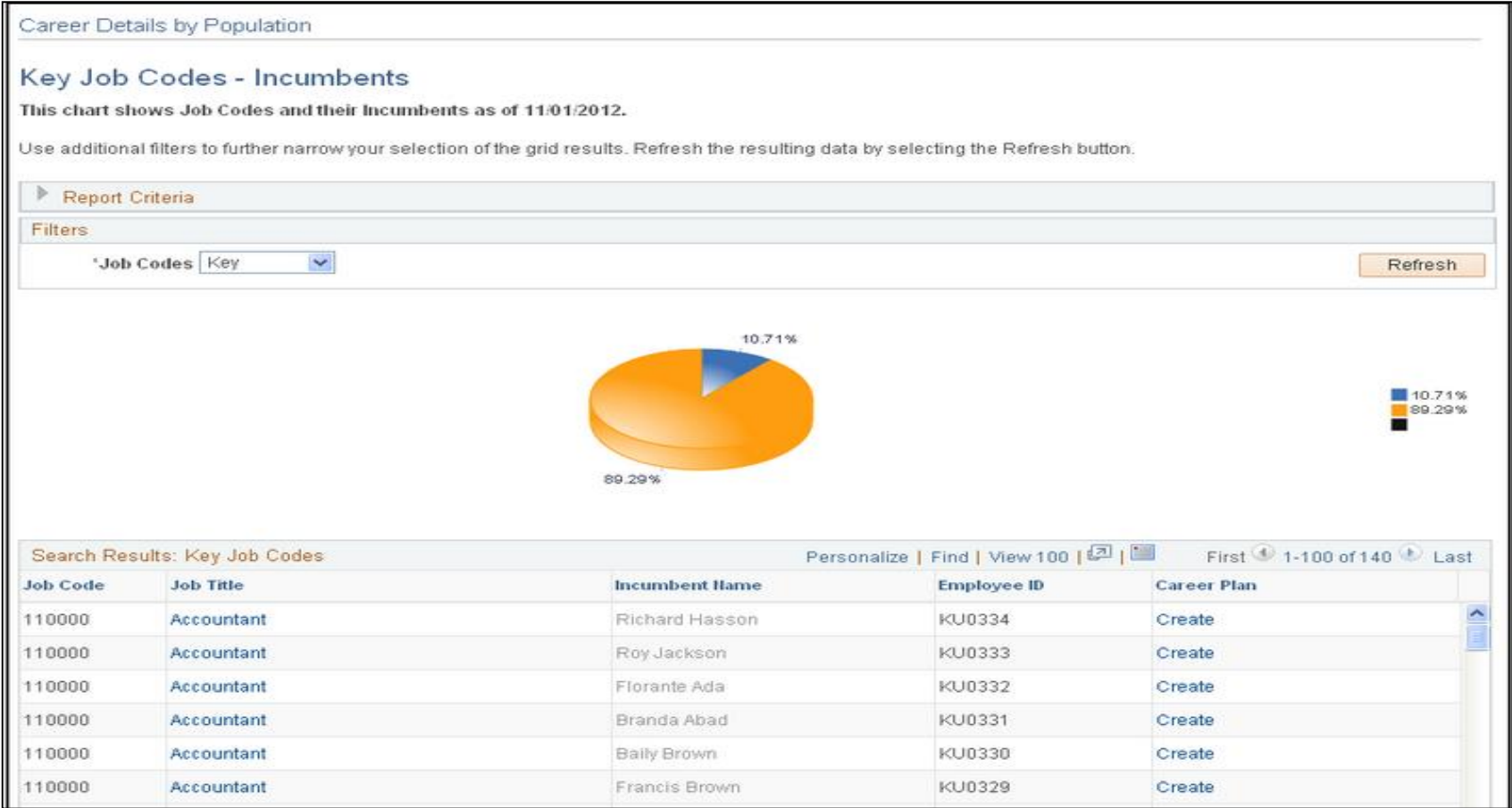
Career Progression Chart

Use the Career Progression Chart page to view career paths and non-person profile summaries in order to perform a competency gap/fit analysis
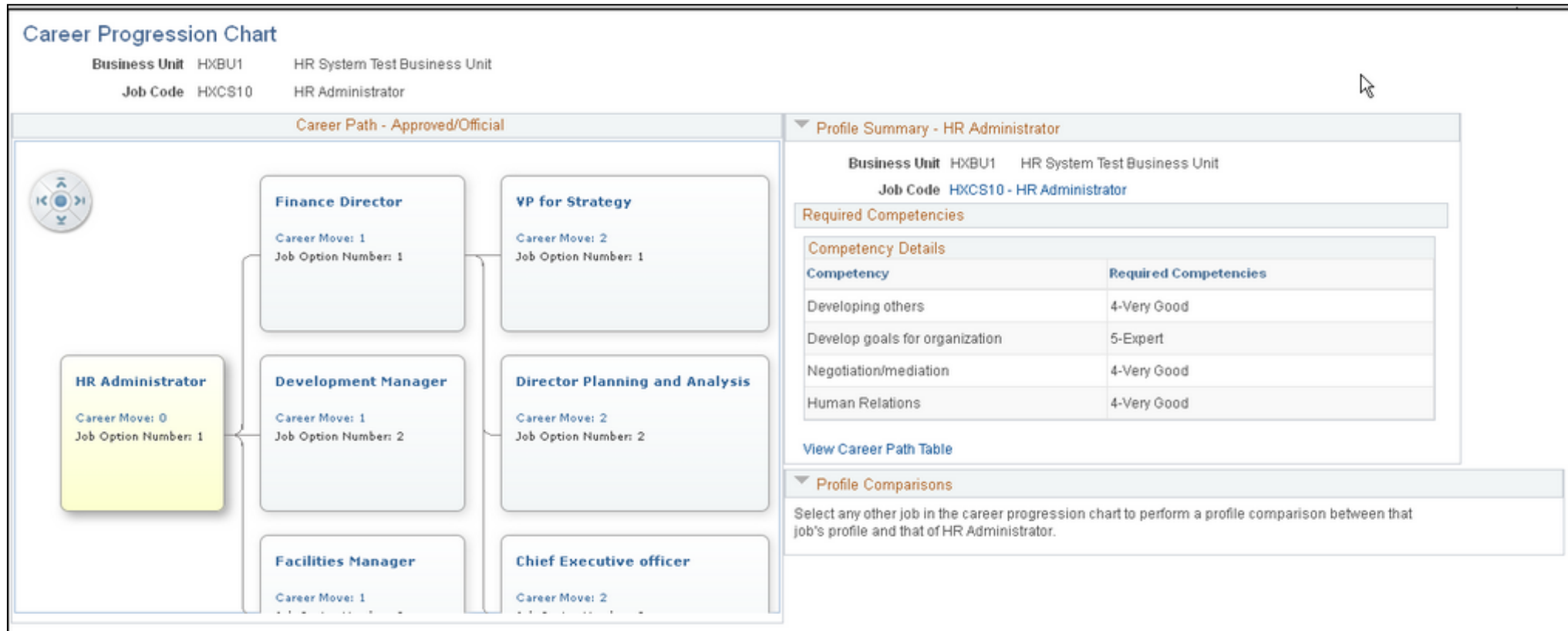
Career Reports - Key Job Code - Incumbents

Identify key job codes and the career plan of any incumbents for those job codes

Career Reports - Career Potential

Identify employees based on their defined potential, when those employees will retire, and how long they have been in their current role

All People								
Employee ID	**Name**	**Title**	**Career Potential**	**Review Date**	**Time Remaining in Role**	**Retirement Date**	**Career Plan**	
B-89BB-PB	Nina Buckheimer	Human Resources Manager	High Potential Candidate	04/03/2008	5 Months	09/03/2034	Review/Edit	
HUX004	Irena Neski	Engineer	High Potential Candidate	04/20/2010		04/20/2047	Review/Edit	
HXCP0003	Srinath Baskaran	Analyst-Budget I					Review/Edit	
HXCP0004	Danesh Roy	Assistant I					Review/Edit	
HXPOS001	Marat Safin	Manager-HR Systems			8 Months	12/30/2008	Review/Edit	
K0MTX005	Diane Palmer	Assistant-Administrative					Review/Edit	
K0W201	Sandra Pierce	Analyst-HRMS	Lateral Transfer	06/03/2008	7 Months	09/03/2030	Review/Edit	
K0W202	Osmar Mutukumari	Analyst-Budget II					Review/Edit	
K0W202	Osmar Mutukumari	Administrator-Network Services					Review/Edit	
K0W203	Sadak Weber	Analyst-Budget II					Review/Edit	

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Plan Succession

Plan Successions

Plan Successions business process enables organization to identify candidates for key positions, anticipate organizational bottlenecks, and develop multiple career paths for individuals who are ready for promotion.

Prerequisites :

- Set up HCM core data
- Set up HR job data
- Define key positions
- Define key job codes
- Identify key employees
- Set up profiles
- Set up career plans
- Identify potential candidates

Setting Up Succession Planning

Succession Planning Setup page is used to define Succession Planning setup and default information, such as the use of profile types, and rating box association

Defining Ratings Boxes Page

Define Ratings Box page is used to define ratings boxes, or matrices, to graphically represent employee rating assignments, such as a 9-Box for performance versus potential, which you can use in succession plans or talent pools to assess employees in relation to other employees
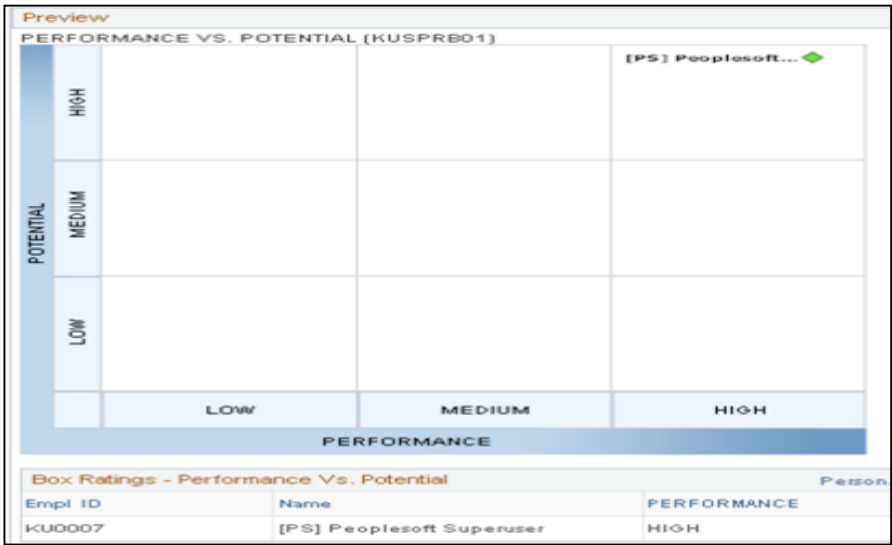
Creating Succession Plans

Succession Planning is the process of identifying long-range needs and cultivating a supply of internal talent to meet those future needs

- Enter succession plan data

- Select candidates

- View candidates for specific positions

Succession Plan Page

Succession Plan page is used to enter plan details such as effective date, plan status, and projected vacancy date.

Candidates Page

Candidates page is used to search and compare employee profiles to identify potential candidates

Ratings Box Page

Ratings Box page is used to rate successors using configurable X-Y matrices, or 9-boxes

Slate page

Slate page is used to view the finalized list of candidates slated to replace the incumbent in a succession plan.

Managing Talent Pool

- *Talent pool is a group of individuals that is generally identified as the top talent within an organization*

- *In order to prevent attrition and provide motivation, individuals that have met certain criteria for success are placed in a pool based upon their role, job code, or position*

Succession Trees

Succession trees provide a graphical view of an organization's succession plan. Succession trees shows which workers currently hold key positions and which candidates are slated to move into this position.
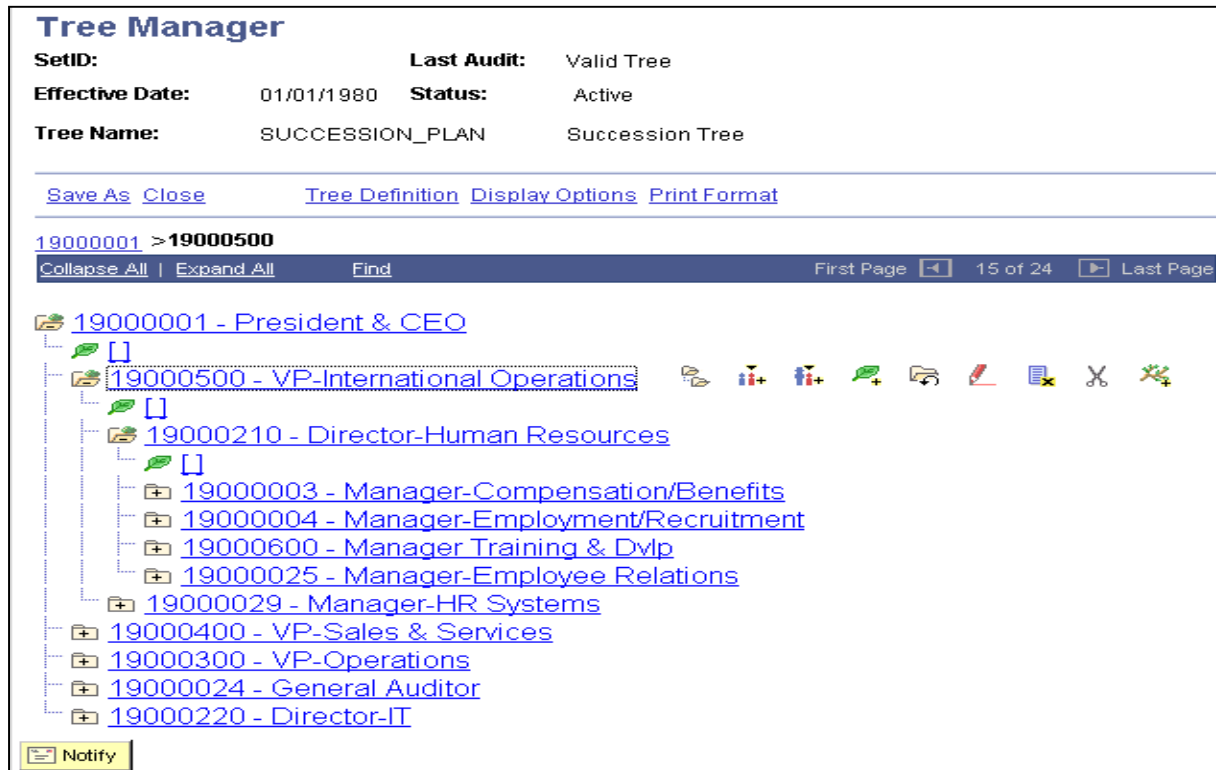
Succession 360

Succession 360 feature gathers and displays a variety of pertinent data from PeopleSoft HR

- Search for people, succession plans, and positions or job codes
- View graphical representations of reporting hierarchies
- View profile summaries for people, positions, or job codes
- View succession plans for people, positions, or job codes
- Edit succession plans

Succession 360

Succession 360° page is used to visually review and manage a person or role within the context of the organization

Succession Reports - Key People / Job Codes / Positions

View candidates for hierarchical-based succession planning, and identify key entities that require succession plans:

Succession Reports Key People/Job Codes/Positions

Thank You

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