

THR82

SAP SuccessFactors Performance and Goals Academy

COURSE OUTLINE

Course Version: 2511

Course Duration:

SAP Copyrights, Trademarks and Disclaimers

© 2025 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. Please see <https://www.sap.com/corporate/en/legal/copyright.html> for additional trademark information and notices.

Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors.

National product specifications may vary.

These materials may have been machine translated and may contain grammatical errors or inaccuracies.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP SE or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP SE or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	<i>Example text</i>
Window title	<i>Example text</i>

Contents

ix Course Overview

1 Unit 1: Getting Started with SAP SuccessFactors Performance and Goals Academy

- 1 Lesson: Preparing for Performance and Goals Academy
- 1 Lesson: Exploring the Performance and Goal Management Modules and Tools
- 1 Lesson: Preparing your Instance and Assigning Role-Based Permissions (RBPs)
- 1 Lesson: Compiling User Data
- 1 Lesson: Using the XML and DTD

3 Unit 2: Introducing Goal Management

- 3 Lesson: Managing Goals in Goal Management
- 3 Lesson: Assigning Roles and Permissions in Goal Management
- 3 Lesson: Aligning Goals in Goal Management

5 Unit 3: Setting Up and Configuring the Goal Plan Template

- 5 Lesson: Converting Legacy Templates in Goal Management
- 5 Lesson: Identifying the Elements of the Goal Plan Template
- 5 Lesson: Configuring the Goal Plan Template
- 5 Lesson: Configuring the Goal Plan Global Settings

7 Unit 4: Configuring Goal Plan Categories and Fields

- 7 Lesson: Configuring the Goal Plan Categories
- 7 Lesson: Configuring the Goal Plan Fields

9 Unit 5: Configuring Goal Plan Permissions

- 9 Lesson: Configuring Goal Plan Permissions

11 Unit 6: Exploring Goal Management as an Administrator and End User

- 11 Lesson: Introducing Goal Management Features and Settings
- 11 Lesson: Configuring AI Capabilities for Goal Management
- 11 Lesson: Managing Goal Libraries
- 11 Lesson: Exploring the Goal Plan as an End User
- 11 Lesson: Managing Personal and Team Goals
- 11 Lesson: Using Generative AI in Goal Management
- 12 Lesson: Managing Initiatives
- 12 Lesson: Exploring Goal Management Integration with Dynamic Teams

13	Unit 7:	Introducing Performance Management
13		Lesson: Describing the Principles and Tools of Performance Management
13		Lesson: Establishing Workflow and Recording Evaluations with the Performance Form
15	Unit 8:	Using Job Architecture in Performance Management
15		Lesson: Managing Job Architecture in SAP SuccessFactors
15		Lesson: Managing Attribute Content
15		Lesson: Mapping Skills and Competencies to Job Roles
15		Lesson: Using Writing Assistant and Coaching Advisor
17	Unit 9:	Setting Up and Configuring the Performance Form Template
17		Lesson: Creating Performance Form Templates
17		Lesson: Working with the Global Settings
17		Lesson: Setting Up Initial Configurations
19	Unit 10:	Configuring Sections in Performance Form Templates
19		Lesson: Configuring Basic Standard Sections
19		Lesson: Configuring the Goal Sections
19		Lesson: Configuring the Attribute Sections
19		Lesson: Configuring the Summary Section
19		Lesson: Introducing the Objective Competency Summary Section
19		Lesson: Configuring Custom Sections
21	Unit 11:	Configuring Permissions in Performance Form Templates
21		Lesson: Identifying Permission Types in a Form Template
21		Lesson: Configuring Permissions in a Form Template
23	Unit 12:	Exploring Performance Management as an Administrator and End User
23		Lesson: Identifying Performance Management Key Features and Permissions
23		Lesson: Enabling Business Rules for Performance Management
23		Lesson: Accessing Performance Management Forms
23		Lesson: Managing the Performance Management Review Cycle
23		Lesson: Configuring Performance Review Support Features for Managers
24		Lesson: Exploring the AI capabilities available in Performance Management

25	Unit 13:	Using Calibration in Performance Management
25		Lesson: Outlining Calibration in Performance Management
25		Lesson: Configuring Calibration Settings
25		Lesson: Configuring the Calibration Template
25		Lesson: Creating and Managing Calibration Sessions
25		Lesson: Using Calibration as an End User
27	Unit 14:	Deploying Continuous Performance Management and Feedback
27		Lesson: Configuring Continuous Performance Management
27		Lesson: Using Continuous Performance Management to Increase Work Performance
27		Lesson: Configuring Continuous Feedback
27		Lesson: Using AI-Assisted Writing in Continuous Performance and Feedback
27		Lesson: Identifying Continuous Performance Management Integrations
29	Unit 15:	Deploying 360 Reviews
29		Lesson: Introducing 360 Reviews
29		Lesson: Setting Up 360 Reviews Form Templates
29		Lesson: Configuring the Rater Section
29		Lesson: Configuring Standard and Ratable Sections
29		Lesson: Managing the 360 Reviews Process as an Administrator
29		Lesson: Managing the 360 Reviews Process as an End User
30		Lesson: Navigating 360 Executive Review
31	Unit 16:	Implementing Translations
31		Lesson: Configuring Translations in Goal Management
31		Lesson: Configuring Translations in Performance Management and other modules
33	Unit 17:	Succeeding as a Consultant
33		Lesson: Locating Relevant Resources and Tools

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant

Lesson 1: Preparing for Performance and Goals Academy

Lesson Objectives

After completing this lesson, you will be able to:

- Access links to course files and implementation resources needed to prepare for this course.

Lesson 2: Exploring the Performance and Goal Management Modules and Tools

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the benefits and tools associated with SAP SuccessFactors Performance and Goals modules.

Lesson 3: Preparing your Instance and Assigning Role-Based Permissions (RBPs)

Lesson Objectives

After completing this lesson, you will be able to:

- Verify your instance initial Provisioning and basic Role-Based Permissions set up.

Lesson 4: Compiling User Data

Lesson Objectives

After completing this lesson, you will be able to:

- Compile user data.

Lesson 5: Using the XML and DTD

Lesson Objectives

After completing this lesson, you will be able to:

- Use XML and document type definition (DTD) to configure Performance and Goals modules.

Lesson 1: Managing Goals in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the organization of goals in Goal Management.

Lesson 2: Assigning Roles and Permissions in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the roles and respective permissions involved in the goal management process.

Lesson 3: Aligning Goals in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Align goals using cascade methods.

Lesson 1: Converting Legacy Templates in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Convert legacy templates into the latest version of Goal Management.

Lesson 2: Identifying the Elements of the Goal Plan Template

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the elements of the goal plan template.

Lesson 3: Configuring the Goal Plan Template

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the goal plan template.

Lesson 4: Configuring the Goal Plan Global Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the global settings, text replacement process and soft warnings in the goal plan template.

Lesson 1: Configuring the Goal Plan Categories

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the goal plan categories.

Lesson 2: Configuring the Goal Plan Fields

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the goal plan fields.

Lesson 1: Configuring Goal Plan Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the goal plan permissions.

Lesson 1: Introducing Goal Management Features and Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Explain Goal Management concepts, permissions, settings, and email notifications.

Lesson 2: Configuring AI Capabilities for Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Review the AI Service Administration capabilities for Goal Management.

Lesson 3: Managing Goal Libraries

Lesson Objectives

After completing this lesson, you will be able to:

- Manage goal libraries used in goal plan templates.

Lesson 4: Exploring the Goal Plan as an End User

Lesson Objectives

After completing this lesson, you will be able to:

- Explore the goal plan as an end user.

Lesson 5: Managing Personal and Team Goals

Lesson Objectives

After completing this lesson, you will be able to:

- Manage personal and team goals.

Lesson 6: Using Generative AI in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Use Generative AI capabilities in Goal Management.

Lesson 7: Managing Initiatives

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Initiatives.

Lesson 8: Exploring Goal Management Integration with Dynamic Teams

Lesson Objectives

After completing this lesson, you will be able to:

- Explore Dynamic Teams integration with Goal Management.

Lesson 1: Describing the Principles and Tools of Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the basic principles, components, and historical evolution of Performance Management.

Lesson 2: Establishing Workflow and Recording Evaluations with the Performance Form

Lesson Objectives

After completing this lesson, you will be able to:

- Identify stages and steps within a route map and how to record evaluations.

Lesson 1: Managing Job Architecture in SAP SuccessFactors

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Job Architecture content with Job Profile Builder.

Lesson 2: Managing Attribute Content

Lesson Objectives

After completing this lesson, you will be able to:

- Manage attribute content with Talent Intelligence Hub.

Lesson 3: Mapping Skills and Competencies to Job Roles

Lesson Objectives

After completing this lesson, you will be able to:

- Map skills and competencies to job roles.

Lesson 4: Using Writing Assistant and Coaching Advisor

Lesson Objectives

After completing this lesson, you will be able to:

- Use Writing Assistant and Coaching Advisor content to provide feedback.

Lesson 1: Creating Performance Form Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the methods of uploading and updating Performance Management templates.

Lesson 2: Working with the Global Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Configure general and advanced form template settings.

Lesson 3: Setting Up Initial Configurations

Lesson Objectives

After completing this lesson, you will be able to:

- Edit the main form template elements.

Lesson 1: Configuring Basic Standard Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the introduction, employee information, review information and signature sections.

Lesson 2: Configuring the Goal Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the goal section(s).

Lesson 3: Configuring the Attribute Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the attribute sections.

Lesson 4: Configuring the Summary Section

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the overall summary section.

Lesson 5: Introducing the Objective Competency Summary Section

Lesson Objectives

After completing this lesson, you will be able to:

- Introduce the objective/competency summary section.

Lesson 6: Configuring Custom Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure custom sections and fields.

Lesson 1: Identifying Permission Types in a Form Template

Lesson Objectives

After completing this lesson, you will be able to:

- Identify permission types that can be configured in a form template.

Lesson 2: Configuring Permissions in a Form Template

Lesson Objectives

After completing this lesson, you will be able to:

- Configure permissions in a form template.

Lesson 1: Identifying Performance Management Key Features and Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Identify Performance Management design decisions, features, and permissions.

Lesson 2: Enabling Business Rules for Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Manage business rules to set conditional behaviors in performance management.

Lesson 3: Accessing Performance Management Forms

Lesson Objectives

After completing this lesson, you will be able to:

- Access forms in the Performance Management Inbox.

Lesson 4: Managing the Performance Management Review Cycle

Lesson Objectives

After completing this lesson, you will be able to:

- Manage the Performance Management review cycle.

Lesson 5: Configuring Performance Review Support Features for Managers

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Performance Reviews support features for managers.

Lesson 6: Exploring the AI capabilities available in Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explore AI-assisted capabilities in Performance Management.

Lesson 1: Outlining Calibration in Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Describe use of Calibration in performance management, including tools and roles.

Lesson 2: Configuring Calibration Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Calibration settings.

Lesson 3: Configuring the Calibration Template

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Calibration template.

Lesson 4: Creating and Managing Calibration Sessions

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Calibration sessions.

Lesson 5: Using Calibration as an End User

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate a Calibration session as an end user.

Lesson 1: Configuring Continuous Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Enable Continuous Performance Management.

Lesson 2: Using Continuous Performance Management to Increase Work Performance

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the different views of Continuous Performance Management.

Lesson 3: Configuring Continuous Feedback

Lesson Objectives

After completing this lesson, you will be able to:

- Use the Continuous Feedback capabilities.

Lesson 4: Using AI-Assisted Writing in Continuous Performance and Feedback

Lesson Objectives

After completing this lesson, you will be able to:

- Enhance content writing in Continuous Performance and Feedback with AI capabilities.

Lesson 5: Identifying Continuous Performance Management Integrations

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the integration points between Continuous Performance Management and other SAP SuccessFactors modules.

Lesson 1: Introducing 360 Reviews

Lesson Objectives

After completing this lesson, you will be able to:

- Introduce 360 Reviews, Detailed 360 Report, and initial configurations.

Lesson 2: Setting Up 360 Reviews Form Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Configure 360 Reviews Templates.

Lesson 3: Configuring the Rater Section

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the rater section in a 360 Reviews form template.

Lesson 4: Configuring Standard and Ratable Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure other sections in a 360 Reviews form template.

Lesson 5: Managing the 360 Reviews Process as an Administrator

Lesson Objectives

After completing this lesson, you will be able to:

- Manage the 360 Reviews process as an administrator.

Lesson 6: Managing the 360 Reviews Process as an End User

Lesson Objectives

After completing this lesson, you will be able to:

- Manage the 360 Reviews process as an end user.

Lesson 7: Navigating 360 Executive Review

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate 360 form completion progress in Executive Review.

Lesson 1: Configuring Translations in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Configure translations in Goal Management.

Lesson 2: Configuring Translations in Performance Management and other modules

Lesson Objectives

After completing this lesson, you will be able to:

- Configure translations in Performance Management and other modules.

Lesson 1: Locating Relevant Resources and Tools

Lesson Objectives

After completing this lesson, you will be able to:

- Access available resources and tools to support SAP SuccessFactors solutions.