"Welcome to Customer Success!" - Training

Putting the ♥ into support

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Topics

Training

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Training Overview

Getting Started Guides:
Premium Support Resources Kit - **Platinum Support Resources Kit**

Why is Training Needed? While the SuccessFactors solution is web-based and designed for ease of use for your end users, the complexities and depth of our BizX suite does require a certain level of training and expertise. Administrators new to the SuccessFactors application can quickly be overwhelmed with learning all the functionality without sufficient training.

• Professional Services: Paid training during implementation of modules

• Customer Community for free training, webinars and recordings

• SuccessFactors University for paid custom and instructor led training

• Customer Success: Answers to how-to type questions via regular support

Note: Live Chat is a great service for getting quick answers to basic questions. Training questions we cannot answer via chat will generate a case. Customer Success is a priority based support service so P1-P3 issues will take priority over P4 "How-To" cases.

Proper Training is an Important Tool in Preventing Escalations

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For Fee Training

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SuccessFactors University/Academy

The SuccessFactors University/Academy team is committed to helping you build the ultimate success story by achieving a total strategic business execution solution for your organization. We complement the offerings of our Professional Services Implementation Team by providing additional education services to further drive user adoption and realize transformation within your organization.

Here you will find training on:

• BizX Administration Introduction
• Competencies
• Performance Management
• 360 Degree Reviews
• Succession Management
• Goal Management
• LMS training
• LMS Admin training
• Workforce Analytics and Workforce Planning
• Calibration
• Recruiting
• and more…

Please visit the Academy's Event page for a <u>schedule of all available paid & free product module training</u>.

E-Learning Series

E-Learning for Small Business That's Easy to Embrace (For PE or SMB Clients)

Your small to midsize business can experience business acceleration when you automate your performance and talent management process. With the SuccessFactors e-Learning Series, you can be sure that your employees are able to make the most of their automation tools, translating learning into success every day.

How do you make limited training resources available "just in time" to support your employees' growing interests and needs? We've got you covered. With our Web-based e-learning modules, HR leaders and managers can easily access, download and customize self-paced tutorials anytime employee training is needed.

Please contact your Account Manager or Customer Success Team to find out how to get the E-Learning Series

Training Provided by Our Partners

Aasonn's SuccessFactors Catalog

Take Advantage of Aasonn's Experience.

The overall benefit of working with Aasonn on a training project is the opportunity to take advantage of our years of experience, in both training and implementation of hundreds of projects. We are unsurpassed when it comes to our product knowledge, implementation expertise and ability to develop our clients' knowledge and skills through Training.

Investigate any of Aasson's exceptional training solutions and services below:

Introduction to SuccessFactors
Goal Management Fundamentals
Performance Management Fundamentals
Career and Development Planning
Succession Planning for Managers
Reporting for Managers
Request More Training Information

Free Training

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SuccessFactors University/Academy

The SuccessFactors BizX Platform product includes a ticket to the SuccessFactors Platform Working Smarter training series, which is a "ticket" to unlimited public Administrator training. The training currently includes courses on BizX Administration Introduction, Competencies, Performance Management, and Goal Management. This list is subject to change.

You can see a list of our public courses <u>here</u>. A special code is needed before you register for the training sessions. When you are ready for your first class, contact <u>training@successfactors.com</u> and we will get you started.

Please note: Professional Edition (PE) Clients require a separate purchase for this. LMS training is not included in the platform offering and requires a separate purchase for our large catalog of LMS Admin training (currently available). Nor are Workforce Analytics and Workforce Planning included in the Working Smarter series.

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Training Resources via Community

Professional Edition (PE) Clients – Getting Started Sessions
Register for LIVE free sessions with our consultants to have your questions answered. [Click here to register]
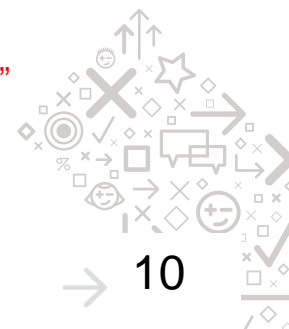Note: These are free only to PE client admins on go-live. When there is admin turnover, there is a fee for replacement admins to access this offering.

Small Business (SMB) & Enterprise Client Product Training Materials
(This includes Premium & Platinum Support Level Clients)

Visit the Customer Community Enterprise Training Page for the latest free module training downloads compliments of SuccessFactors Academy. Here you will find a wide variety of free resources across the BizX Suite including:

• End User Training Materials Course Overview
• BizX Platform End User Training Materials
• 360 End User Training Materials
• CDP End User Training Materials
• Compensation and Variable End User Training Materials
• Goals Management End User Training Materials
• Jobs2Web End User Training Materials
• Performance and Calibration End User Training Materials
• Recruiting End User Training Materials
• Succession End User Training Materials

Please note: Some of the downloads available from our training page include very large files. Please be patient during downloads if using a slower connection. For a small fee the Academy can provide "unlocked" versions of this material so you can customize.
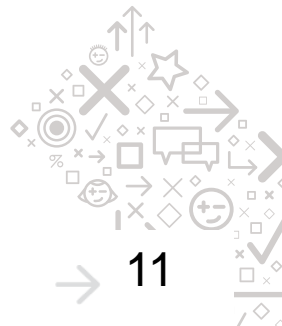
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One Admin Training

How to use One Admin Self Service Tool
The following resources are an invaluable set of videos and presentations that provide an introduction to managing your processes via Admin Tools

- One Admin_Tool_Intro_Video
- How to Add or Edit Users through Manage Users
- How to Create or Edit Goal Plans
- How to Create or Edit PM Templates
- How to Create or Edit Rating Scales
- How to create or edit Route Maps
- One Admin Managing Compensation Plans PPT
- One Admin Managing Goal Plans PPT
- One Admin Managing Performance Templates PPT

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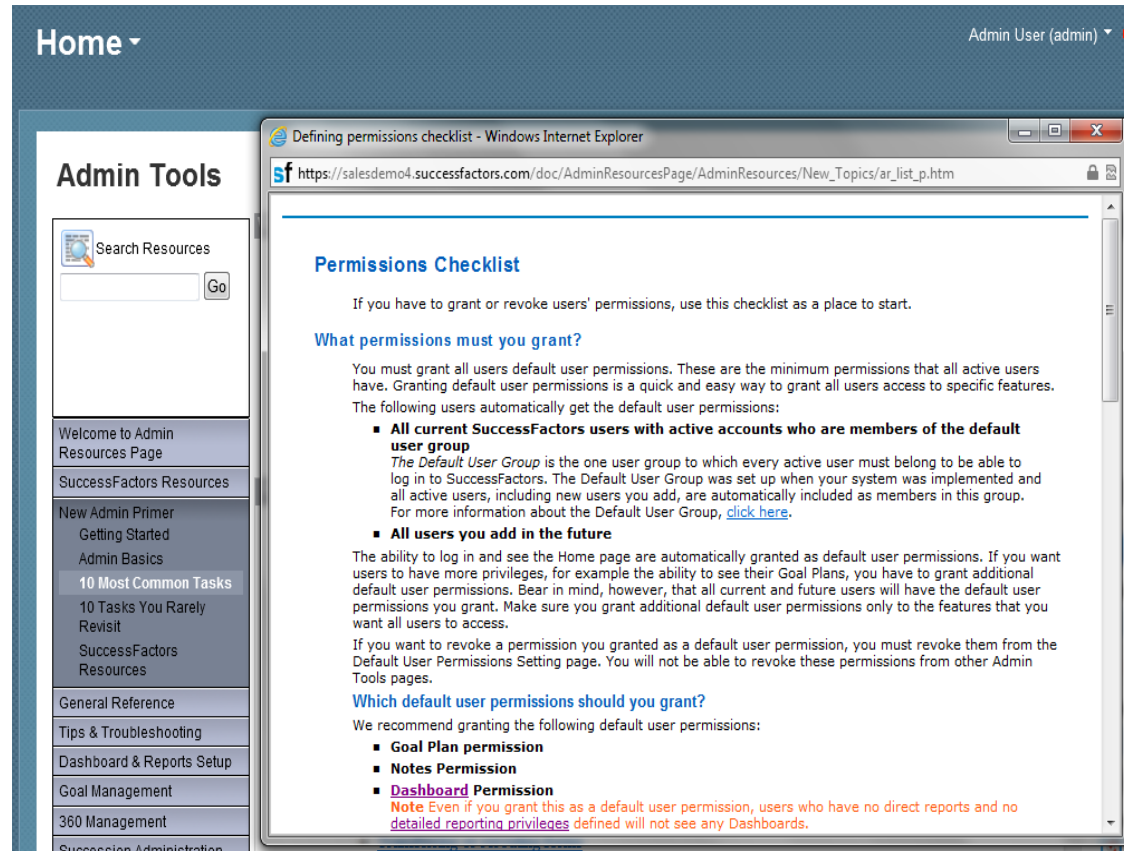BUSINESS EXECUTION SOFTWARE

In-Product Help and Instruction

Probably the most overlooked of all training options available, yet one of the most comprehensive and helpful resources available, is the in-product help & tutorials. This can be accessed directly from
Admin Tools > Administrative Resources
Note: When using the new one admin select "Help & Tutorials" from One Admin Home Screen

The Admin Resources Page provides you with the most current and complete information you want as an Admin. You'll find expanded coverage on many of your Admin questions, checklists to help you set up processes, movies, tutorials and more!

Knowledgebase Articles

Customer Success maintains a large Knowledgebase via the Case Management Portal. Here you will find a very extensive library of knowledgebase articles on every product module available. This should be your 2nd resource when looking for information on specific features and for step-by-step instruction on the general use of features within the suite.

Professional Edition Training

Manager Training Guides

Click on the zip files to open the content:

- Guide-to-Compensation
- Guide-to-Dashboards
- Guide-to-Goal-Setting
- Guide-to-Live-Profile
- Guide-to-Performance-Reviews
- Managing-the-360-Evaluation

Manager Guide.zip

Employee Training Kit

- Complete-360-Evaluation-as-Participant
- PE-Getting-Started-Guide
- Preparing-Your-360-Evaluation
- Your-Goal
- Your-Performance-Review
- Your-Profile

Employee Guide.zip

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Training Resources via Community

Product Resources

Each product module has its own set of free training content within the Customer Community. Visit the Community, and then from the main menu go to > Products > then select the module > then **Product Resources**

Product Demos: Would you like more insight into modules you do not have? View Demos and Datasheets. Our articles, papers, and videos will help give you a better understanding of Business Execution processes and how they can help your business achieve greater results through optimization

Product OneVoice

OneVoice is SuccessFactors Customer Advisory Board program. It was created to make sure all customers can have a voice in product direction and get all the information you need to make smart decisions about how best to use SuccessFactors products within your company. Each SuccessFactors product module has its own OneVoice group, each of which is moderated by one of our product managers. Go to > **Products** > then select the **module** and view latest OneVoice recordings.

Discussion Forums

Ask your colleagues or peers for advice on a functional question or for what they did to accommodate a change in business process. Each product module has its own vibrant discussion forum within the Customer Community. Visit the Community, and then from the main menu go to > **Products** > select product > then **Product Discussions.**

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Customer Success Help

Customer Success by nature is not a training department and therefore is not the optimal channel for full module training. Customer Success does offer support for basic "how to" type questions, as well as brief instruction on specific features within the product. Our strengths are in answering one-off type questions that can be answered via our known solutions. When comprehensive training on product features is needed we will refer you to our training groups; SuccessFactors Academy or Professional Services.

- **Customer Success Offers the Following Education Options:**
  - Recorded customer webinars
  - Case by case answers to common admin tools questions
  - Assistance on using product modules (limited to brief walkthroughs on specific features as opposed to overall module training)
  - Assistance on using the SuccessFactory tool
  - Assistance on using our Self-Service tools (limited to brief walkthroughs on specific features as opposed to overall module training)
  - Monthly Admin Compass email sent to all administrators on record and active in the CRM.

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Other Customer Success Resources

The Value Improvement Program (VIP): This is a series of events designed to promote knowledge sharing across the SuccessFactors customer community. We have already received some great feedback on this program. In a nutshell, each event focuses on effective talent management process design and deployment and highlights a particular customer's personal success. Each session is complimentary and exclusive to SuccessFactors customers as part of their current investment with our technology! Today we offer "**Webcast Wednesdays**" twice per month and "**Customer Value Days**" that are at least one each quarter.

The Value Improvement Program allows you to maximize the value your organization receives from your SuccessFactors investment through best practices and networking opportunities. Check out the VIP Program Calendar and Register for upcoming events and let us know if you might be interested in hosting a VIP Customer Success Day at your organization.

These events gather together SuccessFactors customers sharing similar interests and challenges in a forum where they can network with each other and subject matter experts from SuccessFactors. For more information, please visit our VIP page.

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Other Customer Success Resources

- **Customer Connection Newsletter:** The Admin Compass newsletter is distributed on a monthly basis. Administrators by default will receive this monthly newsletter. The newsletter provides you with information on a variety of topics, including: company and product related news, workarounds for known issues, "Ask the Expert" article, User Group information, product release dates, training calendar and other news of general interest to the user community.

- Webcasts Please review the many webinars currently available from our Training Page covering a wide range of topics.

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Release Summaries (Release Notes)

Another great resource for basic help and instruction on feature sets are the release Summaries. These provide a general introduction to every feature released over time in all modules.

- 2012 Release Schedule
- Sign up for quarterly release webinars
- **Did You Know?** Your No.1 resource for information on new features can be found right in our Release Summaries within the application. Open your instance > Admin tools > Admin Resources > Release Summary : From here you can search on all features that exist!
- Catch up on previous release features and learn all about the modules you already have right from admin tools!
- Release Summaries are also made available via the Customer Community > Products