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Optimized personnel processes through digital transformation

Efficient digitalization of HR processes: SAP
SuccessFactors optimizes performance reviews and
internal training at Samson AG

Samson AG

Company Profile

An innovator in the valve industry

Since its foundation in 1907 by Hermann Sandvoss, the SAMSON AG has developed into a leading company in the valve industry. With a global presence in over 66 countries and around 60 subsidiaries, SAMSON employs around 4,500 people worldwide. The company has been headquartered in Frankfurt am Main since 1916, where around 2,000 employees work on an impressive 150,000 square meter site. In the course of the upcoming "Main Change" project, SAMSON AG will relocate to Offenbach.



Samson AG

— Digital Transformation —



Business Operating Area

SAMSON operates in areas where liquids, gases, vapors and chemical substances play a significant role. As an expert in valves, the company is active wherever things are in motion.

SAMSON operates in a future market with great potential for innovation and has set itself the goal of further expanding the decentralized intelligence of valves. By developing new intelligent systems, the company is revolutionizing process automation to offer its customers more flexible, safer and more reliable processes. To this end, SAMSON promotes technical, business and organizational innovations within the company. SAMSON's corporate philosophy is based on a focus on continuous innovation and development, which still reflects the ideals of the company's founder Hermann Sandvoss. The company relies on the knowledge and experience of its long-standing employees and offers them a wide range of opportunities for future-oriented knowledge and professional development in existing and new fields of expertise.

Corporate Strategy

SAMSON's strategy is to promote a culture of willingness to embrace change at a personnel, organizational and technical level. This enables the company to help shape the current and future markets in a sustainable manner and ensure long-term success. With its continuous pursuit of excellence, SAMSON sets standards in the industry and remains true to the legacy of its founder.



Directory

Optimized personnel processes
through digital transformation

SECTION 1



Starting Position

Personnel Processes Heavily Paper- and Excel-based

The effectiveness of some personnel processes was in need of improvement and the manual effort involved in administration was too time-consuming

SECTION 2



Objective

Reduction of Paperbased HR Processes

Training organization and mapping of employee performance reviews needed to be digitalized in order to increase effectiveness

SECTION 3



Solution

The Selected Modules and the Course of the Project

The existing SAP HCM HR master data system remained in place and was to be supplemented by the SAP SuccessFactors Performance & Goals and Learning modules

SECTION 4



Results and Benefits

Project Conclusion and Aftermath

Creation of a central learning platform to manage training and learning opportunities more efficiently. Achieving greater transparency in the employee performance reviews process

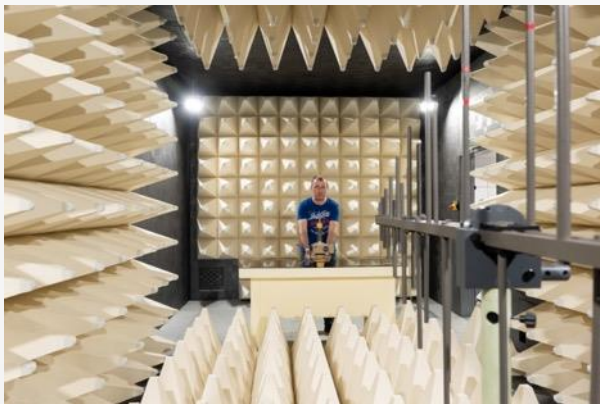
Starting Position

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SAMSON AG emphasizes the importance of internal staff development. In order to strengthen staff development, the internal training academy "Edith Sandvoss Academy" was set up offering training courses in soft and business skills. In addition, company-wide processes such as employee appraisals and performance reviews were implemented. However, the training organization and the mapping of employee appraisals were still heavily Excel and paper-based. Samson's employees and managers agreed that access to training opportunities and processes needed to be digitized in order to realize the full potential of the innovations. In addition, effective support from IT tools was part of SAMSON's HR digitalization strategy. In this context, Samson decided to engage Pentos as an implementation partner to help them achieve their goals.



Samson, a company in the metal and electrical industry that is bound by collective bargaining agreements, was faced with the challenge of digitizing its paper-based employee appraisal process. This process had to comply with the requirements of the collective bargaining agreement and the works council agreement. The introduction of the Performance & Goals module of the SAP SuccessFactors platform was intended to meet these requirements. However, the process could not be reproduced using the tool and could not be adapted to the existing standard. Furthermore, the steps of the performance assessment are linked to fixed time periods, which required a fixed go-live date.



01

02

03

04



Objective

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The main objective was to minimize the paper-based HR processes. In particular, the performance review process was identified as the biggest pain point. The annual employee appraisals were previously carried out on printed paper documents and the evaluations had to be entered manually into the HR master data tool. This led to a high level of manual effort and errors. The introduction of SAP SuccessFactors with the Performance & Goals and Learning modules was intended to solve these challenges.

Another important use case was the booking of seminars for the internal employee academy, which until that point had been done manually via email and Excel lists. In order to reduce gaps in communication, the aim was to ideally reproduce these two use cases in one central system. For this reason, Samson AG decided to introduce SAP SuccessFactors with the P&G (Performance and Goals) and Learning modules. This decision was made in order to meet the high requirements and ensure efficient digitalization of HR processes. The deadline was set due to the upcoming year-end talks.

Due to the fixed deadline for the launch of the new solution, it was important to complete the implementation process promptly and make the systems available on time. The announcement of the transition was immediately communicated to the workforce. The announcement was received positively across the board and met with no resistance. Many Samson employees saw digital access to the training and learning opportunities offered by our Edith Sandvoss Academy and the digital processing and documentation of employee appraisals as the logical next step. In addition, a solution was found that also allows employees without an e-mail address and their own PC access to use the platform. This measure ensures the inclusion of all employees and enables smooth use of the digital HR platform.



Solution

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Technical Solution

SAP SuccessFactors was chosen as the technical solution. The existing SAP HCM HR master data system remained in use and was to be connected to the new system via the SAP Process Integration (PI) middleware. The standard integration and scalability of SAP SuccessFactors were decisive factors for selecting the solution.

Project Preparation

During the preparatory phase of the project, the project managers from Samson and Pentos jointly formed internal teams that were responsible for the various areas of the project. On the Samson side, employees from the HR and IT departments were involved. The transfer of knowledge was particularly important for Samson IT, as it would later be responsible for the administration of the system.

"The required system settings were largely implemented using a coaching approach to ensure that Samson IT is in a position to operate, manage and run the system independently. Samson was able to rely on the expertise of Pentos for this."

Collaboration

"The collaboration with Pentos AG was a positive experience throughout. The sub-project managers on both sides were able to exchange ideas openly in a professional atmosphere and successfully overcome all challenges during the project and the adaptation phase. Regular weekly meetings with the sub-project managers and project management ensured good communication and coordination. In addition, specific dates were agreed for the transfer of knowledge, during which adjustments were implemented together."



Lars Heinze
Head of Talent Management
Technical Lead Implementation
SAP SuccessFactors



Christian Backes
SAP Inhouse Consultant
Project Manager
Implementation
SAP SuccessFactors



Solution

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Challenges

During the project, a challenge arose in the form of a change in project management on the part of Pentos AG. The project manager, who had been involved in the project from the start, retired towards the middle of implementation. This was communicated at an early stage with the project management on the Samson side, and contact was established in good time with Ms. Kazan, who took over as the new project manager. For the transition phase, a tandem project management of the two colleagues was agreed, which ensured a seamless transition on the Pentos side.

Another challenge was the integration via the "PI" interface. As many SAP customers now use the successor technology "CPI", difficulties arose towards the middle of the implementation. The "CPI" experts from Pentos were able to make most of the settings in the PI without any issues. However, there were specific settings in "PI" that were required for smooth interaction between the two systems and could not be implemented internally.

When the project managers were confronted with this obstacle, Pentos immediately engaged an external expert who specialized in "PI" and was able to provide the team with the necessary support in a timely manner.

"Thanks to the commitment of Pentos, the Samson AG did not have to award any additional contracts and was still able to stay within the agreed budget for the implementation."



Christian Backes

SAP Inhouse Consultant
Project Manager
Implementation
SAP SuccessFactors

The final challenge was the introduction of the "Learning" module and the onboarding of the specialist department. Samson employees had to transfer the training courses offered by SAMSON AG to SuccessFactors within a short time period. However, the department's employees had no previous experience with a learning management system (LMS), so Pentos organized additional training sessions at short notice and used a coaching approach to enable the Samson staff to master this challenge independently.



Lösung

Optimierte Personalprozesse
durch digitale Transformation

Challenges

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Results and Benefits

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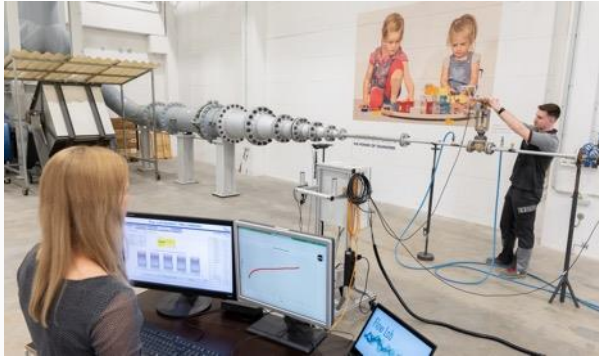
Since the implementation, the management of the system has been incrementally transferred to Samson IT. Pentos AG remains the company's partner for solving any problems that arise or discussing possible new project phases. There has been a continuous increase in the use of the system by the staff, and new requirements have always been implemented directly by Samson AG.

The introduction of the SAP SuccessFactors Learning and SAP Performance & Goals modules has achieved the desired effect. A central learning platform was created at SAMSON to manage training and learning opportunities more efficiently. In addition, the tracking of training courses has been made easier. Enabling internal learning administrators to offer target group-specific learning opportunities has led to an additional increase in efficiency.



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The new system is generally well received by employees and managers. In particular, the paperless documentation and administration of employee performance reviews has been met with approval. There is also a steady stream of suggestions for improvements to the system from employees and managers, which indicates that everyone involved is engaging extensively with the system and actively using it.

Furthermore, all employee performance reviews were documented in the system by Samson IT. This allows employees, managers and the responsible HR business partners to track performance, performance appraisals and target achievement transparently. The SAP-internal interface to SAP HCM also streamlines operations for Samson IT.

