



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

Career Path Table

Business Unit US004

Job Code 310015 Consultant-Senior

Description Management

Default Salary Details

Set ID SHARE

Sal Plan KU01

Grade 006

Manager Level Non-Mgr

Career Move

Find | View All

First 1 of 2 Last

*Career Move 1st Move

1st Move

Job Details

Salary Details

Job Options for Career Move

Find | View All

First 1 of 3 Last

Previous Move Option	Opt Nbr	Business Unit	Job Code	Job Title	Mgr Level	Job Function	Set ID	Plan	Grade
1	1	GBIBU	KU078						

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

Career Plan

Career Path

Career Ranking and Potential

Career Goals

Career Mentoring

Career Strength/Develop Areas

Career Training Plan

Antonio Santos

Person ID KU0010

Career Path

Find | View All

First 1 of 1 Last

Effective Date 03/23/2012

Review Date

Business Unit US006

GBI BU for US006

Job Code 170005

Assistant-Administrative

Department 10000

Human Resources

Position 19000018

Administrative Assistant

Location US HQ

Salary Plan KU01

Salary Grade 004

Supervisor Level

Evaluation Type

Find | View All

First 1 of 1 Last

*Evaluation Type Approved/Official

Potential Future Moves

Find | View All

First 1 of 1 Last

Previous Move Option 1

*Career Move 1st Move

Option Number 1

Target Date

Position

*Readiness Ready Now

Manager Level Non-Manager

Salary Plan KC02

Salary Grade

Business Unit GBIBU

Global Business Institute BU

Department

Job Code 820005

Specialist-Benefits

Job Code Long Description

Update Development Plan

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

Career PlanCareer PathCareer Ranking and PotentialCareer GoalsCareer MentoringCareer Strength/Develop Areas

Antonio SantosPerson ID KU0010

Career Ranking and PotentialFindView AllFirst1 of 1Last

Effective Date03/23/2012Review Date

Business UnitUS006GBI BU for US006

Job Code170005Assistant-Administrative

Department10000Human Resources

Supervisor Lvl

Forced RankingPersonalizeFindView AllFirst1 of 1Last

Review Date	Rank	Out of	Rank Type	Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Career PotentialPersonalizeFindView AllFirst1 of 1Last

Review Date	Rating	Reviewer Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>

#PSRECONNECT

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

Career PlanCareer PathCareer Ranking and PotentialCareer GoalsCareer MentoringCareer Strength/Develop Areas

Antonio SantosPerson ID KU0010

Career GoalsFindView AllFirst1 of 1Last

Effective Date03/23/2012Review Date

Business UnitUS006GBI BU for US006

Job Code170005Assistant-Administrative

Department10000Human Resources

Supervisor Lvl

Short-Term Career GoalsPersonalizeFindView AllFirst1 of 1Last

Estimated Completion Date	Actual Completion Date	Goals (Next 1 - 3 Years)
<input type="text"/>	<input type="text"/>	<input type="text"/>


Long-Term Career GoalsPersonalizeFindView AllFirst1 of 1Last

Estimated Completion Date	Actual Completion Date	Goals (Next 3 - 5 Years)
<input type="text"/>	<input type="text"/>	<input type="text"/>

#PSRECONNECT

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

[Career Plan](#) | [Career Path](#) | [Career Ranking and Potential](#) | [Career Goals](#) | **[Career Mentoring](#)** | [Career Strength/Develop Areas](#) 

Antonio Santos Person ID KU0010

Career Mentoring Details Find | View All First 1 of 1 Last

Effective Date 03/23/2012



Review Date




Business Unit US006 GBI BU for US006

Job Code 170005 Assistant-Administrative

Department 10000 Human Resources

Supervisor Lvl

Career Mentor Details Personalize | Find | View All   First 1 of 1 Last

Name		Mentor Title	Mentor Type	Estimated Date	Completion Date	Career Goal		
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

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

The screenshot displays a web-based form for creating a career training plan. At the top, a navigation bar includes tabs for Career Goals, Career Mentoring, Career Strength/Develop Areas, Career Training Plan (which is selected), and Career Development Plan. Below the navigation bar, the user's name 'Antonio Santos' and 'Person ID KU0010' are shown. The main form is titled 'Career Training Plan' and includes a 'Find | View All' link and pagination controls showing 'First 1 of 1 Last'. The form is divided into several sections: 1. A header section with 'Effective Date' (03/23/2012) and 'Review Date'. 2. A section for 'Business Unit' (US006), 'Job Code' (170005), and 'Department' (10000). 3. A 'Supervisor Lvl' field. 4. A 'Training Program' section with its own 'Find | View All' link and pagination. 5. A 'Training Plan' section with fields for 'Sequence', 'Course', 'Course Title', 'Date Need Identified' (03/23/2012), 'Estimated Date', 'School', 'Reason', 'Required' (checkbox), 'Internal/External' (dropdown), 'Completion Date', and 'School Name'. The form is designed with a clean, professional layout using a light blue and white color scheme.

Antonio Santos Person ID KU0010

Career Training Plan Find | View All First 1 of 1 Last

Effective Date 03/23/2012 Review Date

Business Unit US006 GBI BU for US006

Job Code 170005 Assistant-Administrative

Department 10000 Human Resources

Supervisor Lvl

Training Program Find | View All First 1 of 1 Last

Training Plan Find | View All First 1 of 1 Last

Sequence

Course

Course Title

Date Need Identified 03/23/2012

Estimated Date

School

Reason

☐ Required

*Internal/External

Completion Date

School Name

Employee Career Data

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

Career Assignments

Antonio Santos

EMP

ID KU0010

Empl Record 0

Company

GBI

GBI

First Hire Date

09/12/1997

Current Location

US HQ

Country

USA

Annual Rate

\$18,512.00

USD

State

NY

New York

Career Summary

Find | View All

First 1-2 of 2 Last

Effective Date

07/01/1998

Business Unit

US006

Position Number

19000018

Department

10000

Human Resources

Manager Level

Non-Mgr

Job Code

170005

Assistant-Administrative

Job Function Code

REL

Supervisor Level

Grade

004

Effective Date

09/12/1997

Business Unit

US006

Position Number

19000018

Department

10000

Human Resources

Manager Level

Non-Mgr

Job Code

170005

Assistant-Administrative

Job Function Code

REL

Supervisor Level

Grade

003

Career Progression

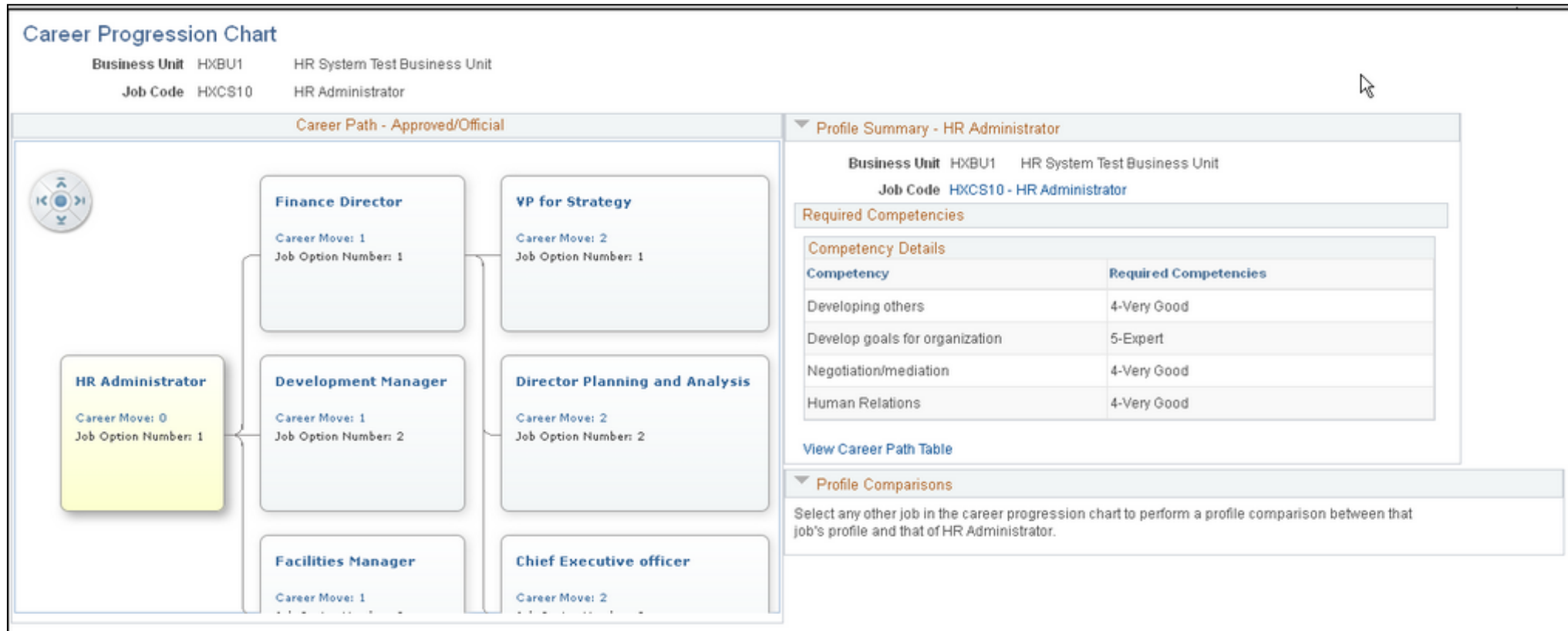
Career progression chart page enables users to see a graphical representation of an employee's career path and perform a profile comparison between the employee and any role selected in the career path

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

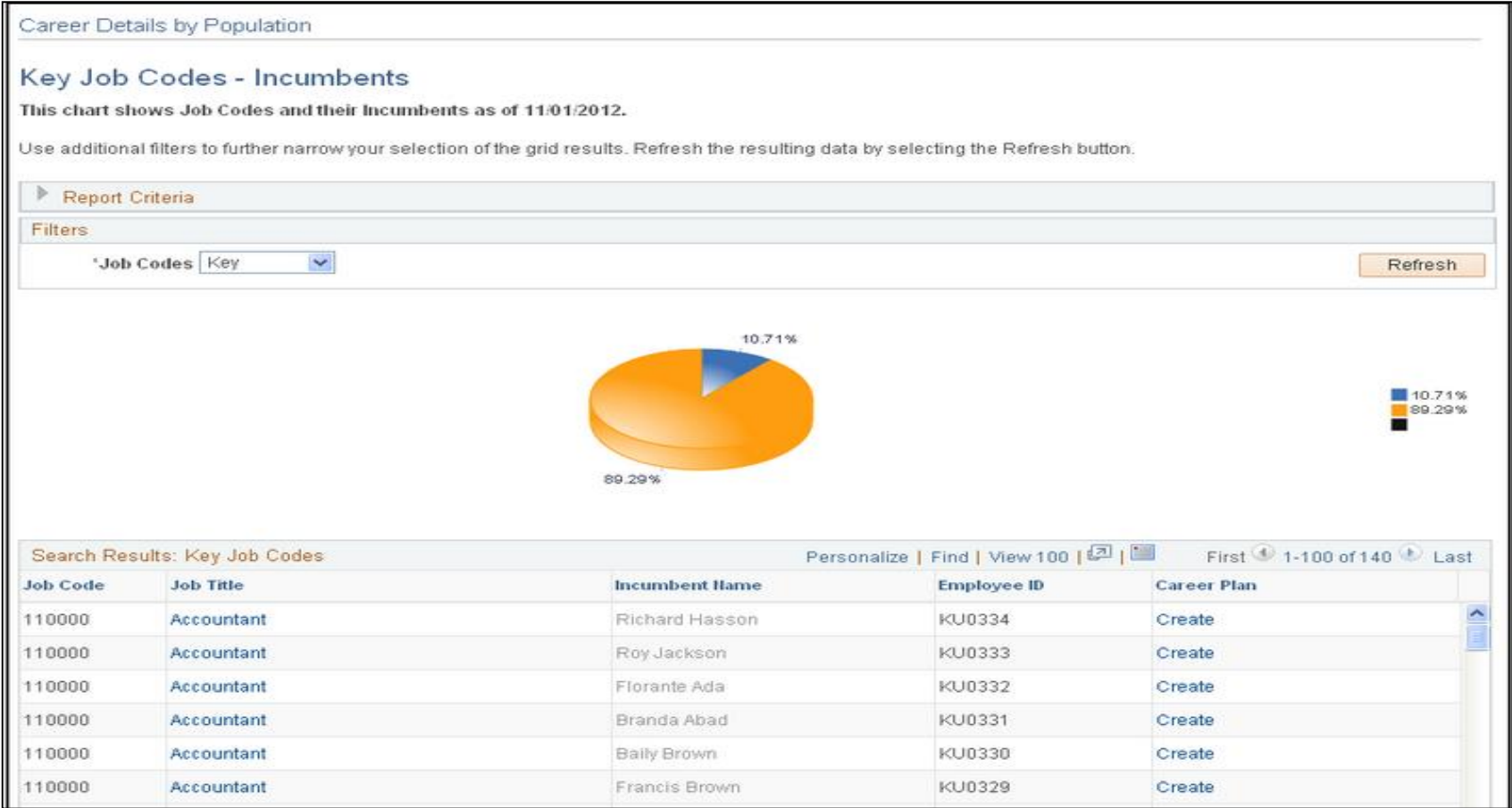
Career Progression Chart

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							
Personalize Find View All  							
First 1-48 of 48 Last							
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

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

Succession Planning Setup

Succession Plan Defaults

Select up to three (3) ratings boxes.

Ratings Box Selection

Personalize | Find | View All | First 1-2 of 2 Last

Ratings Box ID	Title	Description	
KUSPRB01	PERFORMANCE VS. POTENTIAL	9-Box	
KUSPRB02	BEHAVIOR VS. INFLUENCE	9-Box	

Add Ratings Box

☒ Career Planning Impact of Loss

Talent Pool Defaults

Select up to three (3) ratings boxes.

Ratings Box Selection

Personalize | Find | View All | First 1 of 1 Last

Ratings Box ID	Title	Description	
KUSPRB04	TALENT CATEGORIES	Talent Categories	

Add Ratings Box

☒ Career Planning Impact of Loss

Profile Type Defaults

*Primary Person Profile Type

PERSON

Person

*Primary NonPerson Profile Type

JOB

Job

Performance Document Setting

Document Type

PERFORM

Performance Document

Performance Search Settings

Search Document Type

PERFORM

Performance Document

Rating Model

PSCM

Competency Management Scale

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

Define Ratings Box

Ratings Box ID KUSPRB01

Ratings Box Details

*Effective Date01/01/2000

*StatusActive

*TitlePERFORMANCE VS. POTENTIAL

*Description9-Box

Short DescPerform

CommentsRate succession candidates or talent pool members using the Performance versus Potential 9-Box.

☐ Used for Talent Pool Category

X-Axis Setup

TitlePERFORMANCE

Number of Boxes3

Rating IntegrationNone

X-Axis Ratings

1LOW

2MEDIUM

3HIGH

Y-Axis Setup

TitlePOTENTIAL

Number of Boxes3

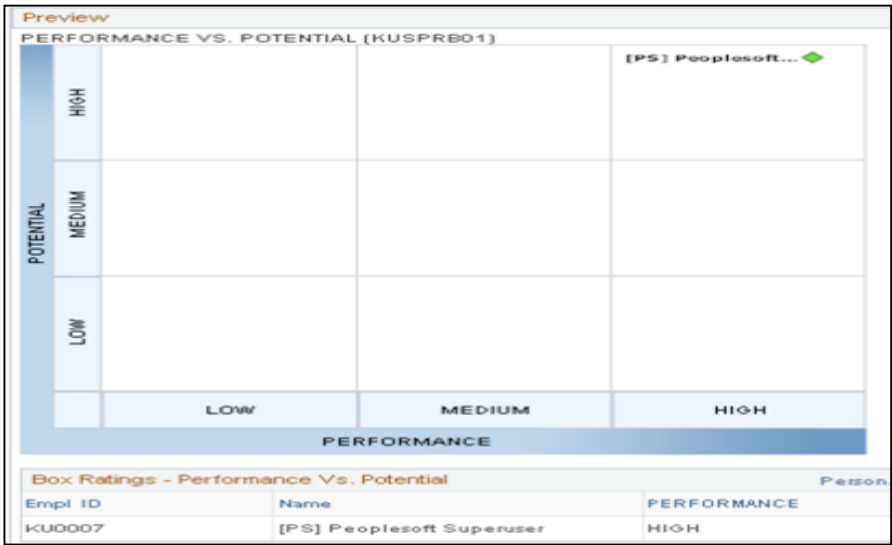
Rating IntegrationNone

Y-Axis Ratings

1LOW

2MEDIUM

3HIGH



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.

Succession Plan	Candidates	Ratings Box	Slate
Plan ID KUSPLAN02	Plan Type Person	Key Person KU0046	
Plan Details ?			
Find View All First 1 of 1 Last			
*Effective Date	01/27/2009	Next Succession Plan Date	
Plan Status	Official	Projected Vacancy Date	07/31/2030
*Description	Plan for Rosanna Channing		
Comments	Plan for Rosanna Channing		
Plan Incumbent ?			
Empl ID	KU0046	Rosanna Channing	
Position Number			
Job Code	600135	Senior Manager-Accounting	
Company	GBI	Global Business Institute	
Supervisor Level			
Business Unit	GBIBU	Global Business Institute BU	
Department	13110	Corporate Accounting	
Sal Plan/Grade/Step	KU01 006		
Performance and Career Details ?			
Date Available	04/01/2011	Retirement Date	07/31/2030
Time Remaining in Role	2 Years	Date of Replacement	04/01/2011
Impact of Loss	High	Risk of Leaving	High
Potential	High Potential Candidate	Readiness	1 - 2 Years
Performance Rating	4 Very Good	Career Development Plan	

Candidates Page

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

Succession Plan

Candidates

Ratings Box

Slate

Plan ID KUSPLAN02 Plan Type Person Key Person KU0046

Plan Incumbent ?

Plan Details

Find | View All First 1 of 1 Last

Effective Date 01/27/2009 Next Succession Plan Date

Plan Status Official Projected Vacancy Date 07/31/2030

Candidate Selection ?

Search Method <Select From List> Find Candidates

Candidates

Personalize | Find | View All | First 1-4 of 4 Last

Succession Details

Performance and Career

Job Data

Salary Plan

Select	Order	Person ID	Name	Candidate Type	*Status	*Succession Readiness	Target Date	Impact of Loss	Risk of Leaving	Notes
<input type="checkbox"/>	1	KU0044	Daryl Reese	Person	Active	Ready Now		High	High	
<input type="checkbox"/>	2	KU0038	Derek Holsinger	Person	Active	1 - 2 Years	09/30/2009	Medium	Medium	
<input type="checkbox"/>	3	KU0076	Mei Lee	Person	Active	3 - 5 Years		Medium	Medium	
<input type="checkbox"/>	4	KU0059	Vicki Zinn	Person	Active	3 - 5 Years		Medium	High	

Select All Deselect All

Add Person Add Applicant Delete Selected

Ratings Box Page

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

Succession Plan

Candidates

Ratings Box

Slate

Plan ID KUSPLAN02 Plan Type Person Key Person KU0046

Plan Incumbent ?

Plan Details

Find | View All First 1 of 1 Last

Effective Date 01/27/2009 Next Succession Plan Date

Plan Status Official Projected Vacancy Date 07/31/2030

Ratings Box Selection ?

Select up to three (3) ratings boxes.

Ratings Box Details

Personalize | Find | View All First 1-2 of 2 Last

Ratings Box ID	Title	Description	View Ratings
KUSPRB01	PERFORMANCE VS. POTENTIAL	9-Box	View Ratings
KUSPRB02	BEHAVIOR VS. INFLUENCE	9-Box	View Ratings

Add Ratings Box

Ratings Box

PERFORMANCE VS. POTENTIAL (KUSPRB01)

HIGH			Vicki Zinn Daryl Reese
MEDIUM		Derek Holsinger	
LOW			
	LOW	MEDIUM	HIGH

PERFORMANCE

Box Ratings - Performance Vs. Potential

Personalize | Find | View All First 1-4 of 4 Last

Person ID	Name	PERFORMANCE	POTENTIAL
KU0038	Derek Holsinger	MEDIUM	MEDIUM
KU0044	Daryl Reese	HIGH	HIGH
KU0059	Vicki Zinn	HIGH	HIGH
KU0076	Mei Lee		

Slate page

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

[Succession Plan](#) | [Candidates](#) | [Ratings Box](#) | [Slate](#)

Plan ID KUSPLAN02 Plan Type Person Key Person KU0046

Plan Incumbent ?

Plan Details

Effective Date 01/27/2009 Next Succession Plan Date
Plan Status Official Projected Vacancy Date 07/31/2030

Succession Slate

Personalize | Find | View All | First 1 of 1 Last

Order	Person ID	Name	Position	Title	Job Code	Succession Readiness	Career Readiness	Blocked	Number of Successors	Succession Plan for Candidate
1	KU0044	Daryl Reese			140035	Ready Now	Emergency	N		Create
2	KU0038	Derek Holsinger	19000034	Accountant	110000	1 - 2 Years	Ready Now	N		
3	KU0076	Mei Lee			110000	3 - 5 Years	Emergency	N		
4	KU0059	Vicki Zinn			110000	3 - 5 Years	1 - 2 Years	N		

Updated on Updated By

[Save](#) [Return to Search](#) [Notify](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Succession Plan](#) | [Candidates](#) | [Ratings Box](#) | [Slate](#)

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

Talent PoolRatings BoxLearning

Talent Pool ID KUSPTP01

Talent Pool Details

Find | View AllFirst1 of 1Last

*Effective Date10/16/2008

StatusActive

CategoryKey People for Finance

*DescriptionDefine Key People in the Fin Org

Short DescriptionDefine Key People in

☐ Used for SP Candidate Searches

Position Number

Business UnitGBIBUGlobal Business Institute BU

Job Code

Job Family

Department

Company

Member Selection

Search Method<Select From List>Find Members

Members

Personalize | Find | View All | 1-5 of 5 | Last

Talent Pool Details

Performance and Career

Job Data

Salary Plan

Members

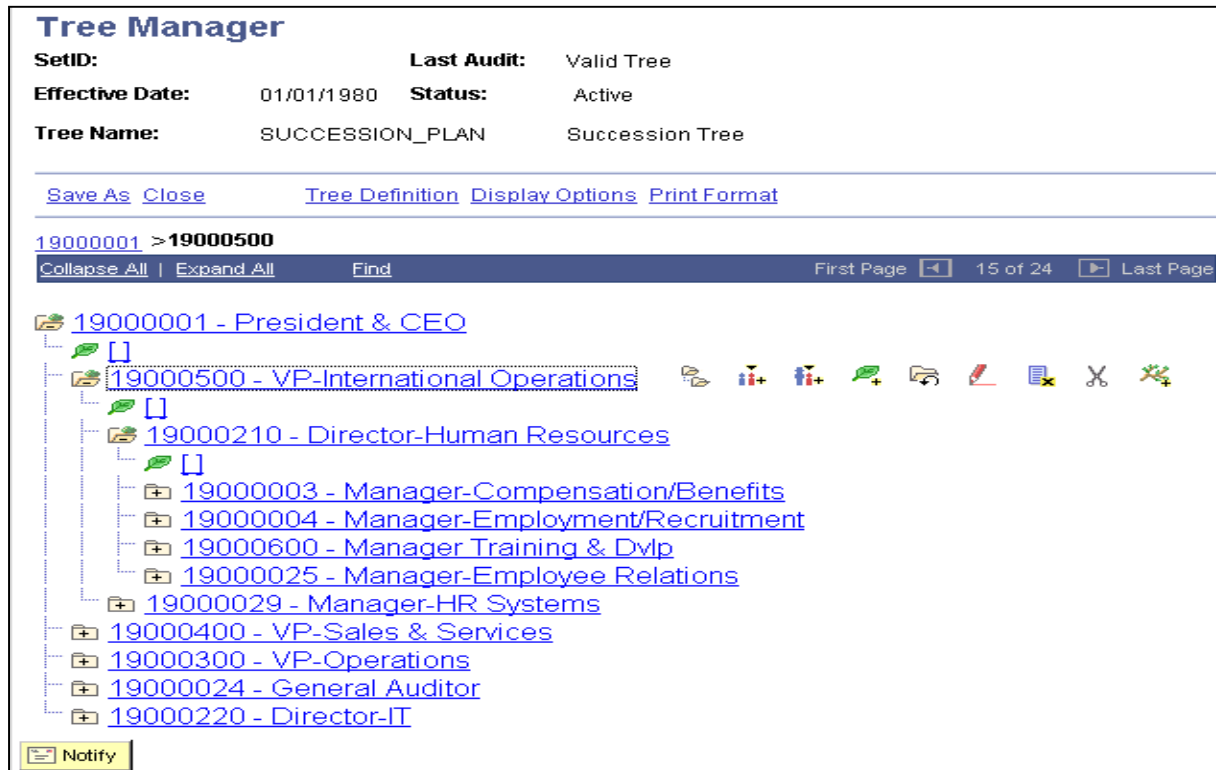
Select	Person ID	Name	Member Type	Status	Talent Pool Readiness	Impact of Loss	Risk of Leaving	Notes
<input type="checkbox"/>	KU0007	Betty Locherty	Person	Active		High	High	
<input type="checkbox"/>	KU0036	Steve Religioso	Person	Active		High	Medium	
<input type="checkbox"/>	KU0044	Daryl Reese	Person	Active		High	High	
<input type="checkbox"/>	KU0046	Rosanna Channing	Person	Active		High	High	
<input type="checkbox"/>	KU0101	Cynthia Adams	Person	Active		High	Medium	

Select AllDeselect All

Add PersonAdd ApplicantDelete Selected

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 360°

*Search For **Persons** Name Last Name Empl ID **Search** [Return to Search](#)

☀ Key Person ◆ Ready Now 🟡 1-2 Years 🟠 3-5 Years 🔴 Emergency

Betty Locherty
Director-Finance

Rosanna Channing
Senior Manager-Accounting
Impact of Loss: High
Risk of Leaving: High
Successors (4)

John Breamar
Director
Impact of Loss: Medium
Risk of Leaving: Low


Daryl Reese
Senior Financial
Impact of Loss: High
Risk of Leaving: High

Edmund Donahue
Manager-Accounting
Impact of Loss: Medium
Risk of Leaving: Medium

Mei Lee
Accountant
Impact of Loss: Medium
Risk of Leaving: Medium

Rosanna Channing - Senior Manager-Accounting

Person Details | Compare To Role | Performance and Career



Person ID: KU0046
Location: Corporation Headquarters
Business Address: 4500 Corporate Lane, Pleasanton, CA 94588
Business Phone: 925.555.1234
Mobile Phone: 925.555.1111

Department: Corporate Accounting
Years of Service: 26.2
Talent Category: Achiever ★★★★★

Go To **Go**

Successor Details - Rosanna Channing

Successors | Compare to Incumbent | Ratings Box

Plan ID: KUSPLAN02
Plan Type: Person
Plan Status: Official
Plan for Rosanna Channing
Plan Effective Date: 01/27/2009
Active Successors: 4

Personalize | View All | 1-4 of 4

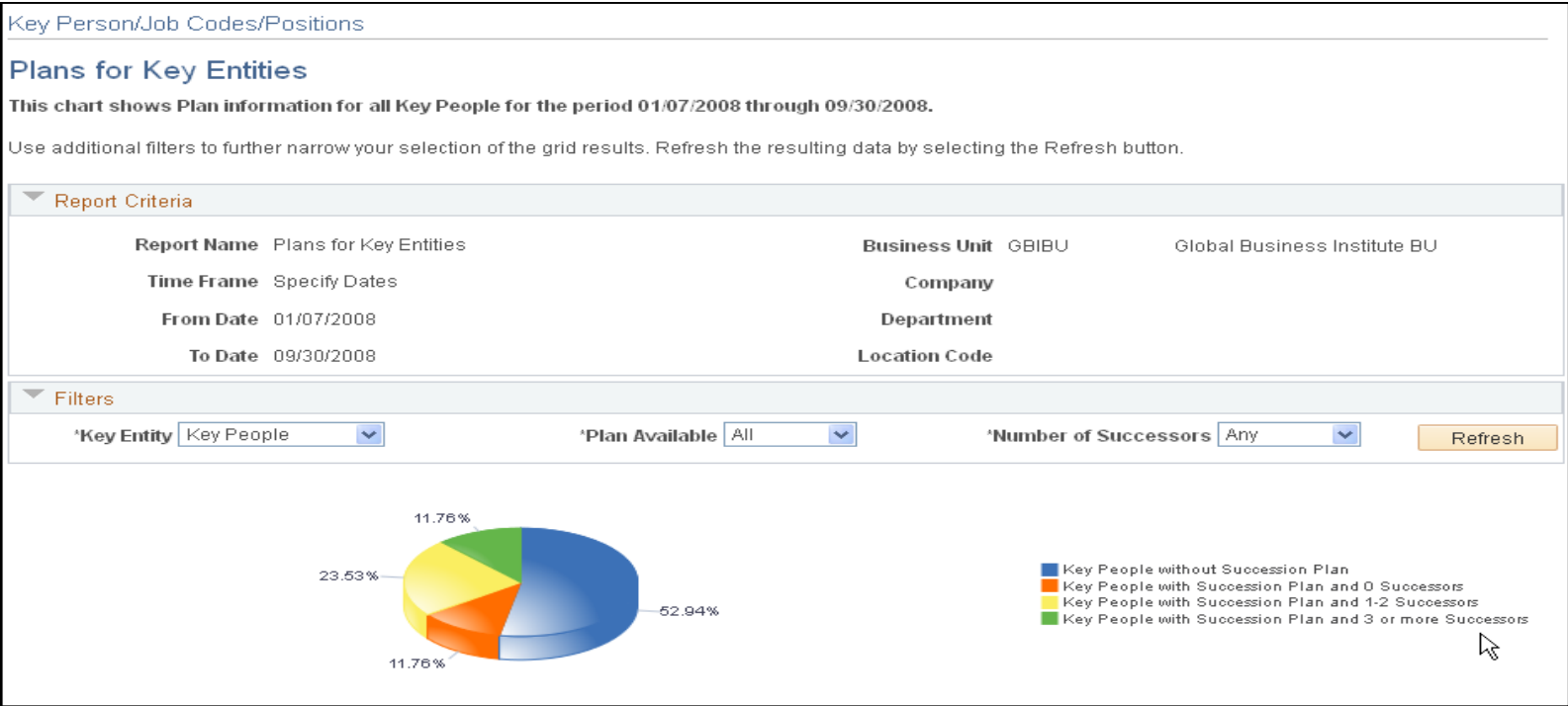
Order	Name	*Status	*Succession Readiness	Impact of Loss	Risk of Leaving
1	Daryl Reese	Active	Ready Now	High	High
2	Derek Holsinger	Active	1 - 2 Years	Medium	Medium
3	Mei Lee	Active	3 - 5 Years	Medium	Medium
4	Vicki Zinn	Active	3 - 5 Years	Medium	High

Add Candidates **Save** (Date change takes effect: 11/05/2012)

[View Succession Plan History](#) [Maintain Succession Plan](#)

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

Search Results: Key People

Personalize | Find | View All | First 1-17 of 17 Last

Employee ID	Name	Title	Attn	Number of Successors	Succession Plan	Talent Pool	View Talent Pool
K0W205	Ramon Skinny	Analyst-Budget II		2	Review/Edit	Use for Overall Perf	»
K0W206	Judah Rosen	Analyst-Budget II		3	Review/Edit	Use for Overall Perf	»
K0W207	Steve Dryckus	Analyst-Financial		4	Review/Edit	Use for Overall Perf	»
K0W208	Barry Larson	Analyst-Financial	!		Create	Use for Overall Perf	»
K0W209	John Gore	Analyst-Financial	!		Create	Use for Overall Perf	»
K0W302	Victor Trujiyo	Administrator Customer Service	!		Create	Technical Key People	»
KU0001	Douglas Lewis	President & CEO	!		Create	Technical Key People	»
KU0027	Grace Stangl	Fire Safety Person	!		Create	Technical Key People	»
KU0044	Daryl Reese	Analyst-Financial	!		Create	Corporate Accounting	»
KU0101	Cynthia Adams	Corporate Controller	!		Create	Corporate Accounting	»



Thank You

Please complete a session evaluation

Session ID: 101910

Contact Info:

vishalr@hexaware.com

Tel: 856-275-0753

