

HR840

SAP SuccessFactors Succession Management Project Team Orientation

COURSE OUTLINE

Course Version: 2505
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

Example text

Window title

Example text

Contents

vii Course Overview

1 Unit 1: Introducing the Project Team Orientation (PTO)

- | | |
|---|--|
| 1 | Lesson: Describing the PTO |
| 1 | Lesson: Managing Data Protection and Privacy |

3 Unit 2: Introducing SAP SuccessFactors Succession Management

- | | |
|---|---|
| 3 | Lesson: Exploring SAP SuccessFactors HCM Suite |
| 3 | Lesson: Describing SAP SuccessFactors Succession Management |

5 Unit 3: Discovering Succession Management

- | | |
|---|--|
| 5 | Lesson: Explaining the Succession Nomination Methods |
| 5 | Lesson: Implementing Succession Planning |
| 5 | Lesson: Reviewing the Decision Checklist |

7 Unit 4: Exploring Nominations, Permissions, and Picklists

- | | |
|---|---|
| 7 | Lesson: Introducing Nominations |
| 7 | Lesson: Configuring Permissions |
| 7 | Lesson: Describing Picklists |
| 7 | Lesson: Reviewing the Decisions Checklist |

9 Unit 5: Discovering Succession Tools

- | | |
|----|---|
| 9 | Lesson: Introducing Succession Tools |
| 9 | Lesson: Explaining Succession Org Chart v12 and Position Tile |
| 9 | Lesson: Describing Succession Lineage Chart v12 |
| 9 | Lesson: Explaining MDF Talent Pools |
| 9 | Lesson: Exploring Talent Search v2 |
| 10 | Lesson: Creating the v12 Matrix Grid Report |
| 10 | Lesson: Accessing Nomination and Successor Portlets |
| 10 | Lesson: Explaining Bench Strength |
| 10 | Lesson: Reviewing the Decisions Checklist |

11 Unit 6: Implementing Position Management for Succession

- | | |
|----|---|
| 11 | Lesson: Describing Position Management |
| 11 | Lesson: Reviewing the Decisions Checklist |

13	Unit 7:	Exploring Presentations
13		Lesson: Defining Presentations
13		Lesson: Managing Talent Cards
13		Lesson: Adding and Editing Slides
13		Lesson: Reviewing the Decisions Checklist
15	Unit 8:	Planning Next Steps
15		Lesson: Reviewing Next Steps

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

UNIT 1

Introducing the Project Team Orientation (PTO)

Lesson 1: Describing the PTO

Lesson Objectives

After completing this lesson, you will be able to:

- Define the purpose and goals of the PTO.

Lesson 2: Managing Data Protection and Privacy

Lesson Objectives

After completing this lesson, you will be able to:

- Locate Data Protection and Privacy resources.

UNIT 2

Introducing SAP SuccessFactors Succession Management

Lesson 1: Exploring SAP SuccessFactors HCM Suite

Lesson Objectives

After completing this lesson, you will be able to:

- Review the SAP SuccessFactors HCM Suite.

Lesson 2: Describing SAP SuccessFactors Succession Management

Lesson Objectives

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Succession Management.
- List the benefits and goals of Succession Management.

Lesson 1: Explaining the Succession Nomination Methods

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the various methods of Succession Nomination.

Lesson 2: Implementing Succession Planning

Lesson Objectives

After completing this lesson, you will be able to:

- Implement the various options available under Succession Planning.
- Describe the factors used for evaluating succession candidates.
- Compare approvals via Form or Formless Nominations.
- Describe Nomination Approval.

Lesson 3: Reviewing the Decision Checklist

Lesson Objectives

After completing this lesson, you will be able to:

- Review the decisions to be made before implementation.

Lesson 1: Introducing Nominations

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the various methods used for nomination in succession planning.

Lesson 2: Configuring Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the different permissions utilized in SAP SuccessFactors Succession.

Lesson 3: Describing Picklists

Lesson Objectives

After completing this lesson, you will be able to:

- Define Picklists and their functionality.
- Navigate to the Picklist Center.
- Configure Picklists Permissions.

Lesson 4: Reviewing the Decisions Checklist

Lesson Objectives

After completing this lesson, you will be able to:

- Review the decisions to be made before implementation.

Lesson 1: Introducing Succession Tools

Lesson Objectives

After completing this lesson, you will be able to:

- List the various tools available in the SAP SuccessFactors Succession module.

Lesson 2: Explaining Succession Org Chart v12 and Position Tile

Lesson Objectives

After completing this lesson, you will be able to:

- Explain Succession Org Chart v12.
- Explain the functionality of the Succession Org Chart v12 tool.
- Illustrate the Position Tile view.

Lesson 3: Describing Succession Lineage Chart v12

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Succession Lineage Chart v12 and its functionality.

Lesson 4: Explaining MDF Talent Pools

Lesson Objectives

After completing this lesson, you will be able to:

- Describe MDF Talent Pools.
- Set up the Talent Pool Fields Configuration Permissions.
- Navigate the MDF Talent Pools interface.

Lesson 5: Exploring Talent Search v2

Lesson Objectives

After completing this lesson, you will be able to:

- Explain Talent Search v2.
- Configure competencies and set up permissions.
- Define the options to export.

Lesson 6: Creating the v12 Matrix Grid Report

Lesson Objectives

After completing this lesson, you will be able to:

- Explain v12 Matrix Grid Reports.
- Configure v12 Matrix Grid Reports.
- Describe Potential.
- Define the purpose of How vs. What Matrix.

Lesson 7: Accessing Nomination and Successor Portlets

Lesson Objectives

After completing this lesson, you will be able to:

- Access Nomination and Successor Portlets.

Lesson 8: Explaining Bench Strength

Lesson Objectives

After completing this lesson, you will be able to:

- Provide an overview of Bench Strength.

Lesson 9: Reviewing the Decisions Checklist

Lesson Objectives

After completing this lesson, you will be able to:

- Review the decisions to be made before implementation.

Lesson 1: Describing Position Management

Lesson Objectives

After completing this lesson, you will be able to:

- Provide an overview of Position Management and position-based nomination methods.
- List the key advantages of the MDF position model over the legacy position model.

Lesson 2: Reviewing the Decisions Checklist

Lesson Objectives

After completing this lesson, you will be able to:

- Review the decisions to be made before implementation.

Lesson 1: Defining Presentations

Lesson Objectives

After completing this lesson, you will be able to:

- Define the purpose of Presentations.
- Enable the Presentations feature.

Lesson 2: Managing Talent Cards

Lesson Objectives

After completing this lesson, you will be able to:

- Define the purpose and benefits of Talent Cards.

Lesson 3: Adding and Editing Slides

Lesson Objectives

After completing this lesson, you will be able to:

- Describe steps involved in assembling a presentation.
- Add live slides and customer profile slides.
- Edit slides and print presentations.

Lesson 4: Reviewing the Decisions Checklist

Lesson Objectives

After completing this lesson, you will be able to:

- Review the decisions to be made before implementation.

Lesson 1: Reviewing Next Steps

Lesson Objectives

After completing this lesson, you will be able to:

- Explore the steps to take after working through the PTO.