RELEASE HIGHLIGHTS

Sage People
Spring '21 upgrade

Highlights

sage
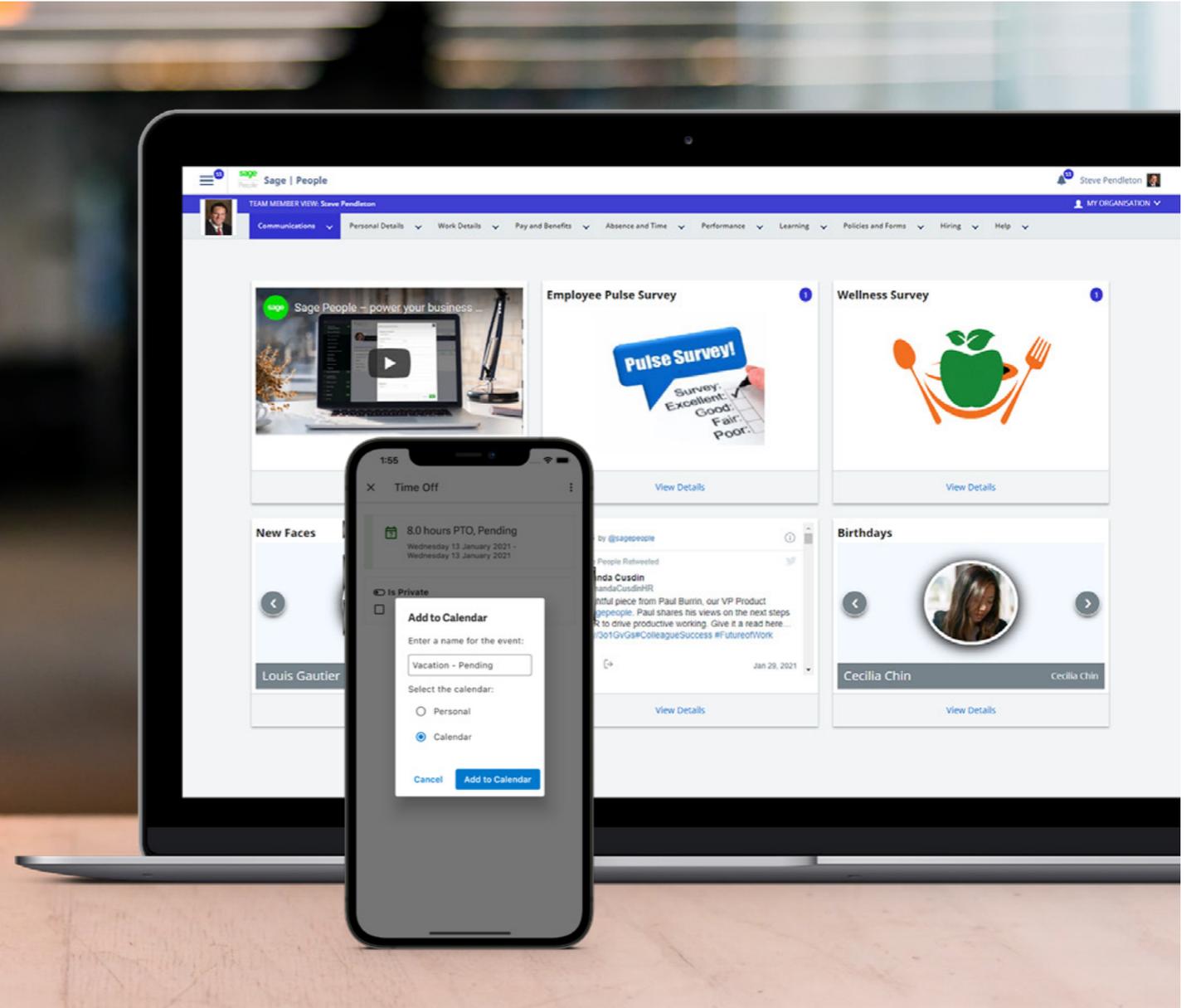
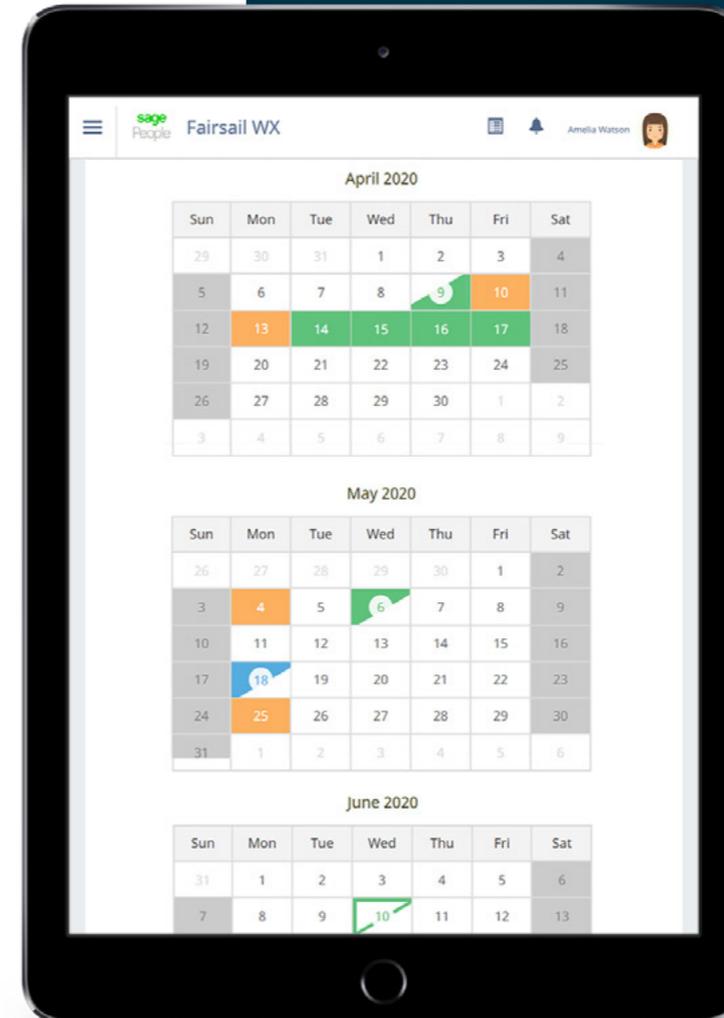# General availability

1. Enhanced objectives

Why is it important?

Flexible performance management has never been more important. With so much change going on in the world, business priorities are evolving and shifting at a faster pace than ever before.

Business leaders not only need to communicate evolving strategies with the workforce, but critically, ensure that every employee is clear on their role in achieving those goals, and that their personal objectives align to that of the company's. The most effective way to do this is by adopting real-time, flexible and continuous performance management processes that foster agility and responsiveness.

Not only can continuous performance management enable everyone in the organization to respond to changes faster and understand where they fit in, but it can truly transform the performance management experience. Often, employees feel it's more of a 'self-defence' or a chance to put a case forward to secure a good rating, rather than an opportunity to self-reflect, learn and grow.

Continuous performance management regularly tracks and reviews more immediate term objectives, iterating and improving performance on the go and tweaking objectives as necessary. With frequent feedback, it feels more authentic and drives much greater value for everyone.

Research shows that those having regular, productive 1:1's with managers are 2x more engaged and 3x more likely to stay with the company for the next two years.[1]

Furthermore, encouraging transparency and having joint objectives for key project groups can have a significant impact on achieving important goals; reducing duplication of effort, ensuring alignment and improving quality of output.

Sage People has always had performance management functionality that enables colleagues to create, view, edit and delete personal objectives. Enhanced objectives have been built from the ground up to take this to another level and address all of the points mentioned above, enabling our customers to transform the effectiveness of their performance management processes, as well as the experience for employees.

[1]https://www.reflektive.com/blog/introducing-11s-new-performance-experience-drive-employee-engagement/#:~:text=Our%20research%20shows%20that%20regular,over%20the%20next%202%20years.

Customer benefits:

Flexible performance management

Increased engagement

Transparency and collaboration

What's new?

In the Spring '21 release, our brand new 'Enhanced objectives' capabilities become generally available (GA) for all customers. This includes the following capabilities, which were released in Winter '21 for early adopters:

Agile objective tracking

- Add specific tasks per objective to track progress in a more agile, granular and incremental manner.
- Leverage the existing continuous conversations feature to now add comments and attachments to individual objectives so you can track progress against them in real-time.

Collaboration and transparency

- Create shared goals and objectives with cross-functional team members, ensuring you're all aligned and working towards the same objectives.
- You can then align your personal objectives to group/teams' objectives to track your contribution specifically and ensure all team members are accountable for their deliverables.
- Choose to 'reveal' an objective with selected employees so they can also see progress against shared objectives, as well as gaining better alignment of goals with one another.
- For colleagues who have dotted lines into other managers or project leaders, permission can be granted for these leaders to also have full visibility and editing rights on objectives.
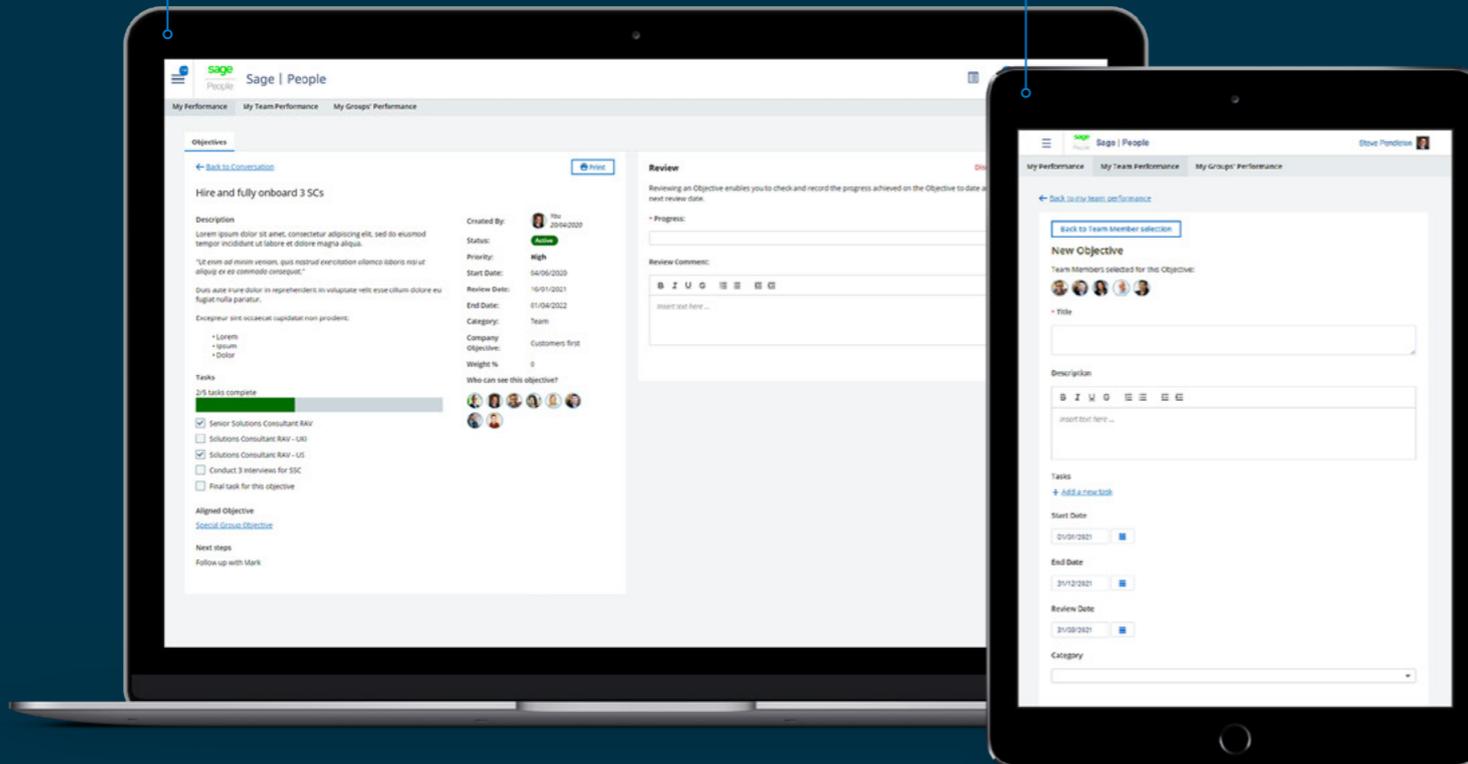
New personal objectives screen

Listing all objectives on the left, and details of the selected objective on the right.
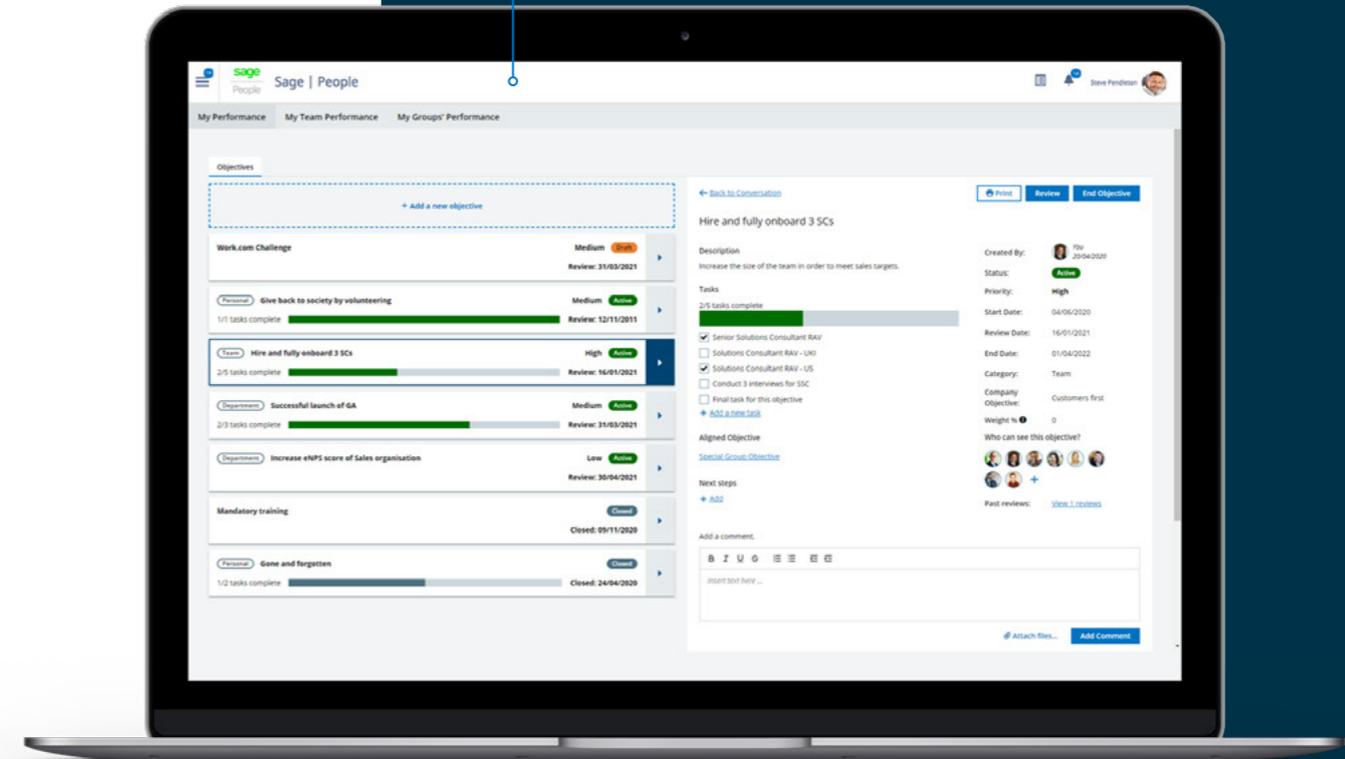
Agile and transparent reviewing of your team's objectives, as well as your own.

Managers can create objectives in bulk for their team

In addition to these features which were included in the Winter '21 release for early adopters, we're also delivering the following capabilities which are brand new to the Spring '21 release:

Simple and flexible configuration for HR

- HR can now customize objective fields. For example, if you have company-wide values, you could create a field to align individual objectives to a value.

- Similarly, you can choose to remove some standard fields if they are not applicable to your company's performance management process.

- Easily configure how to measure success against objectives, for example you may choose to measure achievement using specified ratings and/or levels of completion.

Improved manager experience

- Create objectives in bulk, for example, for all team members or a sub-set of them.

- Dashboards for managers provide one location to view all team member updates without having to go into individual team member records. Here they can see any new activity, for example a new self-review added on an objective, and navigate to it directly to view and respond.

2. Reward planning

Improved bonus calculations

Rewarding your people fairly and in a transparent manner is absolutely critical to keeping employees motivated, feeling secure and ultimately, able to do their best work.

We've made more improvements to the existing compensation planning capabilities by making it easier and more flexible to award bonus payments. You can now use specific formulas to calculate the bonus, rather than just using current salary. For example, if your bonus scheme is based on the accrued or average salary of the previous year, you can build that as a formula and base the bonus amount on that formula.
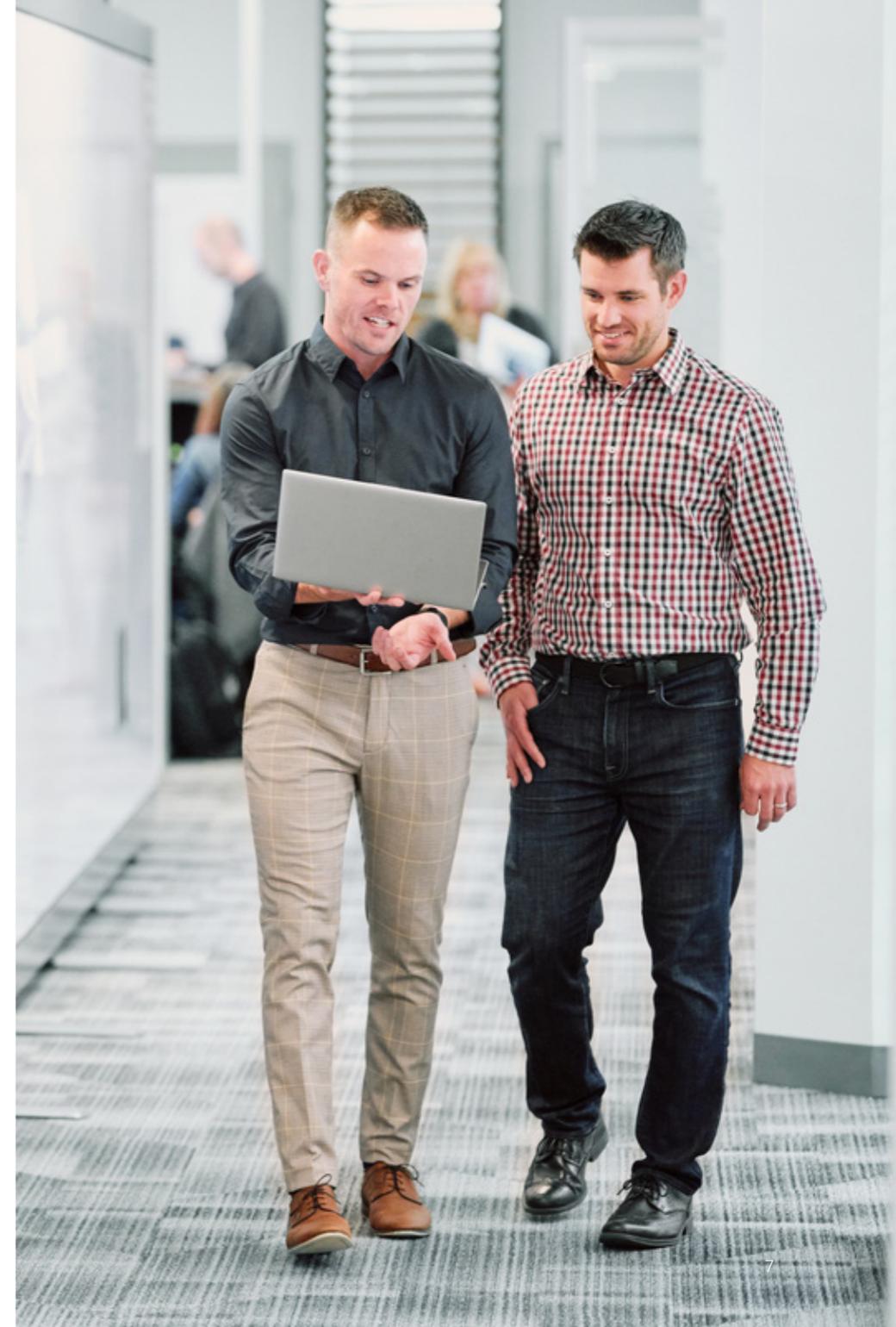
Customer benefits:

Improve employee satisfaction

Recognise fairly

Enhance transparency

General availability

3. Self service user experience

Having listened to your feedback and requests, we have made a number of UI improvements for the self-service WX portal which will be delivered in the Spring '21 release. This is a first step towards delivering a much improved, modern and consumer-grade user experience – with more to come!

UI improvements to WX self-service
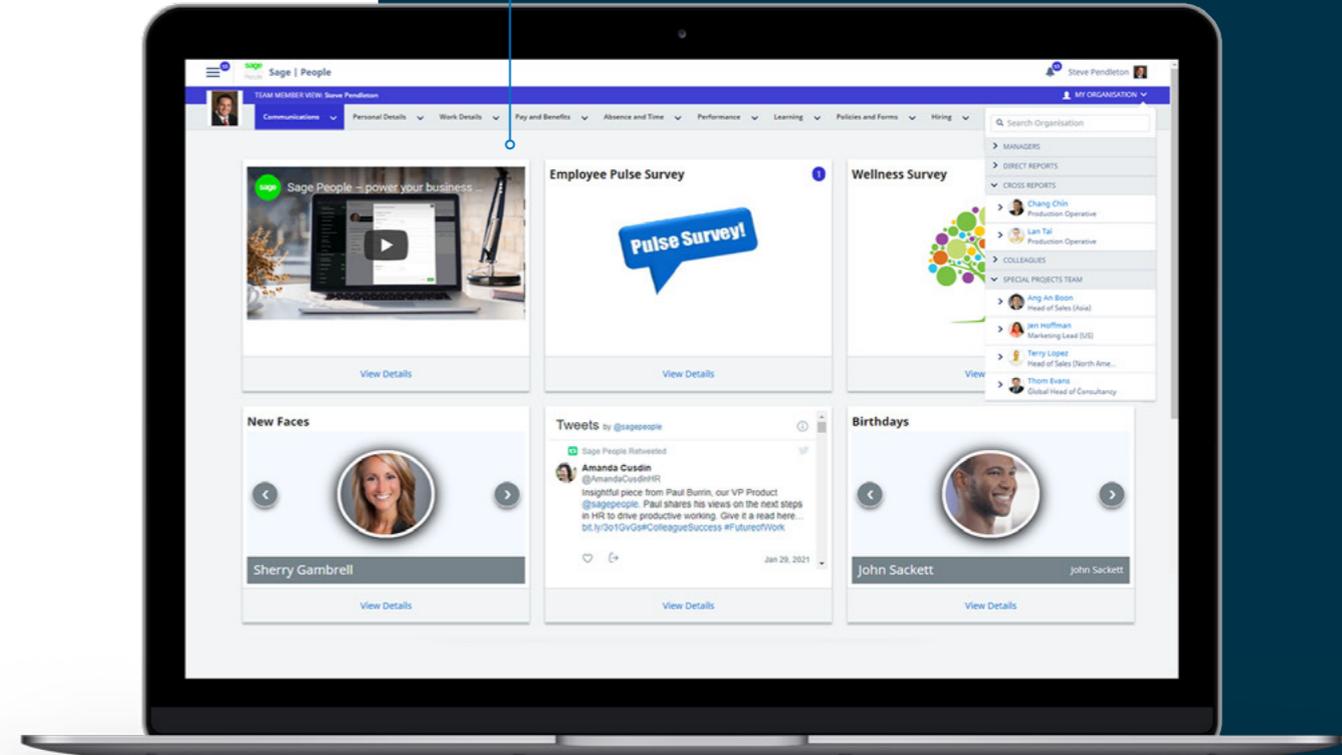
The latest improvements which you can now benefit from include:

Slicker WX tiles
- Tiles are now fully responsive and will quickly adjust based on window size.
- All of the tiles are now automatically aligned to one another for a much cleaner view.
- The 'view details' boxes at the bottom of the tiles are no longer greyed out and are now slightly larger, improving usability for customers.

Intuitive navigation
- The customer logo in the top left is now clickable and acts as a home button, enhancing navigation from wherever a user is in the system.
- The 'People directory' icon and the 'Team member' dropdown have been consolidated to make it easier and more intuitive to search for colleagues across the organization.

Better branding
- Customers are now able to bring their brand to life even more by applying their colours across the system more prominently, with the ability to apply a block colour to the service bar navigation (rather than just a thin line).

Improved accessibility
- The accessibility of the system is now much improved as customers can now use their keyboard to navigate through the full system, without the need to use their mouse.

Customer benefits:

Intuitive user experience

Reinforce your brand

Improved accessibility

sage

4. Time and attendance

Why is it important?

No matter the size of your business, managing employee vacation and sickness can be time-consuming, complex, and often distracts employees from the jobs they were hired to do. Furthermore, requests for support or to resolve errors can take up a lot of HR time, causing frustration and a poor experience.

As an early adopter (EA) program in the Winter '21 release, we refreshed the way time off is booked in Sage People so that it is more intuitive and simple to use, creating a better user experience and reducing errors, as well as the need for HR intervention.

We have since had fantastic customer feedback including new suggestions, which along with UX best practice guidelines, has enabled us to build these capabilities out even further, which we are now making generally available in the Spring '21 release.
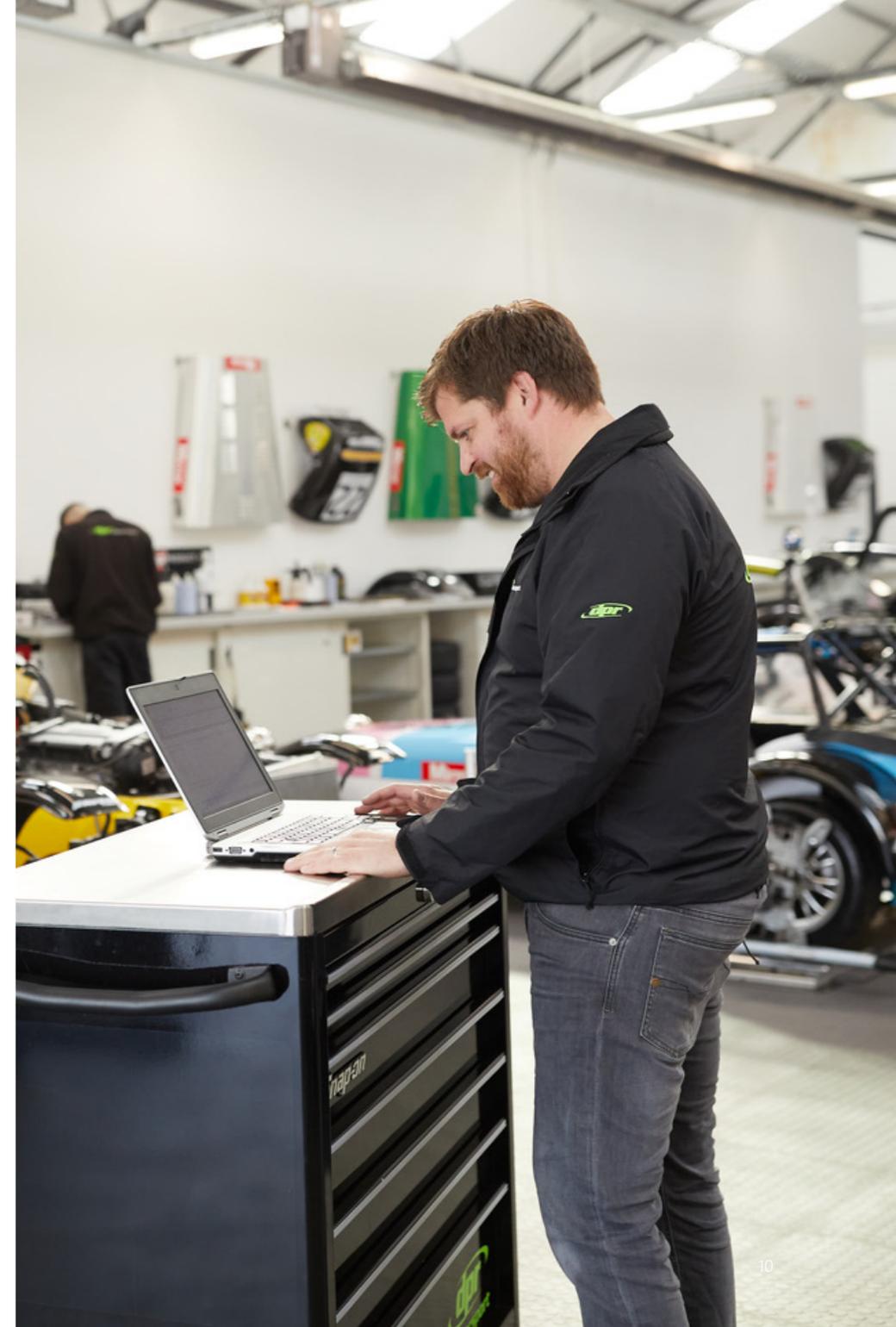
Customer benefits:

Streamlined processes

**Better user experience**

Less admin

sage

What's new?

In the Winter '21 release, we improved the process for booking absences as an early adopter (EA) program, and are now making generally available (GA) as part of the Spring '21 release:

Intuitive process for booking absences

- We've made it really simple to complete the time off booking process by including error messages along the way, that not only flag when there is an error, but highlights where, so users can resolve immediately.

- We've combined the booking process from two separate pages into a single page and made the page editable throughout.

- Furthermore, we have also improved the look of partial day absences in the WX calendar to make them easy to spot – resolving one of our top customer priorities!
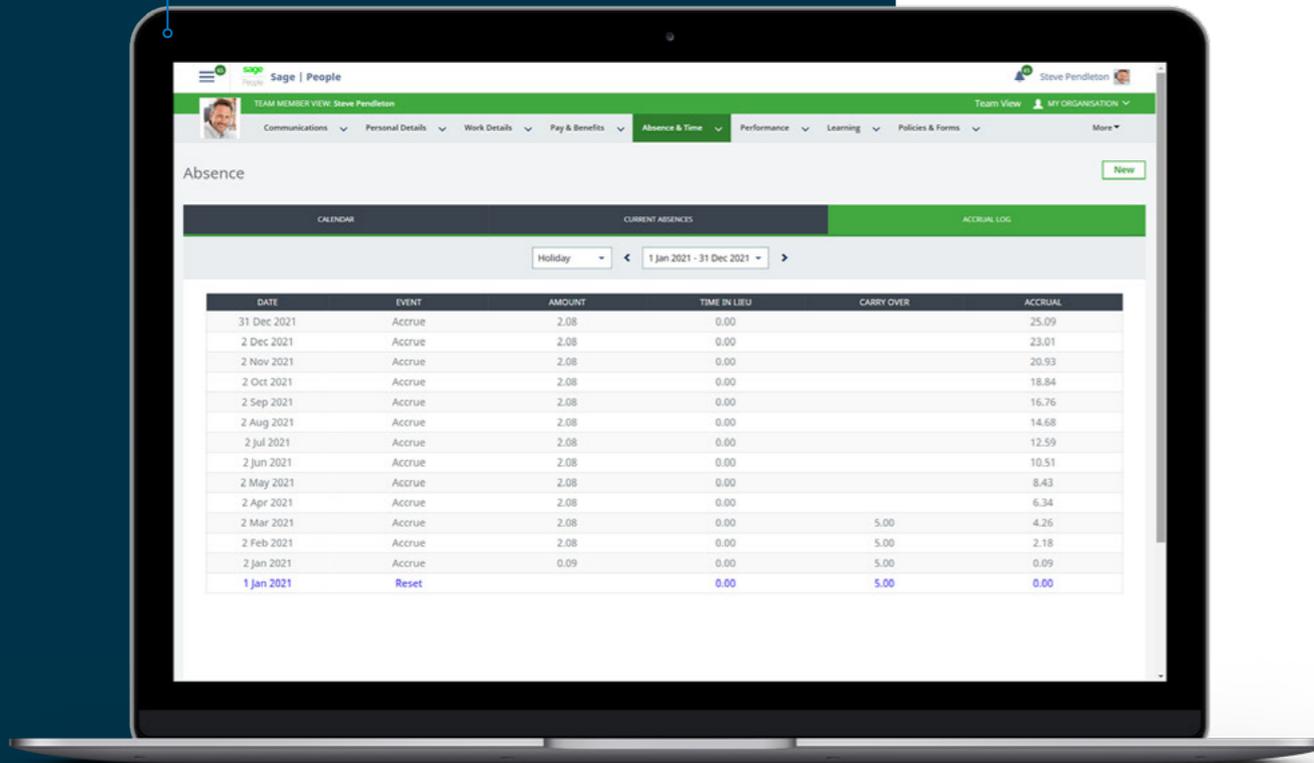
New modal UX

New pop up screen for booking time off.
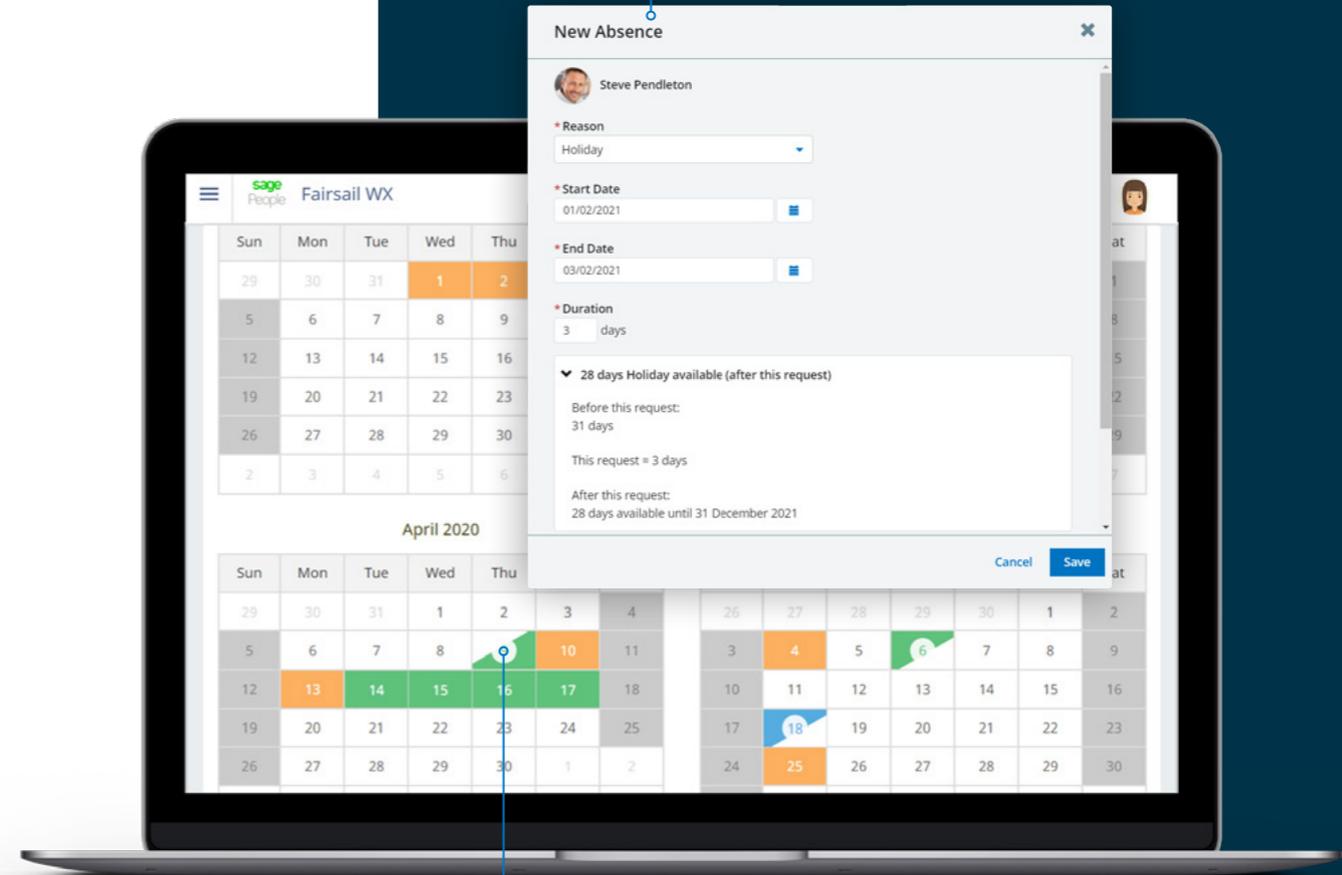
Partial days

Easily view partial day absences.

Improvements to accrual log.

In addition to the improvements aforementioned, we're also delivering the following capabilities which are brand new to the Spring '21 release and are generally available (GA):

Clearly structured accrual log
We've extended the accrual log to show all applicable types of absences (for example, holiday entitlement, purchased leave, parental leave), making it really transparent how absences have been accrued, as well as showing future dates to clearly see what balance is left.

The scenario below explains how this helps solve challenges for HR today.

Scenario:

John is leaving the business next month. So far, he has accrued ten vacation days, including vacation he has purchased, however he has already used twelve. HR want to explain to him how his final payment will be deducted to take this into account, and why.

Previous HR admin challenge:
The accrual log only showed John's annual leave and he couldn't see his separate purchased leave, so it was difficult to explain to John how this has been calculated. It also didn't show future accruals to help visualise how the balance is spread across the year.

HR admin challenge solved:
HR can now easily show John his annual leave on one tab and the purchased leave on another – and both of them show how this accrues across the whole year. John can clearly see that he has taken more vacation than he has accrued for that point in the year, so understands why his final payment has been deducted to account for that.
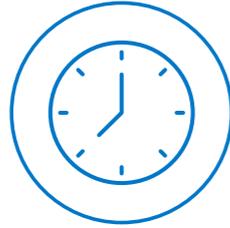
Early adopter

5. New mobile app

Why is it important?

The use of mobile phones for work purposes was already on a sharp growth trajectory before the COVID-19 pandemic, but now, it would seem mobile has become even more essential to keep the workforce connected and able to work more flexibly in remote locations.

Data from a global survey conducted in 2020 revealed that 70% of worldwide respondents who use the internet, claimed to be using their smartphones or mobile phones more as a direct result of the coronavirus outbreak.[2]

[2]https://www.statista.com/statistics/1106607/device-usage-coronavirus-worldwide-by-country/

That is not surprising given the global shift to remote working, pretty much overnight.

But what can we expect post-COVID? For many organizations, remote working may well become more of a permanent fixture even after COVID-19 restrictions, after all there are huge benefits in doing this, such as opening up your talent pool to candidates outside of office locations, and even cost efficiencies too. Mobile will therefore be an essential technology for many to enable employees to work remotely effectively; keeping them connected, able to receive communications in a timely manner, and critically, to be able to self-serve with ease and in a manner that is in-keeping with their consumer experiences.

The same goes for your HR team too – enabling them to carry out important and frequent tasks quickly and easily, wherever they are, means they can respond faster to workforce requests and avoid becoming a bottleneck in many scenarios. This is critical when it comes to operating at pace and reacting quickly to changing priorities. This is exactly why we are investing so much in our mobile capabilities and have made great strides forward in the recent months.

Recently, we enabled the new Sage People mobile app to take full advantage of your mobile features, such as face and fingerprint ID for additional security, font and display size adjustment and call features, so you can carry out faster HR and People processes, resulting in far superior experiences for your HR team and employees. But the Spring '21 release delivers even more enhancements to ensure your mobile experience is even slicker and future proof.

Customer benefits:

Slicker mobile experience
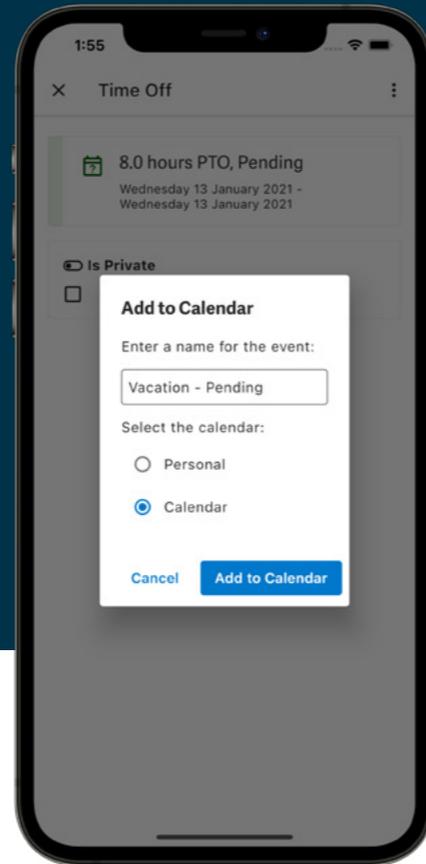
Keep employees connected

Fast and secure

Flexible and scalable

What's new?

We're continuing to build out the Sage People mobile app for early adopters and since the Winter '21 release, we have even more fantastic functionality, including:


Syncing with i-calendar
Users can now save vacations straight to the chosen calendar on their mobile (for example i-cal or outlook, or any other calendar they may have installed on their phone). This will show as a generic absence, rather than the specific of the absence, to ensure information remains confidential.
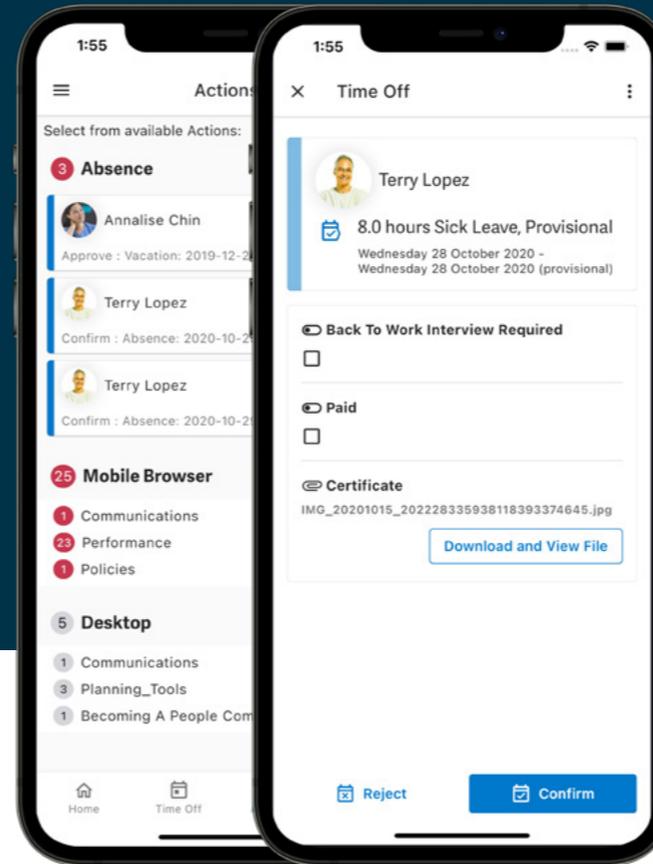
Native manager actions
Managers can now review, approve and reject any absence action directly from the native mobile app, rather than having to go via the web browser, improving the user experience and enabling them to respond faster.
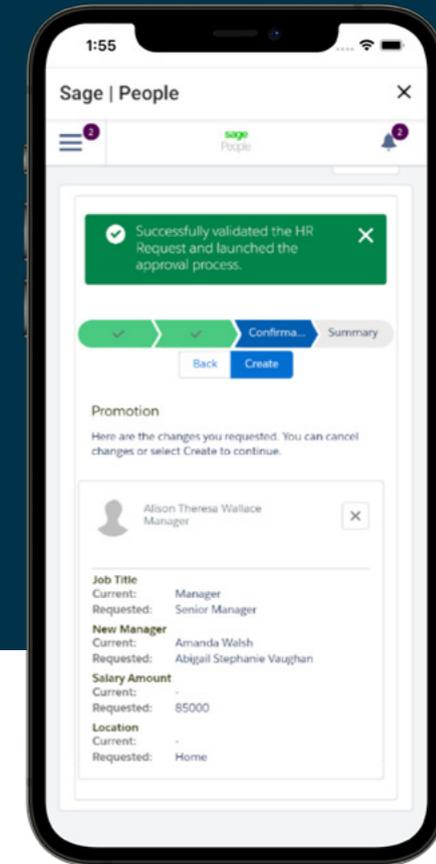
People management workflow
In the Spring release, we are enabling people management workflow to be fully responsive on the native mobile app. This means that for employees, managers and HR, it is a much improved experience when raising and taking action to employee changes from their mobile, just as it is via the mobile web browser.

Customer benefits close-up

Slicker navigation that's designed for mobile

Our focus is on making life easy for our customers and the new app provides a sleek and concise user experience that meets the needs of the 'on-the-go' workforce. All priority content is organized and accessible in a visually appealing mobile device-specific way so employees can get things done efficiently.

Engage your remote workforce

Enable employees to complete activities when they are notified or come to mind. Keep connected with remote or mobile workers and ensure they are up-to-date with the latest company communications. Employees can carry out HR functions like booking vacations, keeping personal information current, and clicking to call company contacts.

Fast, secure, and reliable

With all employee information in one secure cloud-based system it means employees can access workforce information at their convenience from their mobile. Companies benefit from full control of access and security, and mobile features like face and fingerprint ID keep information secure if an employee device is lost or stolen.
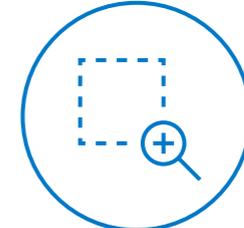
Flexible and scalable

The app supports Sage People's renowned configurability including company branding and process automation. The system is responsive and can be tailored through simple configuration by the HR team.
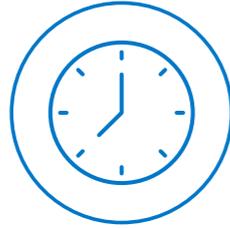
6. Time and attendance

Daily absence reporting

You can now report absences on a daily basis, making it much easier to report on and align to your pay periods:

- Clearly see how many absences took place over any specified time period you choose – whether this be by calendar month or pay period.

- Once you have switched on the new functionality, the system will populate day-by-day breakdown information for any absences booked from that point.

- Previously, when an employee had booked an absence event, e.g. a period of sickness, the system would capture the full event as having happened only in the month it began, as it had no way to accurately allocate the individual days of absence to the actual month or pay period.

- For customers using Payflow, it will now be possible to export absences in this daily format to help with payroll processing and reporting.
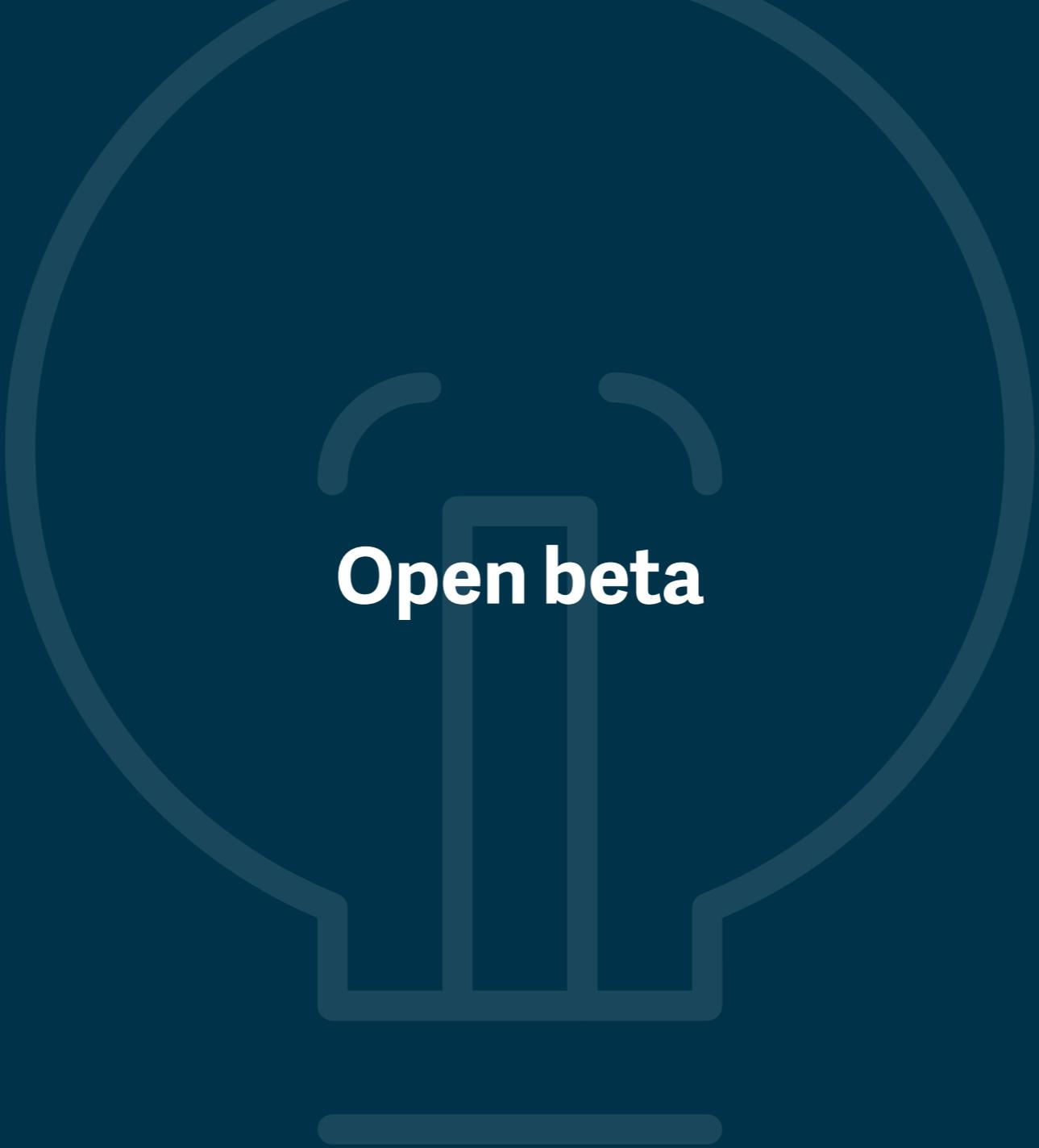
Customer benefits:

Streamlined processes

Better user experience

Less admin

Open beta

7. Payroll API

Why is it important?

APIs support 3rd party systems including other Sage products, strategic partners and complementary solutions to safely and sustainably consume data from Sage People as the source of truth.

The average business uses multiple applications in several software categories, including CRM, ERP, payroll, marketing, finance, communications and more. APIs provide a gateway to other systems through integrations, in which they can access data securely to transfer data between them. As a result, APIs play a big role in improving processes and collaboration across businesses. Currently Sage People uses the Payflow file transfer system to transfer data to and from payroll systems.

The new API enables greater collaboration across systems and business areas and has the potential to improve productivity, efficiency, and employee insights.

Integrating your HR and People system with your payroll system has huge benefits, from time savings and efficiencies, to increased accuracy of payroll and more.

Customer benefits:

Faster and automated

Increased accuracy

Save time

What's new?

Many of our customers use Payflow today, which enables the transition of Sage People data to and from third party payroll providers, through secure downloads and uploads of files. To make this process more seamless and automated for the user, we are building out our Payroll API capabilities, currently as an Open beta program.

In the Spring '21 release, we are delivering a brand-new Payroll API which includes:

- Automatic transfer of data and documents, including payslips and tax forms, from third party payroll providers into Sage People.

- This means no manual downloading, uploading, or even clicking buttons – saving hours of time each pay period.

- Furthermore, the error visibility is greatly improved, with errors flagged and highlighted in quick succession, enabling immediate resolution and significantly reducing everyday risk and data loss.

This is currently running as an open beta, which means although the API product is available to all customers, the API's are still under development and subject to change. The Payroll API is currently limited to sending information for a single employee per data processing, although the process can run multiple times to transfer all your staff data.

As part of our continuous improvements, we are actively reviewing the capability of sending payroll data for multiple employees per data processing for the future.