



SOLUTION FACT SHEET

SUCCESSION CONFERENCE REPORTING SYSTEM: SUCCESSION SCORECARD, SUMMARY & INDEX

January 2008

SOLUTION DESCRIPTION

The Succession Conference Reporting Solution from Aasonn is based on all of the necessary data from the SuccessFactors "Employee Profile" and more. It is like "One-Stop Shopping" for all of the data you need to evaluate a candidate as part of your succession planning process.

With the **Succession Planning Scorecard**, you get a quick view of all of your candidates information including their picture in a presentation quality, polished report. You get data from employee profile including:

- ◆ current overall rating
- ◆ performance history
- ◆ competency and behavior ratings
- ◆ current succession nominations
- ◆ objectives ratings

PLUS you will get report sections on (includes custom fields):

- ◆ Retirement Potential
- ◆ Near Term Potential
- ◆ Retention Outlook Matrix
- ◆ Career Summary
- ◆ Career Goals
- ◆ Career Interests
- ◆ Work History - both Internal/External
- ◆ Education
- ◆ Special Assignments and Projects

This report reads like a snapshot but it has so much detailed information that it can facilitate strategic decision making while allowing comparisons and discussions amongst your Succession Conference participants. Most importantly you can have these discussions without the distraction of a notebook computer available to each participant at the meeting.

You also get a comprehensive Index of all candidates for the conference that provides a summary line with the corresponding page number of that person's Succession Planning Scorecard within the conference booklet.

THE SUCCESSION SCORECARD (PART 1)



With the **Succession Planning Scorecard**, you get a quick view of all of your candidates succession related information including their picture.

OBJECTIVE

“Objective, comprehensive, and well organized reports are essential to a productive and thorough Succession Planning Conference.”

ONE STOP SHOPPING

“One-stop shopping for all of the information needed to make well informed succession decisions while creating an equal footing for each candidate.”

COMPREHENSIVE

“The most comprehensive and authoritative talent management information source available to your organization; available at the push of a button.”

WELL THOUGHT OUT

“Well thought out with only the pertinent information. A complete snapshot for each employee in the nomination process on a single page.”

HUGE TIME SAVINGS

“The time savings is huge when comparing the time required to find and summarize the data; and then generate these conference ready reports.”

Talent Manager

Employee Name: Griffin, Grace G
Employee ID: 120808
Position Title: Policy&Collab Director
Reports To: Schultz, Theodore (Ted) E
Controlling Dept: Strategy Policy & Reg Activities
Department: Strategy & Planning
Talent Pools: LTIP

Yrs in Job: 2
Yrs at ABC: 12

Job Role: Individual Contributor

Succession Candidate For:

Readiness	Job Role	Title	Incumbent
Ready in 1-2 years	Business Segment Leader	VP Sustainability & Comm Aff	Bowman, Roberta B
Ready in 3-5 years	Business Segment Leader	VP Energy Efficiency	Schultz, Theodore (Ted) E

Retirement Potential: Low

Near Term Potential: Not Rated

Risk of Loss

High				
Medium				
Low				◆
?				
	?	Low	Medium	High

Impact of Loss

Goal Ratings

Customer Impact	■■■ Fully Meets
ABC Energy Business Values	■■■■ Frequently Exceeds
ABC Energy Reputation	■■■■■ Consistently Exceeds
Financial Impact	■■■ Fully Meets
Human Resource Results	■■■ Fully Meets
Operational Impact	■■■■ Frequently Exceeds
Safety (FOR MANAGERS)	■■■ Fully Meets

Competency Ratings

Act Ethically	■■■■■ Frequently Exceeds
Adaptability	■■■ Fully Meets
Align the Business	■■■■■ Frequently Exceeds
Drive for Results	■■■ Fully Meets
Drive Innovation	■■■ Fully Meets
Foster Open Communication	■■■■■ Frequently Exceeds
Influence Others	■■■ Fully Meets
Inspiring Leadership	■■■ Fully Meets
Interpersonal Communications	■■■■■ Frequently Exceeds
Make Insightful Decisions	■■■ Fully Meets
Promote Teamwork	■■■■■ Frequently Exceeds
Think Strategically	■■■ Fully Meets

Overall Performance Rating History

06/01/2006 - 05/31/2007 ■■■■ Frequently Exceeds

PERFORMANCE, GOALS, & COMPETENCY HISTORY

At a glance, know the positions that the candidate is being nominated for along with a comprehensive performance history that includes goals achievement and competency ratings. More importantly, know almost immediately if the candidate is at risk of loss and how severe the loss would be to your organization.

On the next page, you will be able to see the candidate’s qualifications that includes internal and external professional work history.

Leverage your SuccessFactors’ information and make better use of your organization’s time.

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THE SUCCESSION SCORECARD (PART 2)

The scorecard provides “side-by-side” data on a single page that leverages your SuccessFactors investment and improves your ability to make better decisions.

Career Summary					
Over my eleven year career with ABC Company I have spent time on the regulated and unregulated sides of the business and in Corporate. This has provided me with a unique background in managing corporate strategic initiatives balanced with hands-on experience in operating environments. My expertise includes: 1) Extensive experience in leading projects that have significant impact on the enterprise. 2) Strong relationship skills 3) Strong analytical skills including identifying opportunities, risk assessment, and the ability to create strategy that generates desired results. 4) Excellent negotiating skills. 5) Demonstrated track record of successfully leading and motivating cross-functional teams with multiple priorities and continuously changing deadlines.					
Career Goals					
Long-term goal is to become a Business Segment Leader for ABC Company that has ultimate responsibility for the P&L aspect of the business line or regulatory relationships. I would also welcome turnaround or reorganization opportunities. Exploring Investor Relations is also of interest. Short-term goal is to exceed expectations as the policy lead for Energy Efficiency and significantly move our objectives forward in all 5 states. This position will require the ability to influence and implement strategy across multiple departments in 5 states without direct authority.					
Career Interests					
Level	Function	Comments			
Operational Leader	Regulatory affairs	Opportunities to leverage my relationship skills, operating knowledge and energy policy experience with our regulators to generate additional revenue for the Company as well as wholesale opportunities would be of interest.			
Tactical Leader	Business Development	I would welcome those opportunities to participate in or lead M&A projects to utilize knowledge gained through earning an MBA. Asset evaluation for buy or sell opportunities would utilize my ability to lead cross-functional teams while expanding my financial experience.			
Tactical Leader	Fin - Investor relations	Interested in expanding my financial knowledge of the Company through Investor Relations. This type of role would utilize my external relations skills, MBA and strategy work.			
Internal Work History			External Work History		
Date	Position Title	Department	Date	Position Title	Company
04/2006	Dir Energy Efficiency Policy & Co	-Global-	09/1992	General Manager	Teague Holdings
05/2003	GM, Marketing Services	CSSM	06/1991	Manager	THIS END UP Furniture Co.
11/1999	Dir Energy Policy Initiatives	G C Energy Policy & Strategy			
11/1998	Manager Project Development	DENA			
11/1997	Director of Marketing	D.E. Industrial Asset Developm			
06/1996	HR Specialist	Human Resources			
Education					
Institution	Degree	Field of Study	Major	Received	
Univ North Carolina Charlotte	Master's Degree (or equivalent)	Business	Marketing	1996	
Gulford Coll	Bachelor's Degree (or equivalent)	Business	Management	1991	
Special Assignments					
Dates	Assignment/Project	Role/Accomplishment			
01/2006 - 05/2007	Charlotte Chamber Cam	Asked to lead ABC's Midland Chamber Campaign. Co-Chair in 2006, Chair in 2007. Exceeded stretch targets both years raising over \$650k each year.			
09/2005 - 04/2006	Duke/Cinergy Merger Te	Led Products & Services Team for merger. Responsible for developing a new model for this Marketing function. Exceeded stretch target. After merger close, responsible for implementing our merger plan for Large Business Customers for the Customer Strategy & Planning organization. Successes include standardizing customer satisfaction measures and market plans across all territories and implementing MyABC, a dedicated website for large customers in the Midwest. Accepted role in new Energy Efficiency organization Oct. 2006			
06/2000 -	Nuclear Plant Acquisitio	Led the legislative due diligence team for the evaluation of a nuclear plant acquisition			

GET NECESSARY INSIGHT

View the Goals and History of the Candidate so that you know which direction that they want to go within your organization.

View internal and external work history to see how the past experience lines up with the expectations of the nomination process as well as the employees own expectations.

This portion of the Scorecard helps you to align people with the right roles which helps you target talent gaps while identifying the best possible hires inside your organization.

Education and special assignments add perspective to the process and may determine if a candidate is qualified and has the necessary accomplishments required for the positions that they are being nominated for.



INTEGRATION WITH TALENT MANAGEMENT

Experts recommend that organizations need to ensure that succession planning is integrated with the tactical processes of talent management. Integration needs to include performance management, training and development, compensation, as well as goal assessment. It's equally important to link succession planning to competency management and career development.

Once you have the integration in place, reporting and analytics components become paramount to making your Succession strategy successful.

PRESENTATION QUALITY REPORTS


The Aasonn Succession Conference reporting system is tailored to your needs. It allows you to assimilate the necessary information into a usable report that allows you to leverage your investment in the SuccessFactors talent management suite.

MORE THAN JUST THE SCORECARD

No Succession Reporting System would be complete without reports that summarize your areas needing succession planning or give you a picture of your areas of greatest vulnerability. With the Aasonn **Succession Conference Reporting Solution**, you also get several other reports that cover these areas of concern:

- ◆ **Statistics Summary—Target Positions by Job Role** (see example below)
- ◆ **Target Positions With Fewer Than 2 Succession Candidates "Ready Now"**
- ◆ **High and Medium Retirement Potential Incumbents**
- ◆ **High and Medium Retirement Potential Succession Candidates**
- ◆ **Succession Candidates Nominated for Multiple Positions**
- ◆ **Minority and Female Succession Candidates**

Aasonn ties all of these valuable reports together by generating a comprehensive index with a line item summary of all candidates and the page number of their Succession Scorecard. The only thing that you have to do is decide on the binder that want to display and present your Succession Conference Guide.

<i>Statistics Summary - Target Positions by Job Role</i>														
	Succession Planning			Readiness Risk				Succession Candidate Readiness						
	Target Positions	Positions with Succession Plans		Candidates Ready Now				Ready Now	Ready 1-2 Yrs	Ready 3-5 Yrs	Total			
			0	1	2	3+								
Senior Executive	8	88% (7)		2	1	3	1	33% (10)	37% (11)	30% (9)	23 / 30			
Business Segment Leader	50	98% (49)		10	12	14	13	37% (89)	38% (93)	25% (61)	154 / 243			
Operational Leader	4	25% (1)		0	0	1	0	40% (2)	20% (1)	40% (2)	5 / 5			
Tactical Leader	3	()						()	()	()	/			
Individual Contributor	12	()						()	()	()	/			
Totals	77	74% (57)		12	13	18	14	36% (101)	38% (105)	26% (72)	165 / 278			

	Target Position Incumbents							Target Position Succession Candidates						
	Number of Incumbents	Avg Age	Avg Job Tenure	Avg Yrs Service	% (n) New Hire	% (n) Female	% (n) Minority	Number of Candidates	Avg Age	Avg Job Tenure	Avg Yrs Service	% (n) New Hire	% (n) Female	% (n) Minority
Senior Executive	8	54	1.4	22	0% (0)	0% (0)	0% (0)	23	47	1.5	19	0% (0)	26% (6)	26% (6)
Business Segment Leader	50	49	1.7	18	4% (2)	32% (16)	16% (8)	154	46	1.8	18	4% (6)	20% (31)	13% (20)
Operational Leader	4	48	1.3	10	25% (1)	25% (1)	0% (0)	5	37	0.6	5	0% (0)	20% (1)	0% (0)
Tactical Leader	3	48	1.5	9	0% (0)	33% (1)	33% (1)					()	()	()
Individual Contributor	12	55	5.5	19	8% (1)	100% (12)	17% (2)					()	()	()
Totals	77	50	1.7	18	5% (4)	39% (30)	14% (11)	165	46	1.7	18	5% (6)	20% (33)	13% (22)

ABOUT AASONN

Aasonn is an Authorized SuccessFactors Services Partner. We have a highly experienced staff of HR professionals, many with Ph.D. degrees in Organizational Behavior or Industrial Psychology. Our talented professional services staff are experts at implementing SuccessFactors software solutions and can help you develop your talent management and human capital management best practices, including essential change management processes and procedures for a successful implementation. Our consultants have implemented these solutions for over 300 customers worldwide. In fact we've worked with some of the biggest fortune 500 companies.

Aasonn offers outsourcing solutions, talent management and business intelligence solutions designed to help your company achieve greatness. Call us today and let us help you design your Succession Conference Reporting System or implement the SuccessFactors' award winning Talent Management Suite. Contact Sales at (888) 718-1562 ext. 114.