SUCCESSFUL PROJECT IMPLEMENTATION

A CASE STUDY OF IMPLEMENTING SUCCESSION PLANNING AT LUCILE PACKARD CHILDREN'S HOSPITAL
PRESENTING TODAY

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OBJECTIVE OF TODAY’S PRESENTATION

• Share our experience on Succession Planning implementation

• Focus on high level implementation planning approach

• Best practices and lessons learned

• Give you some insights for your future SuccessFactors implementations
STANFORD UNIVERSITY MEDICAL CENTER

LUCILE PACKARD CHILDREN’S HOSPITAL

• World-class, non-profit hospital devoted entirely to the care of babies, children, adolescents and expectant mothers
• Established in 1919
• Located in Palo Alto, CA
• Headcount: 3000+
WHY SUCCESSION PLANNING?

- Critical to the business continuity and the success of many hospital initiatives at Lucile Packard Children’s Hospital
- Current program has not yet been introduced to and widely utilized by all management positions
- A desire to create a continuous flow of talent
- Identification of successors for key positions
- Robust communication tool for senior management team
WHY SUCCESSFACTORS?

• Familiarity with the tool

• Existing information (Job Description, Performance Rating, Goals)

• Features: Picture, Org Chart, 9 Box, Employee Profile, Scorecard, Nomination, Talent Search, Talent Comparison, Reports

• Efficient HR Administration

WHAT WE CHOSE TO IMPLEMENT
How am I going to plan for this implementation?

## INTERNAL PROJECT PLANNING

<table>
<thead>
<tr>
<th>People</th>
<th>Project Management</th>
<th>Change Management</th>
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<tbody>
<tr>
<td>- Project Sponsor, Champions, Program/Process/Technology owner, other stakeholders and customers/users&lt;br&gt;- Task force?</td>
<td>- Project objectives&lt;br&gt;- Scope, Deliverables, Timeline&lt;br&gt;- Project Charter, Project Plan&lt;br&gt;- Support strategy&lt;br&gt;- Post implementation stabilization</td>
<td>- Understand dynamics in the organization&lt;br&gt;- Raise awareness&lt;br&gt;- Continuous communication to future users&lt;br&gt;- Continuous project status update&lt;br&gt;- Training (materials, classes, web based tutorial…)</td>
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<table>
<thead>
<tr>
<th>Program</th>
<th>Process</th>
<th>Technology</th>
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<tr>
<td>- Understand current program: philosophy, vision, outcome, challenges&lt;br&gt;- Program requirement&lt;br&gt;- Align terminology</td>
<td>- Understand current process and challenges&lt;br&gt;- Design future business process&lt;br&gt;- Integration with other business process&lt;br&gt;- Process requirements&lt;br&gt;- Align terminology</td>
<td>- Different functionalities, System Administration and Reporting Tool&lt;br&gt;- Integration with other SF modules (TGM, PM, JDM) or 3rd party applications&lt;br&gt;- Data requirements/interface&lt;br&gt;- Implementation&lt;br&gt;- Documentation</td>
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## PROJECT PLANNING WITH SUCCESSFACTORS

<table>
<thead>
<tr>
<th>Before</th>
<th>During</th>
<th>After</th>
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</thead>
<tbody>
<tr>
<td>• Statement of Work</td>
<td>• Detailed business and system requirements</td>
<td>• Post implementation stabilization</td>
</tr>
<tr>
<td>• Set expectations</td>
<td>• Best practices</td>
<td></td>
</tr>
<tr>
<td>• Project timeline</td>
<td>• Resolve system design gap</td>
<td></td>
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<tr>
<td>• Roles and responsibilities</td>
<td>• System Administration training</td>
<td></td>
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<tr>
<td>• Common goals</td>
<td>• Testing</td>
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</table>

## PLANNING FOR GO LIVE

### Technology
- Data scrubbing
- Prepare position import file
- Import Background, Personnel and Trend files
- Set up permission
- Production validation

### Process
- Event calendar
- System process
- Point of contact

### People
- Communication
- Training
- Support Team
NEW SUCCESSION PLANNING CYCLE

1) Executives logon to SF

2) Org Chart, Talent Profile and Scorecard

3) Review 9 box

4) Nominate Successors

5) Succession Planning Review meeting between VP and HR

6) Succession Planning Review meeting between C Level and HR

7) 1:1 meeting between CEO and HR

8) Presentation to Board of Directors

9) Development Plan for High Potentials

SUCCESSFUL OUTCOME

- Paper process is completely replaced
- Executives find the tool easy to use
- Easy to print Talent Profile and Scorecard
- Very well received by Board of Directors - “this is the most impressive/comprehensive report they have ever seen by any organization”
- Better, complete data on our talent
- Highly valid leadership development planning
- Identification of continuous supply of talent for business continuity
SUCCESS CRITERIA

• Executive sponsor identified
• Managing expectations
• Face to face project kick off
• Demonstration of tool
• System Administration and report training upfront
• Project plan and timeline defined and follow through
• 1 point of contact accountable for defining and delivering requirements
• Program, process and technology owners identified
• Work with analysts from business group
• Hands on in the system on day 1
• Clearly defined training strategy for users
• Thorough testing throughout project
• Close collaboration between SuccessFactors and Lucile Packard’s Children Hospital

LESSONS LEARNED

• Keep it simple
• Keep your customers in mind for configuration, communication and training
• Clarify what is required vs what is wanted
• Clarify roles and responsibilities – decision maker, executer, program/process/technology owner
• Test, Test, Test
• Scrub data before import
• Don’t forget your support strategy
Q & A

Thank You