

## Case Study

Streamlined processes with Oracle Taleo succession and performance management platforms



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### Client

One of the world's leading services and technology enterprises that offers business process improvement and document management, and employs over 140,000 people in more than 60 countries.

### The Business Challenge

The client experienced disparate business and HR processes after doubling in size through global acquisitions. Leadership commissioned an HR transformation, which identified succession planning and performance management as top priorities. Driving factors included:

- > **Lack of Reporting and Analytic Capabilities:** Managers and HR did not have visibility into internal talent or analytics capabilities to capture performance management metrics electronically.
- > **Inconsistencies in Processes:** There were inconsistencies with performance management processes. Goals did not align with the organization's overall objectives and employees did not understand how their performance contributed to their career growth and development.
- > **Manual Processes:** The client used a paper-based process for goal setting, performance appraisals, and development planning.
- > **Poor Manager and Employee Experience:** Manual processes and lack of self-service caused managers and employees to depend on HR as an administrative function to process paperwork. They lacked the tools needed for effective, ongoing performance management and career development.

### The Baker Tilly Solution

Baker Tilly addressed the client's need for a system that would address their challenges while integrating with their overall talent management strategy, process, and change management needs. The client opted to move to an integrated cloud solution. The work included:

- > Analysis and identification of pain points with the client's succession and performance management processes.
- > Defining a global roadmap for the succession and performance management platforms that integrated with the larger HR transformation.
- > Creating effective workflows and business processes that connected strategic objectives to individual contribution.
- > A rollout to targeted populations with phased functionality and scope and assistance with deployment.
- > Promoting adoption through communications and training.

### Business Results

The client implemented the Oracle Taleo Succession Planning and Performance Management cloud solution which has enabled the following key business results:

- > **Robust Reporting and Analytic Capabilities:** Visibility into performance management metrics and completion rates with Taleo's sophisticated analytics and reporting capabilities. Visibility into internal talent and identification of high performing talent, high-potential talent, and high-risk employees.
- > **Consistent Processes:** An increase in employee compliance with performance management requirements through consistent use of succession planning and performance management processes.
- > **Automated Processes:** Streamlined and efficient automated processes have positioned HR as a strategic entity in the organization with the capability to identify successors for critical roles and build a pipeline for vacancies.
- > **Improved Manager and Employee Experience:** A collaborative performance management process between the employee and manager, enabling better tracking of progress on goals, performance, competencies, and career development.

### About Baker Tilly

Baker Tilly is a professional services firm with a specialized Human Capital Management consulting practice. We work to help clients modernize their HR strategies, processes, and technology that improve workforce engagements to drive business results. Baker Tilly's approach provides clients the insights to manage their end-to-end talent lifecycle to solve today's critical challenge: unleashing the power of their people. Our professionals thrive on the excitement that comes from helping clients succeed in today's dynamic marketplace.

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# Solutions for today's succession and performance management challenges



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## Realities of Performance Demands Today

To achieve their business objectives, organizations must align their goals to their business strategy, consistently evaluate and meet their objectives, develop the necessary skills, and plan for future roles. Too often these areas become “check the box” activities, rather than efficient and effective processes that foster meaningful contributions across the organization. A recent worldwide survey of nearly 400 organizations confirmed that the impact of the global financial crisis (GFC) translated into even higher productivity and performance demands from fewer employees, while still pursuing business growth. As a result, aligning business goals to individual performance, leveraging process efficiencies, and fostering high performance cultures are key to survival in our post-GFC world<sup>1</sup>.



## Common succession and performance management challenges

In efforts to meet the increased productivity and performance demands in the post-GFC world, organizations are faced with several unique succession and performance management challenges.

- > **Prioritization:** With scarce resources, it is difficult for organizations to decide how to invest. Priorities differ based on many factors: business calendar, achievement of business case, replacement of legacy or unsupported applications, current pain points, etc.
- > **Alignment:** Changes to business strategy warrant a quick response to align employee responsibilities with goals that will contribute to the achievement of strategic objectives. Without alignment to the business strategy it is impossible to understand the development activities needed and progress toward performance objectives.
- > **Visibility:** Without knowing what talent exists within the organization, companies tend to immediately look externally. According to the Wall Street Journal, external hires tend to get paid 18-20% more than internal hires in the same job, but they perform worse on performance reviews during their first two years.
- > **Workforce Response:** Baby boomers are exiting the workforce in large numbers, while incoming workers have different expectations. They are frustrated with static annual performance events and do not see the connection between development planning, succession planning, career planning, goals and performance reviews. According to Gallup, only 13% of employees globally are actively engaged in their work.

## The Baker Tilly Approach - The Path Forward

Baker Tilly's Human Capital Management team can help you develop the right succession and performance management approach to address these challenges and drive success within your organization. Together we will work with you to:

- > Align your succession and performance management strategy with your talent management and business strategies
- > Evaluate constraints and determine the right sequencing and prioritization of succession and performance management activities
- > Transform the annual cadence of performance into a regular interaction via mobile tools and real-time feedback capturing mechanisms
- > Build goal and performance review processes that help achieve the results you are striving for
- > Identify the processes and tools to coach and develop talent to succeed in their current role while preparing them for the future needs of the organization
- > Articulate the potential within a given role or career and help employees understand the necessary actions to achieve their full potential.
- > Define a succession planning strategy that is tightly aligned with your business strategy to deliver on your objectives 3-5 and 5-10 years into the future
- > Increase visibility of talent metrics to identify strengths and weaknesses and aid in identifying high-potentials and programs needed to enhance their performance

1. Source: Saba, J. & Bourke, J. (2010). Employee performance management: The alpha and omega of talent strategy and business execution. Aberdeen Group.