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HCM for Midsize Enterprises

Technology Evaluation Centers

HCM for Midsize Enterprises

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About This Guide

Size matters.

Midsize companies must strive for the agility of smaller businesses but compete for talent as fervently as larger midsize businesses. And they must look to the latest in technology to help them stay competitive. The purpose of this buyer's guide is to provide clarity on the human capital management (HCM) requirements of midsize organizations.

This buyer's guide explores HCM strategy and supporting software solutions for the various scales of midsize enterprises. It includes a special section on the lessons in best practices that midsize organizations can take from both their smaller and larger counterparts.

Further, this guide examines the functionality offered by HCM technology vendors for midsize businesses. It emphasizes the importance of core human resources (HR) functionality and practices as a foundation on which to grow other areas concerning the management of employees.

There are two product comparison charts in this guide consisting of information supplied by vendors of some of the most popular HCM solutions on the market. These charts are intended to inform users about the technology available to them, as well as whether it is suited for smaller or larger midsize organizations. This guide additionally describes several innovative HCM technologies and how they benefit a company's HCM strategy.

Lastly, the buyer's guide presents a range of real-life case studies that highlight client successes and thought leadership about HCM issues and challenges facing midsize businesses, and the solutions vendors are offering to address them.

Foreword

HR Technology Adoption by Midsize Organizations

Lexy Martin, Principal at HRTechValue

This HCM for Midsize Enterprises Buyer's Guide covers solutions available to midsize enterprises. But what is the adoption level for these organizations? To get the adoption picture, we take a look at the results from the longest running survey on human resources (HR) technology adoption and value achieved—the Sierra-Cedar HR Systems Survey. This statistically representative survey shows there is a progression of greater technology adoption as organizations grow in employee size. It further shows a set of top performing organizations, designated as "quantified organizations," lead in technology adoption and value achieved. We share some lessons learned from these top performers to help guide organizations' future HR technology plans.

For the purposes of this preface, we evaluate the adoption and value achieved for organizations of the following employee and contingent workforce (served by HR technologies) groups. Of a total 1063 respondents to the annual Sierra-Cedar survey, 745 have 10,000 or less employees and were included in this evaluation for the TEC HCM for Midsize Enterprises Buyer's Guide. Of these 745, 17 are top performers. We call this group the "quantified organizations." [1]

According to the classification scheme used in the buyer's guide, here we've divided the midsize group of organizations into smaller and larger midsize companies having between 100 and 5,000 employees, and an enterprise category for firms with between 5,000 and 10,000 employees.

- **Smaller Midsize** (34%): 100–1,000 employees and contingents served
- **Larger Midsize** (47%): 1,000–5,000 employees and contingents served
- **Enterprise** (19%): 5,000–10,000 employees and contingents served (included here as some of the midsize-sized organizations will continue to grow)

[1] The "quantified organizations" were selected based on their BI process maturity, the percent of managers with direct access to analytics and BI, their use of higher numbers of HR and talent management data sources to juxtapose workforce data with financials, sales, and various operational systems, and the fact that they use more categories of HR metrics.

The survey covers the adoption of the following HR technology solutions and processes:

- Administrative and service delivery (direct access) applications
- Workforce management applications
- Talent management applications
- Business intelligence (BI) and workforce optimization solutions
- Social- and mobile-enabled HR processes

Survey Results: Overall HR Technology Adoption

At a glance, we see that as organizations' employee and contingent workforces increase, their overall adoption level of HR technology also increases. The midsize organizations do not lead in adoption of any of the 38 applications tracked, while enterprise organizations, those between 5,000 and 10,000 employees, lead in the adoption of 24 applications, and the *quantified organizations*, the top performers, lead in adoption of 29 of the 38 applications tracked in the survey.

Application Categories	Master Cohort % In Use Today n=745	Smaller Midsize % In Use Today	Smaller Midsize 100-1000 employees plus contingents	Larger Midsize % In Use Today	Larger Midsize 1000-5000 employees plus contingents	Enterprise % In Use Today	Enterprise 5000-10000 employees plus contingents	Quantified Organization % In Use Today	Quantified Organization 100-10000 employees plus contingents
Average number of employees + contingents	3,078		533		3,173		7,445		3,988
Administrative	92%	86%	At Market	94%	At Market	95%	At Market	98%	At Market
Service Delivery	44%	36%	Lags	46%	At Market	53%	Leads	50%	Leads
Workforce Management	39%	37%	At Market	39%	At Market	43%	At Market	47%	Leads
Talent Management	45%	36%	Lags	46%	At Market	58%	Leads	66%	Leads
Business Intelligence	40%	37%	At Market	40%	At Market	42%	At Market	64%	Leads
Workforce Optimization	9%	8%	Lags	8%	Lags	15%	Leads	28%	Leads
Social Media	37%	31%	Lags	37%	At Market	46%	Leads	48%	Leads
Cohorts lead in x of 38 applications			0		0		24		29

"Leads" designates a cohort that is 10% or greater than the "in use today" adoption level of the master cohort of all the organizations included in this analysis, "Lags" indicates the cohort is 10% or less than the master cohort adoption level, and "At Market" designates the cohort is within 10% (plus or minus) of the master cohort adoption level. These designations will be used throughout this preface.

Survey Results by Application Type

Administrative and service delivery application adoption: Reviewing adoption levels of the administrative applications we see that all organizations are "at market" (not lagging or leading) for this category, with almost universal adoption of an HR management or payroll solution, although fewer smaller midsize organizations have these solutions. All the *quantified organizations* have benefits automation, reflective of best practices in their typically global organizations. Half of the *quantified organizations* use the embedded analytics of their core HR management system, demonstrating a substantial lead in this category, reflective of their stance of supporting data-driven decision making and adopting technologies in all forms to support this capability, whether embedded or as standalone BI and workforce optimization solutions.

With service delivery applications, across the board the smaller midsize organizations have adopted these solutions less frequently and lag behind while the enterprise organizations lead. One particular area of leadership is in the adoption of an HR-oriented help desk among the quantified organizations. This particular application is one which enables organizations to serve a larger number of employees with fewer HR staff.

Application Categories	Master Cohort % In Use Today n=745	Smaller Midsize % In Use Today	**Smaller Midsize** 100-1000 employees plus contingents	Larger Midsize % In Use Today	**Larger Midsize** 1000-5000 employees plus contingents	Enterprise % In Use Today	**Enterprise** 5000-10000 employees plus contingents	Quantified Organization % In Use Today	**Quantified Organization** 100-10000 employees plus contingents
Average number of employees + contingents	3,078		533		3,173		7,445		3,988
Administrative	**92%**	**86%**	**At Market**	**94%**	**At Market**	**95%**	**At Market**	**98%**	**At Market**
HR management system	92%	85%	At Market	95%	At Market	97%	At Market	100%	At Market
Benefits administration	87%	79%	At Market	91%	At Market	92%	At Market	100%	Leads
Payroll	96%	96%	At Market	97%	At Market	97%	At Market	94%	At Market
Embedded core analytics	27%	21%	Lags	30%	At Market	29%	At Market	50%	Leads
Service Delivery	**44%**	**36%**	**Lags**	**46%**	**At Market**	**53%**	**Leads**	**50%**	**Leads**
HR-oriented help desk	37%	29%	Lags	39%	At Market	45%	Leads	56%	Leads
Employee self service	72%	63%	Lags	75%	At Market	81%	Leads	69%	At Market
Manager self service	41%	31%	Lags	43%	At Market	52%	Leads	38%	At Market
Workforce lifecycle management	27%	21%	Lags	28%	At Market	35%	Leads	38%	Leads

SaaS vs. on premise adoption: Often, discussions of HR management system adoption focus on whether the solution should be a cloud-based, software-as-a-service (SaaS), or an on-premise solution. The current trend for all organizations is a move toward SaaS deployments. Here we see that the smaller midsize organizations lead the charge toward SaaS, as these organizations are now able to afford the lower upfront costs and protection from future upgrade costs of a solution based on their employee count. Over half of the midsize firm employers expect to deploy a SaaS human resource management system (HRMS) in 12 months.

	Saas HRMS Today	SaaS HRMS in 12 Months
Master Cohort	32%	52%
Smaller Midsize	46%	61%
Larger Midsize	18%	51%
Enterprise	18%	42%
Quantified Organizations	27%	46%

In addition to the cost benefits, other expected benefits include: shorter implementation times leading to faster time to value; shorter release vs. upgrade times; and fewer HRIT/IT headcount.

Workforce management applications: As with other application areas, when it comes to those solutions that help organizations get the right people with the right skills in the right place at the right time and ideally at the right cost, smaller organizations use these solutions less than larger organizations and the *quantified organizations* lead substantially in adoption.

Application Categories	Master Cohort % In Use Today n=745	Smaller Midsize % In Use Today	Smaller Midsize 100-1000 employees plus contingents	Larger Midsize % In Use Today	Larger Midsize 1000-5000 employees plus contingents	Enterprise % In Use Today	Enterprise 5000-10000 employees plus contingents	Quantified Organization % In Use Today	Quantified Organization 100-10000 employees plus contingents
Average number of employees + contingents	3,078		533		3,173		7,445		3,988
Workforce Management	**39%**	**37%**	**At Market**	**39%**	**At Market**	**43%**	**At Market**	**47%**	**Leads**
Time & attendance/Time & labor	79%	79%	At Market	77%	At Market	85%	At Market		Not sufficient data
Absence management	54%	59%	At Market	52%	At Market	50%	At Market	50%	At Market
Leave management	39%	35%	Lags	41%	At Market	44%	Leads	56%	Leads
Labor scheduling	29%	22%	Lags	28%	At Market	44%	Leads	50%	Leads
Labor budgeting/forecasting	19%	17%	Lags	21%	At Market	19%	At Market	36%	Leads
Embedded workforce mgt. analytics	15%	9%	Lags	16%	At Market	15%	At Market	44%	Leads

Talent management applications: As organizations grow, they adopt the various talent management applications more. *Quantified organizations* lead substantially in adoption of all talent management applications.

Application Categories	Master Cohort % In Use Today n=745	Smaller Midsize % In Use Today	Smaller Midsize 100-1000 employees plus contingents	Larger Midsize % In Use Today	Larger Midsize 1000-5000 employees plus contingents	Enterprise % In Use Today	Enterprise 5000-10000 employees plus contingents	Quantified Organization % In Use Today	Quantified Organization 100-10000 employees plus contingents
Average number of employees + contingents	3,078		533		3,173		7,445		3,988
Talent Management	**45%**	**36%**	**Lags**	**46%**	**At Market**	**58%**	**Leads**	**66%**	**Leads**
Recruiting	83%	72%	Lags	86%	At Market	94%	Leads	94%	Leads
Profile management	22%	22%	At Market	20%	Lags	36%	Leads	31%	Leads
Learning and development	65%	45%	Lags	70%	At Market	82%	Leads	100%	Leads
Career planning and development	19%	14%	Lags	16%	Lags	36%	Leads	56%	Leads
Performance management	69%	58%	Lags	72%	At Market	77%	Leads	88%	Leads
Succession planning/ management	27%	19%	Lags	26%	At Market	42%	Leads	38%	Leads
Compensation management	65%	57%	Lags	65%	At Market	78%	Leads	81%	Leads
Embedded talent analytics	10%	5%	Lags	9%	At Market	19%	Leads	38%	Leads

One topic of interest for talent management systems is the decision to adopt the talent management functionality that comes with the HRMS or to adopt a separate integrated talent management (ITM) suite. The smaller midsize organizations are essentially evenly split with 37% taking talent management functionality from their HRMS and 36% using an ITM suite. The larger midsize and enterprise organizations more frequently favor the HRMS for their talent management functionality (larger midsize: 42% HRMS, 28% ITM; enterprise: 49% HRMS, 32% ITM). The *quantified organizations* with under 10,000 employees, however, resoundingly choose an ITM suite (23% HRMS, 54% ITM), taking advantage of the embedded analytics and other emerging functionality such as mobile that enables them to place more BI/analytics capabilities directly into the hands of managers with their devices of choice.

BI and workforce optimization: BI includes foundational technologies of an HR warehouse and middleware, various reporting approaches, statistical tools and visualization tools; workforce optimization includes analytics and planning. At the overall level, the smaller and larger midsize organizations either lag or are at market compared with the master cohort, with the enterprise organizations leading with some of the more advanced technologies such as middleware, statistical tools, and analytics/planning. As organizations grow in size, these BI and analytics solutions become increasingly important. The *quantified organizations* substantially lead with these technologies, giving them the tools to make data-based decisions about their workforce.

Application Categories	Master Cohort % In Use Today n=745	Smaller Midsize % In Use Today	Smaller Midsize 100-1000 employees plus contingents	Larger Midsize % In Use Today	Larger Midsize 1000-5000 employees plus contingents	Enterprise % In Use Today	Enterprise 5000-10000 employees plus contingents	Quantified Organization % In Use Today	Quantified Organization 100-10000 employees plus contingents
Average number of employees + contingents	3,078		533		3,173		7,445		3,988
Business Intelligence	**40%**	**37%**	**At Market**	**40%**	**At Market**	**42%**	**At Market**	**64%**	**Leads**
HR warehouse	50%	51%	At Market	50%	At Market	50%	At Market	80%	Leads
Simple management reporting	82%	78%	At Market	85%	At Market	83%	At Market	88%	At Market
Drilldown	63%	65%	At Market	62%	At Market	61%	At Market	81%	Leads
HR scorecard/dashboard	32%	29%	At Market	34%	At Market	31%	At Market	50%	Leads
Middleware	20%	13%	Lags	20%	At Market	29%	Leads	53%	Leads
Statistical tools	14%	12%	Lags	14%	At Market	19%	Leads	38%	Leads
Other visualization tools	16%	13%	Lags	15%	At Market	19%	Leads	56%	Leads
Workforce Optimization	**9%**	**8%**	**Lags**	**8%**	**Lags**	**15%**	**Leads**	**28%**	**Leads**
Workforce analytics	13%	12%	Lags	12%	At Market	18%	Leads	33%	Leads
Predictive analytics	7%	5%	Lags	7%	At Market	11%	Leads	25%	Leads
Workforce planning	7%	6%	Lags	6%	Lags	15%	Leads	27%	Leads

Social and mobile-enabled processes: The most important part of today's dialogue on the use of social and mobile functionality centers on the HR processes that are thus enabled. In the following table, we show the percentage of the workforce using social or mobile overall and for administrative processes (record keeping, payroll, and benefits), talent management processes (performance, learning, etc.), and BI/analytics processes along with the percentage of recruiters or hiring mangers using social for recruiting. While an area of low use today, the overall survey reports substantial expected increases in adoption of social-enabled processes (50%) and mobile-enabled processes (100%). The *quantified organizations* lead with almost four times the usage of social-enabled processes and more than double the usage of mobile-enabled processes.

	Master Cohort	Smaller Midsize	Larger Midsize	Enterprise	Quantified Organization
Social Applications					
% of Employees Using Social - Overall	6.5	7.3	5.3	7.9	23.2
% of Employees Using Social - Admin Processes	6.6	9.3	4.8	6.6	17.5
% of Employees Using Social - TM Processes	7.0	8.0	5.6	9.4	23.1
% of Employees Using Social - BI	5.2	4.5	5.6	5.5	41.7
% of Recruiters Using Social for Recruiting	54.1	48.8	55.1	60.8	64.6
% of Managers Using Social for Recruiting	18.1	13.2	16.1	32.5	41.7
Mobile Applications					
% of Employees Using Mobile - Overall	14.1	14.6	13.6	14.8	29.6
% of Employees Using Mobile - Admin Processes	15.9	21.1	14.2	11.2	34.1
% of Employees Using Mobile - TM Processes	21.9	18.7	23.0	23.6	39.4

Lessons Learned from "Quantified Organizations"

The above reporting is intended to show readers from midsize organizations what others of their size are doing with respect to HR technology adoption. We chose to show the larger enterprise organizations as well here, as smaller organizations often increase in size over time, so having the information from that size cohort shows a potential direction for application adoption. In almost all cases, these enterprise organizations more frequently increase their adoption of HR technologies as they mature their overall human capital management.

The lessons learned from the *quantified organizations* in this survey can be used as a guide toward developing a more data-driven HR function. We recommend using these organizations (of all sizes, with an average employee plus contingent size of ~4,000) as your benchmark, as they constitute the top financial performers from the latest Sierra-Cedar HR Systems Survey.

These organizations guide their workforce decisions with data. These organizations have a 79% greater return on equity (ROE) than the not quantified organizations—they are truly top performers! (ROE measures an organization's success at generating profits from every unit of shareholder equity, such as that allocated for HR technologies.) These organizations achieve an advantage in today's data-driven world.

Key Takeaways

Overall, the results from the Sierra-Cedar HR Systems Survey identify several lessons learned from these top performers that inform our recommendations for companies seeking to improve their HR management:

1. They standardize processes resulting in "effective" rather than just "efficient" process maturity, so work to standardize both your HR and talent management processes.
2. They have an HR systems strategy and keep it updated frequently. They further have an enterprise integration strategy three times more frequently than others. If you do not already have such strategies, make these a priority.
3. They have a culture of change management with every technology upgrade, release, or implementation. Always practice change management with your technology efforts.
4. They more frequently are top adopters of workforce management, talent management, and BI solutions, as we've seen throughout the above discussion. These technology areas should be part of your future direction.
5. They innovate with higher levels of social- and mobile-enabled process adoption. As you look to adopt new technologies, make sure they support such process enablement.

About the Sierra-Cedar HR Systems Survey

This highly respected survey providing insight and guidance to practitioners around the world has run continuously since 1997. With responses from organizations of all sizes and from all regions, it serves as a global benchmark of human resources (HR) technology adoption and the value achieved from its use, seen through the eyes of HR information technologists (HRIT) and information technologists (IT).

The full survey report is available for download for free, including further key HR practices such as systems strategy, adoption blueprints, integration and implementation approaches, change management, and expenditure and resource strategies.

About the Author

Lexy Martin was the lead author of the Sierra-Cedar HR Systems Survey for its first 16 years and turned over the reins to Stacey Harris in November, 2014. While not classically "retired," she currently is working part time. Her new endeavor, HRTechValue is dedicated to supporting organizations to understand and use the value propositions of the breadth of HR technologies. She can be reached at lexy@hrtechvalue.com.

HCM for Midsize Enterprises

The midsize enterprise is not a uniform concept. It comes in many forms that require different levels of software capabilities and robustness. Discussions on human capital management (HCM) led by both software vendors and users typically distinguish between smaller midsize companies and larger midsize companies. But where do we stop talking midsize small and begin talking midsize large? At which point does an organization's perception of itself change from fitting the smaller scale of the midsize range to fitting the larger midsize scale in this range? And similarly, how do HCM technology vendors define and respond to the nuances of the midsize enterprise spectrum?

When vendors attempt to orient their strategies and products to fulfill customers' business needs, they base this on the knowledge that companies of different sizes have different expectations. HCM software vendors typically classify companies according to the number of people they employ, as this indicates the number of users of the HCM software within a company, and segmenting customers by number allows vendors to better predict and address their customers' HCM needs.

However, organizations tend to put little weight on this vendor-based categorization, as vendors usually have their own perception of company size that doesn't correlate with how other parties view size differentiations. For instance, some vendors classify a 250-employee organization as a small to medium business (SMB), while the organization itself may think of itself as midsize. This can create tensions between vendors and customers, as, for example, a vendor may offer minimal functionality for SMBs, while the 250-employee organization may be looking to develop fairly elaborate talent management strategies.

Most midsize organizations follow similar standards and processes to run their human resources (HR) operations and strategies, as the principles and core functionality remain the same across organizations and they can work with already existing business best practices. However, functionality requirements vary from one industry to another and, moreover, from one company to another (even within a given sector). For instance, a high-tech company with 1,000 employees is more likely to need talent management to attract and retain highly qualified engineers than a retail company with the same number of employees. In the case of a retail organization, optimal scheduling ranks higher in priority.

Technologies belong to the realm of means and morality to the realm of ends, even though, some technologies end up invading the whole horizon of ends by setting up their own laws, by becoming "autonomous" and no longer merely automatic.[1]

[1]Thinkers like Bruno Latour view technology as an entity that is no longer devoid of power, as it limits agency and action through inner rules. Latour's text, "Morality and Technology: The End of the Means," is quoted throughout this guide, to shed light on the influence of HCM technology on the dynamics of the working world.

And a relatively small pharmaceutical research company with a few hundred employees is likely to require more learning management functionality than say a pharmaceutical distribution company employing thousands of employees.

Based on TEC's experience in working with midsize companies, we have distinguished between smaller midsize companies (100–1,000 employees) and larger midsize companies (1,000–5,000 employees). HCM software vendors have sought to tackle the variation in HCM technology requirements between smaller and larger companies in the midsize range in various ways. Some vendors have specialized in one or both ends of the range, while others offer reduced versions of their enterprise class solutions to smaller mid-market clients.

This buyer's guide examines the high-level features and functions offered by HCM technology vendors targeting midsize businesses, and discusses how the HCM technology needs of midsize companies correlate with company size or, more specifically, number of people employed. The guide also looks at the importance of core HR functionality and practices to further grow other HCM areas within a company, such as talent management, learning management, and workforce management. These discussions are based on a review of the current literature and conversations with vendors and end users.

HCM Technology and Strategy for the Midsize Business at Different Scales

For most midsize companies, adoption and absorption of HR technology tends to follow a predictable course. For the smaller midsize company, with 100–1,000 employees, the core HR functionality of payroll, employee records, benefits administration, recruitment, and time and attendance are the first employee-related hurdles that tend to be automated. For larger midsize companies, those with 1,000–5,000 employees, these core HR needs are augmented by other functionality that needs to be considered and preferably addressed with technology when a larger workforce is involved—talent acquisition, performance and compensation management, and leave management, ideally delivered in a localized, personalized, and data-centric manner.

This is the core HR functionality for midsize companies—without which a company would not be able to sustain itself. This is not to say that this functionality is all that is critical or required for enabling high performance in a company's employees. But without this core, any further HR optimization is not possible.

Indeed, a slew of HCM functionality features are critical requirements for ensuring employers' competitiveness in the market with respect to talent, and how to recruit, manage, and retain it. For the smaller midsize organization, employee self-service, onboarding, performance and incentive management, and training and development are indispensable, as these organizations rely on highly qualified employees. An integrated system that can report on data and transactions for compliance and better decision making is expected.

For the larger midsize company, the focus is more on learning management, career development and succession planning, social collaboration, analytics, and internationalization, all of which help companies better handle workforces of thousands of employees who are perhaps spread across countries or continents and who need to to keep up with new developments in their domains and maintain their level of expertise.

Companies that have addressed these critical HCM and talent management needs in their adoption of HCM technology are likely to operate their business well, but may not necessarily be the best-performing companies in their fields or in the market. Visionary

In the wake of [recent research] work, we now begin to discover long periods in pre-history when technical ability preceded the emergence of human language by several hundred thousand years.

companies that push innovation and address emerging market needs quickly outgrow the aforementioned core and talent management software functionality. Although some HCM software functionality may be considered by both vendors and practitioners as a nice to have, it may actually be required for nurturing talent by supporting elaborate HR strategies that core and critical software features cannot support.

For smaller midsize companies, this functionality includes absence and leave management, social collaboration, and dashboards—tools that help smaller midsize companies respond to the needs of their employees while optimizing workforce utilization.

Companies on the larger end of the midsize spectrum would benefit greatly from vendor relationship management, consumer-style user interface, visual workflow management, industry-specific best practices, social analytics, and big HR data—these capabilities make for more refined and intelligent HR decision making and execution.

As software vendors may see the lines between smaller and larger midsize companies as being blurred, midsize organizations need to be crystal clear about their business requirements when they go shopping for HCM technology. Furthermore, they have to map those requirements to the vendors' software functionality feature sets and approach to market segmentation.

Hierarchies of HR Needs

In an article published in 2013 in the *International Journal of Business and Management Invention*, Dr. Nyameh Jerome looks at how Maslow's hierarchy of needs, a well-known theory in psychology about human motivation and needs, may be applied to the area of HR. He asserts that the ultimate goal of a company when it comes to employees is to boost performance and therefore work toward successfully attaining a company's business objectives. The author describes the relationship between Maslow's hierarchy of needs and the well functioning and success of an organization with three levels of HR needs.

At the bottom of the hierarchy, Jerome sees a well-defined organizational culture that places the physiological and safety needs of its employees at its core.

Higher in the hierarchy than organizational culture is a strong human resource management (HRM) practice that defines the organizational structure, with detailed descriptions of the roles and responsibilities to be handled by employees. HRM ensures that role-specific physiological and social needs have been satisfied, as a basis for employees to feel they have self-esteem and the potential for self-actualization.

Finally, Jerome sees that self-esteem and self-actualization lead to high employee performance, which functions as a principal driver in helping a company attain its goals.

Based on Maslow's hierarchy of needs and some of Jerome's ideas, a hierarchy of HCM technology needs for both smaller and larger midsize organizations can be created (see figures 1 and 2), with the base of the pyramid showing the basic functionality required for each size range of company, and the higher parts of the pyramid showing functionality that is not absolutely necessary but can help a company more readily achieve its HR goals and better nurture and keep talent.

Using these hierarchies, we will look at the levels of HCM functionality that smaller and larger midsize companies require and the ways HCM technology can help companies avoid investing in unnecessary features, eliminate data entry duplicate efforts, and tackle complex administration issues.

Functionality Requirements for Smaller Midsize Organizations

Core Functionality

Employee records

This functionality is a basic need for companies of all sizes, but it is particularly important for smaller midsize businesses, whose employee records are typically fragmented across Excel files, point solutions, and sometimes paper. Employee records allow companies to manage employee data, such that all HR personnel can access and update it whenever necessary in a single place, thereby avoiding double data entry efforts.

Integration with payroll

In a smaller midsize business, payroll is most likely maintained by an in-house or third-party accountant who uses either a payroll system or spreadsheets. As payroll is an important cost center and a sensitive zone for employees, errors must be eliminated to the extent possible. Employees are not happy when they receive incorrect paychecks, while employers cannot run the risk of incurring losses or breaching confidentiality. Integration between payroll and other HCM modules—especially the system of records and incentive management—is essential to ensuring data consistency across all modules within an HCM system. Solutions that target the smaller midsize market segment do not typically include a payroll module, hence the need to ensure that they integrate with most third-party payroll systems available on the market.

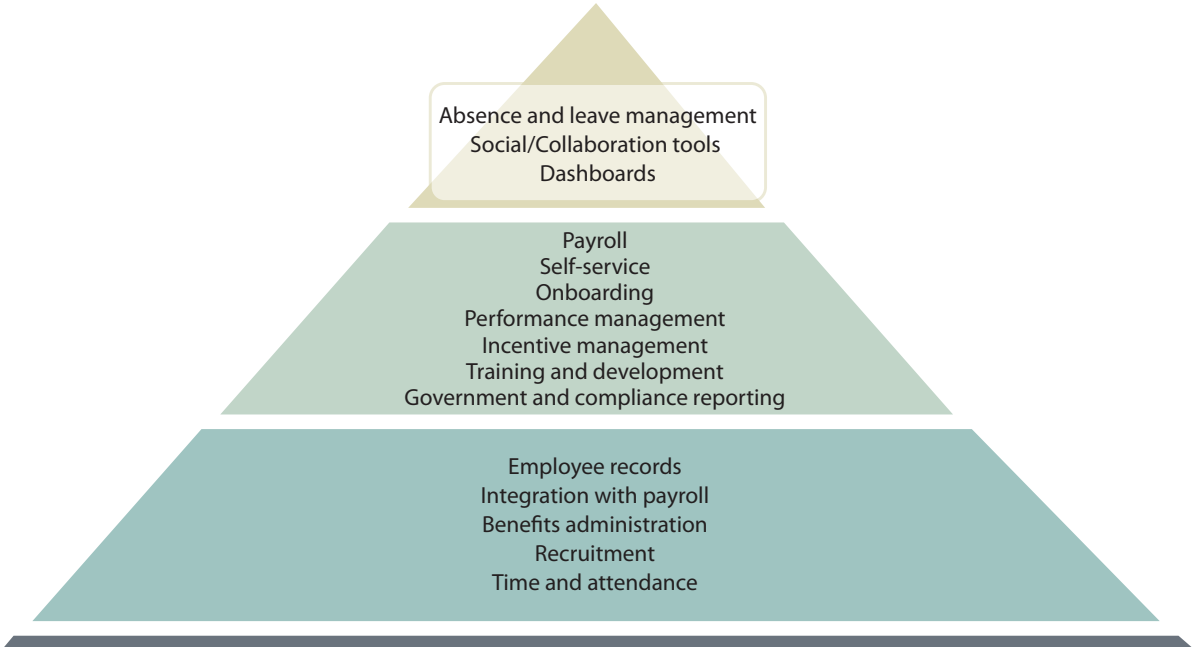

Figure 1. Hierarchy of functionality needs for smaller midsize organizations

Benefits administration

This capability allows companies to administer multiple benefit plans and eligibility rules. Different benefit plans can be linked to employee profiles, positions, and roles as defined in the employee records module. The benefits module in HCM software also tracks corresponding benefits deductions to be reflected in payroll. HR and managers can view enrollment data and assess the adoption of plans.

Recruitment

When smaller midsize organizations start having more advanced hiring needs, such as a significant increase in the number of new hires, difficulty retaining employees, and need for highly qualified expertise, it may be the case that Excel-based recruiting or basic applicant tracking software (ATS) solutions have become inadequate and antiquated. Both recruiters and hiring managers require software that includes approval workflows, screening and selection capabilities, recruiting expense tracking, as well as integration with job boards, social sites, etc. Solutions that offer candidate self-service help companies ensure a positive candidate experience.

Time and attendance

Depending on the industry, time and attendance functionality is handled in various ways (punch in/out, project based, timesheets, etc.). Data capture methods have to be agreeable to employees, such that they do not interfere with their routine activities. In addition, data collection has to be error free, as this type of information is used toward payroll, disciplinary

actions, rewards, etc. In the cases where pay is calculated based on time and attendance, tight integration with payroll is required. Decisions regarding paid time off (PTO) approvals and hiring of new resources are also made in part using time and attendance data.

Critical Functionality

Payroll

An HCM suite with out-of-the-box payroll capabilities becomes a critical requirement when there is an increase in the number of payroll transactions, such as wages, commissions, and incentives, or in the face of stringent regulatory compliance and tax management. A solution that provides quarterly updates, including tax tables that reflect changes in tax laws, better assists payroll practitioners in smaller midsize organizations.

Self-service

This is a critical feature for smaller midsize companies that want to keep their talent engaged, as it simplifies communication and allows for fast data access and updates by employees. Employees can view and modify profile information, participate in open enrollment, view pay stubs, read company news, change bank information, view vacation balances, apply for jobs, etc. When self-service is made available on mobile devices and in the cloud, it becomes an even more powerful tool for both employees and managers, as requests and approvals can be submitted from anywhere at any time.

Onboarding

As smaller midsize businesses seek to maximize the utilization of their HR, onboarding helps avoid loss in productivity of new hires. If onboarding tasks are not automatically initiated and tracked, new hires can stay idle for weeks and even interfere with the work of their peers. It is essential that new hires receive the right assistance, resources, and tools from the beginning and that they can provide feedback on the services provided by various departments (IT, HR, accounting, etc.). As this is a critical period in the life cycle of employees, it is important that new hires do not form negative impressions and get ideas that may hinder their motivation and drive. Furthermore, if during the onboarding period a new hire does not receive the right amount of training and orientation, it is possible that he or she will end up making mistakes on their first jobs and may even develop bad practices from the outset.

Performance management

In smaller midsize businesses, performance reviews are not necessarily a well-established practice. However, motivated employees tend to want to know where they stand and expect this type of engagement from their employers. Ultimately, performance management helps

Technologies belong to the human world in a modality other than that of instrumentality, efficiency or materiality. A being that was artificially torn away from such a dwelling, from this technical cradle, could in no way be a moral being, since it would have ceased to be human—and, besides, it would for a long time have ceased to exist.

managers administer teams optimally and track teams' progress against established company or department goals. Although the system cannot replace the manager's skills, it helps him or her to understand the motivational drivers of a team. As smaller midsize solutions do not typically include succession planning capabilities, performance management can help with finding the next available resource for key positions in a company.

Incentive management

Incentivizing employees is an important motivational encouragement. Smaller midsize businesses have to envision and keep track of both cash and non-cash incentives (such as bonuses, training, vacation, etc.) to ensure that employees are satisfied with their compensation. It is important that this module be integrated with payroll to secure correct payments and taxation. Another important integration point for this module is with performance management, ensuring that employee performance is reflected in employee rewards.

Training and development

Smaller midsize organizations need to help employees learn more than what is readily available during on-the-job training and on-the-job knowledge acquisition. In so doing, employers ensure that employees do not have to improvise or continuously resort to workaround solutions for daily routines or exceptions handling. In fact, training plans that design and monitor training activities, certification expiry dates, and skill gaps allow employees to develop the necessary skill sets to achieve a certain level of performance. For some employees, training and development represent a motivational incentive, as new skills make them more valuable on the job market.

Government and compliance reporting

Companies looking to grow their business must increase their level of accountability. As companies grow, they have to deal with more and more government and union compliance rules. Companies have to ensure that they are compliant with employment rules and government agencies' reporting requirements to avoid paying hefty fines. For some industries or job roles, compliance with health and safety is critical—not only because the government requests it, but also because employees are exposed to difficult work conditions. For instance, health and safety compliance is critical for manufacturers of chemical products and transport companies that carry hazardous materials.

"Nice to Have" Functionality

Absence and leave management

For a smaller midsize business, it is important to ensure that employee vacations do not leave the company short-staffed to the point that business is slowed. Employers have to track and report on various types of leave forms to estimate and forecast the most leave-

intensive periods of the year. Also, in the case of unscheduled absences, it is beneficial for employers to have replacements accessible at any time to avoid losing contracts and money.

Social/Collaboration tools

Midsize businesses that want to run fast and grow quickly need to consider employee comfort level with technology, which can affect performance and innovation. Most employees today are familiar with social tools. We tend to associate these tools with facilitated communication and see them as a venue for finding and sharing new ideas. Popular social tools that are available free of charge may not be suitable for enterprises, as they are not adapted to the work environment and its exigencies. And a main concern with social collaboration tools relates to business privacy issues—ensuring that critical company information does not find its way into conversations on social media.

Dashboards

Thanks to the dynamic nature of dashboards, managers are able to modify metrics and views without involving IT personnel. Smaller midsize companies generally do not have access to these capabilities, but these tools can save employees' time and make information accessible to all employees, and thus are worth considering in an HCM solution. Dashboards eliminate the need for exporting to Excel and applying functions and filtering for data analysis.

It is pointless to want to define some entities and some situations as technical in opposition to others called scientific or moral, political or economic. Technology is everywhere, since the term applies to a regime of enunciation, or, to put it another way, to a mode of existence, a particular form of exploring existence, a particular form of the exploration of being—in the midst of many others.

Functionality Requirements for Larger Midsize Organizations

Core Functionality

Centralized employee records

HR professionals of larger midsize enterprises have increased pressure from management to keep employee data accurate for various exigencies: compliance, compensation, learning, etc. As such, HR departments must record and maintain detailed profiles of employees that include more than just contact, salary, and benefits information. Such profiles should also display employees' performance, training activities, career plans and objectives, etc. A company of this size (1,000–5,000 employees) most likely will have more than one HR system, hence the need for a unified system of records.

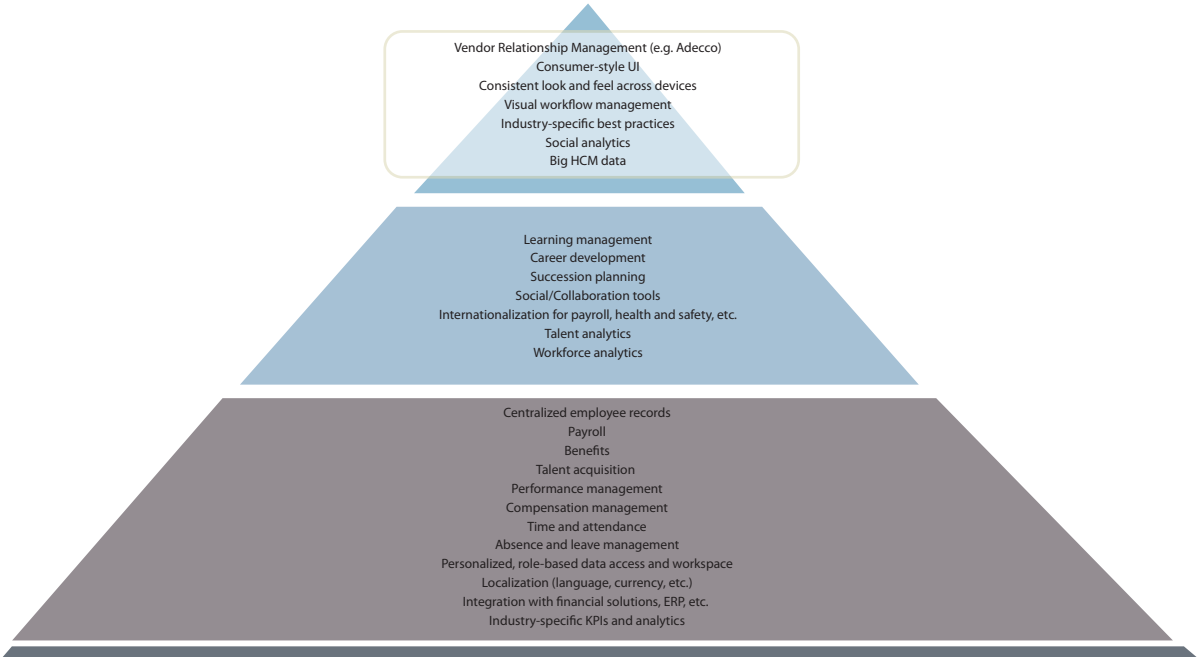

Figure 2. Hierarchy of functionality needs for larger midsize organizations

Payroll

As large midsize companies typically deal with a large variety in job types, roles, and competencies, as well as more elaborate company goals, payroll is likely to become a complicated endeavor. Additionally, companies with multiple locations must comply with national and local regulations, as well as union measures. When there are too many rules and too many exceptions for payroll to follow, it can become a burden for the HR department, which instead of dealing with employee performance, learning management, career development, and goal alignment, ends up spending the majority of its time and resources verifying that the right paychecks with the right amounts go to the right people.

Benefits

Much like with payroll, benefits administration becomes more complex as the number of employees in an organization increases. Eligibility rules vary based on positions, roles, union bargaining, or individual negotiations, at the time of hire. Open enrollment is an essential feature for companies that want to ensure their employees have flexibility and can adjust their benefits plans annually according to their needs. Integration with benefit carriers expedites employee enrollment and enables employee access to direct payments in-store, at the doctor's office, etc.

Talent acquisition

Larger midsize companies necessarily have more key positions and roles than smaller organizations and require employing highly qualified and influential people. Integrated recruitment and onboarding is a key element in capturing an employee's interactions with an organization from the pre-hire stages to the period of accommodation and strategic development. Talent acquisition capabilities also include advanced candidate engagement, which via tools such as recruitment marketing ensures that an organization remains on the radar of job seekers.

Performance management

For larger midsize organizations, it becomes apparent that performance is linked to productivity. A company cannot fully analyze its levels of productivity if employee performance data is not taken into consideration. The evaluation of employees' performance has to go further than annual performance appraisals, and should include ongoing performance feedback via social tools and 360-degree reviews and monitoring of employee key performance indicators (KPIs) against business goals. Furthermore, performance management is a core functionality, as many other aspects of HR depend on it: compensation, learning management, career development, succession planning, and so on.

Compensation management

This is another core component for larger midsize enterprises, as it addresses numerous rules coming from a denser organizational structure (i.e., having numerous job positions, roles, and complex hierarchies) and better-monitored performance levels. Consequently, a compensation modeling tool is required for designing a company-wide pay structure that can easily respond and adapt to performance scores, individual and company goal attainment, and the overall company achievements. Compensation impacts key aspects of larger midsize companies, such as retention, employee recognition, and attracting new talent, and therefore must be managed very cautiously.

Time and attendance

Larger midsize organizations typically need to have some type of time and attendance monitoring—not necessarily punch in and punch out—to account for employees' hours and delivered work. Time and attendance data is used for payroll, employee performance management, and analytics and reporting. It is one of the first indicators that something may be going wrong with an employee; if, for example, the employee appears to be taking too much time off, or on the other hand, doing too much overtime.

If we are unable to distinguish between a technical object and a non-technical one, we should nevertheless be able to locate the dimension pertaining to technology in some entity.

Absence and leave management

Much like payroll and compensation management, absence and leave for larger midsize organizations deals with a large number of rules dictated not only by compliance, but also by company activity. In smaller midsize organizations, it may be easier to book time off on short notice and arrange replacements at the peer level. However, larger midsize organizations cannot afford to have people out of production, particularly in high seasons, without scheduling replacement resources ahead of time. Employee productivity can also be impacted by increased absenteeism. So absence and leave data becomes important for detecting the causes of absences, which can be more complex than sickness or family issues. In fact, if a team is not a good fit for an individual, he or she may need to take more time off, as being at work becomes emotionally draining not because of the work itself but because of the coworkers.

Personalized, role-based data access and workspace

Larger midsize organizations have to address stricter data security and data abundance issues than smaller midsize organizations. As a result, these organizations require a more refined version of the typical role-based data security and access, which is typically sufficient for smaller midsize businesses. Personalization filters must reflect more than the role or position that a person holds in a company and consider other employee-related information, such as employee interests, education, or career plans, to display the relevant information.

Localization (compliance, language, currency, etc.)

As larger midsize organizations tend to run their operations over multiple locations, they must follow local compliance regulations, or risk incurring fines. Furthermore, large midsize organizations are challenged with translating reports or forms for offices in locations where the official language is other than that where the organization is headquartered.

Integration with financial solutions, ERP, etc.

Most larger midsize enterprises need employee salaries and expenses to be processed in their financial system. Consequently, file transfer protocol (FTP) transfers of downloaded payroll data may become risky and cumbersome tasks. Integration of the HR system with an enterprise resource planning (ERP) system is also required, as some tasks such as employee performance monitoring (tasks completed/failed per employee, time per completed task, etc.) and employee scheduling for projects (which should consider skill set matching, leave management, etc.) are typically managed in ERP/project management systems.

Industry-specific KPIs and analytics

Larger midsize enterprises require industry-specific reference points to better transmit company expectations to employees and better understand employees' expectations of

the company. Benchmarking and market trends are required for performance reviews that assess industry-specific competencies and aptitudes. Additionally, HR practitioners resort to this type of data to model compensation packages to attract and retain employees.

Critical Functionality

Learning management

Companies with 1,000+ employees acknowledge the critical role that learning plays in their efforts to be competitive in the talent retention market. Growing the company entails investing in employees' development beyond on-the-job training, internal PowerPoint presentations, and required certifications. Learning looks to develop or improve employees' critical thinking and their ability to make decisions by looking at a situation from various perspectives. Contemporary learning management software presents users with the opportunity to create and share knowledge in real time between users spread across different locations, thus allowing teams of professionals to gain new cultural perspectives on various issues. While smaller midsize organizations can handle their learning needs with training management, third-party tools, or massive open online courses (MOOCs) technology, larger midsize organizations require a learning management module that can manage the content, scheduling, and tracking of the learning process for both instructors and students alike and that can be integrated with the employee records module.

Career development

Larger midsize companies tend to undergo rapid changes (growth or contraction), and hence turmoil, more readily than larger companies. Companies can design short- and long-term skill and competency requirements for their employees to help them weather these turbulent periods. Career development goes hand in hand with learning and compensation management, as certain skills have to be developed and enhanced using learning and money incentives. Today, as employees make several career changes during their lifetime, it is paramount that career planning initiatives anticipate the movement of employees both within and outside the company to avoid potential disruptions. HR professionals can anticipate that the employee life cycle in the 21st century may constitute a departure from and subsequent return to the company with new experiences and skill sets and thus should factor this potential reality into current decision making.

Succession planning

Large midsize companies experience disruption when employees that have been with the company for long periods of time retire, resign, or are transferred, particularly during periods of rapid growth. When a few key individuals safeguard critical knowledge about the company's operations, a succession planning initiative is required to ensure that the

knowledge is not lost with the departure of these individuals. Some forms of knowledge can be transferred to others through documentation, whereas others require in-person learning/training and collaboration for effective transmission. Succession planning technology helps identify good future candidates for key positions and roles and the creation of thorough plans for knowledge transfer from incumbents to future leaders and managers over a realistic time period.

Social/Collaboration tools

As the workforce of larger midsize companies comprises a large variety of cultures and age groups, there is the potential for numerous barriers to effective communication—and hence, facilitating collaboration among these groups is critical to business continuity. Consumer technology provides the framework for maintaining professional as well as personal relationships and for collaborating on social media. As a result, social technology is essential for certain aspects of HCM, such as staying in contact with prospective candidates or former employees. Social tools facilitate the alliance of employee communities based on interests as well as the planning of professional or leisure activities with employees. A social interface also displays alerts about HCM tasks to be completed (open enrollment, performance reviews, course enrollment, and so on).

Internationalization for payroll, health and safety, etc.

For companies with offices in multiple countries, internationalization becomes a critical feature, as it collects and monitors data from all of the company's locations for better reporting and for optimization of company-wide efforts. It is important to accommodate the needs of not only employees across multiple locations, but also employees that change geographical locations during their careers. Additionally, vendors often work with consulting companies in order to stay current of local, cross-border, and international conventions and legal requirements.

Talent analytics

Analytics is an integral component of talent management. Talent analytics helps larger midsize organizations gain insight into employee performance, skill gaps, learning requirements, and so on. The tool plays a critical role in helping employees remain indispensable to the organization in the face of rapidly changing work environments. Talent analytics can function much like a Fitbit, which counts the number of steps a person takes in a day—monitoring the progress of employees' goals and career paths against set targets. For talent management professionals it is important to estimate and track employees' potential, and finding the means for fulfilling this potential is key to ensuring the development of individual employees and the company as a whole. Additionally, employers can leverage talent analytics to uncover the root cause(s) of the underperformance of a highly competent employee, for example.

The hammer that I find on my workbench is not contemporary to my action today: it keeps folded heterogeneous temporalities, one of which has the antiquity of the planet, because of the mineral from which it has been moulded, while another has that of the age of the oak which provided the handle, while still another has the age of the 10 years since it came out of the German factory which produced it for the market.

Workforce analytics

Although commonly used to identify employees who are no longer necessary and thus can be laid off, workforce analytics can also be used for workforce forecasting—particularly in larger midsize companies that employ seasonal or contingent workers. Similarly, workforce analytics can be used to optimize team efforts during periods of high absenteeism, such as the flu season. This is particularly important for industries where organizations need to comply with union and health and safety rules. For instance, workforce forecasting and planning initiatives require that careful consideration be given to working constraints such as limited exposure to hazardous materials or the maximum number of hours allowable (and mandated by unions) for each per position, ensuring company compliance.

"Nice to Have" Functionality

Vendor relationship management

Larger midsize organizations look to staffing agencies (e.g., Adecco) for the streamlined procurement of hiring services, including head hunting and the fast sourcing of seasonal workers. Vendor relationship management applications automate the staffing life cycle—starting with job order creation and ending with invoicing—affording larger midsize organizations the competitive edge for tackling such challenges. Staffing agencies also provide accompanying services—as they manage relationships with temporary workers, from administration to payments, thus simplifying a company's administrative chores. This functionality becomes an important advantage for companies that need to employ large cohorts of seasonal workers over short periods of time.

Consumer-style user interface

Most employees—regardless of age—consider Google, Facebook, and Twitter interfaces as the new norm. Larger midsize organizations need to keep their workforce engaged with such consumer-style displays, and may need to update their systems accordingly. Users today expect to have functionality that will facilitate or enhance their experience, such as tile views, discussion threads, status updates, or the ability to turn new features on and off. Although administrators may acquiesce to work with legacy interfaces, users of HR systems for engagement, such as learning, performance reviews, social collaboration, etc., expect to have a better experience. HR staff with administrative responsibilities is increasingly demanding modern interfaces, as there is a perceived connection between productivity and an intuitive interface look and feel.

Consistent look and feel across devices

The proliferation of mobile devices has made it mandatory for larger midsize companies to offer applications that can be accessed in some capacity on multiple devices. While

payroll processing may not be a great fit for a mobile device, performance reviews and social learning are expected to be available on tablets and mobile phones. Users expect a consistent design across devices—to avoid wasting time looking for features or relearning processes. Bring your own device (BYOD) to work is an initiative that is now commonplace in many organizations, especially with many company employees working from the comfort of their own homes. As employees use a variety of devices outside the office, a consistent look and feel across devices makes for a more efficient workforce. For instance, the same employee may need to use an HCM solution on a desktop computer at the office, a laptop at home, and a tablet and smartphone while travelling.

Visual workflow management

Larger midsize organizations need to standardize many of their varied HR processes and work methods, such as talent acquisition, performance reviews, compensation management, and retirement. Although the IT department will always remain an essential part of a company's relationship with technology, HR professionals want to gain more control over what was previously considered an IT domain. Visual workflow management technology allows HR stakeholders to change the sequence of events in workflows and processes and perform what-if analyses in order to view the impact of any change on day-to-day routines.

Industry-specific best practices

Larger midsize organizations are still learning their way around HR practices and seeking guidance on how to address vertical-specific HR challenges. For example, retail organizations need to be better able to plan for seasonality, manufacturing and construction companies to comply with safety regulations, and finance and health care organizations to abide by privacy laws. So organizations turn to vendors for their expertise in HCM system deployments and implementations. An HCM system that has not been deployed and configured with regard to industry-specific standards will be like a car without seats—it will be very difficult to use and get maximal performance. To fill this need, vendors have developed consultancy practices or partnerships with institutes or organizations that research and model industry-wide practices.

Social analytics

Larger midsize organizations use this functionality to measure the internal pulse of employee sentiment and the external success of the employer's brand. Social analytics can not only unveil whether investments in things such as social recruiting have paid off, but also help with finding passive candidates by matching their social profiles with available job positions. Additionally, this tool helps monitor the satisfaction of candidates and track prospect experience with the company. It is important that companies be aware of not only what their own employees are saying about them on social media, but also what candidates are saying, as the latter can also have an important influence on the employer's brand.

Big HR data capabilities

This functionality aids companies that generate a lot of data around their employee records and life cycles. Big data helps with providing insights into structured and unstructured data that is fragmented across various applications. It allows HR/HCM professionals to discover new questions and concerns that may have been overlooked due to a lack of in-depth data analysis. By processing big data related to employees and HR practices, companies can take advantage of historical information that is hard to analyze with traditional reporting and BI—for better data analysis and forecasting. Additionally, those companies that monitor social media will find big data very important for analyzing high volumes of unstructured data in real time.

Product Technology

Mobility

Mobile applications can be delivered via native apps or web browsers (HTML5). Both technologies have pros and cons. While HTML5 apps can be accessed from any device—thanks to responsive design technology—native apps offer better user experience, as they adapt better to specific operating systems and mobile platforms. Mobile HCM apps may target specific needs (time tracking, social learning, etc.), or unify functionality and create different levels of access for specific users (employee, manager, recruiter, etc.). Smaller midsize companies may benefit more from apps that are specifically designed to meet their most important needs, while larger midsize companies may opt for apps with more broad functionality, as they require more capabilities and may even manage user profiles and access rights.

Delivery model

The cloud has become the typical delivery model for HCM functionality in the market. Best-of-breed vendors that have built their applications directly in the cloud have put pressure on vendors with legacy systems to adopt the on-demand model. In HCM this makes sense for the most part, whereas other industries such as health care may demand to have their data in-house. As more and more security problems may plague the software-as-a-service (SaaS) model, the on-premise and hybrid models are likely to regain traction. Cloud deployments are fraught by the customer perception of the potential for compromised security when the data repository is shared between multiple customers, or tenants.

One can easily understand the anthropoid monkey in Stanley Kubrick's film 2001, stupefied and surprised when faced with the world opened up by a jawbone held like a hammer—and as a club handy for killing. If, in a famous swirling movement, he flings it so high and far that it becomes the space station of the future, it is because all technologies incite around them that whirlwind of new worlds.

HCM Best Practices for Midsize Businesses

An important driving force in the development of a company is its differentiation from other organizations. Based on its culture and world view, an organization can seek inspiration for its best practices and strategies in the area of human capital management (HCM) from similar-sized companies or go outside its own narrative and source ideas from companies of various different sizes. And it is the ability of a company to adapt ideas from others to its own tune that help it develop its identity and achieve profitability.

Midsize organizations are oftentimes caught between two extremes: feeling nostalgic for when they were small and nimble, and aspiring to become crystallized forces in their industries. The midsize business sector is a vibrant environment with intense movement. Most midsize organizations have to navigate their emergence from a start-up or small-to-medium business (SMB) status while effectively competing against already established businesses. And once they have reached a certain level of growth, they must consider whether to maintain the status quo or expand through acquisitions, mergers, or internal development.

Larger midsize companies may seek to simplify processes, much like their smaller counterparts. On the other hand, smaller midsize businesses may seek to become more process oriented and structured, and attain a certain level of credibility and comfort. Midsize organizations must therefore

- compete for talent,
- be as agile as a start-up, and
- always seek technological improvements.

Competing for talent

Smaller midsize companies appear to be at a disadvantage at acquiring and retaining talent, as their employment offerings may not be as attractive as those of larger midsize organizations. The smaller organizations have a tendency to emulate the larger midsize recruiting model—which promises a plethora of benefits, good wages, long-term career development and learning opportunities, as well as the option to eventually occupy attractive middle and upper management positions. But job seekers should weigh these potential benefits against the bureaucracy and sometimes rigid hierarchies that tend to burgeon in larger midsize

organizations. Additionally, smaller midsize organizations can promote their incentives: flexibility, less politics, more and faster opportunities for promotion—allowing employees to witness their contribution to the company's success in a tangible way.

Slick as a start-up

Larger midsize organizations are well acquainted with complexity. From a human resources (HR) perspective, hiring thousands of people who have different levels of compensation is complex enough. Add to that different geographies with local compliance rules or professional orders and union demands and the level of complexity becomes multifold magnified. As larger midsize businesses may not be able to follow a centralized model, a multi-tier approach can help these organizations achieve the nimbleness and agility typical of smaller midsize organizations. Such an approach implies using different HCM software systems in different locations, such that the systems address the needs of each particular location. The idea is to avoid imposing large monolithic systems to locations that have minimal needs.

For example, consider a high-tech equipment company with headquarters (HQ) in Canada, a production facility and warehouse in Mexico, and a professional services division to install and maintain the equipment located in the United States. Each location is likely to have different HCM needs. HQ will have a top requirement for core HR, as benefits and payroll are typically consolidated at a company's principal location, while it may not need workforce management, as most HQ employees are not required to punch in and out.

But the production and warehouse facility will require robust workforce management capabilities, and will put less of an emphasis on learning management, as most employees need only job-specific training. Finally, the professional services location will require robust learning management capabilities, with core HR assuming less importance (as most payroll and benefits activities are managed by HQ).

Technology never satisfies

As a midsize company continues to grow, it must grapple with choosing highly specialized mid-market best-of-breed solutions or adopting a full HCM suite. Smaller midsize businesses with growing technology needs may find it easier to complement their in-house technology with add-on applications—avoiding lengthy implementations and having to deal with complex systems. However, much fragmentation in technology may negatively impact a company's HR operations and strategies—in which case a vertical-specific full suite HCM solution for midsize organizations may be better suited to the business.

Smaller and larger midsize businesses may not look that different in their technology needs, particularly if we consider their short-term and long-term needs. Present and future requirements can have a huge impact on the selection of a solution that is best suited for the specific profile of a company. But evolving needs should be considered beyond the selection of an HCM solution to the implementation and maintenance (including upgrades) of the system.

From an implementation perspective, a phased approached may be preferable to a full implementation. For instance, a company may decide to start with core HR and workforce management capabilities and gradually add modules or integrate with third-party solutions for career development, learning management, succession planning, etc. This approach helps plan and manage change over a long period of time while limiting the disruption to employees (as would be caused by a full suite implementation).

Finally, changing company priorities affects the maintenance of an HCM solution, as for example, the need to buy extra licenses for certain software functionality modules, requirements for tighter integration with financial solutions, encryption of certain sensitive data, etc. And, although cost considerations may sway buyers away from technology that can truly help them achieve their long-term vision, it is advisable that buyers look for systems that can scale and are highly configurable, at prices that are reasonable to both smaller and larger midsize organizations.

How HCM Technology Needs Are Prioritized

Below are some examples of HCM software selection projects that Technology Evaluation Centers (TEC) consultants were involved with that show how midsize companies prioritize HCM technology needs according to their short- and long-term strategies.

Example 1: Development bank, 200 employees in one site, undisclosed revenue

As table 1 shows, at the time of the selection project, this smaller midsize company did not see training as a critical need, as it was in the process of transitioning from spreadsheet, paper-based, and fragmented point HR solutions to a centralized HCM system.

Table 1. Priority ratings for HCM software features indicated during the HCM selection project

Functionality	Priority rating (no. of criteria)
Employee records	Must have (10)
Employee self-service	Very important (8)
Payroll	Must have (10)
Benefits	Must have (10)
Recruitment	Important (6)
Performance management	Must have (10)
Career development and succession planning	Important (6)
Training management	Nice to have (4)
Compensation management	Must have (10)
Workforce management	Important (6)

However, once the anxieties of implementing its first HCM system would be put behind it, this development bank—which employs highly specialized professionals (engineers, legal experts, etc.) for its development projects worldwide—would require more robust training management capabilities at some point in the future.

As the technological needs of any company tend to evolve over time, decisions makers can benefit from sensitivity analysis to better assess how technology vendors may respond to their long-term needs. When analyzing the training management capabilities from three different vendor solutions (figure 1), the company realized that the best solution for its current needs—which places low importance on training management (vendor 3)—was not the same as the best solution for its future needs—which places high importance on training management (vendor 1).

This type of analysis unveils how a certain software solution may be a great fit for the current set of needs, but become inadequate as the needs of the company change/grow and as the company comes to rely on more technology to better administer its HCM operations. In this case, vendor 3 adequately meets the training management needs of the organization, but as the organization employs highly skilled professionals whose performance depends on continuous learning, those needs can be expected to grow considerably. Opting for a system that cover more than the indicated present needs is critical.

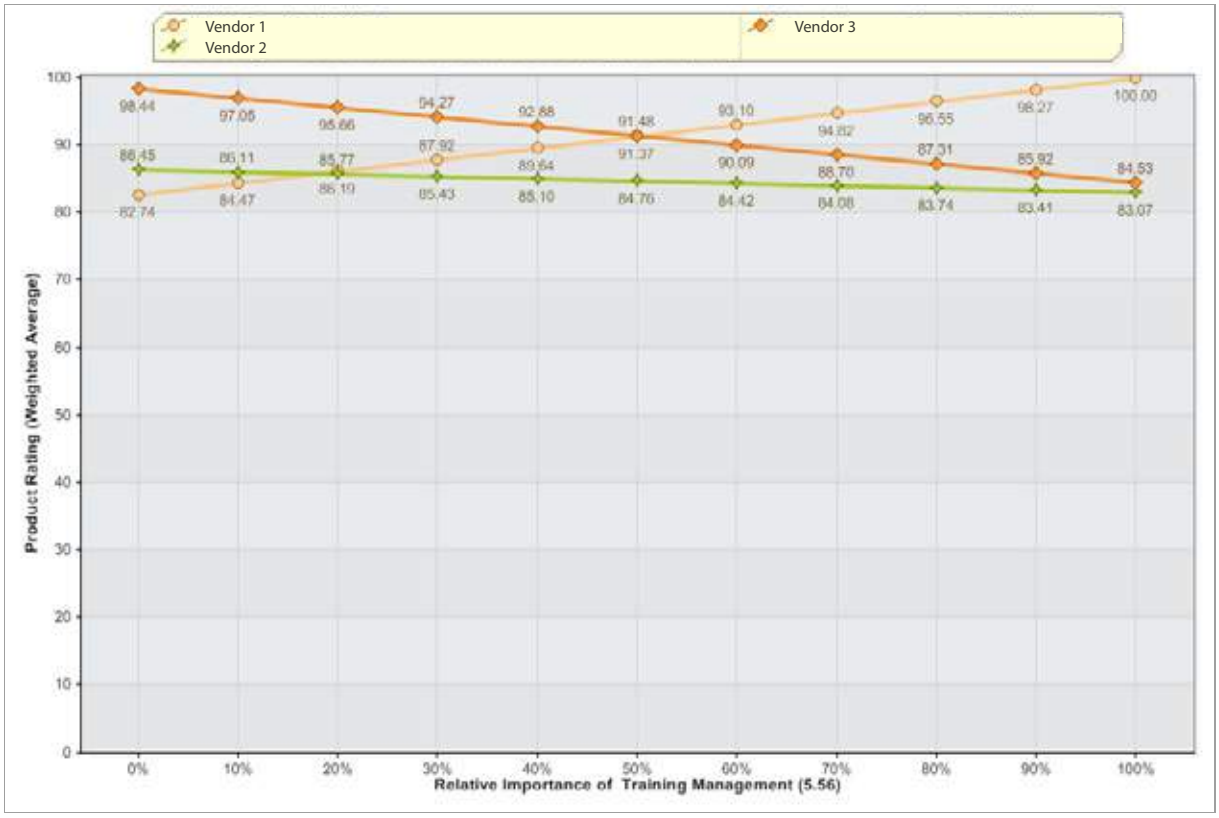

Figure 1. Sensitivity analysis of training management needs

Example 2: Manufacturing company, 3,500 employees in 25 sites, $1 billion annual revenue

At the time of the selection project, this company had a very robust workforce management solution implemented across all its 25 sites. Additionally, it outsourced payroll. However, its current HR legacy solutions and supported processes lacked operational efficiency and did not meet regulatory compliance. Furthermore, as the company was specialized in producing industrial equipment, it required highly qualified employees and therefore a very comprehensive recruitment application. Hence, recruitment was a critical requirement (see table 2).

Table 2. Priority ratings for HCM software features indicated during the HCM selection project.

Functionality	Priority rating (no. of criteria)
Benefits	Very important (8)
Employee records	Must have (10)
Employee self-service	Important (6)
Recruitment management	Critical (10)
Career development and training	Important (6)
Competency management	Important (6)
Management of rewards	Important (6)
Budgeting and cost control	Not important (2)
Government and compliance reporting	Very important (8)
Employment history and personnel reporting	Important (6)
Employee metrics	Very important (8)
Track discipline actions	Nice to have (4)

Figure 2 illustrates the gap in performance (weighted average) between the selected product (the winning vendor, represented by the 0 baseline) and the other two shortlisted vendors (vendor 2 and vendor 3). The winning vendor excelled in recruitment, covering areas such as candidate status summary, sourcing engine integration, competency management, résumé parsing, etc., which the other two shortlisted vendors were unable to support out of the box. As the product differences chart demonstrates, the recruitment solutions provided by vendors 2 and 3 either did not support certain functionality (indicated by the score of -100) or provided certain functionality only through modification (score of -30).

Figure 2. Product differences for recruitment management

Best-fit technology, best foot forward

Although smaller midsize and larger midsize businesses have different technology needs, they both need to consider their short-term as well as long-term business plans, and hence functionality requirements, in their software buying decisions. Buying software just for the current state of the business may turn out to be dangerous and expensive over the long term. However, if cost does not permit buyers to purchase the software solution with the ideal number of features and functions, they should work with information technology (IT) to find flexible and expandable technology.

Product Comparison

	HCM Solutions for Smaller Midsize Enterprises (100–1,000 Employees)	ADP Workforce Now	Aragon-eRH* OneAragon	BambooHR	BDI Talent Management	Epicor HCM Express
	# of Employees Supported					
Functionality	**Core**					
	Employee records	S	S	S	S	S
	Integration with payroll	S	S	S	S	S
	Benefits administration	S	S	P (Maxwell Health, BeneTrac)	NS	S
	Recruitment	S	S	S	S	S
	Time and attendance	S	S	P (NimbleSoftware, SwipeClock)	NS	S
	Critical					
	Payroll	S	P (ADP, Sage, HR Access)	P (ZenPayroll, TRAXPayroll, Advantage Payroll, Simplepay.ca)	NS	P
	Self-service	S	S	S	S	S
	Onboarding	NS	S	S	NS	S
	Performance management	S	S	P (Small Improvements, Cornerstone OnDemand, HRN, Bullseye)	S	S
	Incentive management	NS	S	NS	P (HRsoft)	S
	Training and development	P (Cornerstone OnDemand)	S	S	S	S
	Government and compliance reporting	S	S	S	NS	S
	Nice to have					
	Absence and leave management	S	S	S	NS	S
	Social/Collaboration tools	NS	S	S	S	NS
	Dashboards	S	S	S	NS	S
Product Technology	**Mobility**					
	HTML5	S	S	NS	NS	S
	Native apps	S	NS	S	NS	NS
	Delivery model					
	Cloud	S	S	S	S	S
	On premises	NS	NS	NS	NS	S
	Hybrid	NS	NS	NS	S	S

*Aragon-eRH was acquired by Digital Dimension in January 2015.

S Supported | P Supported via the indicated partners | NS Not supported

HCM: human capital management; HRMS: human resources management solution.

	HCM Solutions for Smaller Midsize Enterprises (100–1,000 Employees)	FinancialForce.com HCM	Infinisource iSolved + iSolved TimeForce	Kronos Workforce Ready	Microsoft Dynamics AX 2012 R3	Namely	NOW Solutions emPath
	# of Employees Supported	50+	20+				
Functionality	**Core**						
	Employee records	S	S	S	S	S	S
	Integration with payroll	S	S	S	S	S	S
	Benefits administration	S	S	S	P (CEM HCM)	S	S
	Recruitment	S	P (Newton)	S	P (CEM HCM)	P (Greenhouse, Jobvite, Lever)	S
	Time and attendance	S	S	S	P (CEM HCM)	S	S
	Critical						
	Payroll	NS	S	S	S (enhanced with CEM HCM)	S	S
	Self-service	S	S	S	S	S	S
	Onboarding	S	S	S	P (CEM HCM)	S	S
	Performance management	S	S	S	P (CEM HCM)	S	S
	Incentive management	S	NS	S	P (CEM HCM)	S	S
	Training and development	S	NS	S	S	P	S
	Government and compliance reporting	S	S	S	S	S	S
	Nice to have						
	Absence and leave management	S	S	S	S	S	S
	Social/Collaboration tools	S	NS	NS	S	S	S
	Dashboards	S	S	S	S	S	S
Product Technology	**Mobility**						
	HTML5	S	S	S	S	S	S
	Native apps	S	S	S	P	S	NS
	Delivery model						
	Cloud	S	S	S	S	S	S
	On premises	NS	NS	NS	S	NS	S
	Hybrid	NS	NS	NS	S	NS	S

S Supported | P Supported via the indicated partners | NS Not supported

HCM: human capital management; HRMS: human resources management solution.

	HCM Solutions for Smaller Midsize Enterprises (100–1,000 Employees)	Paycor Perform	Sage HRMS	SAP ERP HCM	SentricWorkforce	StarGarden
	# of Employees Supported	1+				150+
Functionality	**Core**					
	Employee records	S	S	S	S	S
	Integration with payroll	S	S	S	S	S
	Benefits administration	S	S	S	S	S
	Recruitment	P (Newton)	P (Visibility Software)	S	S	S
	Time and attendance	S	P (Insperity)	S	P (InfoTronics, NOVAtime)	S
	Critical					
	Payroll	S	S	S	S	S
	Self-service	S	S	S	S	S
	Onboarding	S	P (Visibility Software)	NS	S	S
	Performance management	S	P (Cornerstone OnDemand)	S	S	S
	Incentive management	NS	P (Cornerstone OnDemand)	S	S	S
	Training and development	S	P (Cornerstone OnDemand)	S	S	S
	Government and compliance reporting	S	S	S	S	S
	Nice to have					
	Absence and leave management	P (Attendance on Demand)	S	S	S	S
	Social/Collaboration tools	NS	S	S	NS	NS
	Dashboards	S	P (SAP)	S	S	S
Product Technology	**Mobility**					
	HTML5	S	NS	S	NS	S
	Native apps	S	S	S	NS	NS
	Delivery model					
	Cloud	S	P (nGenx)	S	S	S
	On premises	NS	S	S	NS	S
	Hybrid	NS	S	S	NS	S

S Supported | P Supported via the indicated partners | NS Not supported
HCM: human capital management; HRMS: human resources management solution.

	HCM Solutions for Smaller Midsize Enterprises (100–1,000 Employees)	SuccessFactors HCM	SumTotal elixHR + SumTotal Talent Expansion	UltiPro	Workday HCM	Zenefits
	# of Employees Supported			300+		5–699
Functionality	**Core**					
	Employee records	S	S	S	S	S
	Integration with payroll	S	S	S	S	S
	Benefits administration	S	S	S	S	S
	Recruitment	S	S	S	S	NS
	Time and attendance	S	S	S	S	S
	Critical					
	Payroll	S	S	S	S	P (ADP, ZenPayroll, Paychex, Intuit QuickBooks, Intuit Payroll)
	Self-service	S	S	S	S	S
	Onboarding	S	P (iCIMS)	S	S	S
	Performance management	S	S	S	S	NS
	Incentive management	S	S	S	S	S
	Training and development	S	S	S	P (Cornerstone OnDemand)	NS
	Government and compliance reporting	S	S	S	S	S
	Nice to have					
	Absence and leave management	S	S	S	S	S
	Social/Collaboration tools	S	S	S	S	P
	Dashboards	S	S	S	S	S
Product Technology	**Mobility**					
	HTML5	S	S	S	S	NS
	Native apps	S	S	NS	S	NS
	Delivery model					
	Cloud	S	S	S	S	S
	On premises	NS	S	NS	NS	NS
	Hybrid	S	S	NS	NS	NS

S Supported | P Supported via the indicated partners | NS Not supported

HCM: human capital management; HRMS: human resources management solution.

	HCM Solutions for Larger Midsize Enterprises (1,000–5,000 Employees)	ADP Vantage HCM	Aragon-eRH* OneAragon	BDI Talent Management	Ceridian Dayforce HCM	Cornerstone OnDemand Talent Management Suite	Epicor HCM
	# of Employees Supported				100+	400+	
Functionality	**Core**						
	Centralized employee records	S	S	S	S	NS	S
	Payroll	S	P (ADP, Sage, HR Access)	NS	S	NS	P
	Benefits	S	S	NS	S	NS	S
	Talent acquisition	S	S	S	S	S	S
	Performance management	S	S	S	S	S	S
	Compensation management	S	S	P (HRsoft)	S	S	S
	Time and attendance	S	S	NS	S	NS	S
	Absence and leave management	S	S	NS	S	NS	S
	Personalized, role-based data access and workspace	S	S	S	S	S	S
	Localization (language, currency, etc.)	S	S	S	S	S	S
	Integration with financial solutions, ERP, etc.	S	S	S	S	S	S
	Industry-specific KPIs and analytics	S	S	NS	S	S	S
	Critical						
	Learning management	S	S	S	P (Desire2Learn)	S	S
	Career development	S	S	S	S	S	S
	Succession planning	S	S	S	S	S	NS
	Social/Collaboration tools	S	S	S	S	S	NS
	Internationalization for payroll, health and safety, etc.	S	S	NS	S	NS	S
	Talent analytics	S	S	S	S	S	S
	Workforce analytics	S	S	S	S	NS	S
	Nice to have						
	Vendor relationship management (e.g., for staffing agencies)	NS	NS	S	NS	NS	NS
	Consumer-style UI	S	S	S	S	S	S
	Consistent look and feel across devices	S	S	S	S	S	S
	Visual workflow management	S	S	S	S	S	NS
	Industry-specific best practices	S	S	S	S	S	S
	Social analytics	NS	S	NS	NS	NS	NS
	Big HCM data	S	S	NS	S	S	S
Product Technology	**Mobility**						
	HTML5	S	S	NS	S	S	S
	Native apps	S	NS	NS	S	S	NS
	Delivery model						
	Cloud	S	S	S	S	S	S
	On premises	NS	NS	NS	NS	NS	S
	Hybrid	NS	NS	S	NS	NS	S

*Aragon-eRH was acquired by Digital Dimension in January 2015.

S Supported | P Supported via the indicated partners | NS Not supported

ERP: enterprise resource planning; HCM: human capital management; HRMS: human resources management solution; KPI: key performance indicator; UI: user interface.

	HCM Solutions for Larger Midsize Enterprises (1,000–5,000 Employees)	FinancialForce.com HCM	Infor HCM	Kronos Workforce Central	Lumesse TalentLink
	# of Employees Supported		2,000+		
Functionality	**Core**				
	Centralized employee records	S	S	S	S
	Payroll	S	S	S	NS
	Benefits	P	S	S	S
	Talent acquisition	S	S	S	S (enhanced with LinkedIn, work4Labs, SHL/CEB, Broadbean)
	Performance management	S	S	S	S
	Compensation management	S	S	S	S
	Time and attendance	S	S	S	NS
	Absence and leave management	S	S	S	S
	Personalized, role-based data access and workspace	S	S	S	S
	Localization (language, currency, etc.)	S	S	S	S
	Integration with financial solutions, ERP, etc.	S	S	S	S
	Industry-specific KPIs and analytics	S	S	S	S
	Critical				
	Learning management	S	S	NS	S (enhanced with Skillsoft courses integrated through OLSA, Cegos, Learning Nexus, Vado, Intuition, ILX)
	Career development	S	S	NS	S
	Succession planning	S	S	NS	S
	Social/Collaboration tools	S	S	S	S
	Internationalization for payroll, health and safety, etc.	NS	S	NS	
	Talent analytics	S	S	NS	S
	Workforce analytics	S	S	S	S
	Nice to have				
	Vendor relationship management (e.g., for staffing agencies)	NS	NS	NS	NS
	Consumer-style UI	S	S	S	S
	Consistent look and feel across devices	S	S	S	S
	Visual workflow management	NS	S	S	S
	Industry-specific best practices	NS	S	S	S
	Social analytics	S	NS	NS	NS
	Big HCM data	S	S	S	NS
Product Technology	**Mobility**				
	HTML5	S	S	S	S
	Native apps	S	S	S	S
	Delivery model				
	Cloud	S	S	S	S
	On premises	NS	S	S	S
	Hybrid	NS	S	S	S

S Supported | P Supported via the indicated partners | NS Not supported

ERP: enterprise resource planning; HCM: human capital management; HRMS: human resources management solution; KPI: key performance indicator; UI: user interface.

	HCM Solutions for Larger Midsize Enterprises (1,000–5,000 Employees)	Microsoft Dynamics AX 2012 R3	Namely	NOW Solutions emPath	Oracle Fusion HCM	PeopleFluent
	# of Employees Supported		1,000–3,000			2,000+
Functionality	**Core**					
	Centralized employee records	S	S	S	S	S
	Payroll	S (enhanced with CEM HCM)	S	S	S	NS
	Benefits	P (CEM HCM)	S	S	S	NS
	Talent acquisition	P (CEM HCM)	P (Jobvite, Greenhouse, Lever)	S	S	S
	Performance management	P (CEM HCM)	S	S	S	S
	Compensation management	P (CEM HCM)	NS	S	S	S
	Time and attendance	P (CEM HCM)	S	S	S	NS
	Absence and leave management	S	S	S	S	NS
	Personalized, role-based data access and workspace	S	S	S	S	S
	Localization (language, currency, etc.)	S	S	S	S	S
	Integration with financial solutions, ERP, etc.	S	S	S	S	S
	Industry-specific KPIs and analytics	S	S	S	S	S
	Critical					
	Learning management	S	P	S	S	S
	Career development	P (CEM HCM)	NS	S	S	S
	Succession planning	P (CEM HCM)	NS	S	S	S
	Social/Collaboration tools	S	S	S	S	S
	Internationalization for payroll, health and safety, etc.	NS	P	S	S	S
	Talent analytics	S	S	S	S	S
	Workforce analytics	S	S	S	S	S
	Nice to have					
	Vendor relationship management (e.g., for staffing agencies)	NS	NS	S	S	S
	Consumer-style UI	S	S	S	S	S
	Consistent look and feel across devices	S	S	S	S	S
	Visual workflow management	S	S	S	S	S
	Industry-specific best practices	S	S	S	S	S
	Social analytics	NS	S	S	S	S
	Big HCM data	S	S	S	S	S
Product Technology	**Mobility**					
	HTML5	S	S	S	S	S
	Native apps	P	S	NS	S	S
	Delivery model					
	Cloud	S	S	S	S	S
	On premises	S	NS	S	S	NS
	Hybrid	S	NS	S	S	NS

S Supported | P Supported via the indicated partners | NS Not supported

ERP: enterprise resource planning; HCM: human capital management; HRMS: human resources management solution; KPI: key performance indicator; UI: user interface.

	HCM Solutions for Larger Midsize Enterprises (1,000–5,000 Employees)	Sage HRMS	SAP ERP HCM	SentricWorkforce	SimplyDigi	StarGarden
	# of Employees Supported	1,000–3,000				
Functionality	**Core**					
	Centralized employee records	S	S	S	S	S
	Payroll	S	S	S	P	S
	Benefits	S	S	S	P	S
	Talent acquisition	P (Visibility Software)	S	S	S	S
	Performance management	P (Cornerstone OnDemand)	S	S	S	S
	Compensation management	P (Cornerstone OnDemand)	S	S	P	S
	Time and attendance	P (Insperity)	S	P (InfoTronics, NOVAtime)	P	S
	Absence and leave management	S	S	S	P	S
	Personalized, role-based data access and workspace	S	S	S	S	S
	Localization (language, currency, etc.)	P (BAASS)	S	S	S	S
	Integration with financial solutions, ERP, etc.	S	S	S	S	S
	Industry-specific KPIs and analytics	S	S	S	S	S
	Critical					
	Learning management	P (Cornerstone OnDemand)	S	S	S	S
	Career development	P (Cornerstone OnDemand)	P (Nakisa)	S	S	S
	Succession planning	P (Cornerstone OnDemand)	P (Nakisa)	NS	S	S
	Social/Collaboration tools	S	S	NS	S	NS
	Internationalization for payroll, health and safety, etc.	NS	S	NS	S	NS
	Talent analytics	S	S	NS	S	S
	Workforce analytics	S	S	S	S	S
	Nice to have					
	Vendor relationship management (e.g., for staffing agencies)	NS	NS	S	S	NS
	Consumer-style UI	S	S	S	S	S
	Consistent look and feel across devices	S	S	S	S	S
	Visual workflow management	S	S	S	S	S
	Industry-specific best practices	S	S	S	S	S
	Social analytics	NS	S	NS	S	NS
	Big HCM data	P (SAP)	S	NS	S	S
Product Technology	**Mobility**					
	HTML5	NS	S	NS	S	S
	Native apps	S	S	NS	S	NS
	Delivery model					
	Cloud	P (nGenx)	S	S	S	S
	On premises	S	S	NS	NS	S
	Hybrid	S	S	NS	NS	S

S Supported | P Supported via the indicated partners | NS Not supported

ERP: enterprise resource planning; HCM: human capital management; HRMS: human resources management solution; KPI: key performance indicator; UI: user interface.

	HCM Solutions for Larger Midsize Enterprises (1,000–5,000 Employees)	SuccessFactors HCM	SumTotal elixHR + SumTotal Talent Expansion	UltiPro	Workday HCM
	# of Employees Supported		2,500+	1,500+	
Functionality	**Core**				
	Centralized employee records	S	S	S	S
	Payroll	S	S	S	S
	Benefits	S	S	S	S
	Talent acquisition	S	S	S	S
	Performance management	S	S	S	S
	Compensation management	S	S	S	S
	Time and attendance	S	S	S	S
	Absence and leave management	S	S	S	S
	Personalized, role-based data access and workspace	S	S	S	S
	Localization (language, currency, etc.)	S	S	S	S
	Integration with financial solutions, ERP, etc.	S	S	S	S
	Industry-specific KPIs and analytics	S	S	S	S
	Critical				
	Learning management	S	S	P (CertPoint, Total Training Network)	P (Cornerstone OnDemand, Saba)
	Career development	S	S	S	S
	Succession planning	S	S	S	S
	Social/Collaboration tools	S	S	S	S
	Internationalization for payroll, health and safety, etc.	S	S	S	S
	Talent analytics	S	S	S	S
	Workforce analytics	S	S	S	S
	Nice to have				
	Vendor relationship management (e.g., for staffing agencies)	S	P	NS	NS
	Consumer-style UI	S	S	S	S
	Consistent look and feel across devices	S	S	S	S
	Visual workflow management	S	S	S	S
	Industry-specific best practices	S	S	S	P (Deloitte, Accenture, Aon, Capgemini, HP, IBM, KPMG, PwC, CSC, DayNine, Huron, Kainos, Kloud, Mercer, Meteorix, NGA, OneSource, Sierra-Cedar)
	Social analytics	S	S	NS	NS
	Big HCM data	S	S	S	S
Product Technology	**Mobility**				
	HTML5	S	S	S	S
	Native apps	S	S	NS	S
	Delivery model				
	Cloud	S	S	S	S
	On premises	NS	S	NS	NS
	Hybrid	S	S	NS	NS

S Supported | P Supported via the indicated partners | NS Not supported

ERP: enterprise resource planning; HCM: human capital management; HRMS: human resources management solution; KPI: key performance indicator; UI: user interface.

Innovation in HCM Technology: Niche Vendors

Changes in the business environment lead to changes in the technical requirements of organizations, placing new demands on emerging technologies. Although well-established vendors are the first to innovate in response to new market demands, niche vendors, being more focused, may be able to engineer their technology to address specific niche needs.

However, innovation from niche players does not come without integration challenges, as niche systems rely on HCM systems' data. Integration of niche applications with different solutions from the same vendor or with different solutions from different vendors is required for any given customer to attain a viable HCM strategy. As a result, these types of software tools must be adaptable and able to integrate in various ways: cloud to cloud; cloud to on premise; embedded on specific platforms.

Here is a sample of niche players and their innovative technologies.

> "If you want to keep your intentions straight, your plans inflexible, your programmes of action rigid, then do not pass through any form of technological life."

Axonify

Axonify uses gamification, adaptive learning, and brain science principles to deliver learning management solutions that help companies identify and close knowledge gaps for individual employees and the company as a whole. This approach departs from the traditional skills gap analysis approach, which focuses on roles, positions, etc., rather than on the level of expertise and knowledge that each employee holds in a particular area. Axonify also offers functionality for learning content administration and analytics.

Castlight

Healthcare insurance is a major HR challenge for most companies, which seek to provide coverage for their employees' health at a reasonable price. Castlight Health develops solutions targeted to help both employers and employees make informed benefit administration and benefit enrollment decisions. Castlight Enterprise Healthcare Cloud platform provides HR and finance with real-time insights into healthcare spending data to control costs. The application unveils employee benefit spending behavior, as well as the affordability and profitability of each benefit plan.

eQuest

eQuest delivers solutions that support recruitment marketing, which includes job posting distribution and compliance, social media mobile recruiting, and big HR data. The company has built an extensive job posting platform—the Advantage Job Board Network, which leverages job boards and search engines to connect companies with millions of candidates. To complement its technology, eQuest offers advisory services through its team of media professionals who train and assist customers to better leverage the dynamics of the Internet and social media for their recruitment needs.

Fuel50

Developed by Career Engagement Group, Fuel50 is an interactive career path software application with the main goal of making a company's career and job opportunities visible to its employees. The tool helps align employees' ambitions with the employer's objectives—a perspective that makes for a more balanced career development undertaking by employees, HR, and hiring managers. Traditionally, HR and managers have controlled most aspects of an employee's career, with very little input from the employee. Faced with the impossibility of declining promotions or transfers, employees would accept new assignments that presented very little appeal to them. But, software alone is very unlikely to suffice for such an inexact science as career development. Fuel50 also offers services and career engagement research to add value to its technology.

Logi-Serve

Logi-Serve produces interactive and visually compelling employee assessments to deliver engaging virtual environments, keeping users motivated to complete assessment tasks. The Visual Logic storyboarding technology utilizes graphics that simulate real-life job situations and corresponding emotional representations such as facial expressions and body language to elicit more accurate responses. The employee assessment data is then validated by using a Logi-Serve–developed methodology—Triangulation, which looks at employee feedback through various lenses (role playing, past experience, and personality profiles). The solutions offered by Logi-Serve can be used for both candidates and existing employees.

OrgVue

OrgVue focuses on HR analytics and workforce planning to assist enterprises with their ability to gather data from multiple systems and cleanse it prior to analysis. Thanks to what-if technology, data can be viewed in various contexts side by side, with real-time updates. The OgVue platform also helps companies define processes and establish and monitor employee roles and accountabilities aligned with organizational objectives.

RNA by BlackbookHR

Relationship Network Analysis (RNA) is a visually attractive tool that paints a picture of how employees relate to each other within an organization. It unveils different hierarchies based on the positions, roles, departments, and units defined in a traditional organizational structure. Organizations can leverage this knowledge for various purposes such as onboarding of new hires and new managers, performance analysis, and planning and managing change. The vendor targets organizations that go through mergers or acquisitions, or that require making "the invisibles" visible within an organization—influencer figures who act more or less quietly.

QUEsocial

QUEsocial uses social media channels to help recruiters tap into the pool of passive or lightly active candidates. The platform helps companies promote their employer brand, such that job seekers remain engaged until they are actively looking for a job or a job offer triggers their interest. QUEsocial uses gamification concepts which incentivize candidates to converse with employers over long periods of time. The QUEsocial candidate engagement engine is built upon a methodology (called the Social Business Adoption Curve) which encourages and incentivizes real interactions between people who are connected on social media, thus having latent online relationships come to life.

Swoop

Swoop is a data-driven recruitment aid tool that collects data of all types—structured and unstructured, internal and external, historical and brand new—to offer detailed candidate profiles. Swoop integrates private and Internet public data, such that companies can view their employees and potential new hires under a single, unified profile. With more than 150 million profiles available, Swoop strives to provide a robust talent search engine as well as the required algorithms to rank candidates and match them to the recruiting needs of hiring companies.

TalentBin

TalentBin is a talent search engine that crawls more than 100 websites to create a large pool of candidates. To date, the application stores information on more than 300 million candidates that are searchable and accessible by employers. The vendor also offers a collaborative feature which gives recruiters, hiring managers, and sourcers the opportunity to collaborate to better find and approach candidates. Besides software, the vendor employs a dedicated customer success team which offers implementation support as well as ongoing training and assistance to clients.

Talemetry

Talemetry complements existing applicant tracking systems with functionality that improves candidate experience. The tool adds talent sourcing and candidate relationship management, job distribution, external agency management, mobile/social career sites, and candidate application solutions to clients' in-house applicant tracking systems. The Talemetry recruitment marketing platform integrates with major HCM systems, such as Oracle and Infor, and can easily adapt to the requirements of its clients thanks to the configurability of the system.

Sentiment Analysis—Unveiling the Social Chatter about Human Capital

Online reviews sites, social media sites, and personal blogs hold great power in today's economy due to their potential to influence consumer decision making and ultimately market trends. The influx of subject matter experts onto Web 2.0 venues to express their experiences, criticisms, and perspectives has had a major impact on the business-to-business (B2B) milieu. Nowhere have the effects of social media been more pointed than in the enterprise software market, particularly in evaluating enterprise software products and practices.

Technology Evaluation Centers (TEC) recently embarked on an experimental project looking at the enterprise software market through the lenses of social media. To this end, TEC used a social media sentiment analysis tool created by Canadian-based vendor Semeon Analytics Inc.[1] Semeon Analytics combines semantic, sentiment, intent, and statistical analysis of the flurry of activity on a particular area on social media sites to yield a data analysis output.

This report explores social sentiment on three key areas of enterprise software for human capital management (HCM): recruiting, performance management, and training and development. These areas of HCM are of interest to many practitioners and influencers, as they constitute key pillars that impact the whole employee life cycle and ultimately the success of a business. In fact, these three areas represent the principal HR cost centers for many organizations.

The report is based on a query ran with Semeon Analytics that crawled 1979 social media sources that are active in the HCM realm. The search covered documents that were published between March 2014 and March 2015. The results display three word clouds, as generated by Semeon Analytics. Words appear in three different colors: red, green, and grey. Red indicates negative sentiment, green indicates positive sentiment, and grey

"Recruiting, performance management, and training and development are of interest to many HCM practitioners and influencers, as they constitute key pillars that impact the whole employee life cycle and ultimately the success of a business."

[1] About Semeon

Semeon is a privately held company in Montreal, Canada, that combines semantic, sentiment, and statistical analysis. With more than 100 years of combined experience in natural language processing (NLP), the people at Semeon surround themselves in a culture of innovation, simplicity, and powerful technology, fuelling their products and their company to have the highest standards in the industry.

indicates neutral sentiment. Words also appear in different sizes, which indicate the volume of social chatter associated with them. Invisible to the reader is the fact that when drilling down from a word in the cloud, in the actual software application, we are able to access the documents that Semeon Analytics crawled and analyzed to yield its results. Some of these documents are discussed in the report.

Recruiting

Job hunting and career management technology critical to prospects

Sentiment analysis unveils that within the recruiting domain, "job hunting" and "career management" are prominently associated with positive sentiment (see green keyword terms in figure 1). The positive sentiment stems partly from the fact the Society for Human Resource Management—and important hub for the working world—has upgraded its recruitment technology, thus allowing job seekers to unveil relevant career opportunities with greater ease and accuracy. Indeed, as salaries continue to stagnate, job seekers look at two major ways to increase their incomes. They can either seek new job opportunities with new employers, or take steps to improve their career paths with their current employer. Thanks to technologies like cloud and mobile, job hunting has been made easy. Interested candidates can interact with employers conveniently from any location using whichever device they prefer.

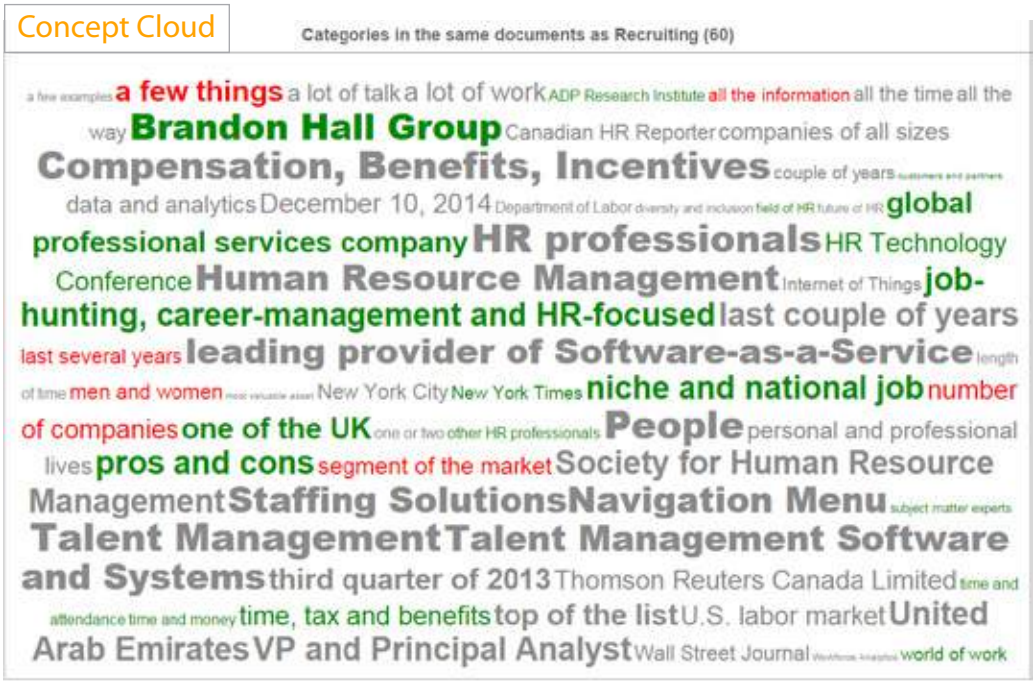

Figure 1. Sentiment analysis on "recruiting"

Mobile and cloud technologies combined with social media allow professionals to stay current of important developments and opportunities with companies of interest, and be informed about the job market overall. Social media allows job seekers and employers to create and nurture an environment that supports person-to-person (P2P) interactions, which is conducive to good business practices.

Additionally, communities such as Glassdoor and LinkedIn are particularly helpful in recruiting. These social technologies—made possible by the advent of Web 2.0—improve job hunting and career management experiences, as candidates and employees can tap into insights from like-minded professionals.

Talent management software, SaaS changing recruiting

Analysis finds that "human resource management," "people," "talent management," "talent management software," and "software as a service" are all keyword terms that are associated with neutral sentiments (see grey keyword terms in figure 1). The focus on talent management is expected, as companies acknowledge that increased care for their employees leads to increased productivity. And SaaS appears to have changed recruiting from a delivery model and platform perspective, allowing candidates and employers to be in touch with each other from any location and to update information in real time. However, users may not be so interested in discussing delivery models on social channels, but in the things that different software features and functions allow them to do, potentially explaining the neutral sentiment about SaaS.

Sentiment analysis reveals some "grey areas" that need to be addressed by organizations. Here are a few:

- *Specialized or accidental HR personnel*. According to 2014 survey conducted by XpertHR, it appears that "most practitioners 'fell into' HR by accident." As a result, this may shape the image candidates have of recruiters and HR professionals: as individuals who cannot be trusted. But even if most people working in HR happened to fall upon their careers, this is not necessarily a bad thing. Stories have to be retold. Most professionals come to work in HR through a discovery process. It is not straightforward career path as say engineering or finance. The discovery is indeed part of the journey, and it enhances the value that an HR professional brings to both candidates and employers.
- *Recruiting strategy is still lacking*. According to a Brandon Hall report "only 8% of companies have an optimized talent acquisition strategy." In other words, in addition to software tools, recruiters need to have a proper understanding of the company's culture, growth rate, and ideal mix of employees in order to properly lay the foundation for a successful talent acquisition initiative.
- *Changes in the job market*. The rise of temporary jobs in certain business sectors requires a new approach to attracting candidates. Let's face it. One of the biggest perks to permanent employment is the benefits package: medical insurance, vacation time, etc. Perhaps introducing certain benefits for temporary workers may be a solution to this recruiting challenge.

Performance management

Compensation is not the whole story

"Compensation," "benefits," and "incentives," the main keywords related to performance management, are associated with neutral sentiment (see figure 2). The term training and development appears less prominently in social media conversations on performance management. The results show that performance management continues to be tied to compensation management more closely than to career development, succession planning, or learning management. Although many organizations have made some strides in placing performance at the center of developmental programs, employees either see these efforts as marginal or decide not discuss them in the public Web 2.0 arena.

Figure 2. Sentiment analysis on "performance management"

Talent management software systems enhance the user experience

When it comes to performance management, "talent management" and "talent management software and systems" are keyword terms associated with positive sentiment. This may indicate that HR professionals have a positive experience with talent management software when managing performance. Indeed, performance management is at the heart of talent management strategies. And many vendors have put much effort into enhancing the user experience of the talent management software applications currently in use.

Simplify, facilitate performance reviews for the future

"A lot of work" is associated with negative sentiment. This result suggests that despite a positive experience with talent management software, HR professionals and employees may still see performance review cycles as cumbersome and stressful. As many companies still rely on year-end reviews that are closely tied to compensation planning, both managers and employees still must give careful thought and much work in order to provide fair reviews. Continuous reviews that capture employee performance contextually may be a better approach or a potential answer to the amount of work required by year-end reviews.

Indeed, it is common knowledge that performance management is never a black-and-white process. Despite rules, methods, and processes, a multitude of exceptions preclude the possibility of ever creating an automated performance plan that will cater to all employees, teams, and managers. According to a blog post by Drs. Elaine D. Pulakos and Rose Mueller-Hanson from PDRI, a CEB Company:

> "The best companies shift focus away from performance management systems to critical performance management behaviors."

These behaviors include manager-led employee development, and employee interactions with her/his work community. They can be tracked all year round and allow for flexible performance evaluations, underlining each individual's strengths and areas for improvement.

One question raised by the sentiment analysis is whether artificial intelligence (AI) can be used to help with performance management? An article by Steve Boese describes the concept of the Cognitive Assistant that Learns and Organizes (CALO). One of the goals of AI is to more accurately and more rapidly manage large amounts of information, surpassing the capacity of the human brain. Ideally though, AI would think and learn like humans. But would managers and employees prefer to work with an artificial assistant for performance administration or would that be a little too intrusive? And would AI be able to adapt to the unexpected situations and numerous exceptions of employee performance? It remains to be seen. But AI can definitely play an important role in performance management.

Training and development

Focus on succession planning and social technologies

"Succession management" is an important keyword associated with positive sentiment in the context of training and development (see figure 3). This shows that companies have understood that training and development is critical to succession planning. Indeed, learning and development plans have seen much success in closing skill gaps and strengthening a company's talent readiness for handling new tasks and roles.

"Compensation," "benefits," and "incentives," important keywords associated with training and development, were found to have neutral sentiment. This shows that training and development plans may be perceived as forms of compensation. With spiking prices in college and university program tuition fees, employers can provide financial assistance to their employees. As employees become more educated, they can do their jobs better, and even become more motivated. Learning-centric organizations could become the way of the future. With increasing use of software systems and the automation of various processes, employees could be released from menial tasks and freed up for more innovative and entrepreneurial engagements. In fact, Emily Wilson, Director of Solutions Marketing Learning at SuccessFactors suggests that "Corporate learning must turn employees into lifetime students and teachers" in order for them to remain competitive.

Figure 3. Sentiment analysis on "training and development"

Another interesting factor revealed by sentiment analysis in the context of training and development is the importance of using social technology in training and development contexts. According to talent management expert Steven Gilbert, social media is a critical factor in the realization and success of training and development. He writes: "If HR teams and resourcing professionals fail to utilize social technology in internal training and development, there is the risk that people strategies will become significantly outdated." Indeed, social technology complements formal training and development practices, such as instructor-led courses or goal completion monitoring, with informal environments that facilitate creative thinking to solve problems and employee collaboration to complete tasks.

Conclusion

This report aims to examine unstructured Web 2.0 data using sentiment analysis to garner insights that may improve the human resource practices of organizations. Although sentiment analysis is not yet a well-established practice in the enterprise software research market, this method provides insight into what employees, job seekers, HR practitioners, and vendors chat about in the social sphere. Sentiment and semantic analysis unveils that human resource practitioners still do not have clear strategies that complement technology. Human resource processes still demand a lot of work from employees who may not have the time to complete certain HR tasks such as performance reviews. Yet social technology can facilitate collaboration between employees in some areas of HR such as training and development to help with career development.

While technology has eliminated a number of inefficiencies across the HCM areas of recruiting, performance management, and training and development, among others, it is clear that human touch remains important. How we use technology and employ it in overall business designs and strategies determines whether an organization will be successful in developing its human capital management and ultimately growing its business.

“Sentiment and semantic analysis unveils that human resource practitioners still do not have clear strategies that complement technology.”

> “While every technology deployment comes with its own unique set of challenges, the TEC process was more efficient from the perspective of both cost and time.”
>
> **—Bob Lloyd, Manager, Business and Logistics Solutions, Flakeboard Ltd.**

TEC’s Enterprise Software Selection Services

Technology Evaluation Centers (TEC) is the impartial advocate for the enterprise software purchaser. TEC helps companies like yours choose the enterprise software solutions that best meet their unique business requirements. Our selection services can help ensure the success of your next software selection project—quickly, impartially, and cost-effectively.

TEC’s approach combines comprehensive research, industry-leading decision support technology, a proven selection methodology, and the expertise of our analysts. We can help you

- bring objectivity and transparency to the selection process,
- choose the solution that best satisfies your specific business requirements,
- reduce the cost, risk, and duration of your selection project, and
- offer rational financial justifications, and provide a clear audit trail.

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Vendor Notes

- Deltek: Deltek Becomes Player in Talent Management Market with Acquisition of HRsmart
- Elysian Field Software: Elysian Field Software to Bring HCM and FSM Support in the Cloud for Service Organizations
- Epicor: Epicor Releases Epicor HCM 5.8
- Kronos: Kronos Readies Workforce Ready Winter 2015 Release
- Kronos: Analytics and R&D Take the Spotlight at KronosWorks 2014
- NetSuite: Magmic Is Game for NetSuite's TribeHR HCM System
- Ramco: Ramco to Include More HCM Users via SMS
- Saba Software: Saba's @Work 2014 Global Summit—The Impact of Happiness
- SAP: Cirque du Soleil and SAP Join Hands to "Run Simple"

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Get detailed, customizable software feature lists for your HCM/HR software evaluation.

- Human Capital Management
- Human Resources (HR) Management System
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Use TEC's online software evaluation system, TEC Advisor, to see how HCM software solutions address your company's unique business requirements. **Start your online evaluation now**.

Casebook

Case Study

BambooHR Customer Success Story

BambooHR Helps Beans & Brews Consolidate and Streamline Processes and Paperwork

Beans & Brews has a homegrown recipe for creating exceptional customer experiences. But to grow, it needed BambooHR for sharing accurate employee information and reports.

The Company

The Laramie family established the first Beans & Brews Coffee House in 1993 in Salt Lake City. Today, Beans & Brews has 25 locations throughout Northern Utah and has created a franchise opportunity to expand the business into other markets. From the beginning, the company's focus has been an unwavering commitment to the principles of quality, freshness, and integrity.

The Challenge

The VP of operations is responsible for writing and implementing best practices to ensure an exceptional in-store customer experience. But with a growing number of stores, she often spent half her day manually collecting and compiling employee information. Paperwork had to be filled out, copied, and emailed from multiple store locations. Missing information sometimes required store visits to gather. Even the most straightforward tasks, such as employee evaluations, were difficult to plan and coordinate.

The Solution

An integrated, affordable, flexible human resources information system (HRIS) that scales.

- Easy to use
- Streamlined process
- Shared visibility between store locations and the corporate office
- More time to focus on growing the business

About BambooHR

BambooHR is an online HR software service for small and medium-sized businesses. As the price/performance leader, BambooHR makes it easy and affordable for small and growing companies to transition from spreadsheets to a human resource information system (HRIS) that adapts to their changing needs. Clients make more time for meaningful work by using BambooHR's applicant tracking system (ATS) and HRIS to manage the employee lifecycle.

The information BambooHR provides gives HR a seat at the table by giving executives visibility into strategic indicators like employee turnover and retention. BambooHR is a software as a service (SaaS) application, so businesses only need to pay a low monthly subscription based on the number of employees and a one-time implementation fee. There's no extra charge for customization, multiple administrators, enhanced features, support, or inactive employees. www.bamboohr.com

> "I grew up in the business, starting out as a barista at age 17, so I'm passionate about creating processes that ensure a quality customer experience. Before BambooHR, I'd sometimes spend half of my day chasing paperwork and missing pieces of information. Now I have time to standardize what I've learned for our training program, so new associates can be successful."

Sarah Blue, VP of Operations,
Beans & Brews

bamboohr™

Case Study

Cornerstone OnDemand Customer Success Story

Retaining Employee Culture amid Company Growth

Headquartered in Fort Collins, Colorado, New Belgium Brewing is the third-largest brewer of craft beer in the nation and the eighth-largest brewery in the United States. An innovator in the brewing world with a strong emphasis on people and culture, New Belgium is recognized as one of Outside magazine's "Best Places to Work" and one of the Wall Street Journal's "Best Small Businesses."

New Belgium is building a new brewery in Asheville, North Carolina, while simultaneously expanding its national sales force. The growth and expansion of the business has created the need for a more streamlined—and cost-effective—approach to talent management. "Growth is challenging. That's why a lot of companies fail. Growth is even harder in a company that has a soul and a culture," said Christine Perich, chief financial officer (CFO) and chief operating officer (COO) for New Belgium. "During our expansion, we need to be able to keep employees connected and engaged, deliver training across the country, and make more data-driven decisions."

Industry: Manufacturing
Region: United States
Live: Since 2012
Employees: 500
Business impact: Find the right candidates faster, enable self-directed learning, save time and money, make data-driven decisions

Why Cornerstone

In 2012, New Belgium turned to Cornerstone's integrated, cloud-based talent management suite. With the Cornerstone Learning Cloud, Performance Cloud, and Recruiting Cloud, New Belgium found a configurable system designed to help the company facilitate online learning, streamline performance management, better engage employees, and identify and hire the right people. Because the Cornerstone system is highly scalable, the system also will easily expand with the company as business and workforce needs increase.

The Results

Find the right people for the right jobs, in less time. With the Recruiting Cloud, New Belgium can find candidates who are both a skill and cultural match much faster. "We're fortunate to get 200 to 300 applicants for any job opening. Our challenge is how we get through those applicants to find the people who really want to work here and self-select

into our culture," said Jennifer Briggs, HR director for New Belgium. "The Recruiting Cloud enables us do that in less time, which means we have more time to engage with the right candidates."

Build a self-directed learning community. With the Learning Cloud, New Belgium can enable team members to pursue a variety of learning interests, at their convenience. The ability to offer blended and experiential learning opportunities has been instrumental in increasing engagement, particularly among Millennials. "Our challenge is to create communities and learning opportunities that are accessible nationwide," said Jennifer Briggs, New Belgium's HR director. "With Cornerstone, we can connect people through community building and learning opportunities and put coworkers in charge of their own learning. This is very empowering."

Save time and money on training. The Learning Cloud allows New Belgium to save resources while simultaneously improving the training experience. "Previously, to help a coworker develop new skills, I would have to send coworkers to an expensive class that would take them out of their job for three days," said Andrea Dimatteo, learning and organizational development for New Belgium. "With the Learning Cloud, coworkers can engage in self-directed learning on their own schedules. We're saving money and time and seeing even better training outcomes."

Make data-driven decisions. With Cornerstone, New Belgium has access to comprehensive performance and training metrics. These have been key to improving decision making. "Cornerstone is helping our leaders move beyond gut-level decision making. Managers can access performance data and instantly see their team's story," said Greg Churchman, New Belgium's talent sage. "Cornerstone's tracking and reporting capabilities are helping us transition from believing to knowing."

Reduce time to hire. The Recruiting Cloud allows New Belgium leaders to reduce onboarding time through the creation of talent pools. "We may find a great candidate who isn't the right fit for a current job opening," said Churchman. "With Cornerstone we can continue to build relationships with these candidates so when a job comes up that is a good fit, we have great candidates that have already been vetted."

"With the Learning Cloud, coworkers can engage in self-directed learning on their own schedules. We're saving money and time and seeing even better training outcomes."

Andrea Dimatteo, Learning and Organizational Development, New Belgium Brewing

About Cornerstone

Cornerstone OnDemand is a leader in cloud-based applications for talent management. Our solutions help organizations recruit, train, manage and connect their employees, empowering their people and increasing workforce productivity. To learn more, visit csod.com.

Cornerstone ONDEMAND *Empowering People*

Case Study

FinancialForce.com Customer Success Stories

Ahead Streamlines Processes, Increases Transparency and Collaboration with FinancialForce

Ahead is purpose built to enable companies to understand and take advantage of today's revolutionary technologies. These technologies drive the next-generation data center, which improves agility, availability, and responsiveness, and takes out cost. Our technologists, consultants, and sales team help clients evaluate the potential technical, operational, and financial benefits of these innovative solutions. Where the benefit is adequate, we work to properly architect, procure, and deploy these solutions in a timely and effective manner.

Business Issues

- Information not easily accessible
- Management unable to see into sales funnel and view project status
- Disconnect between management and engineers in the field

Project Results

- More granular information around projects and resources—e.g., how much time a person is spending on a single task
- Time card and expense tracking is easier
- High level management buy-in
- Processes streamlined
- On-demand real-time reporting has led to a reduction in headcount
- Chatter has increased collaboration between all departments by 20%
- Email volumes have been reduced by 15%
- Improved customer service as sales can see project status after sale is made

Watch this video for more information on Ahead's success story with FinancialForce.com.

> "We needed a system that would grow with us and save us time and money. The efficiencies and cost savings we have realized as a result of FinancialForce PSA have enabled us to do this."
>
> Jocelyn Garrison, Financial Analyst, Ahead

Company: Ahead

Products in Use: FinancialForce Revenue Recognition; FinancialForce PSA; FinancialForce HCM

Company size: Medium

Previous system: Tenrox

Location: Chicago, United States

Industry: IT services

Pandora Gains Better Integration, Flexibility, and Process Simplification in the Cloud with FinancialForce

Launched in 2005, Pandora is the leading Internet radio service, with more than 70 percent market share among the top 20 Internet radio service providers. Its dramatic growth is due to an innovative model of identifying the "genetic code" of every music track—over 400 unique attributes—and using this code to generate playlists with similar characteristics to a user's favorite song or artist. In this way, Pandora enables people to enjoy music they know and discover new music that they'll love. Pandora went public in June 2011 and today employs 662 people nationwide, with annual revenues topping $275 million (USD). It had 65.6 million active listeners as of the end of January 2013. Most listeners use the ad-supported service for free.

In 2010, Pandora Radio began a journey to move its entire information technology (IT) infrastructure into the cloud to create an agile, sustainable platform for future growth. Integral to the success of that strategy were cloud-based human capital management (HCM) and accounting solutions.

Company: Pandora Media

Products in Use: FinancialForce Accounting; FinancialForce Billing; FinancialForce HCM

Company size: Medium

Previous system: QuickBooks

Industry: Media (broadcast, publishing, Internet)

Business Issues

- Inability to report accurate, up-to-date financial information
- Disparate systems running independently of each other causing huge complexities
- Existing workforce processes and systems were insufficient to support rapid growth
- No central system of record for workforce data

Project Results

- Finance system fully integrated with CRM data
- All business processes greatly simplified using the same infrastructure
- Powerful reporting and search functionality
- Trusted financial data available for company earnings calls at the touch of a button
- Integration with procurement system has simplified supplier transactions
- Flexibility for rapid change needed in fast-paced marketplace
- Unified HCM platform serves as system of record for all other cloud applications, including Salesforce.com
- Introduced social, mobile, and advanced business intelligence (BI) capabilities

- Centralized system of record promotes consistency across broader cloud ecosystem and serves as a platform for growth
- Improved process automation, efficiency, and self-sufficiency
- Better decision support through improved business insights
- Improved collaboration and accessibility to social and mobile support native to the platform

About FinancialForce.com

FinancialForce.com delivers ERP at Customer Speed™. Built on the Salesforce1 Platform, FinalForce ERP equips customer-centric businesses with a unified cloud platform and all the applications necessary to grow both the top and bottom line. Our Financial Management, Human Capital Management (HCM), Professional Services Automation (PSA), and Supply Chain Management (SCM) apps allow businesses to increase the speed in which they operate and be more responsive along every touch point of a customer's journey. Founded in 2009 and headquartered in San Francisco, www.FinancialForce.com is backed by UNIT4 and www.salesforce.com.

To learn more please follow FinancialForce.com on Twitter: @FinancialForce, visit FinancialForce.com's Facebook page or www.FinancialForce.com.

> "Pandora recently did its first ever earnings call as a publicly traded company and the numbers came direct from FinancialForce, so we could not be more thrilled with what we have managed to do."
>
> Mark Brennan, Senior Director Information Services, Pandora

Case Study

HRIZONS Customer Success Story

Phoebe Putney Health System (PPHS): Partnering with HRIZONS® and Oracle® Taleo to Realize an Evolving Vision of Integrated Talent Management

Client Overview

Phoebe Putney Health System (PPHS) is a network of hospitals, family medicine clinics, rehab facilities, auxiliary services, and medical education training facilities serving the communities of southwest Georgia. Founded in 1911, Phoebe Putney Memorial Hospital is a 443-bed teaching hospital and a regional center for cancer treatment, cardiac medicine/surgery, gastrointestinal disease, and neuroscience. It is one of Georgia's largest comprehensive regional medical centers.

Project Challenge

The Phoebe leadership team has had a longstanding vision of integrated talent management (ITM) as part of their organizational mission. Their human resources leadership team selected HRIZONS as a consulting partner with the knowledge of the healthcare industry, integrated talent management, and the Oracle Taleo technology platform to help translate the Phoebe vision into an operational, scalable, and sustainable technology platform. The key issues addressed during this strategic partnership included:

- Design a goals management solution that would help align performance in the organization with the strategic pillars of the Phoebe strategic plan.
- Design and implement a job description management solution that would be compatible with the Oracle Taleo platform in support of its talent management, human resources, and Joint Commission compliance needs.
- Oversee the solution design and implementation of a talent management platform—performance management, recruitment, onboarding/offboarding, development, career management, talent reviews, succession planning, and reporting/analytics.

Solution Design and Project Management

Design a goal management solution

HRIZONS consultants met with the strategic planning committee and the human resources leadership team to understand the current process of strategic goal setting at the executive level and how that could drive goal alignment and performance throughout the organization. Considerations of organizational readiness and change management determined the scope of the initial rollout, with a focus on establishing alignment of individual goals with strategic pillars and the cascading of departmental goals with well-defined measurement criteria as the first steps. The longer term plan includes the management of strategic business goals and initiatives at various levels of the organization, with linkages to individual goals at all levels of the organization.

Design and implementation of a job description management solution

Phoebe leadership recognized the central importance of high quality job descriptions for all of their talent management processes—especially for performance management and recruiting. They enlisted the help of the HRIZONS team to manage the project that would define a standardized job description template, facilitate the re-write of over 700 job descriptions, and import the revised job structure and content into Oracle Taleo to support their integrated talent management strategy using competency-based job descriptions.

The job description management (JDM) project has been the most ambitious and innovative initiative of the Phoebe engagement and has provided a leading edge solution for integrated talent management leveraging competency-based job descriptions within the Oracle Taleo technology platform.

Ambitious and Innovative

A re-write of over 700 job descriptions was managed using HRIZONS's proprietary HRZ®JDMS job description solution and the completed job library was consolidated and imported into Oracle Taleo's competency and certification libraries, to build out job roles and job requisition templates in support of the Oracle Taleo platform. This provided employees access to job descriptions within the Oracle Taleo platform in support of career management and development, and also provided employees with access to a full library of job descriptions in PDF format made accessible to employees via Phoebe's network. In addition, an ongoing job description management process was implemented to facilitate revisions and the creation of new job descriptions, followed by deployment of the newly developed HRZJDMS solution that further automates and improves the job description management processes.

> "Our partnership with HRIZONS is helping us realize our vision of a truly integrated talent management system. We're building the infrastructure to support our immediate and long terms goals for talent acquisition, development, retention, and superior performance. It's great to see the vision becoming a reality!"

William Peterson,
Corporate Director of Human Resources,
Phoebe; Chief Project Manager,
HRIZONS/Oracle Taleo projects

A customized form and workflow to manage employees verifying job descriptions has also been designed by the HRIZONS team to support Joint Commission compliance requirements. The solution became available for employees to view their job descriptions in Oracle Taleo, and will support focal performance reviews to evaluate employees using job-specific behavioral, functional, and technical competencies that represent desired performance expectations and outcomes. This initiative was designed to drive improved organizational performance and enhance employee engagement as it creates a tangible link between real-life, well defined job expectations and performance evaluations and resulting development plans.

Solution Design and Implementation of Other ITM Modules

Using HRIZONS 4 LENSES APPROACH® (process, content, technology, analytics) and HRIZONS thought leadership, Phoebe continues its integrated talent management initiative as it fully deploys and optimizes the Oracle Taleo platform, with the emphasis on system and process integration and ease of use for end-users. Currently recruitment, onboarding, offboarding, talent reviews, and succession planning are all being implemented, with the design of custom reports to support decision making in all of these key areas.

> "The HRIZONS team has been there at each step to make sure our talent management projects are moving forward and that everything is working as designed. They're a great help."
>
> Misty Jones,
> Senior Compensation Analyst, Phoebe;
> Project Implementation Lead,
> HRIZONS/Oracle Taleo projects

Key Success Indicators

HRIZONS and Phoebe have worked closely together using a collaborative approach to move the organization towards its vision of an integrated talent management solution. To date, key success indicators have included:

- Strong project sponsorship from the CEO, executive talent committee, and HR leadership
- Phoebe core team execution of the build phase of the JDM project, including coordination of approvals with line managers and reviews and updates to job descriptions as needed.
- Ongoing project management and thought leadership from the HRIZONS team—working closely with the Phoebe human resources team and the Oracle Taleo organization to introduce new processes and system functionality and to coordinate solution design specifications, data import processes, reporting design, and general system support.
- HRIZONS HRZJDMS job description solution and methodology to streamline the rewrites and data import of the job description library into Oracle Taleo, including job description writing guides, quality checks, competency library streamlining, data mapping, and job content integration with the Oracle Taleo platform.

About HRIZONS

HRIZONS® is an integrated human capital management (iHCM) solutions and consulting firm designed to make your organization more competitive and successful by optimizing processes for attracting, deploying, engaging, and developing your talent.

Smarter Compensation Enables a Smarter Workforce

The connection between compensation and career advancement

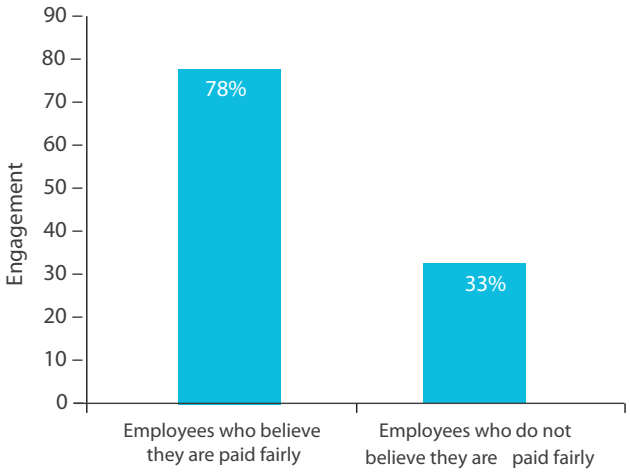
In a recent IBM study (IBM, 2012), chief executive officers (CEOs) identified human capital as a top source of sustained economic value. For many organizations, rewarding people is one of the organization's largest investments, accounting for up to 70 percent of operating expenses (Bersin, 2009). Given the value of this asset and the cost of maintaining it, organizations seeking a true return on their investment in people must develop a deep competency in compensation and rewards, not only to help ensure packages that attract, retain, and engage key talent, but also to help ensure that budget is optimized in alignment with the organization's business strategy.

A "Smarter Workforce" is one in which an organization uses behavioral science, social technology, and deep analytics to match people with the work they were meant to do, and provides both tools and environments that drive collaboration and harness the organization's collective capabilities. In a world with an increasingly empowered workforce, it is committed to replacing organizational hierarchies and narrowly defined jobs with a more dynamic and responsive definition of work, creating a more meaningful employer-employee value exchange that can result in even better outcomes for both.

Compensation and rewards, like other areas of human resources (HR), must evolve to support a smarter workforce, but can also be an important part of its foundation.

Attract, engage, and motivate

Research shows that compensation is one of the top reasons people join and leave organizations, and fair pay is one of the things employees seek from leaders (IBM, 2012). Finding the right candidates, those who truly fit the organization from both a skills and culture perspective, is a critically important task that can be rendered meaningless if those candidates do not join because they get better offers elsewhere. Similarly, investments in talent are wasted when employees depart for more competitive salaries. Compensation programs and practices are important to ongoing engagement as well. Employees who believe they are paid fairly are nearly twice as engaged as those who do not and belief in fair pay comes from understanding how pay is determined, how to optimize it, and the belief that pay is connected to performance (see figure 1). In essence, simply paying competitively is not enough; to keep the workforce optimally engaged, organizations must also help ensure that employees and managers understand pay and rewards.



Source: WorkTrends 2012. Perception is Reality: The Importance of Pay Fairness to Employees and Organizations.

Figure 1: Compensation and engagement

Invest, do not spend

A smarter workforce can drive better business outcomes, but the cost of acquiring and maintaining that workforce can easily consume the dividends it pays. Overpaying thousands of employees by thousands of dollars can cost an organization millions. Losing top performers due to underpayment can have an even greater impact via replacement costs and lost productivity. Insight into how compensation dollars are spent, across the organization, is critical to effective management of the cost of talent. Are we competing as aggressively as we need to for jobs that are mission critical? Are we falling behind in fast-moving pay markets? How are we paying low versus high performers? As the labor market

changes in different ways across the globe, pay practices must adapt or the organization's most critical asset is at risk. When compensation dollars are viewed as an investment rather than an inevitable and inflexible cost of doing business, the organization can build and maintain a smarter workforce more profitably.

Top three reasons employees join organizations	Top three reasons employees leave organizations
The job itself	Work/life balance
Compensation benefits and recognition	Compensation benefits and recognition
Development and growth opportunities	Training

Source: WorkTrends 2012. Perception is Reality: The Importance of Pay Fairness to Employees and Organizations.

Figure 2: Top three reasons why employees join and leave organizations

Compensation in the era of social, mobile, empowered employees

Virtually all markets have, at their heart, an exchange of value. Although it is our vision that work can evolve to a component of an individual's identity, paying fairly and competitively will almost always be important, whether via a fixed salary for a defined job, or via a more dynamic reward based on skills or output. Employees and job seekers typically have more access to data than ever before and approach the employer-employee value exchange as informed consumers who believe they deserve fair and competitive rewards. In the pre-Internet days it was rare for employees to have insight—beyond anecdotal—into the typical pay for a given job. The reality of paper binders and CD-ROMs, carefully guarded by compensation and HR teams, made physical access to compensation market data nearly impossible for those outside of HR. As the Internet exploded in the late 90s, companies like Salary.com began to arm employees not just with data, but with high quality data on typical salaries for many common jobs. While employees did not always understand how to use this data, it shifted the balance of power in discussions about pay in a way that caused great discomfort among corporate HR practitioners. Employers faced a new type of scrutiny on the compensation front as employees increasingly understood their worth. HR professionals faced a new challenge: help managers and employees have meaningful dialogues about pay.

In a smarter workforce, where work evolves to a more "customized" package of skills and outcomes that do not necessarily conform to standard benchmarks, employees and job-seekers will likely demand an even more precise reconciliation of work with rewards. Although pay itself may be redefined from a structural perspective, it will likely still, at its core, be a huge contributor to each individual's ability to lead the life he or she wishes to

live. To make the smarter workforce a reality, HR and compensation teams will need, yet again, to raise the level of conversation about pay and how it connects to contributions. The demand for transparency will likely increase.

Organizations that seek to build a smarter workforce will need technology solutions that enable flexibility and provide insight in both the design and administration phases of compensation. If managers are to be facilitators rather than coaches, they will need a high degree of proficiency in discussing rewards with employees. Compensation professionals will need to spend much of their time consulting with the organization and working with managers to raise their level of dialogue on compensation. Keeping rewards competitive may become more of a moving target, and companies who remain rooted in spreadsheet-based processes will likely be left behind.

Big data and analytics

As the chief human resources officer (CHRO) takes the proverbial seat at the table, he or she must take responsibility for managing not just the organization's most critical, but also its most expensive, investment. However work evolves, spend on employee compensation will likely continue to dominate the financials of the majority of organizations, and the deep analysis of markets, current practices, and modeled scenarios arm the CHRO with an understanding of the levers that can be pulled to help create a more effective rewards strategy in the budget. Compensation analytics will typically move from the historical to predictive, from standards like "What is the cost of overpayment?" and "What is the cost of replacing an employee who leaves for a bigger salary?" to future-focused questions like: "What impact will small shifts in reward mix have on attrition?" and "At what point will increased rewards show diminishing returns for retention and engagement?"

A new definition of work

Over time, work has evolved from a means of providing basic needs to something that grants dignity, status, and satisfaction. Work will eventually become a means of establishing identity – the work you do will, in part, define who you are. It is only possible to redefine work, however, when the core of what work enables and accomplishes remains true. Work cannot evolve to an element of personal identity if it does not first and foremost continue to fulfill its underlying duty as a provider of basic human needs. Work can be about identity, but it will almost always be about survival. While employees may increasingly consider work as part of self-actualization, there will almost always be an extent to which tangible rewards – more notably pay and benefits – must be competitive. An organization's ability to redefine work as dynamic and responsive will likely depend on its ability to make the meeting of needs a foregone conclusion and to design rewards programs that are both flexible and scalable in virtually any context.

In addition, compensation and rewards will likely continue to play a critical role in the career advancement picture. Employees generally expect that to some extent, as they advance in their careers, they can acquire more rewards. In a well-designed compensation program, there is a logical but nuanced connection between pay and career level. Keeping this connection will likely be critical as work is redefined. The relationship of fixed and variable pay may change, and new pay vehicles may develop, but employees must still see a clear connection between career advancement and pay level. In order to develop and maintain this connection, HR and compensation professionals will need exceptional visibility into market trends, internal mobility, and correlations between pay and downstream outcomes like engagement, productivity, and intent to leave.

Smarter compensation enables a smarter workforce

When organizations excel at the fundamental elements of hiring, rewarding, engaging, and keeping the best possible people, they develop a foundation on which to begin a smarter workforce journey and accelerate results through the use of behavioral science, collaboration technology, and data analytics. A measured and mindful approach to employee compensation helps ensure a solid framework on which to redefine work, helps employees find meaning in what they do and wisely manages the organization's most critical investment.

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For more information

To learn how to build a smarter workforce, visit: ibm.com/social-business

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Case Study

Infinisource Customer Success Story

Employee Administration Simplified with Infinisource

Company: Shared Imaging

Solution: iSolved Comprehensive

Company Size: 150 Employees

Company

Shared Imaging opened its doors in 1987, offering CT, MRI, and PET/CT equipment to hospitals and health care providers for clinical, operational, and financial health care solutions.

Providing equipment (flexible assets) from such major manufacturers as GE, Philips, and Siemens, Shared Imaging offers customizable imaging solutions for interim, permanent, and mobile solutions and leasing options ranging from two weeks to four years.

Challenge

Shared Imaging had been misled by a previous provider, who promised to provide payroll software that could calculate weighted overtime, an essential computation for the business. Mobile technologists' wages are measured using two different methods. Hourly wages are paid for the actual drive time to the imaging site, and once scanning begins, the technologists become eligible to earn their full wages.

Unfortunately, the HR department became burdened by working with endless, tedious spreadsheets. Shared Imaging's other critical requirement was employee document storage. Because the company is joint commission accredited in ambulatory care, concise documentation must be maintained for all employees who have any patient contact. A system was needed to manage and maintain license certifications, updated vaccinations, and other mandatory documents.

Solution

Shared Imaging was impressed with iSolved's single-data system and made the switch to the new cloud-based framework. The payroll module could now calculate weighted overtime for over sixty technologists, and that meant good-bye to spreadsheets.

iSolved's Report Writer enabled the document upload feature to retain copies of employee licenses, annual vaccine status, and other mandatory documentation. Employee administration became simplified by utilizing a carrier feed to transmit enrollment data directly to insurance companies and other benefits administration providers.

About iSolved

iSolved is Infinisource's comprehensive human capital management solution for payroll, time, benefits, and HR that manages an employer's most important asset—its people. The cloud-based platform is delivered through elite, regional payroll providers who provide best in class service to their clients. This unique approach gives small to midsize employers access to a cutting edge HCM solution, while retaining the local service relationship they prefer. For more information, visit www.infinisource.com

> "By using a combination of TimeForce and iSolved, our new system meets our specific needs. Infinisource went above and beyond to make it work, and now it's a seamless process. iSolved is our entire world!"
>
> Marian DeGroot, Vice President
> Human Resources, Shared Imaging

iSolved®

INFINISOURCE

Case Study

Infor Customer Success Story

Infor Helps Hillsborough County Public Schools Enhance Teacher Effectiveness

About the organization

Hillsborough County Public Schools, headquartered in Tampa, Florida, is the eighth-largest school district in the United States and employs approximately 15,000 teachers. The district's 192,000 students attend 248 elementary and secondary schools. Additionally, there are 60 learning centers in the district.

Background

Hillsborough County Public Schools is not a typical school district, based on size alone. Of necessity, the IT system for such a large district will also not be typical of other districts. The size and complexity of staffing, managing, and administering such a district puts it beyond the scope of most other school districts' IT systems. Hillsborough's system is comparable to those found at major corporations in terms of technology and software sophistication.

The plan

Hillsborough has long been a champion of monitoring and evaluating the performance of its students and developing strategies to improve that performance wherever possible. Early on, district officials realized that a key relationship exists between student performance and teacher effectiveness. As a result, they began to formulate a strategy that centered on observing, appraising, and enhancing teacher effectiveness. They created a plan to institute the Empowering Effective Teachers Project, involving five core initiatives:

- Measuring teacher effectiveness
- Performance-based career ladder
- Next generation pay-for-performance

- Programs and initiatives for high-needs students
- Apprentice teacher acceleration program

There were also five enabling initiatives:

- Enhanced recruitment and dismissal
- Strengthen school leadership
- Performance management
- Integrated instructional toolkit
- Change management and communications

Fortunate coincidences

Coincidental to the development of this plan, an event occurred that will affect the district in ways yet to be determined. The Bill and Melinda Gates Foundation chose Hillsborough as one of 20 school districts invited to submit to the foundation talking points related to student performance issues. The outcome of this invitation led to Hillsborough becoming one of ten districts chosen to submit formal proposals to the foundation. Four of those proposals then competed to become the sole winner of a sizable grant to finance the proposed project. Hillsborough was one of those four.

As these events were unfolding, Hillsborough was upgrading its system software to include the Infor™ Talent Management Suite with these applications:

- Infor Global Human Resources, which will help reduce time required to manage and maintain core HR processes, helping free time for more focus on core talent management functions
- Infor Talent Acquisition to help identify, attract, and engage high-potential employees and find more talent like them
- Infor Goal Management, which aligns employee goals with core business objectives
- Infor Performance Management, which will use data benchmarks and key performance indicators to help Hillsborough better assess teacher competency against job profiles, which can ultimately help identify, develop, and retain top performers
- Infor Compensation Management, which will help Hillsborough build upon its current teacher compensation system, based on tenure and credentials, to a more efficient and modern career ladder model
- Infor Development Planning, which contains tools to design training plans to help ensure future career development opportunities
- Infor Succession Management, which will assist the district in addressing the high attrition rate prevalent among new teachers by helping to identify teachers at risk for leaving and to locate teacher candidates with competencies that could fulfill future vacant or successor roles

It all comes together

Discussions of the opportunity presented by the Gates Foundation took place throughout the district. One of the individuals involved in some of the discussion was Joe Cochran, manager of IS and process improvement for the district. As such, he was also intimately familiar with the software upgrade taking place. He noticed a distinct correspondence between what Hillsborough was proposing to the Gates Foundation and what the Infor Talent Management applications could provide. The mapping between the two was incredibly close.

After some meetings with district management, it was decided to use these software capabilities as highlights in the proposal to the Gates Foundation, demonstrating that the plan not only was logical but could be carried out and effectively sustained over the long term. In November of 2009, a $100 million (USD) grant was awarded to Hillsborough to pursue its plan over a period of seven years. To date, this is the largest grant ever awarded to a school district by the Gates Foundation.

> "Hillsborough County Public Schools could well become a national model for addressing the issues of both teacher effectiveness and student performance."

Some of the players

The award was the culmination of a concerted effort by many groups. During the time leading up to winning the grant, focus groups discussing the plan were held for everyone involved. Parents, students, support staff, the community at large, and business leaders were all asked for their input concerning the plan. The most important group involved both the district officials and union officials.

Union officials were brought into the effort early so that they could decide whether or not the proposed changes in the district's plan would be acceptable to the teachers they represented. In fact, the union became a champion of the plan, meeting with its members and constituent teacher groups to explain how teachers would benefit from the proposed changes. Throughout these meetings, Infor representatives provided all the technology information needed to describe how the plan could be carried out and, most importantly, sustained using Infor Talent Management.

The plan becomes a project

The project launched in 2010 and the earliest activity funded by the grant was an intensive effort to get teachers and principals trained in the use of the relevant software from Infor. The project calls for some teachers to be chosen as peers and mentors to other teachers so these individuals received specialized training during this time.

The Empowering Effective Teachers Project is currently active in the teacher observation/evaluation step of the process. Meetings have been held between teachers and observers prior to the actual classroom observations taking place, and the teachers have also been meeting with their peers and mentors. So far, the feedback from teachers has been extremely positive as they learn more about the objectives of both the observations and eventual evaluations and their connection to career development and compensation.

The rest of the project will roll out and, as a result, Hillsborough County Public Schools could well become a national model for addressing the issues of both teacher effectiveness and student performance. Infor is extremely proud to have played a major role in helping to turn this plan into a project and will continue to do all it can to support Hillsborough in meeting the project's objectives.

About Infor

Infor is fundamentally changing the way information is published and consumed in the enterprise, helping 73,000 customers in more than 200 countries and territories improve operations, drive growth, and quickly adapt to changes in business demands. To learn more about Infor, please visit www.infor.com.

Demystifying HCM Talent Analytics: Turning Data into Predictive Team Fit Insight

How to make better business decisions about people to build a better business

Human Resources (HR) is a people- and partnership-based venture and information is its currency. To date, however, very little of that currency has been spent outside of HR. In the world of big data, HR has remained on the sidelines, keeping a low profile while other organizational entities, such as sales, marketing and finance, have boldly harnessed data for both short term analysis and a predictive view of the future.

Times are changing. Now HR has the opportunity to follow the same path, but with a broader benefit to the greater organization. With the rise of sophisticated next-generation talent management tools powered by the cloud, data can be translated into a real-time view of talent and performance across an enterprise, adding speed and accuracy to team building, employee career mapping, goal setting, and individual development.

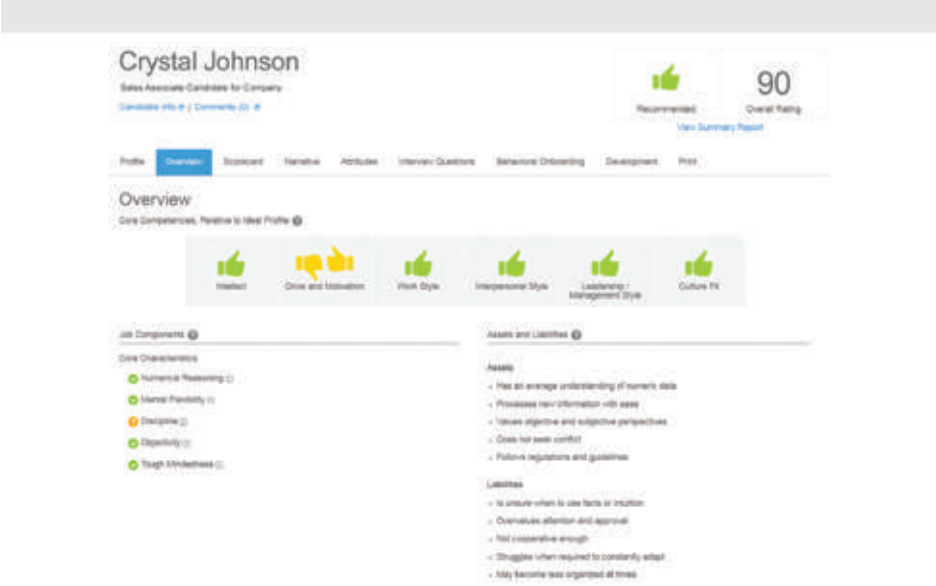
> "With the rise of sophisticated next-generation talent management tools powered by the cloud, data can be translated into a real-time view of talent and performance across an enterprise, adding speed and accuracy to team building, employee career mapping, goal setting, and individual development."

Aligning people with strategy: It starts with an analytical approach

The concept of talent management has evolved from purely an HR function into a much broader concept. Organizations can now unlock the potential of their workforce at every step in the employee life cycle, from talent acquisition, to onboarding, to career growth management. New behavior assessment tools have also evolved, giving business leaders a direct line of sight into organizational, team, and individual employee goals, in order to align people with strategy.

Strategies, however, can't execute themselves. It takes employees who are engaged and embedded in an organization's mission and values to achieve expected business outcomes. By using an analytical approach to assess team fit and job match throughout each individual's employment life cycle, a business can build an agile workforce that is consistently capable of high-value execution.

However, the intentional application of talent to achieve business goals relies on the ability to cut through the complexity of analytics to focus on what really matters—people. The right technology can demystify the process by doing the work for you, crunching numbers behind the scenes to give you the talent analysis you need to make the correct people decisions at the right time—decisions that are based on knowledge and insight, not instinct or opinion.



HCM talent analytics—overview

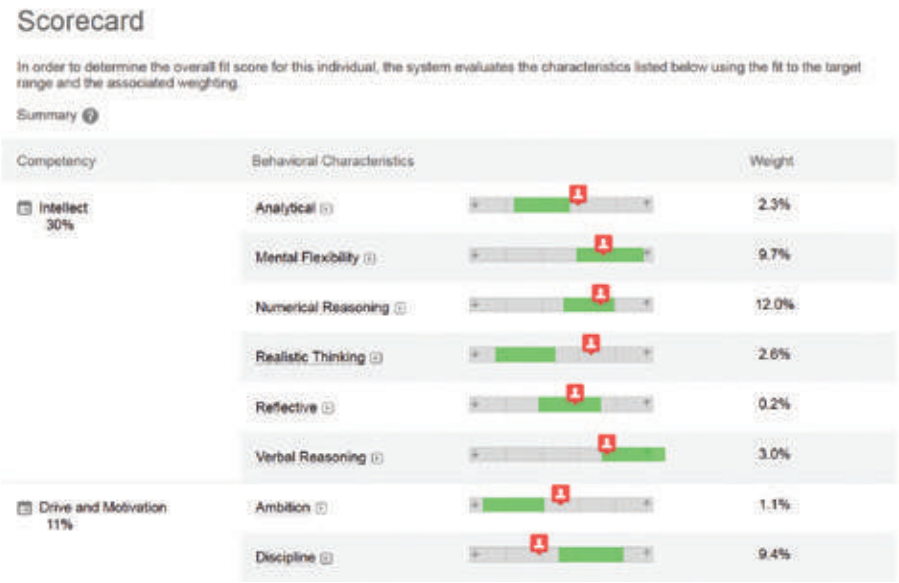
The right tools at the right time: Build a talent framework that drives results

The correct implementation of the right analytics tools at the right time can lead to greater engagement, better retention, and the assurance that a business has multiplied its chances of having high-potential resources matched to the right job today, as well as in the future.

For example, when coupled with skills assessments, the use of behavioral analysis tools at the talent acquisition stage can help an organization hire talent that fits both the

requirements of the job and the culture. And, just as importantly, behavioral assessments and behavioral data can be used to evaluate individuals for roles and assignments on an existing team. In areas like sales, product development, programming, and marketing, team cohesiveness and effectiveness can be critical to success, because the performance of the group is more important than the attributes of any one individual.

The assessment of current employees is a necessary factor in team development, because shared values can support a team approach and their absence can undermine its mission and success.



HCM talent analytics—scorecard

Talent management tools can also be put to work on behalf of existing employees to map capabilities and key strengths, and identify areas of opportunities. This not only drives individual and team effectiveness, it also aids in collaboration and buy-in to organizational goals. The right HR software can make this data visible to the functional areas of a business to facilitate employee growth and learning development and to identify top performers. When talent management analytic tools are used to determine "best team fit," managers throughout the organization can make more informed talent decisions and deploy talent when and where it is needed, quickly and efficiently.

The bottom line: The analysis of workforce data leads to predictive insight. And, it can help create an internal talent framework that can be layered over an organization's business strategy in order to achieve both short-term and long-term results. HR is sitting on a wealth of people-knowledge. It's time to share the wealth and put it to work for everyone.

The rise of big data: The cloud-enabled race is on

The rise of big data is pressuring HR to keep up with the rest of the world. A 2014 survey showed that just 14% of HR departments are currently using data analytics. That compares to 77% of operations organizations, 58% of sales organizations, and 56% of marketing organizations.[1] The race is on for HR to catch up, fueled by a new generation of web-based technology tools. The benefit of using cloud-based talent analytics includes:

- Cloud-based tools are faster to implement and require fewer IT resources, and multiple tools can be linked into one integrated system
- Cloud storage makes workforce intelligence available and accessible whenever and wherever it is needed
- A web-based system makes workforce management continuous—it doesn't have to be tied to a physical workstation or network

HR has a story to tell: It's time to tell it

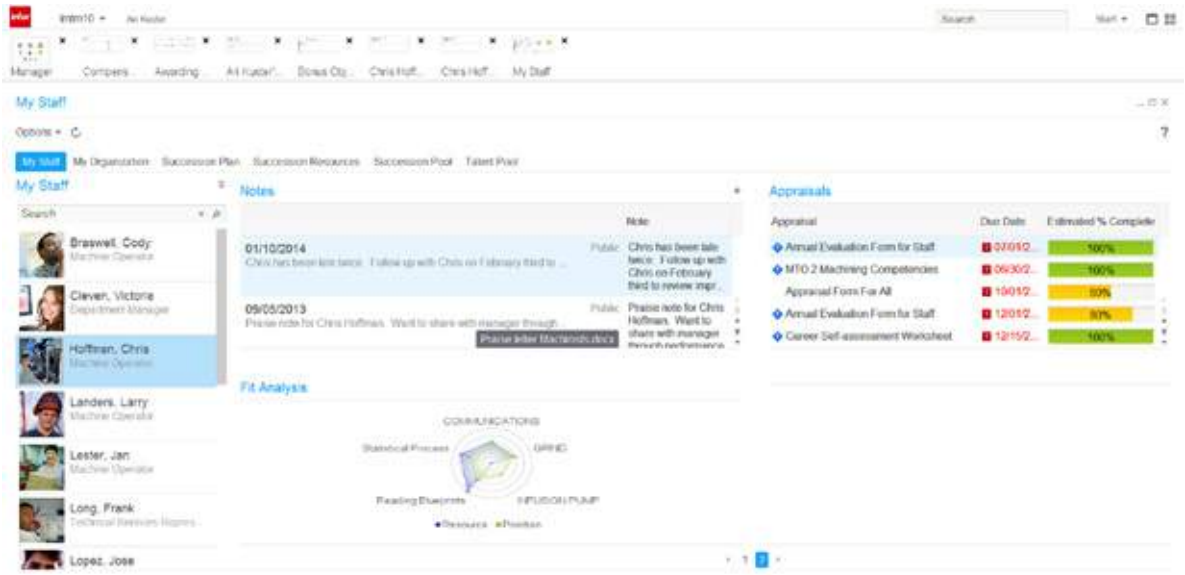
Big data, business intelligence tools, and new-generation technology have moved from heavily discussed trends to real solutions that help businesses translate huge amounts of data into actionable insight that can drive performance. And, while the benefit is obvious, HR departments and the organizations they support have been particularly slow to accept and implement these new tools and technologies. There are myriad reasons. Legacy systems can be a messy tangle of outdated technology with data fragmented and dispersed across an organization. And, this lack of technology, system integration, and enterprise-wide visibility may have tarnished HR's credibility enough to stymie or slow internal acceptance of a more data-driven approach.

In many instances, HR has been its own worst enemy because it has failed to understand the transformative power of deeper workforce analysis. In a 2013 survey, 77% of HR professionals said they were unable to determine how their workforce potential was affecting the bottom line. Less than half, 44%, said they used objective data regarding talent performance to guide business decisions.[2]

Despite this, it should be HR's responsibility to lead the charge. As Gary Hamel has said, "In most of the cases of strategic inertia I've come across, HR wasn't the primary culprit, but neither was it a powerful force for change." [3]

> "New talent management tools can help HR tell its story to the C-suite by providing a disciplined approach and methodology for connecting the dots between employee data and business results, to show what happens when people strategy meets business strategy."

HR can become a powerful force for change by showcasing the impact valid talent data can have on people, operations, and on the bottom line. New talent management tools can help HR tell its story to the C-suite by providing a disciplined approach and methodology for connecting the dots between employee data and business results, to show what happens when people strategy meets business strategy.



Infor HCM Talent Management dashboard

Transforming the workplace: Putting talent data to work to build a better workforce

In our technology-driven world, we sometimes forget that businesses are the collective expression of the individual efforts of employees and the managers who mentor them. Business owners have intuitively known that best-fit individuals and teams produce the most impactful results. With a new generation of tools, the ability to predict a match between an employee and his or her capacity to deliver against business strategies is no longer open to intuition—it's now validated through a framework of insightful data, leading to a new era of workforce intelligence and employee effectiveness.

The time is ripe for HR talent management professionals to demonstrate the added value they can bring to a business' financial health, through their direct contributions to growth, market share, and competitive vitality. While the executive suite must play a pivotal role

in improving talent performance, HR leaders who have the data, insights, and technology at their fingerprints can be a catalyst for change by initiating an ongoing dialogue about strategic workforce investments and talent-building transformation programs.

About Infor

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> "A 2014 survey showed that just 14% of HR departments are currently using data analytics. That compares to 77% of operations organizations, 58% of sales organizations, and 56% of marketing organizations."

[1] Mark Feffer, "HR Moves toward Wider Use of Predictive Analytics," Society for Human Resource Management, October 6, 2014.

[2] Chris Nerney, "How HR analytics can transform the workplace," Citeworld, March 28, 2014.

[3] Gary Hamel, "Why your HR department needs a major reboot," Forbes, May 1, 2013.

The Future of Work
Around the World

An Oxford Economics survey sponsored by SAP takes a forward look at what employees and executives around the world think about topics such as workforce development, the role of millennials, organizational leadership, and the skills gap. Here's some of what we learned.

27

We surveyed
2,700 employees
and
2,700 executives
in
27 countries

The New Face of Work

Top trends impacting workforce strategy

1. Millennials entering the workforce
2. Globalization of labor supply
3. Difficulty recruiting employees with base-level skills

Challenges to building a workforce that meets future business needs

1. A low level of employee longevity and loyalty
2. Limited access to adequate technology
3. Lack of qualified leadership

83%
of executives say they will be increasing the use of contingent, intermittent, or consultant employees.

34%
of executives feel that they've made progress in building a workforce that can meet future business goals.

The Millennial Workforce

What's important to you?	Millennials	Nonmillennials
Making a positive difference in the world	20%	20%
Compensation	68%	64%
Work-life balance	29%	31%
Meaningful work	14%	18%
Achievement of income goals	32%	30%

Only 30%
of executives say their companies give special attention to the particular wants and needs of millennials.

What Matters Most at Work

Employee concerns about their jobs

- ✓ Position changing or becoming obsolete
- ✓ Not enough opportunities for advancement
- ✓ Inadequate staffing levels

Ways to increase employee loyalty and engagement

What employees want:

- ✓ Higher compensation
- ✓ More comprehensive benefits
- ✓ Career opportunities

What employers offer:

- ✓ Bonuses
- ✓ Training
- ✓ Benefits for families

The Leadership Cliff

Only 34%
of executives agree that their leaders are prepared to lead a diverse workforce.

Only 44%
of employees say that leadership at their companies is equipped to lead their organizations to success.

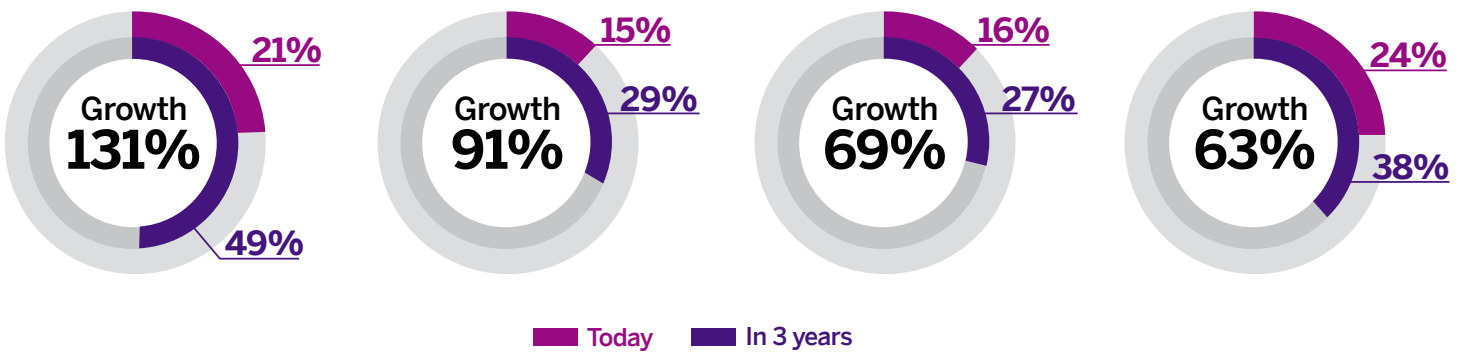
42%
of executives agree that their expansion plans for growth markets are limited unless the right leadership is in place.

Bridging the Skills Gap: The Learning Mandate

The most cited areas of employee professional development and learning

1. Managerial relationships
2. Informal mentoring
3. Self-directed learning

Skills needed today and in the future



How is your company preparing its workforce for the future?
To learn more details about this study, please visit us at http://sfsf.ly/Workforce2020.

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Case Study

Zenefits Customer Success Story

A Modern Broker, For a Modern Business

July 2013

The Broker Model Breaks Down

With 45M+ gamers posting videos and comments on the Twitch.tv platform every month, John Park knew that something had to change. As Twitch Interactive's Controller, John was responsible for managing HR and benefits for Twitch's entire team, including the 10+ new employees it was adding monthly. And with the company showing no signs of slowing down, John was left managing a growing workforce with a benefits process that couldn't keep up.

"With our insurance broker, the process for getting our people enrolled in health insurance was almost completely manual," he says. "People would forget to fill out their paperwork all the time, and our office manager and I had to do all of the follow-up ourselves."

Sometimes enrollment forms would fall through the cracks, deadlines would be missed, and John would be the one holding it together.

That's when he came to Zenefits with three goals:

- Streamline the company's open enrollment process.
- Get the paper out of the company's system.
- Get a simple enrollment tool that employees will actually like.

Company: Twitch

Joined Zenefits: 8/1/2013

FT Employees Before Zenefits: < 80

FT Employees Now: > 130

Time & Cost Savings With Zenefits

Health Insurance Premiums - 15.5%

Benefits Paperwork Eliminated 100%

Avg. Benefits Onboarding 5 min

August 2013

Twitch Puts Zenefits' Broker Creds to the Test

John's first big challenge was open enrollment. Twitch was making the move from small group to large group insurance, and the Zenefits team had only a few weeks to gather quotes, help John structure his benefits, and get all of Twitch's employees enrolled.

"We gave Zenefits a pretty tight window, but they made it a really smooth transition," John says. "They got us new quotes quickly and, after we made a choice, they hosted a brown bag session for our employees to get them up to speed."

And then, with just 48 hours to go until the open enrollment deadline, John and the rest of Twitch's employees went online and enrolled in health insurance through Zenefits—a feat that would have been unthinkable with a traditional broker.

"It was really easy for all of us," John says. "All of the information our employees needed was right at their fingertips and they got their questions answered right away."

March 2014

Twitch Makes Zenefits a One-stop Shop for Benefits

Since August 2013, Twitch has onboarded dozens of new employees—and every one of them has enrolled in benefits through Zenefits.

"Our employees use Web services like Zenefits all the time, so they get it immediately," John says. "The user interface is really intuitive and it walks them through the entire health insurance enrollment and onboarding process in just a couple of minutes."

Today, benefits enrollment at Twitch takes less than 5 minutes per employee and just about everyone is entered into payroll and enrolled in benefits within their first week. And, if they're not, John and his office manager have complete visibility into each new employee's onboarding status and can follow up directly.

"It's made our lives so much easier," he says. "And we've proven that we can manage benefits for 130 employees without a full-blown HR team."

About Zenefits

Zenefits is a free, SaaS-based HR platform that gives businesses a single place to manage their payroll, benefits, and compliance—all online, in one beautifully designed dashboard. Employers can sync directly with their current payroll, health insurance, and other HR systems in seconds, or use Zenefits to set up with new payroll and benefits providers. Once connected, Zenefits helps automate 95 percent of HR administration work, from benefits enrollment to employee on-boarding. Zenefits was co-founded by Parker Conrad and Laks Srini. For more information, visit www.zenefits.com or follow Zenefits on Twitter: @Zenefits.

To learn more about this Zenefits customer success story or to read additional stories, visit http://www.zenefits.com/customers.

> "Zenefits has made our lives so much easier. The user interface is really intuitive and it walks new hires through the entire health insurance enrollment and onboarding process in just a couple of minutes."

John Park, Controller,
Twitch Interactive

Vendor Directory

Vendor Directory

Vendor	Web Site	Twitter
Accenture	www.accenture.com	@Accenture
ADP	www.adp.com	@ADP
Adrenalin eSystems Ltd	www.myadrenalin.com	@adrenalinHRMS
Advantage Payroll Services	www.advantagepayroll.com	
Aon Hewitt	www.aon.com/human-capital-consulting	@AonHewitt
Aragon-eRH	www.aragon-erh.com/en	@Aragon_eRH
Attendance on Demand	www.attendanceondemand.com	@AoDCorp
Axonify	www.axonify.com	@Axonify
BAASS	www.baass.com/hris-human-resource-information-system-software	@baassbiz
BambooHR	www.bamboohr.com	@bamboohr
Benefitfocus	www.benefitfocus.com	@Benefitfocus
Benefits Xpress by American National Property and Casualty Company (ANPAC)	www.anpac.com/xpress	
BeneTrac, a Paychex Company	www.benetrac.com	
blackbook HR	www.blackbookhr.com	@BlackbookHR
Bullhorn	www.bullhorn.com	@Bullhorn
BullseyeEngagement	www.bullseyeengagement.com	@BullseyePM
Business Decisions, Inc. (BDI)	www.businessdecisions.com	
CallidusCloud	www.callidussoftware.com	@CallidusCloud
Cangrade	www.cangrade.com	@Cangrade
Capgemini	www.capgemini.com	@Capgemini
Career Engagement Group	www.fuel50.com	@CareerEngager
Castlight Health	www.castlighthealth.com	@CastlightHealth
Causecast	www.causecast.com	@Causecast
CEGOS	www.cegos.com	@Cegos
Celergo	www.celergo.com	@CelergoLLC
CEM Business Solutions (CEMBS)	www.cembs.com	@CEMBSglobal
Ceridian	www.ceridian.com	@Ceridian
Cézanne HR	www.cezannehr.com	@CezanneHR
cfactor Works	www.cfactorworks.com	@cfactorworks
Chronus Corporation	www.chronus.com	@Chronus_Inc
ClickSoftware	www.clicksoftware.com	@ClickSoftware
CoreCentive	www.corecentive.com	@CoreCentive
Cornerstone OnDemand	www.cornerstoneondemand.com	@CornerstoneInc
CoursePeer	www.coursepeer.com	@CoursePeer
CSC	www.csc.com	@CSC
DayNine Consulting	www.daynine.com	@Day9Consulting
Decisyon	www.decisyon.com	@Decisyon
Deloitte	www.deloitte.com/global	@Deloitte

Vendor Directory

Vendor	Web Site	Twitter
Desire2Learn	www.desire2learn.com	@Brightspace
Empower Software	www.empowersoftware.com	@empowersoft
Entelo	www.entelo.com	@Entelo
Epicor Software Corporation	www.epicor.com	@Epicor
eQuest	www.equest.com	@eQuestLLC
Equifax	www.equifax.com/workforce/	@Equifax
ExponentHR	www.exponenttechnologies.com	@exponenthr
FinancialForce.com	www.financialforce.com	@FinancialForce
Glassdoor	www.glassdoor.com	@Glassdoor
Greenhouse Software	www.greenhouse.io	@Greenhouse
Halogen Software	www.halogensoftware.com	@HalogenSoftware
Harvest HCM	www.harvesthcm.com	@HarvestHCM
HealthcareSource	www.healthcaresource.com	@quality_talent
High Line Corporation	www.highlinecorp.com	
HireIQ Solutions	www.hireiqinc.com	@HireIQinc
HireVue	www.hirevue.com	@hirevue
HP	www.hp.com	@HPServices
HR Performance Solutions (HRN)	www.hrperformancesolutions.net	@HRPerfSolutions
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HRsmart by Deltek[a]	www.hrsmart.com	@HRsmart
HRsoft	www.hrsoft.com	@HRsoft_Inc
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Huron	www.huronconsultinggroup.com	@Huron
IBM	www.ibm.com/software/smarterwokforce/	@IBMSmtWorkforce
iCIMS	www.icims.com	@iCIMS
ILX Group	www.ilxgroup.com	@ILXGroup
Infinisource	www.infinisource.com	@Infinisource
Infor	www.infor.com	@Infor_HCM
InfoTronics	www.infotronics.com	
Insperity	www.insperity.com	@Insperity
Intuit	www.intuit.com	@Intuit
Intuition	www.intuition.com	@intuition_com
Jobvite	www.jobvite.com	@Jobvite
Kainos	www.kainos.com	@KainosSoftware
Kenexa by IBM[b]	www.kenexa.com	@IBMSmtWorkforce
Kloud	www.kloud-consulting.com	@kloudconsulting
KPMG	www.kpmg.com	@KPMG
Kronos	www.kronos.com	@kronosinc
LBi Software	www.lbisoftware.com	@LBiSoftware

Vendor Directory

Vendor	Web Site	Twitter
Learning Nexus	www.learningnexus.co.uk	@learningnexus
Lever	www.lever.co	@Lever
Logi-Serve	www.logi-serve.com	@LogiServe
Lumesse	www.lumesse.com	@Lumesse
Maxwell Health	www.maxwellhealth.com	@maxwellhealth
Mercer	www.mercer.com	@MercerInsights
Meridian Knowledge Solutions	www.meridianks.com	@MeridianKS
META4	www.meta4.com	@Meta4_GlobalHR
Meteorix	www.meteorix.com	@Meteorix
Microsoft Dynamics	www.microsoft.com/en-ca/dynamics/erp-ax-overview.aspx	@MSFTDynamics
MoBolt[c]	www.mobolt.net	@mobolt
Monster	www.monster.com	@Monster
Moodle	www.moodle.org	@moodle
Nakisa	www.nakisa.com	@NakisaInc
Namely	www.namely.com	@NamelyHR
NetSuite	www.netsuite.com/portal/products/netsuite/erp/hcm.shtml	@NetSuite
Newton Software	www.newtonsoftware.com	@NewtonSoftware
NGA Human Resources	www.northgatearinso.com	@NGAHR
nGenx	www.ngenx.com	@nGenxCloud
Nimble Software	www.nimblesoftsystems.com	@NimbleSchedule
Notilus	www.notilus.co.uk	
NOVAtime Technology	www.novatime.com	@NOVAtimeCorp
NOW Solutions	www.nowsolutions.com	@nowsolutions
NuView Systems[d]	www.nuviewinc.com	@NuViewSystems
OneSource Virtual	www.onesourcevirtual.com	@OneSourceV
Oracle	www.oracle.com/applications/human-capital-management/index.html	@OracleHCM
OrgVue	www.orgvue.com	@OrgVue
PageUp People	www.pageuppeople.com	@PageUpPeople
Paychex	www.paychex.com	@Paychex
Paycor	www.paycor.com	@PaycorInc
PeopleFluent	www.peoplefluent.com	@PeopleFluent
Peoplenext	www.peoplenext.com.mx	@PeopleNext
PwC	www.pwc.com	
QUEsocial	www.quesocial.com	@QUEsocial
Saba Software	www.saba.com	@SabaSoftware
Sage	www.sage.com	@sagegroupplc
SAP	www.sap.com/hcm	@SAPHCM

Vendor Directory

Vendor	Web Site	Twitter
Sapien LLC	www.sapiensoftware.com	@Sapien_HRMS
Sentric	www.sentric.net	@SentricInc
SHL (CEB's SHL Talent Measurement)	www.shl.com	@CEB_SHL
Sierra-Cedar	www.sierra-cedar.com	@SierraCedar
SilkRoad	www.silkroad.com	@silkroadtweets
SimplePay.ca	www.simplepay.ca	@simplepaycanada
SimplyDigi	www.simplydigi.com	@SimplyDigi_LMS
Skillsoft	www.skillsoft.com	@Skillsoft
Small Improvements	www.small-improvements.com	@smallimprove
Softworks	www.softworks-workforce.com	@softworksltd
Sopra HR	www.soprahr.com/en	@soprahrtweets
StarGarden Software	www.stargarden.com	@StarGardenCorp
SuccessFactors, an SAP Company	www.successfactors.com	@successfactors
SumTotal Systems, LLC, a Skillsoft Company[e]	www.SumTotalSystems.com	@SumTotalSystems
SwipeClock	www.swipeclock.com	@SwipeClock
SwoopTalent	www.swooptalent.com	@SwoopTalent
Talemetry	www.talemetry.com	@talemetry
TalentBin by Monster[f]	www.talentbin.com	@TalentBinHiring
Talentsoft	www.talentsoft.com	@TalentsoftGroup
Technomedia	www.technomedia.com	@TechnomediaNA
Thomsons	www.thomsons.com	@ThomsonsOnline
Total Training Network (TTN)	www.ttnlearning.com	@TTNLearning
Towers Watson	www.talentreward.com	@talentreward
TRAXPayroll	www.traxpayroll.com	
Ultimate Software	www.ultimatesoftware.com	@UltimateHCM
Vado	www.vadoinc.net	
ViewsOnYou	www.viewsonyou.com	@ViewsOnYou
Visibility Software	www.visibilitysoftware.com	@VisSoft
Visier	www.visier.com	@VisierAnalytics
Workday	www.workday.com	@Workday
WorkForce Software	www.workforcesoftware.com	@WorkForceSW
Zenefits	www.zenefits.com	@Zenefits
ZenPayroll	www.zenpayroll.com	@ZenPayroll

[a] HRsmart was acquired by Deltek on March 2, 2015.
[b] Kenexa was acquired by IBM in December 2012.
[c] MoBolt was acquired by Indeed on July 3, 2014.
[d] NuView Systems was acquired by Ignite Technologies in July 2014.
[e] SumTotal Systems, LLC was acquired by Skillsoft in October 2014.
[f] TalentBin was acquired by Monster in February 2014.

About the Author

Raluca Druta is TEC's human capital management (HCM) analyst. She holds a graduate diploma in computer science, and brings in-depth knowledge of various industries and their related business fields to TEC's research. She has experience as a consultant for IT firms in the areas of conflict management resolution and recruiting and staffing.

She has also implemented feedback management software and trained end users and administrators in higher education institutions. Druta is proficient in customer-facing activities and project management, and has a working familiarity with customer and employee issues common to the retail, logistics, and fashion industries. Her background knowledge of website design and SEO further inform her understanding of critical enterprise software components.

As the world's leading online provider of software selection tools, services, and research materials, Technology Evaluation Centers (TEC) helps companies and organizations evaluate and select the best enterprise software for their needs. With its software selection expertise and advanced decision-making software, TEC also helps reduce the time, cost, and risk associated with enterprise software selection. Today, TEC is recognized as an industry-leading software selection advisory firm with more than 400,000 subscribers to its information services and software evaluation and selection tools.

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