In this chapter, you’ll take a tour of SAP SuccessFactors Compensation. You’ll begin with the basics of the Compensation and Variable Pay modules, before learning about key features and processes such as compensation planning, promotions, executive review, spot awards, and more.

“Compensation”

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Chapter 7
Compensation

Designing an effective compensation system is crucial to an organization’s talent management and total rewards strategy because compensation management plays a big factor in attracting and retaining talented employees. The SAP SuccessFactors Compensation module provides the toolsets to design, automate, and launch a solid compensation program.

Economic trends are forcing organizations to adopt pay-for-performance strategies because tying workers’ pay to actual business results provides more visibility and control into the compensation payout, improves budget accuracy, and reduces risk. This helps enforce a culture in which everyone in the organization is awarded fairly according to individual contribution and organizational performance in areas such as teams, projects, and business units. It provides incentives for the workforce to align and deliver on the goals of an organization in a tangible way. This enables organizations to drive toward profitability and thus provide a bigger pool to reward employees who helped create that additional profitability.

SAP SuccessFactors Compensation is a comprehensive solution that enables an organization to streamline the following planning components:

- **Base pay**
  - Merit, salary, promotion, and lump sum planning

- **Long-term incentive pay**
  - Restricted stock, stock options, performance units, and cash awards

- **Short-term incentive pay**
  - Bonus and spot awards

- **Variable pay**
  - Bonus based on variable pay components (through the SAP SuccessFactors Variable Pay module)
Some common methods of calculating employee compensation are leveraging spreadsheet tools or deploying custom software. This complex and nonintegrated approach is inflexible to an organization’s changing dynamics and introduces data inconsistencies between human resource information systems (HRISs) and compensation systems.

Compensation provides a single source of all employee data to be utilized for calculation of compensation components. Data from SAP SuccessFactors Employee Central or SAP ERP Human Capital Management (SAP ERP HCM) is integrated, providing a single source of truth for the compensation process.

The Compensation solution has two component offerings:

- **Compensation**
  - This is an engine for calculating merit, stock, and bonus data in relation to employee performance and guidelines.

- **Variable Pay**
  - This complex and robust bonus calculation engine allows you to tie business goals and individual results to the payout amount.

Further Resources
For further information, refer to the SAP SuccessFactors Compensation product page on the SAP Help Portal.

We’ll look at these solutions as we go through the chapter. First, we’ll take a look at the basics of employee compensation with the Compensation solution, before we discuss the compensation process, reporting options, and implementation tips.

### 7.1 Compensation Basics

Compensation provides a standard configurable framework that enables you to perform various types of compensation planning processes. Whether you are performing merit or bonus planning—or another form of compensation planning—the Compensation module enables compensation planners and HR professionals to access information quickly, make required changes, and complete the compensation cycle in an efficient and simple manner.

An out-of-the-box and configurable workflow provides flexibility to launch the compensation cycle, whether you’re using standard approval hierarchy or a custom compensation hierarchy. The Admin Center provides configuration flexibility for each step of the compensation cycle. Approval of the compensation cycle is also a seamless process for both planners and HR professionals in the organization. As the compensation cycle progresses through the workflow steps, Compensation notifies the appropriate planner or administrator through emails and dashboard alerts if an action is required on their part.

To successfully launch a compensation cycle, you must set up a Compensation Plan template and perform the configuration and setup activities that meet the design needs of your organization. These activities are performed in Compensation Home found under the Admin Center, as shown in Figure 7.1.
The next step is to generate compensation worksheets (forms), which are created based on current data in the system. As the compensation cycle progresses toward completion, compensation forms require updates based on certain data elements that may have been updated during the compensation cycle.

The final step is to review and approve all of the compensation worksheets by the respective planners. Once this is completed, data is ready to be consumed by your HRIS for further action. Rewards statements and reports are generated after approval of the compensation forms.

In this section, we'll walk through the foundational components of Compensation, including plans for both Compensation and Variable Pay.

7.1.1 Compensation and Variable Pay

With Compensation, you can configure the following three compensation components:

- **Salary**
  You can configure any combination of merit increase, promotion, adjustment, lump sum, or bonus calculations. Performance ratings can be leveraged from the Performance Management solution or uploaded into the solution as required per the compensation guidelines. You can prorate bonus calculations based on the employee hire date and end date for the year. Standard and custom fields set up for this component leverage the lookup tables, salary pay matrix, and job code and pay grade mapping tables to perform functions and calculations that are reflected on the compensation form.

- **Bonus**
  Management by objectives (MBO) can enforce a pay-for-performance bonus configuration, as opposed to a formula-based bonus. Goal attainment data is integrated from Performance Management, and the bonus amount is calculated as a percentage of bonus targets.

- **Stock**
  You can configure stock options, restricted share units, performance units, and cash. Standard and custom fields set up for this component leverage the lookup tables, stock value, and stock factor tables to perform the calculations.

Variable Pay, meanwhile, is a robust solution that calculates employee bonuses based on quantitative business performance and individual performance measures.

An organization can decide whether to use the bonus calculation feature of the Compensation solution or the Variable Pay solution as part of the compensation planning cycle design.

The following are key features of the Variable Pay solution:

- **Proration of bonus calculation** for an employee who has held two or more positions in the organization, has had two or more pay grades, has had a salary change, or is associated with multiple scorecards
- **Management of several bonus plans with weighted business goals**
- **Modeling of “what-if” scenarios to forecast bonus payout**
- **Integration of employee performance in bonus calculation**
- **Support for additive or multiplicative formulas**
- **Multiple time-based payout cycles such as monthly, quarterly, and annually**

Compensation leverages standard functionality from the SAP SuccessFactors HCM Suite that is essential in delivering a complete end-to-end compensation process. The following are key features of Compensation that you would use during your compensation planning processes:

- **Calibration**
  “Nine-box” sessions review compensation data across teams, departments, and the entire organization to ensure fairness in the compensation process. Performance data from SAP SuccessFactors Performance & Goals can be leveraged to align performance and goals with compensation. Compensation data can be leveraged during the succession Calibration session; Figure 7.2 shows an output of a Calibration session.

- **Live metrics**
  As shown in Figure 7.3, live metrics offer graphical visibility into employee and compensation data, such as performance distribution by employees or pay versus performance matrix.

- **Rewards statement**
  You can generate compensation and variable pay statements for employees using standard fields and custom text.

- **Executive review**
  This provides visibility into all compensation and variable pay data. Employees can be viewed according to security permissions, reporting structure, organization levels, and views.
7.1 Compensation Basics

- **Compensation Profile**
  This lets compensation planners make recommendations while viewing employee history and graphical views of positions. Figure 7.4 shows a planner’s view of an employee Compensation Profile.

- **Decentralized administration**
  This allows global companies with unique local requirements for compensation components to have their administered locally with governance provided by the centralized administration team. The elements currently available for decentralized administration include Compensation and Variable Pay guidelines, Variable Pay bonus plans, business goals, and business goal weights.

Let’s take a look at how compensation plans work.
7.1.2 Compensation Plans

Most organizations have an annual compensation cycle; each compensation cycle should have a corresponding plan in the system. Figure 7.5 illustrates the summary of a sample compensation plan for all eligible employees. Plans are generally not personalized and represent an entire population of the organization under a specific hierarchy.

![Figure 7.5 Summary View of the Compensation Plan](image)

The *Plan Status* section on the left provides a high-level summary about the plan; the *Route map Progress* section on the right illustrates the progress of the compensation cycle.

Under the plan details—shown in Figure 7.6—you can see the *Budget* status for each compensation component within the plan, such as Merit, Promotion, Lump Sum, and so on.

At the bottom of Figure 7.6 you can also see the employee *Eligibility* statistics—comparing the number eligible and ineligible employees—for the plan components.

Below *Eligibility*, you’ll find the *Guidelines* assignment statistics for employees, seen in Figure 7.7. This provides a quick analysis of how many employees meet the guidelines configured for the compensation plan template.

![Figure 7.6 Budget Overview of the Compensation Plan](image)

![Figure 7.7 Guidelines Analysis of the Compensation Plan](image)
7.1.3 Maintaining Compensation Process Data

Before you initiate the setup of the compensation plan, you must populate the required base setup tables with data. These data elements are accessed on the Compensation Home page by selecting Actions for all plans. You will be taken to the Import/Export Data section by default, where you can populate this data for the first time or maintain data that has been populated before.

In the Import/Export Data section, you use the All Plans menu to export employee data (which is useful for troubleshooting employee data issues), import and export the currency conversion table, and create lookup tables to be used in the compensation and variable pay forms.

Lookup tables are used in custom formulas to map data to an employee based on certain attributes if the required information is not contained in one of the compensation worksheet columns. Your compensation plan design includes gathering any requirements for setting these tables. Input and output columns form the structure of the lookup table, which is then referenced in the formula box of the compensation plan template. Figure 7.8 shows an example of a lookup table.

The Salary Plans menu of the Import/Export Data section is where you can upload or export salary pay matrices and perform job code and pay grade mapping. If you use Employee Central, then the pay ranges you have set up in Employee Central can be used. However, a number of customers do not use pay ranges in Employee Central, and so this integration is optional.

Salary pay matrices contain the salary ranges for each distinct value of pay grade. Values in the salary pay matrix are set up in functional currency and also drive the comparison ratio (compa-ratio; i.e., the employee’s salary divided by the market rate salary) and range penetration (the employee’s salary minus the pay range minimum, divided by the pay range maximum minus the range minimum) calculations on the compensation form for each employee. As part of the salary matrix, you can define whether the pay grade is eligible for promotion and add up to three different attributes for each pay grade. Figure 7.9 shows an example of a salary pay matrix.

Figure 7.9 Salary Pay Matrix

The Stock Plans menu of the Import/Export Data section is where you maintain stock values tables, stock factor tables, and stock participation guideline tables.
The stock value tables are used to define a numerical value for each type of stock. Depending on your requirements, this numerical value can represent the purchase price of the stock or price per unit of a stock. The stock factor tables are used to automatically calculate the appropriate mix of stock types for your employees. You can define the various guidelines for stock participation guidelines table in a stock participation guideline table.

### 7.1.4 Creating Plans for Compensation

Compensation plans and variable pay plans are created in Compensation Home by selecting either **Add new compensation plan** or **Add new variable pay plan**, which was shown back in Figure 7.1. Creating a plan template requires setting a number of settings, defining the layout and field for your plan worksheet, setting details of your plan, and then defining the planners that will use the plan. We’ll go over these steps in the following sections.

When creating a plan template, you have to define the name and upload a template or select one from the SuccessStore. As a best practice, you should choose a template name that reflects the year of the compensation cycle and the compensation components being planned against.

#### Plan Setup

The *Plan Setup* section (see Figure 7.10) is where you configure the settings for your plan template. The main settings to configure include:

- **Starting Point for Eligibility**
  Whether the starting point for eligibility is all employees or no employees. This impacts how your eligibility rules will work.

- **Route Map**
  The route map is the sequence of workflow steps associated with all forms that have been generated based on this compensation plan template. Routing maps are configured to generate compensation forms with employees and their respective planners or HR administrators. Each route map has several steps; each step type can be assigned to a single role, be iterative between two people to exchange feedback, or be collaborative to allow for group review.

- **Currency Settings**
  For your plan you need to select the currency conversion template and the functional currency. If your organization has planners that plan in multiple currencies, the *Currency Conversion Rate Table* converts the functional currency to the default currency of the form.

  - **Salary Pay Matrix**
    If you are an Employee Central customer, you can choose to use the salary pay matrix as defined in the Employee Central solution. For non-Employee Central customers, you must select a salary pay matrix.

  - **Enable Salary Proration**
    This setting enables salary guidelines to be adjusted for employees whose salaries are subject to proration.

  - **Enable Guideline Optimization**
    By default, this option isn’t checked. If your organization has many compensation guidelines that are slowing down the performance of your system, check this option to improve performance.

![Figure 7.10 The Plan Setup Screen for a New Compensation Plan](image-url)
The Advanced Settings subsection—accessed in the Settings dropdown—is the central location for managing the compensation plan template settings, such as form behavior, workflow, security, and functions.

**Note**
After the compensation forms are generated, settings changed on the compensation plan template don’t take effect unless the compensation forms are deleted and generated again.

**Design Worksheet**
The Design Worksheet subsection (see Figure 7.11) is where you design the layout of your compensation form and configure the fields for the compensation components that are required as part of the compensation plan template. It is accessed from the Design Worksheet menu.

A number of standard fields (called columns in Compensation) are available to add to the plan template. These columns are based on the instance configuration for your organization. Custom columns can also be added to the plan template. Various properties can be modified for custom columns, such as title, read-only, visibility, type, format, formula, and so forth. In the Formula box, you can enter mathematical calculations, If logic, conversions, and reference lookup statements pointing to the lookup tables. Each custom column can also be hidden if it is not required to be visible for the planner, be reloadable if data in this field will change frequently based on data import, be reportable to make available in reports and extracts, and have a unique import key associated with it.

Columns can be grouped together into relevant, logical groups that can be color-coded for easy on-screen identification. This helps the compensation planner identify employee and planning information easily on the compensation form.

**Note**
Field permission groups can be used by compensation administrators to restrict field visibility to both standard and custom fields.

Custom messages can be added to the top of the compensation form.

**Plan Details**
The Plan Details menu is where you configure the budget, eligibility, guidelines, and rating sources for your plan template.

For budgets—accessed via the Budget option on the Plan Details menu—you can configure the following:

- **Budget calculation**
The budget calculation status on the compensation form can be configured to be viewed by compensation planners. The configuration options available include the budget calculation mode shown on the form, the planning components the budget is used for, the default budget value, and whom to base the budget calculation on. Multiple budget calculation options can be configured within the compensation plan template.

- **Budget rules**
Budget rules allow you to setup rules for budget calculations. You can choose to allow, warn, or disallow planners from exceeding budget calculations and to save...
the compensation form if the budget is exceeded. You can set up multiple rules for each compensation plan template.

- **Budget groupings**
  You can group fields together to create combined budgets.

The eligibility of employees to be part of the compensation planning process is configured in the **Eligibility** menu option. Here, multiple eligibility rules can be configured for the compensation plan template. It is important to undertake designing each eligibility rule carefully because it affects the planner’s ability to enter planning details against each employee on the compensation form. Rules can be anchored on standard fields available on the compensation plan template, such as pay grade or performance ratings.

**Guidelines** are the rules a planner follows to effectively plan employee compensation for each component on the compensation form. You can configure guidelines in the **Guidelines** menu option. Multiple rules can be set up per compensation plan template. Each guideline rule has a large number of options available for configuration.

The sources of performance ratings to be used in the plan template can be configured in the **Rating Sources** menu option. You can import these ratings or leverage them from other SAP SuccessFactors HCM Suite solutions.

**Manage Users**

The **Manager Users** menu has one option: the **Define Planners** subsection. Here you can define the hierarchy structure compensation forms that are generated for planners to plan employee compensation. The default option is to use the **Standard Suite Hierarchy**, which is based on the employee and the employee’s manager that is set up in the SAP SuccessFactors HCM Suite. Another option, the **Rollup Hierarchy**, allows for planning responsibilities to be assigned to managers higher up in the organization. A custom hierarchy can also be configured as required to meet your organization’s needs. This subsection is also leveraged for troubleshooting employee and planner hierarchy setup.

### 7.1.5 Creating Plans for Variable Pay

As mentioned at the start of Section 7.1.4, variable pay plans are created in Compensation Home by selecting **Add new variable pay plan**.

Within the **Plan Setup** section, the menu options you saw when creating a compensation plan template are there, along with additional menus that do not exist for compensation plan templates. Looking further, you’ll find the options within each menu are different from the same menus that are used when creating a compensation plan template.

For variable pay plans, the settings to be configured differ from what you’ve seen in Compensation. The settings that you can configure include:

- A background section for variable data in the data model.
- A start date and end date for the bonus calculation.
- Calculation settings, which give you multiple options to configure how your variable pay process works, including the use of a flexible payout curve, proration, and multipliers for sections.

In addition to the currency conversation table and functional currency to select, there are options to control which currency is used (either the functional currency or the local currency) and which users can have currency views during the compensation planning process.

Some of the other menus that you will need to consider when configuring variable pay plan templates include:

- **Settings**
  In the **Settings** menu, you can find your advanced options, which are similar to the compensation plan templates. You can also configure calculation formulas used for bonuses, goal plans, pay components, and so forth, and create number formatting rules that are referenced for each value in the variable pay calculation.

- **Design Worksheet**
  In this menu, you configure the visibility of variable pay sections, fields, and label names. You can also access the Column Designer, which enables you to configure what fields will appear on the worksheet as columns, and set the number format for values in the variable pay calculation.

- **Manage Plan Details**
  The various options in the **Manage Plan Details** menu enable you to create, import, or export various data needed to run the variable pay process:
  - Business goals and bonus plans: Create, import, and export
  - Business goal weighing: Import and export
7.2 Compensation Forms

Compensation planning with either Compensation or Variable Pay is performed using worksheets, where the compensation planner makes the required salary and compensation adjustments for their reports. Worksheets are forms that planners use to evaluate, assess, and change compensation. The first step of this process is to generate compensation worksheets. After the compensation planning has taken place, the worksheets can be submitted for approval. Worksheets are based on the templates that we talked about in Section 7.1.4.

The Manage Worksheets section shown in Figure 7.12 is the central location to launch compensation forms and manage the lifecycle of the forms generated for the related compensation plan template.

Let’s walk through how to create and launch worksheets, and go over considerations for those who use Variable Pay, before we look at performing compensation planning with the worksheet.

### 7.2.1 Create and Launch Worksheets

The Create Worksheets option under the Launch subsection opens the panel, as shown in Figure 7.13, to provide step-by-step details for form generation.

Generating a worksheet is quite straightforward. The following steps are involved:

1. **Name Your Worksheet**
   Enter the worksheet name visible to the planner. The planner’s name is appended to this name automatically.

2. **Set Plan Dates**
   Choose the start and end dates of your organization’s planning cycle. The Due Date controls the workflow activity of the form, such as when to notify planners based on date criteria.

3. **Select Worksheets to Create**
   Select the topmost planner in your organization hierarchy. This launches forms
for all planners in the organization per the hierarchy configuration setting of the compensation template. You have the option to generate forms only for the specific planner. You can choose to notify planners of compensation form availability by email.

After all of the details are entered, click the Launch Plan option to start the request for the form-generation process. Upon completion of the process, an email notification is sent with details about how many compensation forms were generated. At this stage, the compensation forms are considered in progress and are shown in the Compensation section we just mentioned. Planners can view and access the compensation form, as shown in Figure 7.14, by selecting Compensation in the navigation menu.

### 7.2.2 Administering Worksheets

Once worksheets have been created, as a compensation administrator you can further manage the worksheets throughout the process by using the Manage Worksheets option under the Manage Worksheets section. As shown in Figure 7.15, this gives you visibility into the individual forms generated as part of the compensation plan template.
In this example, there are forms for Francois Trombley, Scott C Wang, Mya Cooper, and their colleagues. From this option, you can choose to Delete the form, Export as MS Excel, or Export as CSV.

During the compensation planning process, the forms that have been generated may need to be periodically updated. These updates are typically activities such as updating compensation form membership or accounting for budget changes until the compensation planning cycle reaches completion. These activities are performed under the Update Worksheets panel under the Manage Worksheets section, as shown in Figure 7.16.

Figure 7.16 Update Worksheets Options

The following options are available in this subsection:

- **Update all worksheets**
  Clicking this option opens the panel shown in Figure 7.17. You can choose the settings that reflect the data change being applied, such as hire of a new employee, termination of an employee, budget changes, or change in organization hierarchy structure. Any changes in compensation eligibility criteria can be updated through this option. This option allows for updates to completed compensation forms, as well.

- **Update a specific worksheet**
  This enables you to update a specific worksheet, including synchronization of bonus data with performance management forms and the People Profile, adding a new employee to compensation worksheet, removing inactive employees, and updating the budget.

- **Add employees, Move employees, and Delete employees**
  Add employees to existing compensation forms, move employees from one compensation form to another form, and delete employees from a form.

- **Budget Override**
  Update the budget pool available for the compensation cycle. Additional budgets can be propagated and distributed to planners in the organization. Cascading budgets can’t be propagated if the amount spent exceeds the new budget amount.

Figure 7.17 The Update All Worksheets Options
7.2.3 Variable Pay Form Specifics

After the Variable Pay setup is complete, the process to generate variable pay forms is exactly the same as for generation of compensation forms discussed in Section 7.1.4.

On a form, if the planner wants to view detailed calculations for an employee instead of the overview, the planner can click the Action icon next to the employee’s name and select View Details. The plan details include, for example, target amounts, proration, goals, weighting, and payout amounts. Alternatively, the planner can expand the Compensation Profile to conduct further analysis on the employee result, as shown back in Figure 7.4.

The planner can also view summary results of the variable pay worksheet by clicking the Live Analytics link located on the top-right section, as shown in Figure 7.18.

7.3 Compensation Planning

Compensation plans are typically merit, bonus, or equity plans, but there can be other types of compensation plans used, and you may be running a different type of compensation plan. Whatever type of compensation plan you are running, the process to run them is the same.

Each planner in the organization is responsible for timely recommendations for employees as part of the compensation planning cycle process. These activities are performed on the compensation forms generated for each planner. Figure 7.19 shows a sample compensation form with the salary compensation component configuration.

Planners can adjust the display options on the form to get the desired information about the employee and also filter employee information on the worksheet.

When calculated recommendations are provided in the compensation form, planners can choose whether to accept the calculated recommendations for the employees based on the compensation plan template setup or override the system-calculated recommendations. Planners also have the flexibility to view the compensation guidelines as a percentage value or numerical value by adjusting the toggle available in the appropriate column.

Depending on how the compensation plan template is configured, a planner can also view multiple compensation planning components as separate tabs by clicking the
appropriate link on the top-left section of the compensation worksheet. The Summary tab is shown in Figure 7.20.

Figure 7.20 Summary Tab View on the Compensation Worksheet

After a planner has finished making their recommendations on the compensation form, the logical next step is to move the form to the workflow process for approval. To perform this, a planner must click the Send to Next Step button at the top of the compensation form.

Another option available in Compensation for approving the planner recommendations is to enable hierarchy-based approval as part of your solution design. It provides a simple approval model based on tree structure navigation that is built on the organization hierarchy; approvals move up the structure and rejections move downward. This configuration option eliminates the need to generate forms or send forms to the next step in the approval process.

Note
The hierarchy-based approval configuration for approving compensation forms isn’t available for the Variable Pay solution. Otherwise, the compensation planning process is the same for both modules.

7.4 Promotions

When you use Employee Central, Compensation offers the ability to promote employees during the compensation planning process. This integration with Employee Central enables a change of job information in Employee Central directly from Compensation, although changes don’t become effective until the compensation planning results are published to Employee Central.

Note
The promotions integration is not available for Variable Pay, as Variable Pay only covers the bonus process, which doesn’t include promotions.

Promotion of an employee is triggered from a worksheet by selecting the menu for the employee and selecting Promote, as shown in Figure 7.21.

Figure 7.21 The Promote Option on the Worksheet

After clicking Promote, the Employee Details window will appear (shown in Figure 7.22). Here, you can make the necessary changes to the employee’s job information to initiate a promotion for the employee.

Once the changes have been saved, you will be taken back to the worksheet, where you can see the icon that represents that the promotion has been entered next to the employee. This can be seen next to Ellen Marie Fosse in Figure 7.23.
7.5 Executive Review

The Executive Review functionality in the Compensation solution enables any active SAP SuccessFactors user to review (read) or adjust (write) compensation recommendations made for all employees in the organization.

The Executive Review functionality provides a different level of access to compensation planning data (i.e., it groups data from multiple users together), but otherwise works exactly the same way for both Compensation and Variable Pay. The user must be permissioned for this functionality and access to the appropriate employee population. At any given time, data generated within a single compensation plan template can be accessed by selecting the Compensation Review tab in the Compensation module (sometimes displayed as Executive Review), as shown in Figure 7.24.

After the compensation plan template is chosen, the user is presented with a page that exactly matches the design and layout of the compensation plan template. This page shouldn’t be mistaken for the compensation form for a planner. Executive Review neither relies on a compensation form’s workflow state nor behaves like a form. If compensation data is modified in Executive Review, you can send an email notification to the planners or reviewers of the affected underlying compensation form. Planners, HR managers, and administrators can filter data for employees they can edit or view.

The real advantage of using Executive Review is the ability to filter data. This can provide for a detailed analysis and update of compensation data by the administrators, HR professionals, and managers in your organization. Data visible on the Executive Review screen can also be exported in CSV format.

Further Resources

Further information can be found in the guide Employee Central - Compensation Integration under the SAP SuccessFactors Compensation product page on the SAP Help Portal.
7.6 Reward Statements

Leading industry practices call for providing each employee with a personal compensation statement highlighting the employee’s compensation results at the end of the compensation planning cycle. The Compensation solution facilitates this process by providing the capability to create a personal compensation statement template, as shown in Figure 7.25. You can modify the template with your organization’s text, logo, multiple sections, and standard fields on the compensation plan template.

After all compensation forms have been reviewed and marked completed, only then can a personal compensation statement be generated for each employee. The personal compensation statement for an employee is available on the People Profile.
7.8 Spot Awards

The Spot Award program provides you with another way of planning the spot award of bonuses as part of your compensation planning program but outside of your set compensation planning period. Spot awards are typically awarded to a limited group of employees and so the use of worksheets is impractical, and since this type of awards is still subject to budgets, guidelines, eligibilities, and workflow approvals, then a framework is needed to support compensation planners in providing spot awards.

Spot Award programs enable you to award spot awards to select employees. You can setup multiple Spot Award programs. Setting up a Spot Award program follows a workflow and uses a guided wizard to take you through each step of the workflow. The steps for setting up a Spot Award program are:

1. Create the program.
2. Define the program settings. Set the following various attributes of the program (see Figure 7.26):
   - Program name
   - Functional currency
   - Currency conversion table
   - Start date
   - End date
   - Whether the program is active
   - Whether there is a budget associated with this program
   - Whether nominators can override the recommended award amount
   - Any messages to be displayed to nominators that are overriding the guideline amount
   - Whether eligibility is via a business rule or dynamic group
   - Whether the program should be integrated with Employee Central
   - When the program is integrated with Employee Central, which pay component to use for the spot award

Further Resources

Further information can be found in the guides Employee Central - Compensation Integration and Employee Central - Variable Pay Integration under the SAP SuccessFactors Compensation product page on the SAP Help Portal.
3. Define/import the budget for the program.
4. Define award categories and levels. You can define up to 20 categories and levels; categories can be anything that your organization deems as important for employees to be measured against, such as skills or behaviors.
5. Define the guidelines by uploading the guideline amounts that compensation planners can use, based on the categories and levels defined in the previous step of the wizard.
6. Define eligibility (i.e., define the business rule or dynamic group that defines who is eligible for the program). Which option is available depends on the settings made in the second step of the wizard.

Figure 7.26 shows the Settings page of the Spot Award program wizard.

Spot awards are awarded through multiple methods. The main methods are via the following:
- Home page: Select the **Recognize and Reward Someone** tile. Select an employee in the **My Team** tile and select **Reward and Recognition** in the Take Action menu.
- Quickcard: Select **Reward and Recognition**.
- People Profile: Select **Reward and Recognition** in the Actions menu on the employee’s profile.

Depending on the option you select, the first one or two steps will differ. For example, if you launch the process by selecting the **Recognize and Reward Someone** tile, you need to first select a program and then select the eligible employee(s) you want to award a spot award to before you are taken to the screen to select the award category. If you select **Reward and Recognition** in the Actions menu on the employee’s profile, then you are taken straight to a screen to select the Spot Award program and the award category.

Once the process of selecting a Spot Award program and employee has begun, you have to select the award category, the award category level, and the award amount (you can go ahead with the guideline amount or change it); enter a reason for the reward; and then review and submit the award for approval (see in Figure 7.27).

Figure 7.27 Reward and Recognition of an Employee

Spot Award programs can have workflows assigned to them, so that spot awards can be approved or declined.

Further Resources

Further information can be found in the guide Reward and Recognition: Spot Awards under the SAP SuccessFactors Compensation product page on the SAP Help Portal.
7.9 Reporting

The two standard options for compensation reporting are Rollup and Aggregate Export; these are available as part of the Actions – All Plans menu. Let’s take a quick look at each:

- **Compensation aggregate export**
  This is an export of all employee and planning data available within a specific compensation plan template. The extract includes all standard and custom fields (if marked as reportable) defined on the compensation plan template.

- **Compensation rollup**
  This option allows for the generation of the compensation planning and budget information report based on a planner’s hierarchy for the selected compensation plan template. Figure 7.28 shows a rollup summary.

![Figure 7.28 Compensation Rollup Generation Menu](image)

7.10 Implementation Tips

There are a number of tips that can help you make the most out of your Compensation or Variable Pay implementation. We’ll look at a few now:

- **Data**
  Data is a critical aspect of compensation planning. If salary and compensation data is not accurate, then your entire compensation planning process will produce results that can inadvertently impact your payroll.

- **Design**
  Most organizations have exceptions to their processes. To have the most effective compensation planning process, it is important to design for 90 percent of use cases and not for the exceptions. Typically, the exceptions can make a straightforward process become convoluted and cumbersome, which can damage adoption and success of the compensation program.

- **Employee lifecycle changes**
  It is important to understand employee lifecycle event changes and how they impact compensation. For example, a promotion can mean a change in the data of an employee mid-process, or a leave of absence could make an employee ineligible. You also have to consider how new employees are considered and whether they might become eligible through a rule in the system when they should not be eligible for the process so soon into their new job.

- **Workflows**
  Workflows should be designed to be streamlined and, wherever possible, few approvers should be included. Because the process involves salary data, it can be tempting for organizations to include multiple senior-level individuals as approvers in the process. However, this slows down the approval process and doesn’t drive accountability to the compensation planners.

7.11 Summary

The Compensation and Variable Pay solutions provide a robust platform to meet the complex needs of an organization’s compensation design and truly enforce a pay-for-performance culture. The solution offerings in Compensation provide the organization the agility needed to effectively manage a successful compensation cycle by
streamlining the planning process. Integration capabilities with SAP ERP HCM and Employee Central provide the benefit of not having to manage multiple data points.

In this chapter, you learned what is required to set up yearly compensation and variable pay forms, and how to design your compensation worksheets. You also learned how to execute a compensation review and complete the compensation process.

In the next chapter, we’ll look at the SAP SuccessFactors Recruiting solution and how it can support recruiting management, applicant tracking, and recruiting marketing activities.
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