SAP SuccessFactors ♡

Implementing Dynamic Teams

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Content

1 Dynamic Teams

The Dynamic Teams module enables people in your organization to create and manage dynamic teams and then define objectives and key results for the team.

A dynamic team is an informal team that demonstrates agility and adaptability in how it forms, works, and disbands. A dynamic team isn't defined by the formal organizational hierarchy and reporting structure. Instead, it's formed by people coming together for a specific purpose. For example, it can be a cross-functional team, made up of people in different job roles, from different parts of the organization. Or it can be a project team, formed to complete a specific project and then disbanded.

Key capabilities of Dynamic Teams include:

- Objectives and Key Results (OKR)
- Sourcing team members with Opportunity Marketplace

2 Objectives and Key Results (OKR)

Objectives and Key Results (or "OKR") is a popular goal-setting methodology. Dynamic teams can use the OKR methodology to set meaningful goals and measure desired outcomes.

OKR for Dynamic Teams

When OKR functionality enabled, dynamic teams can define their own objectives, then track progress towards the desired key results. Team members who are unfamiliar with OKRs can use onscreen guidance to learn how to write them effectively.

With Objectives and Key Results functionality for the Dynamic Teams, you can:

- Create and manage objectives for the team.
- Add up to five key results for each objective.
- View the overall status of each objective.
- View the overall score of each objective. This score is determined by the completion level of the key results for an objective, with all weights being equal. If a key result's current value exceeds its target value, it counts as 100% complete in the overall score calculation.
- View progress of each key result toward its "definition of success" (DOS).
- Add contributors to a key result.
- Add comments on a key result.
- Receive a congratulatory message on the home page when a key result is successfully met. (Home Page only)

Key Concepts for OKR

Here are some key concepts for understanding the Objectives and Key Results functionality for Dynamic Teams:

- An "objective" describes something that the team wants to achieve.
- A "key result" is a measurable outcome that the team can use to measure progress towards their objective. Every objective has at least one and no more than five key results.
- The "target value" of a key result is the measured outcome that a team aims to obtain.
- The "current value" of a key result is the current measurement of what a team has achieved so far.
- The "definition of success" (or "DOS") is a percentage of the target value that a team consider to be a success. A common definition of success is 70%.

> **⁕ Example**
>
> For example, a dynamic team has an objective to "Increase customer satisfaction." One measurable key result contributing to that objective is conducting a certain number of customer interviews.
>
> If the team aims to conduct 100 customer interviews, their target value is 100. If their definition of success is 70%, the team needs to conduct at least 70 customer interviews for that key result to be considered successful.
>
> Let's say the team completes 10 interviews in the first week. They record a current value of 10. The key result shows as 10% complete. When the team records 80 interviews, the progress bar shows as 80% complete and reaches the threshold for success (shown by a "DOS" indicator). When the team records 100 interviews, the key result is considered 100% complete.

Not a Performance Goal

Objectives and Key Results functionality for the Dynamic Teams requires a license for SAP SuccessFactors Performance & Goals.

However, an "objective" in Dynamic Teams **isn't** a performance goal. Just as the structure of a dynamic team is less formal, so are the team's objectives. A dynamic team's OKRs **don't** have any direct impact on a team member's goal plan in SAP SuccessFactors Performance & Goals.

> ⓘ Note
>
> Some organizations use the term "goal" to refer to performance goals in Performance & Goals, while other organizations use the term "objective". The system can be configured to use either term on most screens, in reference to performance goals.
>
> However, this configuration option doesn't apply to Dynamic Teams. In Dynamic Teams, they're always called "objectives", regardless of the term you use for performance goals.

3   What You Can Do with Dynamic Teams

Learn what people in different roles or with different permissions can do with Dynamic Teams.

Everyone

Anyone with *Create, View, and Edit Dynamic Teams* permission can create a dynamic team or be added to a dynamic team.

When you create a team, you're designated as the *Owner*. When other people are added to the team, they're designated as a *Member*. This designation is shown in the *Team Access* column and determines which other actions you're allowed to perform.

Team Owners

As a team owner, you can do a few things that other team members can't. Only team owners can:

- Add or remove other team members, up to a maximum of 100 members per team.
- Designate other team owners.
- Define the role of other people on the team.
- Use Opportunity Marketplace Assignments for sourcing new team members.
- Mark the team as "active" or "inactive."
- Delete the team.

Team Members

All team members, including owners, can:

- Use the *Dynamic Teams* option in the main navigation menu to access the Dynamic Teams landing page (*My Teams*).
- View a list of dynamic teams they're on.
- Edit team details, like the team name or description.
- Define their own role on the team.
- Hide dynamic teams they don't want to see anymore.
- Mark themselves as an "active" or "inactive" team member.
- Leave a team.
- View tips on how to build effective teams.
- View the *Dynamic Teams* quick action on the home page (if enabled).

Team members with *Create, View, and Edit Objectives and Key Results (OKR)* permission can also:

- Create, edit, or delete objectives.
- Create, edit, or delete key results.
- Add or remove contributers to a key result.
- Add or remove comments on a key result.
- View tips on how to write effective OKRs.
- View the Key Result Success card on the home page.

Team members with multiple employments always see the same dynamic teams on the *My Teams* page, regardless of which employment they've selected in the context switcher.

Administrators

Administrators with *Configure Dynamic Teams* permission can:

- Enable Objectives and Key Results (OKR) functionality.
- Enable integration with Opportunity Marketplace for sourcing new team members.

Administrators with *Configure Objectives and Key Results (OKR)* permission can also:

- Create or delete objective statuses.
- Configure statuses that can be assigned to objectives, including display labels and colors.
- Translate status labels into other languages.
- Configure the order of objective statuses.
- Select the Default status, the status that's assigned to new objectives when they're created.
- Select the Completed status, the status that's used to indicate when an objective is completed.

Administrators with *Access to Dynamic Teams Data in People Analytics* permission can view Dynamic Teams data in story reports, for a given target population.

Administrators with *Generate Change Audit Reports* permission can create change audit reports to track changes to business data in Dynamic Teams.

4 Enabling Dynamic Teams

Enable the Dynamic Teams module.

Prerequisites

- You have access to the *Upgrade Center*.
- You can manage role-based permissions in the system.

Procedure

1. Go to ▌ *Admin Center* ❯ *Upgrade Center* ❯ *Optional Upgrades* ▐.
2. Find the *Dynamic Teams* upgrade. Then follow on-screen instructions to complete the upgrade.

   You can now use role-based permission to grant access to the Dynamic Teams module. It may take a few minutes for new permissions to appear. Log out and back in again to see them.
3. Create or identify a permission role for **administrators** of the Dynamic Teams module. For that role, grant the following permissions.

Permission	Description
▌ *Administrator Permissions* ❯ *Configure Dynamic Teams* ❯ *Configure Dynamic Teams* ▐	Enables people to access the *Dynamic Teams Configuration* screen and configure the Dynamic Teams module.

4. Create or identify a permission role for **users** of the Dynamic Teams module. For that role, grant the following permissions.

> → Tip
>
> To begin with, you probably want to grant these permissions only to administrators or to a small group of testers. Later, when you're ready to roll it out more widely, you can give permissions to a broader group.

Permission	Description
▌ *User Permissions* ❯ *Dynamic Teams* ❯ *Create, View, and Edit Dynamic Teams* ▐	Enables people to access, create, and manage dynamic teams.
▌ *User Permissions* ❯ *General User Permission* ❯ *User Search* ▐	Enables people to use People Search functions, for a target population. It's required for essential functions in Dynamic Teams, like adding a team member.

Results

The Dynamic Teams module is now enabled in the system.

> → Tip
>
> You have up to 30 days to *Undo* the upgrade in the Upgrade Center.

Next Steps

Most customers also enable Objectives and Key Results (OKR), which is a key functionality of Dynamic Teams.

5 Enabling Objectives and Key Results

Enable the Objectives and Key Results functionality so that dynamic teams can define their objectives and track progress towards the desired key results.

Prerequisites

- You have SAP SuccessFactors Performance & Goals.
- Dynamic Teams is enabled.
- You have *Configure Dynamic Teams* permission.
- You can manage role-based permissions in the system.

Procedure

1. Go to ▶ *Admin Center* ❭ *Configure Dynamic Teams* ❭.
2. Turn on the setting *Enable Objectives and Key Results*.

   You can now use role-based permission to grant access to Objectives and Key Results functionality in Dynamic Teams. It can take a few minutes for new permissions to appear.
3. For the Dynamic Teams administrator role, grant the following permissions.

Permission	Description
▶ *Administrator Permissions* ❭ *Configure Objectives and Key Results (OKR)* ❭ *Configure Objectives and Key Results (OKR)* ❭	Enables people to configure settings in the *Objectives and Key Results Settings* section of the *Dynamic Teams Configuration* page.

4. For the Dynamic Teams user role, grant the following permissions.

Permission	Description
▶ *User Permissions* ❭ *Objectives and Key Results* ❭ *Create, View, and Edit Objectives and Key Results (OKR)* ❭	Enables people to create and manage objectives and key results (OKRs) for their dynamic teams.

Results

Objectives and Key Results functionality is now enabled for use with Dynamic Teams.

6 Configuring Objective Statuses for Dynamic Teams

Configure the statuses that dynamic teams can assign to an objective.

Prerequisites

- Objectives and Key Results functionality is enabled.
- You have *Configure Dynamic Teams* and *Configure Objectives and Key Results (OKR)* permission.

Context

Every team objective has a status.

Procedure

1. Go to ▌ *Admin Center* ❯ *Configure Dynamic Teams* ❯.
2. In the *Status Settings* section, review the current list of statuses.

   > ⓘ Note
   >
   > By default, the following statuses are preconfigured for you:
   > - Not Started
   > - On Track
   > - Off Track
   > - Completed
   > - Paused
   > - Cancelled

3. For each status, you have the following configuration options:

Configuration Option	Description
Objective Status Label	The label of the status that's shown on the screen. You can edit it inline.
Status Color,	The text color for the status label, on the *Team OKRs* page. Choose 🎨 (Choose a color for this status).

Configuration Option	Description
Default	The Default status is assigned to new objectives when they're created. You can only select **one** status as the Default status.
Completed	The Completed status is used to indicate when an objective is completed. You can only select **one** status as the Completed status. ⓘ Note Currently, this configuration has no effect, but it's available so that it can be used in the future.
Status Order	Set the order that statuses appear in the menu that team members use to set an objective's status. They appear in the same order as shown in the *Status Settings* section. Use the ⌃ (Move up) and ⌄ (Move down) icons to change the order.

4. To create a new status, choose ＋ (Create status).

   A new row is added to the *Status Settings* list. Then you can edit the new status just like an existing status.

5. To translate objective status labels for each language or locale in the system, choose ⊕ .

   The *Configure Translations* dialog opens, where you can provide translations. If no translation is provided for a given language or locale, the company default locale is used.

6. To delete a status, choose 🗑 (Delete status).

   The status is deleted.

Results

Changes are saved automatically.

Dynamic teams can assign any of the configured statuses to their objectives. New objectives are assigned the *Default* status.

7 Integrating Dynamic Teams with SAP SuccessFactors Opportunity Marketplace

Enable the integration between Dynamic Teams and SAP SuccessFactors Opportunity Marketplace.

Prerequisites

- You have SAP SuccessFactors Opportunity Marketplace.
- Dynamic Teams is enabled.
- You have *Configure Dynamic Teams* permission.

Context

This integration gives team owners the option to use Opportunity Marketplace Assignments to help source qualified team members. Team owners can create an assignment in Opportunity Marketplace and in Dynamic Teams that defines the capabilities, geographic preference, and other requirements they want team members to fulfill.

Procedure

1. Go to ❯ *Admin Center* ❯ *Configure Dynamic Teams* ❯.
2. Turn on the setting *Enable Sourcing with Opportunity Marketplace*.
3. Ensure that users of Opportunity Marketplace also have permission to use Dynamic Teams, and vice versa.

Results

When creating a new assignment or editing an existing one, assignment owners can choose one of their active dynamic teams to be linked. When assignment applicants accept the offer, they're added to the dynamic team. After the assignment owner switches to another team for an assignment, all participants in the assignment are added to the current one.

8 Integrating Dynamic Teams with Goal Management

Integrate Dynamic Teams with Goal Management so that team members can link the objectives of their dynamic team to their performance goals in Goal Management.

Prerequisites

- Goal Management is enabled.
- Objectives and Key Results functionality is enabled.
- You have *Configure Dynamic Teams* and *Configure Objectives and Key Results (OKR)* permission.

Context

This integration gives team members the ability to link the objectives of their dynamic team to their performance goals in Goal Management. When an objective and a performance goal are linked, the linking is shown in both Dynamic Teams and Goal Management.

> ⓘ Note
>
> Linked OKRs are only shown in goal details if you use the **latest** version of Goal Management. In the legacy version, the links aren't shown. They're only visible in Dynamic Teams.

Procedure

1. Go to ▌ *Admin Center* ❯ *Configure Dynamic Teams* ❯ .
2. Turn on the setting *Enable Linking to Performance Goals*.
3. Ensure that users of Goal Management also have permission to use Dynamic Teams, and vice versa.

Results

Contributors to at least one key result for a team objective see the *Link to Goals* option in Dynamic Teams. Linked goals are shown in the *Link to Goals* side panel.

If you use the **latest** version of Goal Management, you also see a *Linked OKRs* section in goal details. If you use the **legacy** version of Goal Management, the linking isn't shown in goal details. Links are only shown in Dynamic Teams.

9 Dynamic Teams on the Home Page

Dynamic Teams includes the following features on the home page.

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile App?
View Dynamic Teams	Takes you to the Dynamic Teams landing page (*My Teams*).	*Quick Actions*	Always shown, based on system configuration and user permission.	• You have *Create, View, and Edit Dynamic Teams* permission. • It's selected at ▶ *Manage Home Page* ❯ *Quick Actions* ◥.	No
Key Result Success	Notifies team members when a key result is achieved. Links you to the relevant key result.	*For You Today*	Appears when the current value of a key result is equal to or greater than the definition of success. ❖ Example For example, if the target value is 100 and the definition of success is 80%, then the Key Result Success card appears on the home page when the current value is 80 or more. Disappears after 30 days.	• Objectives and Key Results functionality is enabled. • You have *Create, View, and Edit Objectives and Key Results (OKR)* permission. • You're added as a contributor to the key result that was achieved.	No

10   AI-Assisted Writing in Dynamic Teams

The AI-assisted writing tool is an interactive tool that uses generative AI capabilities to assist employees with their writing tasks. While writing content in the SAP SuccessFactors applications, employees can leverage the features of the AI-assisted writing tool to enhance multiple aspects of their writing, such as clarity, conciseness, and tone.

In Dynamic Teams, the AI-assisted writing tool can help improve the name and description of a team or a team objective, the description of a key result, and comments on a key result.

The following is a summary of the capabilities offered by the AI-assisted writing tool:

- Uses language processing capabilities to understand the context of a sentence and suggest enhancements in grammar, spelling, vocabulary choices, and phrasing.
- Ensures improved readability and a consistent tone (professional, personable, or constructive) to suit the communication needs for different audience groups in the organization.
- Provides the options to communicate a message in fewer or more words and transform paragraphs to bulleted lists.
- Provides additional actions in the context of the tasks that users perform in their SAP SuccessFactors applications.

The following table outlines the available actions in the AI-assisted writing tool.

Action	Description
Enhance Writing	Suggests enhancements in grammar, spelling, vocabulary choices, and phrasing in the context of the selected line or paragraph.
Change Tone	Provides options to change the tone of the selected line or paragraph to professional, personable, or constructive to suit the communication needs for different audience groups in the organization.
Make Shorter	Shortens a selected line or paragraph to convey the message more concisely.
Make Longer	Rewrites a selected line or paragraph by adding more words to provide a detailed explanation based on the original content.
Make Bulleted List	Converts a selected line or paragraph into a bulleted list to simplify complex information, and enhance readability by breaking it down into easy-to-read points.
Analyze Text	Performs a safety scan on each text box, prompt entry, or Generative AI output in order to detect bias, and suggest replacement text for any language flagged as potentially biased, discriminatory, or harmful.

> ⓘ Note
>
> For information about the languages supported by the AI-assisted writing tool, refer to SAP Note 3396784 .

Related Information

Enabling AI-Assisted Writing

11 Centralized Data Protection and Privacy

Data protection and privacy features work best when implemented suite-wide, and not product-by-product. For this reason, they're documented centrally.

The *Implementing and Managing Data Protection and Privacy* guide provides instructions for setting up and using data protection and privacy features throughout the SAP SuccessFactors HCM suite. Please refer to the central guide for details.

> ⓘ Note
>
> SAP SuccessFactors values data protection as essential and is fully committed to help customers complying with applicable regulations – including the requirements imposed by the General Data Protection Regulation (GDPR).
>
> By delivering features and functionalities that are designed to strengthen data protection and security, customers get valuable support in their compliance efforts. However, it remains each customer's responsibility to evaluate legal requirements and implement, configure, and use the features provided by SAP SuccessFactors in compliance with all applicable regulations.

Related Information

Implementing and Managing Data Protection and Privacy

12 Data Protection and Privacy in Dynamic Teams

Dynamic Teams offers these data protection and privacy features. To help you navigate the configuration content, we've collected it in one place.

Feature	Description	Additional Information
Standard data purge process	Dynamic Teams data is purged with the standard process, using Data Retention Time Management (DRTM).	Getting Started with Data Purge
Master data purge	Dynamic Teams data is included in the master data purge that purges inactive users, along with all their data, based on a common retention time.	Purge of Inactive Users and All Data
Module-specific data purge	Dynamic Teams data can be purged separately, based on its own configurable retention time, using the following purge request types: • *DRTM Dynamic Teams Purge* • *DRTM Objectives and Key Results*	Purge of Specific Data for One SAP SuccessFactors Solution Adding DRTM Objects to Your Instance DRTM Purge Request Types
Data retention time	You can configure retention times for the module-specific data purge of Dynamic Teams data, using the following MDF objects: • *DRTM Dynamic Teams* • *DRTM Objectives and Key Results* First, be sure you have the permissions required to edit the objects, in role-based permissions. Then, you can configure retention times on the *Manage Data* page.	Permissions Required to Configure Data Retention Times Configuring Retention Times for Specific Types of Data
Change audit for personal data	Dynamic Teams data can be included in the standard Change Audit reporting process.	Change Audit Important Notes About Change Audit for Personal Data
Information report	Dynamic Teams data can be included in the standard Data Subject Information reporting process.	Getting Started with the Information Report Important Notes About the Information Report

13   Change History

Learn about changes to the documentation for Dynamic Team in recent releases.

2H 2024

Type of Change	Description	More Info
New	AI-assisted writing is available in Dynamic Teams.	AI-Assisted Writing in Dynamic Teams [page 17]

1H 2024

Type of Change	Description	More Info
June 21, 2024		
Added	We added information about how the overall score of each objective is calculated.	Objectives and Key Results (OKR) [page 4]

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