Agenda

• Background
• SuccessFactors Key Points
• Demo
• Questions
Replacement of BrassRing with SuccessFactors

• The applicant tracking system used since 2006
SuccessFactor was chosen after a Multi-Step Evaluation in 2017

• Reviewed the Market
  • Gartner Group Evaluations

• Sent RFP to list a long list of vendors and narrowed to the following:
  • Taleo
  • PeopleAdmin
  • ICIMS
  • IBM / BrassRing
  • SAP / SuccessFactors
Leading to a project to

• Incorporate industry leading recruiting practices
• Simplify and extend the process to include onboarding
• Provide process transparency
• Improve user experience for the candidate, recruiter and hiring manager
• Integrate third party technologies
• Build a talent community for passive job seekers
The project began with the process ...
... and a need for broader participation.

Today
• Hiring Manager
• Recruiter

Tomorrow
• Hiring Manager / Hiring Manager Team
• Recruiter / Recruiter Team
• HR Representative
• HR Team
• Onboarding Coordinator

Assigned on the iForm Requisition but can be updated later.
Participants view the process in the Talent Pipeline

• Breaks the process into logical steps
• Access is controlled by roles assigned to the requisition
• Provides all Hiring Team participants with visibility to where candidates are in the process
• Includes participation of previously invisible groups such as Visa Services, Background Check Center, Identity Management and EOHW
• Completion of the Hire or Transfer iForm updates the talent pipeline and closes the loop
Using Simple steps ...

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Forwarded By</th>
<th>Candidate Type</th>
<th>Interview Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>RALPH THOMAS</td>
<td>Dept. Resume Review</td>
<td></td>
<td>Internal</td>
<td></td>
</tr>
<tr>
<td>Indiana Jones</td>
<td>Onboarding</td>
<td></td>
<td>External</td>
<td></td>
</tr>
<tr>
<td>Katiness Everdeen</td>
<td>Lacks Preferred Qualifications (Note Required)</td>
<td></td>
<td>External</td>
<td></td>
</tr>
<tr>
<td>Apollo Creed</td>
<td>Candidate Not Selected (Note Required)</td>
<td></td>
<td>External</td>
<td></td>
</tr>
</tbody>
</table>
... with sub statuses providing more detail

Making the invisible visible.
SuccessFactors will be used to recruit for:

• All Staff positions in the University and Health System
• Job Family 27 positions in the School of Medicine and Nursing
• Excluded:
  • All Faculty positions
  • All student positions
  • JF 27 in the University
  • Others

Everyone will use SuccessFactors for Onboarding
Three differences

• Offer Letters are completed and saved in SuccessFactors
  • Offer Approval and Offer Letters using templates
  • Online Offer and Acceptance

• Pre-employment steps occur in SuccessFactors
  • Background Checks / Educational Checks
  • Duke Unique ID / NetID Request
  • Pre-Employment Capacity Test and Health Screen

• Onboarding
  New application with candidate participation
  Collect pre-hire paperwork including the I9
The Offer Process

• It does not replace interaction with HR in determining the appropriate offer details
• It does not replace the interaction with the candidate regarding verbal offers
• It provides a place to enter the offer details and provide an optional approval of information that flows to the Hire or Transfer iForm
• It provides standardized letter templates
• The Offer information saved with the candidate
Pre-employment checks

• All are steps are happening today but now will be visible
• The Hiring Team can see the progress
• Emails are sent when steps are completed
• Requires only initiating the background check request
• EOHW will schedule based on candidates being in specific status
  • The scheduling of the candidates is unchanged. There is now an authoritative list of who needs to be scheduled.
What is Onboarding

• A standard interaction for all hires and transfers
• Duke-branded welcome letter
• Includes a link to a wizard that steps employee through the necessary forms prior to the start date
• The candidate reviews the data before it is updated in SAP
• Provides a manager task list to complete
Candidate Onboarding: Process Steps

1. Manager/HR Activities
- Review of information

2. Employee Activities
- Confidentiality agreement
- Race/ethnicity
- Veteran status
- Disability declaration
- Tax forms
- W-2 Online Election
- Foreign National Form
- Direct Deposit
- I-9 (Part 1)

3. Orientation Activities
- I-9 (Part 2 & E-verify)
Planning Dates

• The videos are available now: https://hr.duke.edu/managers/recruitment/successfactors
• The new iForm requisition will move to production on May 28 to support conversion to SuccessFactors.
• Critical hires for July should be completed in BrassRing by June 12
• Candidates will not be able to apply to jobs during the transition period from June 13 – June 16
  • Noted on the website
  • Informing LinkedIn and others who scrape jobs of the transition period
• SuccessFactors is live on June 17
• The job requisitions remaining in BrassRing must be completed by June 28
The Basics

• Everyone will have access to SuccessFactors
• Access from the Duke@Work
  • Candidate Selection
  • Careers tab
• Roles on requisition will determine if you have recruiting tab
Three components

• Duke@Work
• SuccessFactors
• careers.duke.edu
Process Options

- Focused on what happens in SuccessFactors
  - Who initiates the iForms Requisition, Hire and Transfer is unchanged
- Support centralized and decentralized options
- Not limited to these four options
- The software will not enforce an option. It will enforces steps have occurred within the overall process
- The departments can choose which option that fits their needs
SuccessFactors Process Flow – Version 4 No Hiring Manager

Generic Steps:
- Forwarded to Department
- Interview
- Offer
- Pre-Employment Checks
- Onboarding
- Manager & HR Activities
- Orientation Activities

Hiring Manager

Recruiter

Candidates

HR Representative

Forwarded to Department
- Interview
- Offer

Onboarding Coordinator

- Pre-Employment Checks
- Onboarding
- Manager & HR Activities
- Orientation Activities

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SuccessFactors Process Flow – Version 3 – Hiring Manager

**Generic Steps:**
- Forwarded to Department
- Interview
- Offer
- Pre-Employment Checks
- Onboarding
- Manager & HR Activities
- Orientation Activities

**Hiring Manager**
- Forwarded to Department
- Interview
- Offer
- Pre-Employment Checks

**Recruiter**
- Candidates

**HR Representative**

**Onboarding Coordinator**
- Onboarding
- Manager & HR Activities
- Orientation Activities
Questions