

Human Resources Outsourcing and Human Capital Management Landscape and Technology Trends

Talent Management Landscape

- The market for “Integrated Talent Management Suite” (TM) is growing at 10% (20-30% for SME market).
 - “Integration” and “one-stop shopping” are not the same thing.
 - Organizations implement “TM Suite” in modules.
 - Performance Management is the core, but only accounts for 9% of TM behind Workforce management (14%) and Recruitment (15%) at the enterprise level (enterprise level defined as organizations with 5000+ employees).
 - The primary driver at the enterprise level for implementation is need for automation and self-service.
 - Next Generation TM systems are designed for employees and managers not HR.
 - SaaS is mainstream.
- It is a very crowded market.
 - Market leaders will be those vendors who lead through use of technology or embrace verticals as key differentiators.
 - Critical to examine competitors /partners prior to entering any segment.

Talent Management Landscape

Talent Management Core Fundamentals:



- ✓ 17 TM providers with significant client concentrations in the US
- ✓ Comprehensive Major Players: Authoria, Kenexa, SuccessFactors, Taleo, Workstream
- ✓ EPM Leaders: Halogen, Authoria, Softscape and SuccessFactors as the strongest competitors in this space based on functionality, affordability, scalability, referencability, viability and vision
- ✓ Relevant New Entrants: iNQUATE, ExponentHR, PeopleStrategy, People-Trak

Macro Product Trends

- “Integrated Talent Management Suite.”
- In the technology area most vendors are expected to release SAAS versions of their systems.
- Some providers are building new versions based on .NET and in some cases Ajax.
- Many are exploring Business Intelligence links with systems such as Cognos.
- Many research analysts (Gartner, Forrester, Aberdeen) predict that companies increasingly will gear up to address the new topic of the “High-Performance Workplace” (HPW).

EPM List

Comprehensive Enterprise Solutions:

- Authoria – This is a complex product and in is mostly targeted at companies of over 5,000 employees.
- ExecuTrack - A leading multinational provider
- Halogen - Will customize to fit anybody
- Success Factors – Currently the middle market leader
- Workscape - Mid and Large (No SMB)
- Workstream – Mid and Large (No SMB)

Niche Providers:

- Ascentis HR Office – Merged with EBS
- Cezanne Software – European primary focus
- Cornerstone On-Demand - Strong in Learning market
- Kenexa – “One-stop shopping” comprehensive solution
- Kronos - K-12 and Government Solution
- Performix – Processing center focused, library (3200) of KPIs
- People-Trak – Government, Non-profit, Professional Services and Hospitality
- Pilat HR Solutions – Consulting + Technology approach
- Saba – Large University and Government Solutions
- Softscape – Ideal for large multinationals with custom needs
- ViDesktop – Legal Service industry

SMB Focused:

- ADP – requires client to use their payroll system
- ExponentHR – Different vertical focus but strong SME EPM
- MYPaperlessOffice – Strong Reseller/Partner Channel in SMB
- PeopleStrategy – Focused on SME market
- Sage Abra HRMS – aimed at <500 ee’s
- Spectrum iVantage HR – SMB market
- UltiPro HR – SMB HRIS
- Wisdomnet – Best for those that need recruitment integrated
- Inquate – MSFT Dynamics platform, start-up

HRIS / HROs:

- Empagio – HRO HRIS, niche client base
- Genesys - requires client to be running their HRIS
- Lawson HR - Requires client to be running their HRIS
- Meta4 – Global, Medium to large HRO
- NuView - Mid-market HRIS / HRMS
- Perfect Software - SME market focused HRIS

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