

iProConference: SAP HCM Best Practise  
London, 8<sup>th</sup> November 2012

# Appraisals and Objectives with SAP HCM

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 #HCMBP2012

## Agenda



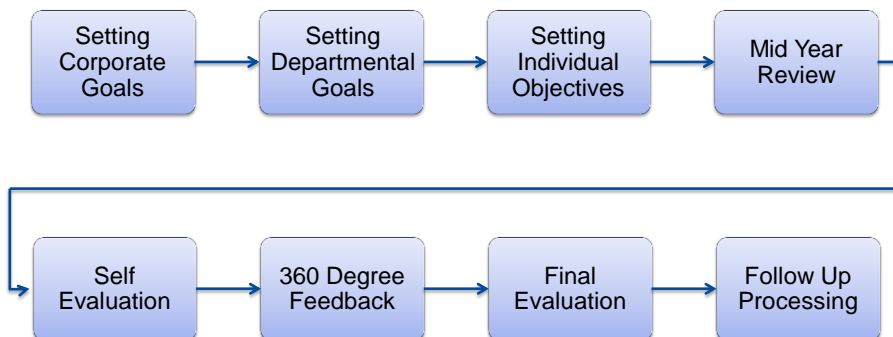
- **Appraisal types and forms**
- **Pre-defined vs. flexible SAP solution**
- **Case study K+S AG**
  - ▶ Introduction of K+S
  - ▶ Project timeline
  - ▶ Performance Management Process
  - ▶ Custom process enhancements
- **Typical pitfalls and solutions**

# Agenda



- **Appraisal types and forms**
- **Pre-defined vs. flexible SAP solution**
- **Case study K+S AG**
  - ▶ Introduction of K+S
  - ▶ Project timeline
  - ▶ Performance Management Process
  - ▶ Custom process enhancements
- **Typical pitfalls and solutions**

# Example: PM process



## Appraisal types and forms



- Personnel appraisals
- Potential ratings
- 360-degree reviews
- Management by Objectives
- Employment references
- Questionnaires
- Online Tests
- Surveys

Folie: 5

## Agenda



- Appraisal types and forms
- Pre-defined vs. Flexible SAP solution
- Case study K+S AG
  - ▶ Introduction of K+S
  - ▶ Project timeline
  - ▶ Performance Management Process
  - ▶ Custom process enhancements
- Typical pitfalls and solutions

Folie: 6

# Predefined performance management process



Easy process configuration – no SAP performance management knowledge necessary

Most of the relevant configuration already in the system

Predefined interfaces

- Learning Solution
- Compensation Management

Parts of the User Interface are implemented in Flash

Folie: 7

# Predefined process: Configuration steps



- Easy template configuration
- The template configuration is created automatically

The image displays two screenshots of the SAP Performance Management configuration interface. The left screenshot, titled "Create:Performance Management Process, Step 1 (Process and Integration)", shows a progress bar with two steps: "1 Process and Integration" and "2 Criteria Groups". Below the progress bar, there are several configuration sections: "General Settings" (Title: Success Plan), "Process Settings" (checkboxes for Potential Assessment, Additional Appraisers, Activate Workflow, Show Review Phase, Show Meeting Scheduling), "Integration Scenario" (checkboxes for SAP Learning Solution, Compensation), and "Rating Scale" (Overall Appraisal: Standard Quality Scale (1-5), Potential Assessment: Standard Quality Scale (0-10)). The right screenshot, titled "Create:Performance Management Process, Step 2 (Criteria Groups)", shows a progress bar with the same two steps. Below the progress bar, there is an "Add Criteria Group" button and an "Individual Goals" section with a dropdown menu for "Type" (Individual Goals) and a dropdown menu for "Grading Scale" (Standard Quality Scale (1-5)).

Folie: 8

# Predefined process: User interface(document)



**Beurteilungsdokument für Mr. Michael Palthrow**

**Timeline**

Phase	Start	End
Planung	01.04.2009	01.09.2009
Review	01.09.2009	31.12.2009
Approval		

Aktuelle Aufgabe: Planung    Fälligkeitsdatum: 01.04.2009

**Content**

**Navigation**

SAP HR - Talentmanagement

Title: SAP HR - Talentmanagement

Due Date: 31.12.2012

Rating: Exceeds

Description: Determine additional features or changes that could improve the program and make recommendations.

Actions: Add

Display:  Manager  Employee

Dr. Herbert Braunstein (Manager) 06.11.2012 09:09:56

Folie: 9

# Pre-defined vs. flexible solution



## Pre-defined process

- Easy Configuration
- Attractive (partly flash based) user interfaces
- Very limited flexibility for process and document changes

## Flexible process

### Flexibility to set up...

- The company's performance appraisal process
- Customer specific elements relevant to their goal performance measures
- And control content and function according to the phase of the process, the user profile, etc.

Folie: 10

# Agenda



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## Performance Management Integration



Introduction of the K+S Group

Project Time Line

The Performance Management Process of Morton Salt

Upgrading and Enhancing the implemented PM

## Experience Growth



K+S is one of the world's leading suppliers of fertilizers currently with sites in Europe and in Canada.

In the salt business, with sites in Europe as well as North and South America, K+S is the world's leading producer.

K+S offers a comprehensive range of goods and services for agriculture, industry, public authorities and private consumers.

K+S employs more than 14,000 people, mainly in Europe and North America.



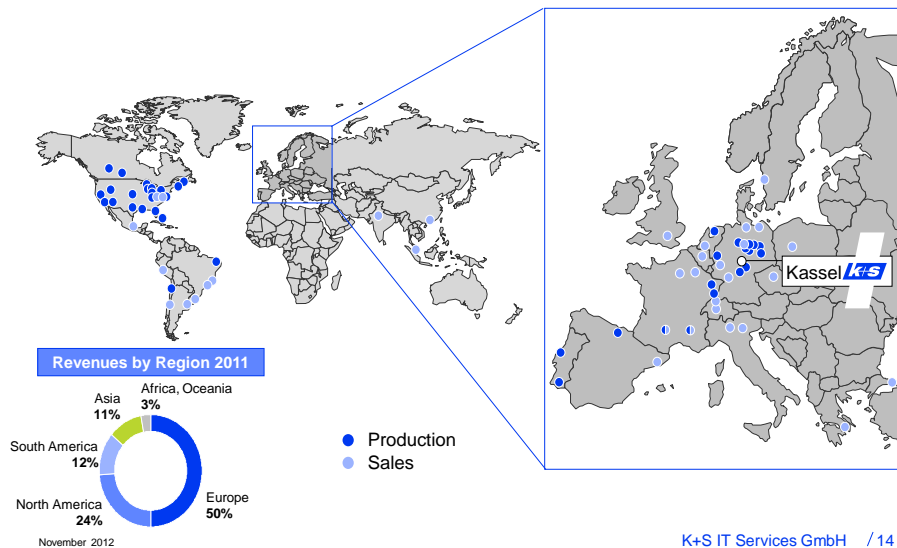
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## Worldwide Presence



### Production Sites and Sales Offices



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## Performance Management Integration



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## Performance Management Integration



### Kick Off and Go Live of Performance Management for Morton Salt Inc., Chicago USA

#### End of year 12/2010

Performance Management data collection and agreement of requirements (Chicago).

#### Early 03/2011

Signing Blue Print and development kick off.

#### Mid year 06/2011

First testing and further requirements for PM process (Chicago).

#### Mid year 09/2011

Further testing (Kassel)

#### End of year 2011

Final testing and approval.  
Go Live for 86 Managers (Chicago)

#### Post Go Live and further Roll Out

Telephone conferences in agreed time intervals. Less support activities. Further roll out for approx. 100 persons in 2013

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Introduction of the K+S Group

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The Performance Management Process of Morton Salt

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### The Performance Management Process of Morton Salt

#### “Basics tasks and individual objectives”

- ★ The fulfillment of basic tasks and individual objectives of a Morton Salt Managing employee is the basis for his bonus payment. Therefore the employee agrees together with his manager and his superior manager his tasks and objectives along a one year period.

#### „Mid year review on basic tasks and individual objectives“

A mid year review of the employee's tasks and objectives is carried out to evaluate if the former agreements are still valid or have to be changed. If so, an agreement on the changes have to be made again between the former involved persons.

#### „Achievement of Tasks and Objectives”

At the end of the year the employee has to make a self appraisal on his achieved tasks and objectives. This appraisal is agreed between the employee, the manager and his superior manager. Once the second level approval is granted the release of the payment is done by the HR commission.

#### „Follow Up“

The agreed appraisal of the employee will be approved and released for payment by the HR commission.

## Performance Management in SAP

### First process step “Basic tasks and individual objectives”

The Performance Management application is organized in an employee and manager service. For the first step the employee finds his document in the employee service for his goal settings. Prior the HR staff generates all forms with an SAP Report. Once generated, the status of the documents has to be changed for release and for sending a mail to every employee.

The screenshot shows the SAP 'Create Personal Success Plans' report selection screen. It includes fields for 'Period' (Today, Current month, Current year), 'Data Selection period' (01.01.2012 to 31.12.2012), 'Person selection period', and 'Payroll period'. There is a 'Selection' section with dropdown menus for Personnel Number (43142), Employment status, Company Code (4002), Payroll area, and Personnel area. The 'Appraisal Attributes' section shows 'Personnel Number' (43170884), 'Begin Date' (01.01.2012), and 'End Date' (31.12.2012). An 'Additional information' section has a 'Test Run' checkbox checked.

## Performance Management in SAP

### First process step “Basic tasks and individual objectives”

The Performance Management document for the employee as well as for the manager is accessible through the SAP Portal.

**Employee Documents** [Help](#)

Status Overview (1)

Show Quick Criteria Maintenance

View: [Standard View] Edit Display Copy tasks from prev. document Export Filter Settings

Appraisal Status	Substatus	Appraisee Name	Appraisal Document Name	Period	To
Goal Setting		Antonio Zamora Gonzalez	<a href="#">Personal Success Plan</a>	01.01.2012	31.12.2012

## Performance Management in SAP



### First process step "Basic tasks and individual objectives"

**Appraisal Document for Antonio Zamora Gonzalez**

Action Log | Print | Attachments (0) | Save

How would you like to continue?

Save and Exit Document  
 Save and submit

Administrative Data

Personal Success Plan | Basic Tasks and Personal Success Factors | Individual Objectives | Electronic Signature

**Electronic Signature**

**RIGHT TO CHANGE PROGRAM:**  
I understand that the Company may at any time and in its sole discretion, change the components of the compensation and performance management dictate.

**COMPENSATION ESTIMATES:**  
I understand that any and all compensation related information found within the performance management system and/or displayed on my Personal do not constitute an actual or a promise of payment.

**RESPONSIBILITY TO KNOW GOALS:**  
I have received and discussed my goals for the performance year and I understand that it is my obligation to be familiar with my Basic Tasks and I herein. I understand that if I have any questions regarding my goals, it is my responsibility to seek out the assistance of my Manager.

**NOT AN AGREEMENT OF EMPLOYMENT (FOR U.S. EMPLOYEES ONLY):**  
I understand and agree that nothing in this performance management system or Personal Success Plan serves or is intended to serve as any form of express agreement with regard to my employment. I further understand that my employment is at will, and neither I nor the Company has entered into duration of my employment.

**SIGNATURES:**  
In the Goal Setting and Achievement Level phases of the system, by affixing my electronic signature on the document, I will be certifying that I receive informed of the level of achievement of my goals, respectively.

**Confirmation Appraisee "In Planning"**  
By clicking "Yes" you are finalizing and acknowledging receipt of your goals. If you feel you can not support these goals, please contact your Manager.

Confirmation:  Yes

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## Performance Management Integration



### The Performance Management Process of Morton Salt

#### "Basics tasks and individual objectives"

The fulfillment of basic tasks and individual objectives of a Morton Salt Managing employee is the basis for his bonus payment. Therefore the employee agrees together with his manager and his superior manager his tasks and objectives along a one year period.

#### ★ „Mid year review on basic tasks and individual objectives“

A mid year review of the employee's tasks and objectives is carried out to evaluate if the former agreements are still valid or have to be changed. If so, an agreement on the changes have to be made again between the former involved persons.

#### „Achievement of Tasks and Objectives“

At the end of the year the employee has to make a self appraisal on his achieved tasks and objectives. This appraisal is agreed between the employee, the manager and his superior manager. Once the second level approval is granted the release of the payment is done by the HR commission.

#### „Follow Up“

The agreed appraisal of the employee will be approved and released for payment by the HR commission.

## Performance Management in SAP

### Second process step „Mid year review on basic tasks and individual objectives“

**Appraisal Document for Antonio Zamora Gonzalez**

Action Log | Print | Attachments (0)

How would you like to continue?

Close

Save and submit

My goals need adjusting

Continue

Admi

Person: Welcome

- Save and submit ends the process
- My goals need adjusting starts the process again

Signature

Performance management is a process of communicating and clarifying job responsibilities, priorities and performance expectations in order to e between employee and manager. The objectives of our Performance Management system are to:

1. Increase two-way communication between employees and managers
2. Clarify mission, goals, responsibilities, priorities and expectations
3. Recognize outstanding performance
4. Identify and resolve performance problems
5. Provide a basis for administrative decisions such as promotions, succession, strategic planning and variable compensation

Our annual Performance Management process contains three distinct phases that occur throughout the performance year:

**Phase I: Goal Setting**  
This is the first phase in the performance Process during which employees and managers determine the basic tasks, individual objectives and p year

## Performance Management Integration

### The Performance Management Process of Morton Salt

#### “Basics tasks and individual objectives”

The fulfillment of basic tasks and individual objectives of a Morton Salt Managing employee is the basis for his bonus payment. Therefor the employee agrees together with his manager and his superior manager his tasks and objectives along a one year period.

#### „Mid year review on basic tasks and individual objectives“

A mid year review of the employee`s tasks and objectives is carried out to evaluate if the former agreements are still valid or have to be changed. If so, an agreement on the changes have to be made again between the former involved persons.

#### „Achievement of Tasks and Objectives”

★ At the end of the year the employee has to make a self appraisal on his achieved tasks and objectives. This appraisal is agreed between the employee, the manager and his superior manager. Once the second level approval is granted the release of the payment is done by the HR commission.

#### „Follow Up“

The agreed appraisal of the employee will be approved and released for payment by the HR commission.

## Performance Management Integration

### Third process step „Achievement of Tasks and Objectives“

The status „achievement of tasks and objectives“ is set by the HR staff in SAP by changing the status flow. After release once again a mail is sent to the involved employees and the document is accessible under the service on the SAP Portal.

The screenshot shows the SAP Administrator Functions interface. The 'Reporting Options' section is visible, and the 'Employee Documents' table is displayed below it. The table has the following data:

Appraisal Status	Substatus	Appraisee Name	Appraisal Document Name	Period	To
End of Year Achievement		Antonio Zamora Gonzalez	<a href="#">Personal Success Plan</a>	01.01.2012	31.12.2012

Below the table, there is a 'Workflow Event' dropdown menu set to 'Appraisee - Change Request'.

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## Performance Management Integration

### Third process step „Achievement of Tasks and Objectives“

The employee has to appraise his basic tasks and individual objectives. This appraisal is agreed between the employee, the manager and his superior manager once again.

The screenshot shows the 'Appraisal Document for Antonio Zamora Gonzalez' in SAP. The 'Basic Tasks and Personal Success Factors' section is active. It displays a table of tasks with the following details:

Task	Description	Final Appraisal	Value Description
Task 1	Support the SAP HCM PD Modules	Above Expectations	No value
Team Work	Communicates independently and comprehensively Works successfully with others Deals with conflicts effectively	Exceptional	Further definitions of the Personal Success Factors can be found by clicking the 'Personal Success Plan' link and clicking the 'Value Description' link.

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## Performance Management Integration

### The Performance Management Process of Morton Salt

#### “Basics tasks and individual objectives”

The fulfillment of basic tasks and individual objectives of a Morton Salt Managing employee is the basis for his bonus payment. Therefore the employee agrees together with his manager and his superior manager his tasks and objectives along a one year period.

#### „Mid year review on basic tasks and individual objectives“

A mid year review of the employee’s tasks and objectives is carried out to evaluate if the former agreements are still valid or have to be changed. If so, an agreement on the changes have to be made again between the former involved persons.

#### „Achievement of Tasks and Objectives”

At the end of the year the employee has to make a self appraisal on his achieved tasks and objectives. This appraisal is agreed between the employee, the manager and his superior manager. Once the second level approval is granted the release of the payment is done by the HR commission.

#### „Follow Up“



The agreed appraisal of the employee will be approved and released for payment by the HR commission.

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## Performance Management Integration

### Fourth process step „Follow Up”

After the evaluation of the employees achievements the process stops and the HR committee at Morton releases the appraisal forms for the follow up process. The follow up process calculates the final amounts for the payroll. A BW Report which provides personnel and payroll data supports the committee in their decisions.

Performance Management									
Bookmark									
▷	Lines								
▷	Rows								
▷	personalize								
		Employee	Task	Months	Real %	Real amount	Target amount	% Goal 1	% Goal 2
		S4244 Tom Mustang	Basic	12	110	1.436,09 EUR	1.305,54 EUR	30	30
			Goal 1	12	134	1.749,42 EUR	1.305,54 EUR	30	30
			Goal 2	12	130	2.262,94 EUR	1.740,72 EUR	40	40
			Goal 3	12	0	0,00 EUR	0,00 EUR	0	0
			Goal 4	12	0	0,00 EUR	0,00 EUR	0	0
			Total	60	374	5.448,45 EUR	4.351,80 EUR	100	100
			Total amount:	60	374	5.448,45 EUR	4.351,80 EUR	100	100

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Project Time Line

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## Copy basic tasks from previous year I

### Problem:

- For many employees basic tasks hardly change
- Managers have to re-enter these tasks each year

**Employee Documents**

Tasks successfully copied.

Status Overview (2)

Hide Quick Criteria Maintenance

Employee: Employees to Appraise

Valid From: 01.01.2009 To: 31.12.2012

Apply Clear

View: Morton Edit Display Copy tasks from prev. document Export Filter Settings

Appraisal Status	Substatus	Appraisee Name	Appraisal Document Name	Period	To
Goal Setting		Dr. Norbert Hartriegel	Personal Success Plan	01.01.2011	31.12.2011
Goal Setting		Dr. Norbert Hartriegel	Personal Success Plan	01.01.2012	31.12.2012

**Solution:**  
Service to copy basic tasks from previous year

## Copy basic tasks from previous year II



- Copied tasks can be changed or deleted
- New tasks can be added

**Appraisal Document for Dr. Norbert Hartriegel** [Help](#)

Action Log | Print | Attachments (0) | Save

How would you like to continue?

Save and Exit Document

Save and submit [Continue](#)

**Administrative Data**

Personal Success Plan | **Basic Tasks and Personal Success Factors** | Individual Objectives | Electronic Signature

**Basic Tasks and Personal Success Factors**

Basic tasks are the routine work activities or job duties that you are expected to perform every day, week, month or quarter. Basic tasks are weighted at least 50% of the role. Summarize the basic tasks of your role below, where indicated.

Weighting: 50 %

**Basic Tasks** [Add](#)

Title:  [Delete](#)

Description:

Title:  [Delete](#)

Description:

**Personal Success Factors**

Personal Success Factors are the expected behaviors identified as critical to success within the K+S/Morton Salt, Inc. organization. You will be measured on

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## Follow up processing – extended log



### Problem:

- No overall follow up log available
- Follow up processing can only be monitored via action log

### Solution:

- Customer specific follow up log
- User interface to start and monitor the follow up process

Selection

Employee:  Start Date:

Manager:  End Date:

Personnel area:  To

Personnel subarea:  To

[Update](#)

View: [Standard View] [Export](#) [Follow Up](#)

Apper ID	Appraisee Name	Apper ID	Appraiser Name	Status	Substatus	Period	To	Process	Message Text
00059102	Svenja Schüler	00052404	Dipl.Ökonom Claudia Schedel	Year Closed		01.01.2012	31.12.2012	●○○	No Basis amount available (TF9608)
00001713	Matthias Hartmann	00052404	Dipl.Ökonom Claudia Schedel	Year Closed		01.01.2011	31.12.2011		
00510010	JARA RAUL	00000019	Kurt Maschke	Year Closed		01.01.2011	31.12.2011		
00700072	Tom Schneeball	00500022	Elmar Lammert	Year Closed		01.01.2012	31.12.2012	○○●	
00700080	Dr. Norbert Hartriegel	00700072	Tom Schneeball	Year Closed		01.01.2011	31.12.2011		
00700080	Dr. Norbert Hartriegel	00700080	Dr. Norbert Hartriegel	Year Closed		01.01.2012	31.12.2012	●○○	No Basis amount available (TF9608)
00001713	Matthias Hartmann	00054244	Elmar Lammert	Year Closed		01.01.2012	31.12.2012	●○○	No Basis amount available (TF9608)
00001713	Matthias Hartmann	00005391	Jörg Wolf	Year Closed		01.01.2011	31.12.2011		



## Matching: Appraiser vs. Manager I

As line managers on all levels often change during the appraisal period many employees have more than one appraiser on one period.

### Requirements:

- Show deviation: appraiser vs. line manager
- Track changes and change appraiser if necessary

Matching Data										
<input type="checkbox"/> Show deviation only										
Document						Org Management				
Appraisee Pers.No.	Appraisee Name	Appraiser Pers.No.	Appraiser Name	Org. Unit	Manager Pers.No.	Manager Name	Org. Unit	Appraisal Status	Substatus	Appraisal Doc. ID
00059102	Svenja Schüler	00052404	Dipl.Ökonom Claudia Schedel	Geo-Informationssysteme	00052404			Year Closed		001B24A2D09603D08AC158B8031CC4B8
00001713	Matthias Hartmann	00052404	Dipl.Ökonom Claudia Schedel	Geo-Informationssysteme	00005391	Jörg Wolf	GM-Assistent	Year Closed		001B24A2D09603D097E3D70C3D939A89
00510010	JARA RAUL	00000019	Kurt Maschke	ATZ-Freistellungsphase	00000000	N/A		Year Closed		001B24A2D09603D0A7A833B140F35016
00700072	Tom Schneeball	00500022	Elmar Lammert	Kaufmännische Anwendungen	00400025	Zieltz B Freischicht	Ausland	Year Closed		001B24A2D09603E08985A945DF71A66
00700080	Dr. Norbert Hartriegel	00700072	Tom Schneeball	Kaufmännische Anwendungen	00000000	N/A		Year Closed		001B24A2D09603E097E3E2DFBE2216F7
00700080	Dr. Norbert Hartriegel	00700080	Dr. Norbert Hartriegel	Ressort 1	00000000	N/A		Year Closed		001B24A2D09603E09EF33371A13313D4
00001713	Matthias Hartmann	00054244	Elmar Lammert	Kaufmännische Anwendungen	00005391	Jörg Wolf	GM-Assistent	Year Closed		001B24A2D09603E09EF338B9ADA50402
00001713	Matthias Hartmann	00005391	Jörg Wolf	GM-Assistent	00005391			Year Closed		001B24A2D09603E0A4975F88BC38D91D

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## Matching: Appraiser vs. Manager II

Focus on deviation only

Matching Data										
<input checked="" type="checkbox"/> Show deviation only										
Document						Org Management				
Appraisee Pers.No.	Appraisee Name	Appraiser Pers.No.	Appraiser Name	Org. Unit	Manager Pers.No.	Manager Name	Org. Unit	Appraisal Status	Substatus	Appraisal Doc. ID
00001713	Matthias Hartmann	00052404	Dipl.Ökonom Claudia Schedel	Geo-Informationssysteme	00005391	Jörg Wolf	GM-Assistent	Year Closed		001B24A2D09603E097E3D70C3D939A89
00510010	JARA RAUL	00000019	Kurt Maschke	ATZ-Freistellungsphase	00000000	N/A		Year Closed		001B24A2D09603D0A7A833B140F35016
00700072	Tom Schneeball	00500022	Elmar Lammert	Kaufmännische Anwendungen	00700071	Peter Pfaffenhütchen	Kaufmännische Anwendungen	Year Closed		001B24A2D09603E097E3E2DFBE2216F7
00700080	Dr. Norbert Hartriegel	00700072	Tom Schneeball	Kaufmännische Anwendungen	00000000	N/A		Year Closed		001B24A2D09603E097E3E2DFBE2216F7
00700080	Dr. Norbert Hartriegel	00700080	Dr. Norbert Hartriegel	Ressort 1	00000000	N/A		Year Closed		001B24A2D09603E09EF33371A13313D4
00001713	Matthias Hartmann	00054244	Elmar Lammert	Kaufmännische Anwendungen	00005391	Jörg Wolf	GM-Assistent	Year Closed		001B24A2D09603E09EF338B9ADA50402

Easily filter appraisals

Matching Data										
<input type="button" value="Save"/> <input type="button" value="Cancel"/>										
Document						Org Management				
Appraisee Pers.No.	Appraisee Name	Appraiser Pers.No.	Appraiser Name	Org. Unit	adopt	Manager Pers.No.	Manager Name	Org. Unit	Appraisal Status	Substatus
00700072	Tom Schneeball	00500022	Elmar Lammert	Kaufmännische Anwendungen	<input checked="" type="checkbox"/>	00700071	Peter Pfaffenhütchen	Kaufmännische Anwendungen	Year Closed	

## Matching: Appraiser vs. Manager III



Easily adopt "new" line manager as appraiser

Appraisee Pers.No.	Appraisee Name	Appraiser Pers.No.	Appraiser Name	Org. Unit	adopt	Manager Pers.No.	Manager Name	Org. Unit
00059102	Svenja Schüler	00052404	Dipl.Ökonom Claudia Schedel	Geo-Informationssysteme		00052404		
00001713	Matthias Hartmann	00005391	Jörg Wolf	GM-Assistent		00005391	Jörg Wolf	
00510010	JARA RAUL	00000019	Kurt Maschke	ATZ-Freistellungsphase		00000000	N/A	
00700072	Tom Schneeball	00500022	Elmar Lammert	Kaufmännische Anwendungen		00700071	Peter Pfaffenhütchen	Kaufmännische Anwendungen
00700080	Dr. Norbert Hartriegel	00700072	Tom Schneeball	Kaufmännische Anwendungen		00000000	N/A	
00700080	Dr. Norbert Hartriegel	00700080	Dr. Norbert Hartriegel	Resort 1		nnnnnnnn	N/A	
00001713	Matthias Hartmann							
00001713	Matthias Hartmann							

Easily search for other appraiser

Personnel Number: All Values

Hide Filter Criteria Personal Value List Settings

Last name:

First name:

Start Search Reset

OK Cancel

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- Typical pitfalls and solutions

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## Pitfalls and solutions



### Different viewpoints

- Rapid Prototyping
- Communication: Weekly "Jour-Fix" meetings

### Over regulation

- Implement important UI or business checks only
- Keep the document structure as simple as possible
- Plan user trainings

### Bad process design

- Restrict the amount of active roles in the process
- Allocate the workload

### Executive Secretaries

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## Questions?



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Innovatives Prozess Consulting

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