

*An Ephor Group introduction to the
North American Payroll Staffing Market*

2015

Payroll Staffing Market Map

Ephor Group, LLC

Payroll Staffing Market Landscape

The scope and demand for Payroll Staffing Services is provided by a range of different vendors:

- Staffing companies,
- Payroll service bureaus,
- Managed service providers (MSPs¹),
- Administrative Service Organizations (ASOs and HROs), and
- HR service consultants which provide services both a la carte and in bundled packages.

The majority of vendors provide these services based on a monthly retainer per employee plus transaction add/move/change and ongoing management fees.

Payroll Staffing Services Market

- + Providers of payroll staffing services have highly developed WFM (Workforce Management) capabilities:
 - o *Job Costing*: Labor management includes time tracking, absence management, advanced scheduling, performance management, and more.
 - o *Labor Optimization*: Taxing issues, tax preparation and the flow of funds from tax, insurance, benefits administration services require controls, and many of core competencies that payroll service entities illustrate. HCM management services require that providers have working relationships and access to the national banking system to move customer funds throughout the financial system.
 - o *Labor Supply-to-Demand Matching (Workforce Planning)*: Strategic workforce demand and supply forecasting matched with organizational job replacement and future hire forecasting.
 - o *Labor Analytics*: Payroll is the source of key data that drives many of the services provided to employees. Payroll processing is complex, and is getting more.
- + Underserved and fragmented market sectors:
 - o Scientific, Engineering, and Technical Staffing
 - o Healthcare Staffing
 - o Governance, Security, Risk, and Compliance Staffing

Middle Market Payroll Staffing Private Company Star Performers Market Map Snapshot:



The firms selected above are intended to be an illustrative introduction to the mid-market leaders. The list is neither exhaustive nor complete. Firms highlighted are market or niche leaders. For more information please email us at ephor@lephorgroup.com.