

ARTICLE | July 2020 | Rogério Giacomini de Almeida and John Bestgen

## SuccessFactors Onboarding 2.0 vs. Onboarding 1.0 and the Power of Integrated Solutions

### Introduction

How important is it that you implement a solid and comprehensive onboarding process for your new employees? This answer may vary slightly from company to company, but a quality process design that supports the overall organizational strategy undeniably benefits both the company and the new employee.

For over a decade, SAP SuccessFactors has been helping its customers to carry out best practice onboarding processes through its integrated solutions. In 2020, SAP SuccessFactors customers now have access to the new Onboarding module, known as the next generation onboarding, or Onboarding 2.0, which fully integrates this module with the rest of the Human Experience Management (HXM) platform suite.

### Feature Comparison

Onboarding 1.0 can work as a standalone module and requires several parallel processes take place to connect with other company modules. Onboarding 2.0 was designed to focus on data awareness, a single platform approach, and simple and intuitive experiences for all users involved, from the process administrator, to the talent acquisition team and then to the new employee.

The basis of Onboarding 2.0 is SAP SuccessFactors Employee Central. Whether you currently have Employee Central or you are still using SAP HR or a third party HRIS, Onboarding 2.0 will benefit all models. The benefits of Onboarding 2.0 may look different than your current environment, but there will be improvements for everyone, nonetheless.

Technically speaking, the big difference between Onboarding 1.0 and Onboarding 2.0 is that in 1.0, the effort required to create intelligent and integrated solutions is greater, and the ability to fully meet leading practice requirements is limited. Also, Onboarding 1.0 is an independent module with its independent provisioning service, and that often needs integration technology to talk to other modules or logic applied to meet what is requested by the business areas. This does not mean that the initial version will no longer meet customer needs, but the new version has significant improvements. For example, customers will have a single platform to manage almost everything while still having the features of SAP SuccessFactors.

An exclusive external portal for candidates has been eliminated. Organizations will be able to provide new employees with company-specific experiences, leveraging new tools such as home page tiles, Business Rules engine, and Admin Center. New features, such as the Document Management Service including SAP SuccessFactors e-Signature (click to sign), have also been added. Perhaps the greatest immediate benefit for customers who adopt Onboarding 2.0 will be the elimination of duplicate functionality, such as notifications, permissions, and document storage.

The table below shows a comparison of the two versions for some of the most important features and how they behave in both modules.

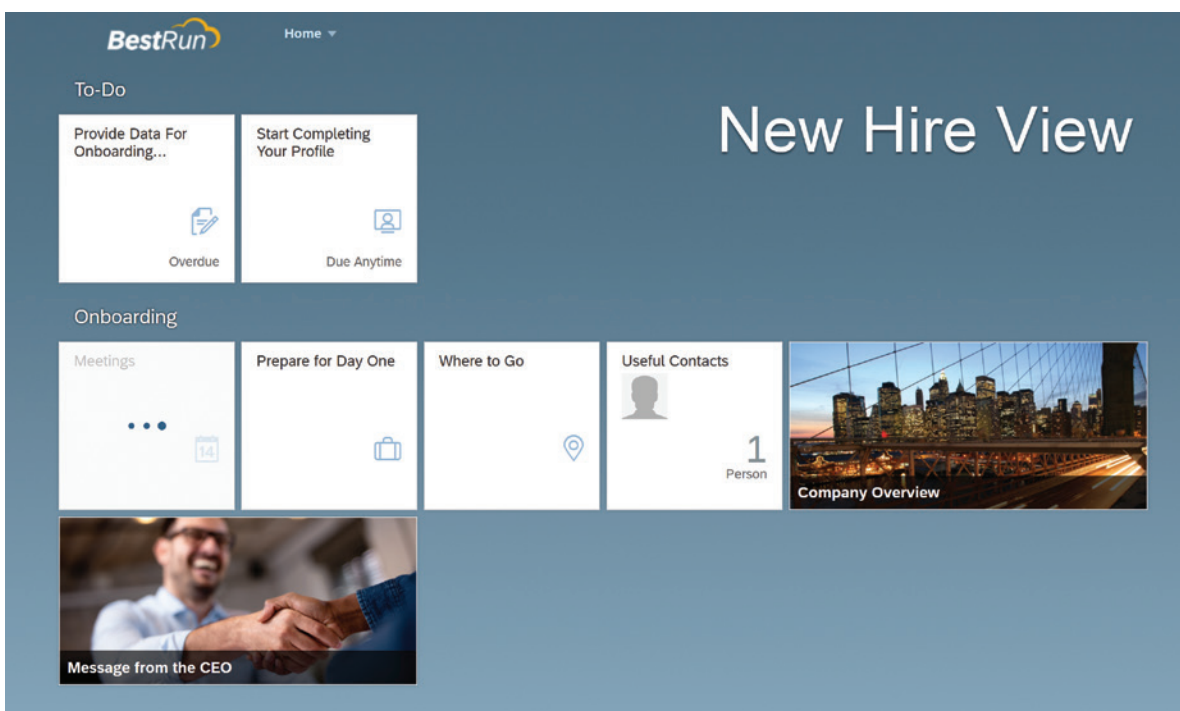
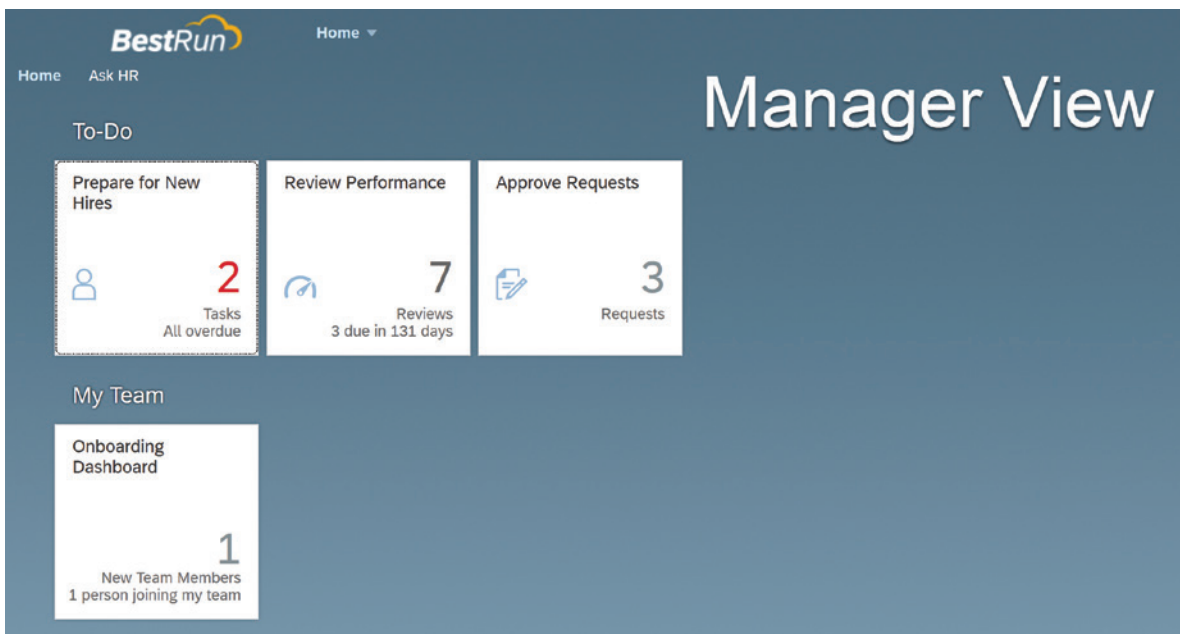
| Scenario                                                                                                     | Onboarding 1.0                                                                                                                                                                            | Onboarding 2.0                                                                     |
|--------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| The onboarding process can be triggered via SFSF Recruiting or via External Applicant Tracking (ATS) system. | Yes                                                                                                                                                                                       | Yes                                                                                |
| Complete tasks by hiring manager or other participant.                                                       | Only users assigned to Hiring Manager role                                                                                                                                                | Yes                                                                                |
| Mass maintenance of tasks by hiring manager or other participant                                             | No                                                                                                                                                                                        | Yes                                                                                |
| New hire (onboarder) custom data collection by new hire (aka additional Onboarding paperwork)                | Yes (all in the same step)                                                                                                                                                                | Yes (data collection and paperwork in different steps)                             |
| Document e-signature via native e-Signature                                                                  | Yes (KMS – Click to sign)                                                                                                                                                                 | Yes (via HXM platform post-GA)                                                     |
| Day One Conversion: Automatically convert onboarder to employee on start date.                               | The hire is assigned a temporary ID and not converted to an employee with permanent ID until start date, unless the permanent ID function is enabled pre-Day One.                         | An external user is created and converts to internal user on their job start date. |
| Rehire                                                                                                       | Rehire is available, but a new temporary ID will be used; the system will not recognize the previous ID until manage pending hire's page, where the system will identify that's a rehire. | Rehire is on New Employment.                                                       |
| Cancel Offboarding process or Internal Hire.                                                                 | No (The activity must be deleted manually.)                                                                                                                                               | Yes                                                                                |
| Compliance forms for US, Canada, India, UK, Australia                                                        | Yes                                                                                                                                                                                       | Post-GA                                                                            |
| Reporting                                                                                                    | There is a basic report feature that does not connect with HXM platform modules. No analytics available.                                                                                  | People Analytics-Embedded Edition                                                  |
| Employee Portal                                                                                              | Yes (external portal: SharePoint)                                                                                                                                                         | HXM platform homepage tiles                                                        |
| Mobile – responsive User Interface                                                                           | No (only platform-based new hires)                                                                                                                                                        | Yes                                                                                |
| Data Mapping (Recruiting-Onboarding-Employee Central)                                                        | Yes (different mapping) Set up Onboarding Integration (Recruiting to Onboarding) Field Mapping tool for Onboarding to EC Integration                                                      | Yes (integrated mapping) Recruit-to-Hire Data Mapping in Admin Center              |

## Some of the New Features

Now that we've reviewed a general comparison of the two versions, let's take a look at some features and what can be done with Onboarding 2.0.

### Home Page

- A home page framework supports the most common use cases of the Employee Portal.
- The home page will include pertinent information for the Hiring Manager (or other relevant roles).
- The homepage will guide the new hire (image below) through the onboarding process.



## Onboarding Dashboard

- The dashboard is a Unified User Interface (same as used in Employee Central and all other HXM modules).
- More flexibility in task assignment via Role Based Permissions (RBP) is available.
- Track all activities via a single dashboard.

| New Hire                                                                                               | Joining Date                          | Hiring Manager | Status                                         | My Tasks                                                                                                                                                                                                                                                                                                           | Due Date                                                                                                        | Tasks Assigned to Others    |
|--------------------------------------------------------------------------------------------------------|---------------------------------------|----------------|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|-----------------------------|
| <b>Bob McQueen</b><br>HR Professional<br>Corporate - US-Philadelphia<br><a href="#">View All Tasks</a> | Tuesday, July 21, 2020<br>2 days ago  | Aanya Singh    | <span style="color: red;">⚠ OFF TRACK</span>   | <a href="#">Start</a> Recommend Links (optional)<br><a href="#">Start</a> Schedule Meetings<br><a href="#">Start</a> Recommend People (optional)<br><a href="#">Start</a> Write Welcome Message (optional)<br><a href="#">Start</a> Prepare for Day One (optional)<br><a href="#">Start</a> Where to Go (optional) | Overdue: 2 days ago<br>Overdue: 7 days ago<br>Overdue: 2 days ago<br>Overdue: 2 days ago<br>Overdue: 2 days ago | 2 tasks (2 Overdue)         |
| <b>Fred Sapore</b><br><a href="#">View All Tasks</a>                                                   | Monday, July 27, 2020<br>in 4 days    | Aanya Singh    | <span style="color: green;">✅ COMPLETED</span> | No pending tasks                                                                                                                                                                                                                                                                                                   |                                                                                                                 | No pending tasks for others |
| <b>Pete Walker</b><br><a href="#">View All Tasks</a>                                                   | Thursday, July 30, 2020<br>in 1 week  | Aanya Singh    | <span style="color: green;">🟢 ON TRACK</span>  | <a href="#">Start</a> Review New Hire Data                                                                                                                                                                                                                                                                         | Due: in 1 week                                                                                                  | No pending tasks for others |
| <b>Nelson Ned</b><br><a href="#">View All Tasks</a>                                                    | Monday, August 31, 2020<br>in 1 month | Aanya Singh    | <span style="color: green;">🟢 ON TRACK</span>  | <a href="#">Start</a> Review New Hire Data                                                                                                                                                                                                                                                                         | Due: in 1 month                                                                                                 | No pending tasks for others |

## Recruit-to-Hire Data Mapping

- A new, integrated mapping tool will be provided.

Admin Center / Recruit-to-Hire Data Mapping

For each Employee Central field, select the corresponding recruiting template and recruiting field. [Click here for instructions.](#)

Ensure that all mandatory fields are mapped for the system to validate. Clear Change

Fields marked with \* are mandatory

| Employee Central Field Label    | EC Field                        | Recruiting Template            | Recruiting Field                     |
|---------------------------------|---------------------------------|--------------------------------|--------------------------------------|
| *First Date Worked              | firstDateWorked                 | Candidate Application Template | Start Date(startDate)                |
| *Hire Date                      | start-date                      | Candidate Application Template | Start Date(startDate)                |
| *New Assignment Comp...         | company                         | Job Requisition Template       | Legal Entity Object(legalEntity_obj) |
| Assignment ID                   | assignmentIdExternal            | Select Template                | Select Field                         |
| attachment-id                   | attachment-id                   | Select Template                | Select Field                         |
| Benefits Eligibility Start D... | benefits-eligibility-start-date | Select Template                | Select Field                         |
|                                 |                                 |                                | Select Field                         |
|                                 |                                 |                                | Select Field                         |
|                                 |                                 |                                | Select Field                         |
|                                 |                                 |                                | Select Field                         |
|                                 |                                 |                                | Select Field                         |

Mandatory Onboarding HRIS Elements

- employmentinfo
- jobinfo
- personalinfo

Employee Central HRIS Elements

- compinfo
- corporateAddress
- emailinfo
- emergencyContactPrimary
- employmentinfo
- globalAssignmentInfo

Mandatory Onboarding HRIS Elements

Map the mandatory fields under the Mandatory Onboarding HRIS Elements section for Onboarding to function.

To validate and save your HRIS elements, map all the fields within a HRIS element before you proceed to the next HRIS element.

[Validate All Entities](#)

## Email Services

- The Email Services framework enables timely engagement.
- The new UI framework is also based on Fiori, meaning it is the same as the whole HXM platform solution.

The screenshot displays the 'Email Services' section in the SuccessFactors Admin Center. It features a navigation bar with 'Active Templates', 'Email Status', 'Configure Triggers', 'Email Categories', and 'Email Settings'. Below this, there are two tables. The first table lists active email notification templates, and the second table lists emails sent out by the system.

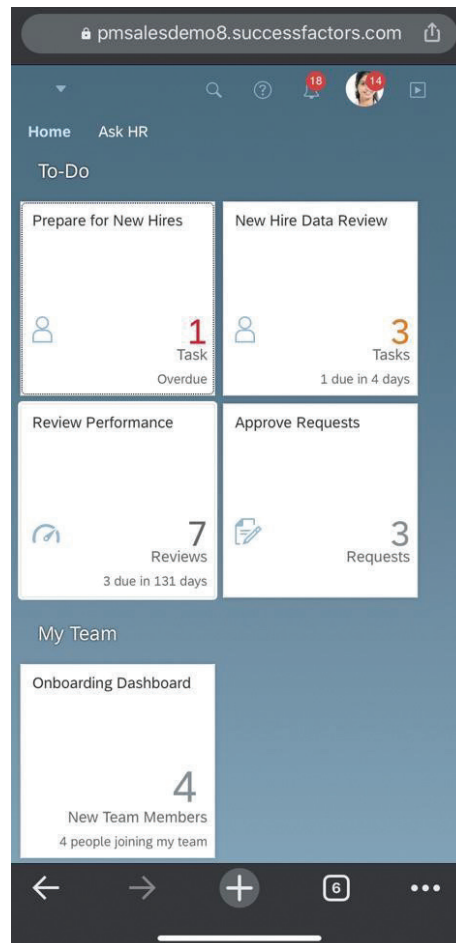
| Template Title                               | Trigger Condition                           | Category                                     | Frequency |
|----------------------------------------------|---------------------------------------------|----------------------------------------------|-----------|
| (ONB) Buddy Assignment Template              | (ONB) Buddy Assignment Trigger              | (ONB) Buddy Category                         | Once      |
| (ONB) External User Welcome Message Template | (ONB) External User Welcome Message Trigger | (ONB) External User Welcome Message Category | Once      |

| Send Time and Date        | Subject                               | Trigger Condition                           | Recipient    | Unsubscribed Recipient | Status | Action |
|---------------------------|---------------------------------------|---------------------------------------------|--------------|------------------------|--------|--------|
| Jul 23, 2020, 11:25:56 AM | You have a new Buddy!                 | (ONB) Buddy Assignment Trigger              | Tessa Walker |                        | Sent   | ✉ 🔄 📄  |
| Jul 23, 2020, 11:10:37 AM | Welcome to the Onboarding Application | (ONB) External User Welcome Message Trigger | Bob McQueen  |                        | Sent   | ✉ 🔄 📄  |

## Mobile UI

- A responsive UI (runs on desktops, tables, smartphones) is available.





## Process Variant Manager

- A Default Onboarding Process is given.
- Users can copy existing processes and adjust to business needs.

Admin Center / Process Variant Manager

Manage Process Variants and define Business Rules Define Business Rules + Process Variant

| ID                                 | Process Variant            | Description                | Process Type | Status | Actions |
|------------------------------------|----------------------------|----------------------------|--------------|--------|---------|
| Onboarding2ProcessCoreWorkfl<br>ow | Default Onboarding Process | Default Onboarding Process | Onboarding   | Active |         |

**Default Onboarding Process**

```

graph LR
    Start[Start  
This is the starting point of the process] --> Review[Review New Hire Data  
Participant reviews the New Hire data]
    Review --> Personal[Personal Data Collection  
New Hire provides the personal data]
    Review --> Create[Create New Hire tasks  
New hire tasks are created]
    Personal --> Additional[Additional Onboarding Data Collection  
New Hire provides the additional data]
    Create --> Additional
    Additional --> Document[Document Flow  
Document generation and]
  
```

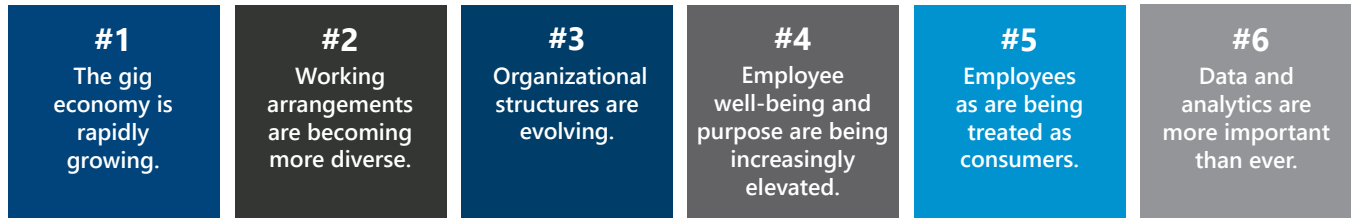
## Leading Practice From a Whole Process Perspective

The relevance of a smart onboarding process is all about the experience. SAP found that 80% of new employees decide whether or not to stay with a company within the first six months [1]. Companies that invest in creating high-quality onboarding programs experience a significant growth in profits and gains in employee engagement, satisfaction, and productivity compared to companies that employ a less thoughtful approach to onboarding. The current candidate-driven market makes it more important than ever to instill a sense of belonging in employees and help them feel deeply and emotionally connected to a company and its mission.

Despite this, onboarding programs are often ineffective because companies don't take the time to create an extended onboarding experience that sets up the employee for success. The employee is given a one-day overview and not introduced to their peers, creating a feeling of isolation. The onboarding program can be sporadic and unorganized, leaving the employee just confused.

Technology provides the opportunity for companies to rethink onboarding, targeted to combat the issues stated above, as a strategic, not administrative, activity. Six major trends are appearing in the world today that will have a significant impact on your onboarding processes. We have outlined the themes and provided a few tips, best practices, and recommendations that can be implemented into your SuccessFactors Onboarding environment to help you combat the changes that we are seeing in our economy and workforce.

## Six Major TRENDS that will have a Significant Impact on Your Onboarding Process



### TREND #1: The gig economy is rapidly growing.

Due to current events and economy, the growth in freelance work around the world has outpaced overall employment growth. In the US, freelance workers currently represent 36% [2] of the total working population, and estimates suggest they could represent more than half of the workforce by 2027 [3]. It is important to focus on engaging, training, and equipping these external workers to support their daily activities.

#### Best practices to meet the needs of external workers:

1. Provide visibility and integration for both the internal and external workers during onboarding activities.
2. Increase compliance tracking for external workers.
3. Customize workflows to fit external workers' roles to increase engagement.

### TREND #2: Working arrangements are becoming more diverse.

Currently, more than two-thirds of people around the world work remotely at least some of the time. In the US alone, over 4.7 million people are working remotely [4]. This is requiring companies to find effective ways to keep all employees connected and engaged. This effort is critical, as research shows "lack of social interaction" [5] is the largest drawback of remote work models. It is crucial that your onboarding process support a sense of collaboration and connection between new employees and their colleagues, even if these employees are not working in the same physical location.

#### Recommendations for increased engagement among remote workers:

1. Provide step-by-step guides for new employees of their required tasks.
2. Provide technologies, such as Slack or Microsoft Teams, that can facilitate those connections and collaboration that will be critical for the employee's success.
3. Provide a consistent onboarding experience regardless of location.

### TREND #3: Organizational structures are evolving.

Companies today are designing themselves for speed, agility, and adaptability, breaking down silos and reorganizing themselves around networks of teams. Gallup found that 84% of U.S. employees are "matrixed" to some extent today, working on multiple teams and possibly reporting to multiple managers [3]. Whether transitioning to work in a new team or a new role entirely, it is critical that employees have clear goal alignment and role clarity and efficient knowledge transfer, and are able to get up to speed as quickly as possible.

#### Tips for creating better alignment and clarity:

1. Enable effective goal creation and management to drive better performance and results.
2. Personalize learning and development plans targeted to the employee's specific goals and succession plans.

## **TREND #4: Employee well-being and purpose are being increasingly elevated.**

Organizations recognize more and more that employee well-being is critical to creating a highly engaged, collaborative, and productive workforce. Technology now allows companies to integrate well-being as a topic specifically into onboarding content and process as a way to illustrate well-being as an embedded cultural value.

### **Recommendations for creating a mentally and emotionally healthy workforce:**

1. Create a sense of comfort and inclusion before Day One by providing team members information and social support.
2. Open lines of communication to facilitate conversation and allow for the employee to ask questions.
3. Align the employee's personal goals to the company's purpose.

## **TREND #5: Employees as are being treated as consumers.**

Historically, companies have often said that employees are their most important asset, but have invested significantly less time and money in their employees than they do their customers. However, today organizations think differently, treating their current and prospective employees as customers, providing them with a true consumer-grade experience. A critical aspect of this experience is the technology provided at work is as engaging and enjoyable as the technology they interact with in their daily lives.

### **Recommendations for providing a high-quality user experience for your employees:**

1. Provide welcome messages and personalized access to relevant information for new hires.
2. Utilize mobile-friendly forms and paperwork, including e-signature capability, to allow for ease of use.
3. Enable technology such as artificial intelligence and chatbot capabilities to provide additional support for questions and tasks.
4. For your hiring managers, provide a mobile app that will provide reporting dashboards and checklists to make sure the tasks get done in a timely fashion.

## **TREND #6: Data and analytics are more important than ever.**

As technology continues to evolve and become more important in business, the need for analytics is rapidly increasing. In addition to collecting traditional HR data, organizations are now making great use of things such as surveys and polls to gauge employee engagement and happiness.

### **Recommendations for incorporating tools for better analytics:**

1. Create reports and dashboards to reflect data on onboarding activities and status, as well as insights across different areas including turnover, retention, goal achievements, time to proficiency, recruiting costs and channels, and training efficiency. These tools allow HR to focus on the strategic side of onboarding while also being able to monitor and improve the onboarding process.
2. Incorporate surveys and 360-degree feedback into the onboarding process.

If you are wondering whether it is worth implementing Onboarding 1.0 or Onboarding 2.0, or even migrating to Onboarding 2.0, focus on the experience of those involved.

Onboarding 2.0, because it is a more integrated solution, can bring you more speed, agility, and efficiency to address the trends mentioned above and provide the high-quality experience that your new hires expect. Also consider that a new integrated reporting solution in Onboarding 2.0 enables users to create reports with cross-information, which is not possible in version 1.0. These benefits help make Onboarding 2.0 the natural choice for a successful experience.

With the new version, less effort is needed to keep the module working. SAP's approach to integrating the platform was purposely designed for this moment. Note that there are few new features in Onboarding 2.0. A well-designed process, therefore, would present little difference to end users (new employee, hiring manager).



## Conclusion

It is time to focus on your earnings and stop worrying about operational details and governance bureaucracies. That's how SAP is thinking about developing and improving its solutions.

The two versions of the Onboarding module have the same objective and manage to bring basically the same results. Onboarding's success will depend on a good process design and the use of the solution in its completeness.

It is essential to consider the experiences of users and the impressions left by the tools that were used during the onboarding process. The spotlight is not only on new employees, but also on those who help to keep your company successful with their good performance.

If you are interested in getting a better understanding of SuccessFactors Onboarding 2.0 and how it can support your organization, GP Strategies® offers a [Gap Analysis for Onboarding 2.0](#). This workshop will focus directly on your business and your current environment, and provide you with an actionable set of recommendations for migrating or implementing Onboarding 2.0.

Learn more about the [Gap Analysis for Onboarding 2.0](#) and start your journey to a better Onboarding experience.

### Sources

1. [SAP Product Brochure – Onboarding](#)
2. [The Future of Employment – 30 Telling Gig Economy Statistics](#)
3. [Onboarding in the Digital Age and the Increasing Role of Technology in Shaping Employee Experiences](#)
4. [Remote Work Statistics: Shifting Norms and Expectations](#)
5. [7 Remote Work Trends that Companies Can't Overlook](#)

## About GP Strategies

GP Strategies is a leading workforce transformation partner—one of the few truly dedicated global providers in the marketplace providing custom solutions. We believe our transformation focus, when paired with deep listening, a customer-centric approach, and innovative expertise, enables our clients to routinely achieve superior business and operational results from our evidence-driven and technology agnostic recommendations.

Whether your business success requires a change in employee performance and mindsets, learning technologies, or critical processes, GP Strategies is the transformation partner you can trust.

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