

“Welcome to Customer Success!” - Training

Putting the ❤️ into support

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





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 [schedule of all available paid & free product module training](#).



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



To maximize an organization's return on investment (ROI), organizational learning needs to be as efficient as possible, while still maintaining its effectiveness. Reducing the time spent preparing for the delivery of materials, as well as the time invested in the instruction, is essential to enhancing an organization's learning agility.

(SOURCE: The Business Impact of Next-Generation e-Learning: How Today's e-Learning Drives Business Results, Dun & Associates, 2011)

About SuccessFactors for Small Business
Make that breakthrough hire. Focus your people on what matters most. Develop and reward exceptional performance. Bridge the gap between your business strategy and your everyday execution. SuccessFactors Business Execution (BioX) Software Solutions can move your small business away from manual paper-based processes and into the BioX Cloud.

Our easy-to-use tools deliver the time and insight that senior leaders, managers and human resource professionals need to move your business forward. You can reach out to new opportunities, markets, products and services with fully engaged, productive employees who are aligned with your company goals. And you can create a unique workplace culture where key performers stick around because they love their work.

Make Your Move. Make a Difference. Learn more at www.successfactors.com.

successfactors
BUSINESS EXECUTION SOFTWARE

DATA SHEET

Best Practices Translate Learning Into Action

Once you introduce SuccessFactors Professional Edition Business Execution Software to your employees and managers, they'll be primed and ready to start taking hold of these powerful new business tools. 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.

We did the heavy lifting for you by creating these flexible e-learning modules using best practices designed to help your entire company see results fast:

- **We make you look good.** As an HR leader, you know that you're ultimately responsible for successful execution when you introduce a new performance management system. We've made it easy for you to become the subject matter expert on system features and functionality. Want to download and customize the e-learning content for your additional internal training? It's a snap with built-in download features included in each module.
- **We reinforce fast and efficient user adoption.** Your employees may need additional training at a moment's notice. With e-learning content built in the BioX Cloud, you have quick and easy access to view, download, customize or share content anytime, anywhere. Best of all, the self-paced e-learning is engaging and simple to follow.
- **We help you plan for payoff.** Your small to midsize company demands maximum returns on every investment, and SuccessFactors delivers on that expectation. You'll see fast, tangible returns on your investment through:
 - **Fast Integration** — Employees across your entire company will quickly get the most out of their software with quick, easy-to-follow and consistent learning that's grounded in best practices.
 - **Reinforced Learning** — Employees' understanding and competence will be reinforced by the engaging and topic-relevant exercises and reviews that are included in each module.
 - **Flexible Content** — Access training online when you need it. Download specific modules for internal training. Customize and share content throughout the organization. With flexibly designed e-learning content, we've got your training needs covered.

Summary

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.

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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 Aasonn'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 [here](#). A special code is needed before you register for the training sessions. When you are ready for your first class, contact training@successfactors.com 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.



Training Resources via Community

Professional Edition (PE) Clients – Getting Started Sessions

Register for LIVE free sessions with our consultants to have your questions answered. [\[Click here to register\]](#)

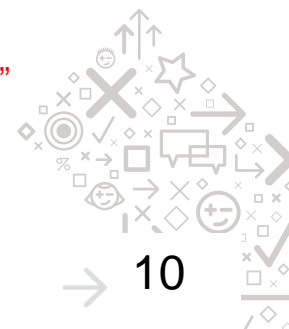
Note: These are free only to PE client admins on go-live. When there is admin turnover, there is a fee for replacement admins to access this offering.

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.

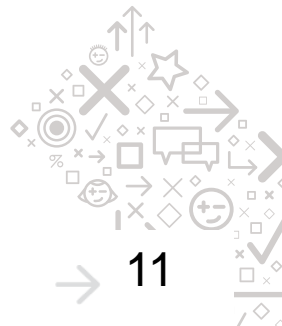


One Admin Training

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](#)

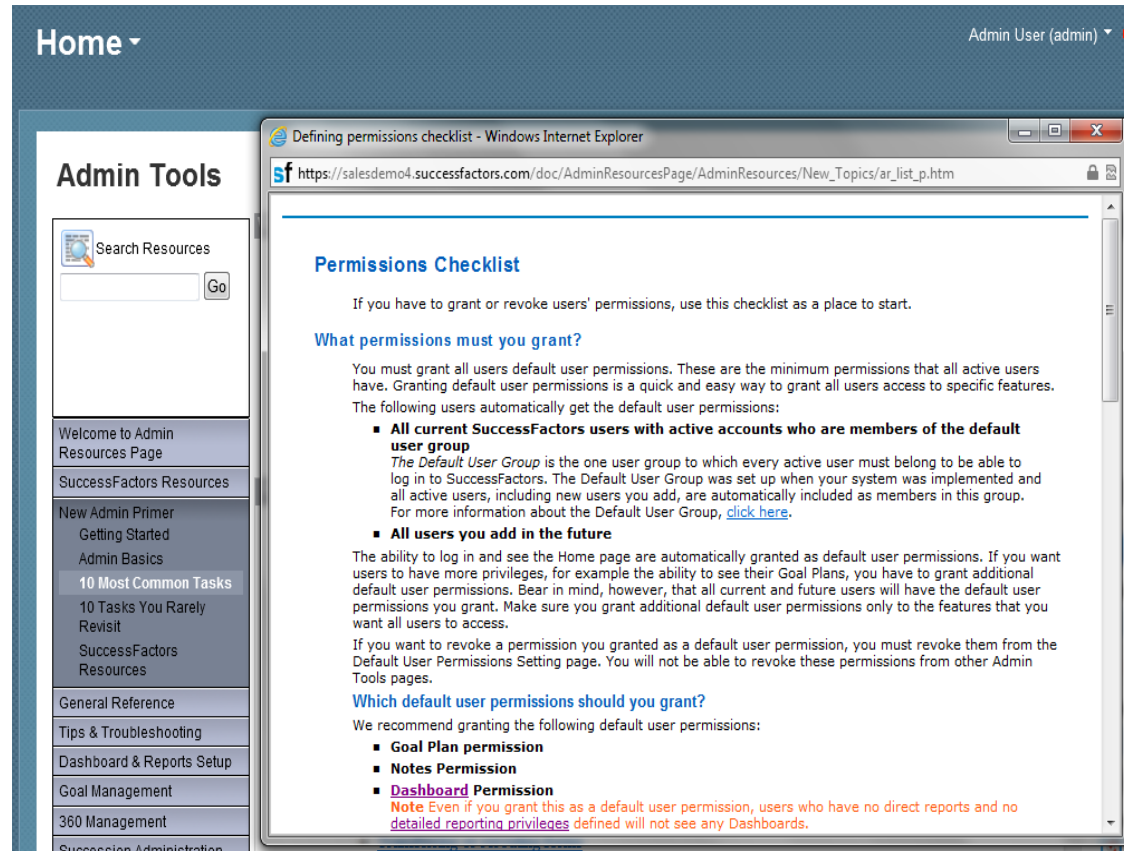


In-Product Help and Instruction

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.

The screenshot displays the SuccessFactors Knowledge Base interface. At the top, the SuccessFactors logo (An SAP Company) and a 'SUPPORT' link are visible. A navigation bar includes links for 'Corporate Site', 'Community', and 'LOGIN'. The main content area shows search results for the term 'goals'. A search bar at the top left contains the word 'goals' and a 'SEARCH' button. Below the search bar, a table lists search results, with 'Relevance' selected as the sort order. The first result is 'SuccessFactors BizX', updated 3 weeks ago, containing 936 words. The second result is 'How to convert .v4e files', updated 4 weeks ago, containing 816 words. A sidebar on the right contains a 'SEARCH' section with a search bar and a 'CALL US' button. Below the sidebar, there is a 'LEARN ABOUT CHAT' section with a link to 'Get information on Chat availability and hours'.

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SUPPORT

Corporate Site Community LOGIN

goals SEARCH Advanced Search

Sort by: **Relevance** Title Modified date

SHOWING 1 - 4 OF 4 RESULTS

Subscribe to search query

SuccessFactors BizX
Updated 3 weeks ago - 936 words
Quick Link (v10) (Jun 24, 2012) Working with Picklists (Jun 24, 2012) Workforce Analytics, Planning, and Reporting (Jun 24, 2012) Words Not Recognized in Spell Check - Custom Dictionary & Medical Dictionary (Jun 24, 2012) Within the Detailed 360 report, what is the "rank" in the 360 Graphical Summary Review? (Jun 24, 2012) Will I get locked out of the Performance Manager if I enter the wrong password too many times? (Jun 24, 2012) Why Some Form Templates are Unavailable Editing Email Notifications (Jun 24, 2012) Why is the system asking me to change my password? (Jun 24, 2012) Why Does the Back Button Not Always Work? (Jun 24, 2012) Why do I see private goals on a PIM form in get feedback? (Jun 24, 2012) Why Do I See Feed Items From a Group I'm Not Following? (Jun 24, 2012) Why do I not see correct results using Team View Starting From... option when running some dashboard reports as HR? (Jun 24, 2012) Why do comments become disconnected from the parent activity? (Jun 24, 2012) Why can't I access the Detailed...
support.successfactors.com/3Knowledge_Base/SuccessFactors_BizX

How to convert .v4e files
Updated 4 weeks ago - 816 words
They decided to use the carat symbol ^ as the delimiter to differentiate from the typical comma which can naturally occur in sentences. Therefore you can think of our .v4e files as simply a csv flat file that uses the delimiter ^ instead of , used in regular .csv files. Excel formatting is always going to have issues with very large file sizes, because the system must hold the entire results in memory to do the formatting. To cut down on processing time and file size, SuccessFactors application saves the file or report as a .v4e file. You should now have on your desktop the original .zip file, and the actual .v4e data file that you just extracted. For most users, doing this will enable you to then open your data file with excel by double clicking your renamed file. If you have not used .v4e files and associated this file type with excel, you will not be able to

SEARCH

goals

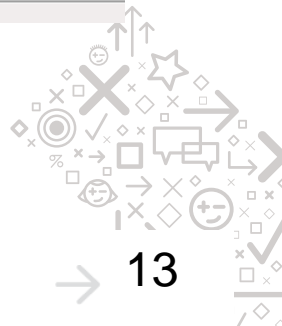
Advanced

CONTACT US

CALL US

LEARN ABOUT CHAT

Get information on [Chat availability and hours](#).



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



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**.

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.



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.

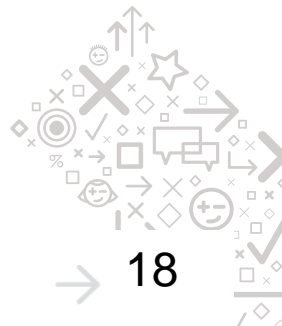
The [Value Improvement Program](#) allows you to maximize the value your organization receives from your SuccessFactors investment through best practices and networking opportunities. Check out the VIP Program [Calendar and Register](#) for upcoming events and let us know if you might be interested in 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](#).



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.



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](#)

