

The Aptitude Index:

Talent Acquisition Systems (2021)

Mapping a New Path

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Introduction

Expanding Horizons and Exploring New Territory

The events of the past year have accelerated the investment in talent acquisition technology. According to Aptitude Research, 44% of companies adopted new talent acquisition solutions in 2020 and one in four companies are looking to replace their ATS system in 2021. Remote recruiting, economic uncertainty, and the mounting pressure to “do more with less” have forced companies to closely examine their talent acquisition technology solutions. And, it has become clear that what worked in the past may no longer work today.

The talent acquisition systems market is not the commoditized market that it was a few years ago. Every provider is moving in a different direction in terms of priorities, capabilities, and roadmaps. Some providers are building out more robust TA functionality, while others are moving into talent management and employee experience. TA buyers must look beyond functionality and consider true partnerships in both the product and the vision. They must dig deeper and ask the tough questions to determine if a provider will be able to partner for the long-term.

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While evaluating the state of talent acquisition technology, three core themes continue to be at the forefront:

- 1 **The Best-of-Breed vs. ERP Debate Persists:** Many talent acquisition leaders still face resistance from IT and/or business leaders when investing in best-of-breed providers over core HCM systems or ERP providers. According to this study, one in three companies state that IT is more involved in talent acquisition technology decision making today . Companies do not want to sacrifice depth of functionality for integration. And in today's market, they can have both. Best-of-breed providers are more flexible and creative with their approach to integration through marketplaces, self-service, and support. At the same time, ERP providers are investing in advanced functionality to improve the recruiter, hiring manager, and candidate experiences.



According to this study, one in three companies state that IT is more involved in talent acquisition technology decision making today.

- 2 **The ATS Is Not Enough:** The modern talent acquisition system is more than a workflow or a traditional ATS. It includes recruitment marketing, CRM, onboarding, and internal mobility. Many providers have enhanced their interview management capabilities, have dabbled with AI matching, and have made commitments to diversity, equity, and inclusion (DEI). **The modern talent acquisition system is an end-to-end platform that supports attracting, recruiting, and hiring talent.**
- 3 **The Foundational Layer Is the Most Critical (and the Most Ignored):** For talent acquisition technology to be effective, companies must build a solid foundation that includes integration, data management, and automation. When a strong foundation is properly laid, it supports every aspect of talent acquisition so that organizations can build upon what is in place. The foundation is not an after-thought, but instead deserves the highest focus and attention to detail.

The goal of this report is to help companies understand the value of a modern talent acquisition system and differentiate between a vendor and a true partner. It provides both a research-based overview of the market and an in-depth analysis on each of the providers who met the criteria for this report.

This year's report includes more detailed analyst insights; a diversity, equity, and inclusion spotlight; and an overview of how providers supported customers through the pandemic. We are also including more information in each profile on the foundational layers of talent acquisition (integration, automation, data management, and security).

Unlike other tools in the market, the Aptitude Index Report report will focus on what matters to the buyer and what solutions might fit with the unique hiring needs of organizations.

This report focuses on the following areas:



1) Encouraging organizations to consider and identify their own internal needs before evaluating a partner, rather than just finding a provider.



2) Providing clarity to the complex landscape of talent acquisition technology.



3) Highlighting the differentiators of each provider across company, product, and roadmap.



4) Offering analysis of the culture, customer support, and experiences of each provider.



5) Identifying capabilities that are easy to overlook in a demo or on a provider's website.

Research Methodology



The Aptitude Index Report does not rank providers. It provides an overview of the market and helps companies rethink the evaluation criteria used to select partners, and identifies which providers might meet their unique requirements. As the market becomes more complex, organizations must take a step back, reexamine what is driving success, and ask new questions around technology decisions. The final section of this report profiles ATS providers and describes their attributes within the context of this criteria. The appendix includes a list of key capabilities buyers should look for when evaluating a talent acquisition system, plus a list of over 100 vendors that fall under the talent acquisition ecosystem.

Quantitative Research:

Through a 2021 research study of over 400 organizations across a wide range of industries and company sizes, Aptitude Research identified key trends and challenges that customers are facing when selecting and implementing a talent acquisition system.

Qualitative Research:

Aptitude Research conducted a series of customer interviews from August 2020 to March 2021 to learn more about what companies are looking for in a talent acquisition solution and what they would like to see in a technology partner.

Solution Provider Analysis:

Aptitude Research conducted two-to-four hour long briefings and demos with each of the providers included in this report. Company background, product background, and a product demonstration were all carefully considered during these sessions.

Below are the criteria for inclusion in the Aptitude Index Report:



Revenue:

Providers that have reached \$10 million.



Customers:

Providers with over 100 customers at the mid-market or enterprise level.



Product Leadership:

Providers that have demonstrated product leadership through their suite of solutions or services.



Ecosystem:

Providers that partner, or are open to partnering with, the broader talent acquisition and talent management ecosystems either through open APIs or a formalized marketplace.

The following providers are included in this report (in alphabetical order):



What's New This Year

This year's Aptitude Index Report has been updated to reflect changes in the market and key differentiators of the leading providers. Our goal is to provide an understanding around the evolution of this market, customer expectations, and the roadmap of each provider to meet those expectations. Below is a list of some of the new sections of the report.

- **Diversity, Equity, and Inclusion:** We looked at each provider's commitment to DEI through its leadership team, culture, product capabilities, and services. Our analysis included a dedicated DEI role, dashboards, ethical AI, and customer resources.
- **AI Matching:** It is difficult to talk about talent acquisition technology without including the impact of AI. Providers have focused on AI matching in a big way over the past year. Many of the providers in this report are investing in both candidate-centric and employer-centric matching as part of their solution.
- **Internal Mobility:** Companies are looking closely at their internal mobility as it relates to talent acquisition. Most providers offer basic capabilities in this area that include dedicated career sites and personalized communication to internal hires. Few providers go deeper with skills frameworks, succession planning, and career development. We included internal mobility as a core pillar in a TA tech stack and explored which providers excel in this area.
- **Partnership Support During COVID-19:** Every company experienced some transformation as a result of the pandemic. Providers responded by offering services and solutions for front-line workers, packaging products in a new way, eliminating replacement fees, and enhancing services. We looked at how each provider supported clients in this environment.



- **Foundational Layer:** This report looks more closely at the foundational layer of the TA tech stack and includes analysis and considerations for integration, data management, and automation. Companies that achieve the most success with their talent acquisition systems are paying close attention to this layer of technology.
- **Investments and Mergers and Acquisitions:** The investment activity in talent acquisition technology did not slow down in 2020. We included information around the investments raised, how the dollars are being used, and acquisitions over the past year.
- **Candidate Communication:** Candidate communication is a critical part of improving the candidate experience, especially in a remote world. Communication is more than mobile app and SMS texts. Our analysis of each provider included integration with messaging platforms, conversational AI, and collaboration platforms.





Top 10 Trends

1 All CRMs Are Not Created Equal:

Every provider is looking to check the box on CRM or recruitment marketing capabilities, but this is not an apples-to-apples market. Every solution looks different and includes different strengths and/or weaknesses. Only a few providers have competitive recruitment marketing platforms that can support career sites, CRM, talent pipelines, analytics, and communication. These providers have acquired leading players in the market to strengthen their platforms. The remaining providers in this report either have limited CRM capabilities or are including CRM and recruitment marketing in their roadmaps for the future.

2 DEI Is Not Just About Product:

Given the importance of DEI's influence in driving technology decisions, it is surprising that more providers are not invested in supporting companies reduce bias and improve diverse hiring. Very few best-of-breed providers have a dedicated role for diversity and inclusion, and others make vague blanket statements to imply that DEI is part of everything they do. The providers that make impacts in DEI have demonstrated a commitment in their leadership, product, use cases, and customer service delivery.

3 Onboarding Is at a Standstill:

Onboarding capabilities still include forms management, tasks management, and socialization. Companies need some way to automate forms, automate tasks, and engage new hires in a portal. Although the experiences have improved, the fundamental capabilities of onboarding have not changed in the past decade. And some of the ATS providers throw in onboarding modules for free in order to win deals – devaluing their products. Most of the innovation in onboarding is coming from the conversational AI providers today that offer a better experience and efficiency.

4 AI Matching Is a Priority:

As the demand for AI matching increases, understanding what options companies have is confusing. Thirty-four percent (34%) of companies are using some matching capabilities. Sourcing providers, stand-alone providers and now, ATS providers, are looking to use AI to rank candidates and improve decision-making. The benefits of AI matching include the ability to reduce bias and improve efficiency. The challenge is that providers must carefully consider ethical AI and how they approach internal and external communities for matching jobs to candidates and candidates to jobs.

5 IBM Talent Acquisition Suite gets Acquired:

Infinite Computer Solutions announced its acquisition of IBM's talent acquisition suite including BrassRing, Lead Manager, and Onboard. It is unclear how Infinite Computer Solutions will support or invest in talent acquisition solutions moving forward. BrassRing customers will likely be looking for a new ATS provider over the next twelve months.

7 Skills Are the New Hiring Currency:

Skills are becoming a critical component of how recruiters and hiring managers evaluate candidates and how candidates present themselves to employers. Skills can provide more accuracy and relevance to a role than past experiences, and help companies make more informed hiring decisions. Many of the larger providers included in this report have made considerable investments in a skills framework to support both talent acquisition and talent management. A few of the best-of-breed providers have also focused on strategic skilling to support recruitment and internal mobility.

9 Internal Mobility Is Still Unclear:

Internal mobility becomes more of a priority when hiring slows down and companies start to look at retention strategies. The events of 2020 have forced companies to look at internal mobility more closely. In fact, 58% of companies surveyed for this report are using or planning to use internal mobility capabilities this year. Internal mobility is comprised of two levels. The first level includes capabilities to engage with internal talent through career sites, job postings, and communication. The second level of internal mobility includes a full talent lifecycle approach, and consistent experience from recruitment to succession planning, career development, and performance management.

6 The ERP Providers Are Here to Play:

Despite perceptions that talent acquisition should be a best-of-breed market, ERP providers have made improvements to their products and invested in research, partnerships, and capabilities to support customers. These providers are improving the candidate experience, exploring CRM capabilities, and leading with internal mobility. The next year will be telling to see how these roadmaps shape up and what potential acquisitions may occur.

8 Candidate Communication Is a Work in Progress:

Candidate communication is still a shortcoming for ATS providers. These systems are designed for employers and shifting to a candidate-centric approach is a challenge for many providers. While most of the providers in this report include SMS/text communication and some digital assistant or chatbot, several providers are now integrating with messaging platforms including WhatsApp and WeChat or collaboration platforms/enterprise platforms including Microsoft Teams, Slack, and Salesforce.

10 Analytics Need To Drive Outcomes:

Companies need more than dashboards from their ATS providers. They need powerful analytics to help inform their recruitment strategies, highlight shortcomings, and allow them to take actions. Analytics helps companies better understand talent, communicate with key stakeholders, and make smarter decisions. Some of the providers in this report have made considerable strides in talent analytics over the past few years, while others are simply reporting key metrics.



Top Roadblocks

The More Things Change, The More They Remain the Same

According to Aptitude Research, 44% of companies invested in new technology in 2020 and one in four companies are looking to replace their ATS. Most companies are going through some type of talent acquisition transformation today. Companies are looking more closely at their technology partners, adjusting to remote recruiting, and engaging with candidates in new ways.

But, as the talent acquisition function has changed, it has created new challenges and exacerbated old ones. Recruiters feel overwhelming pressure to do more with less, and 40% of companies have had to downsize talent acquisition functions last year. Technology providers are adding functionality every week. This creates opportunities, but also frustrations as recruiters struggle to adopt these solutions. According to Aptitude Research, the talent acquisition market is more complex with new categories, players, and partnerships:

- **Only three percent of companies are using all of the functionality in their ATS system.**
- **Less than 20% of companies are very satisfied with their current provider.**
- **One in four companies are looking to replace their current ATS provider in 2021.**

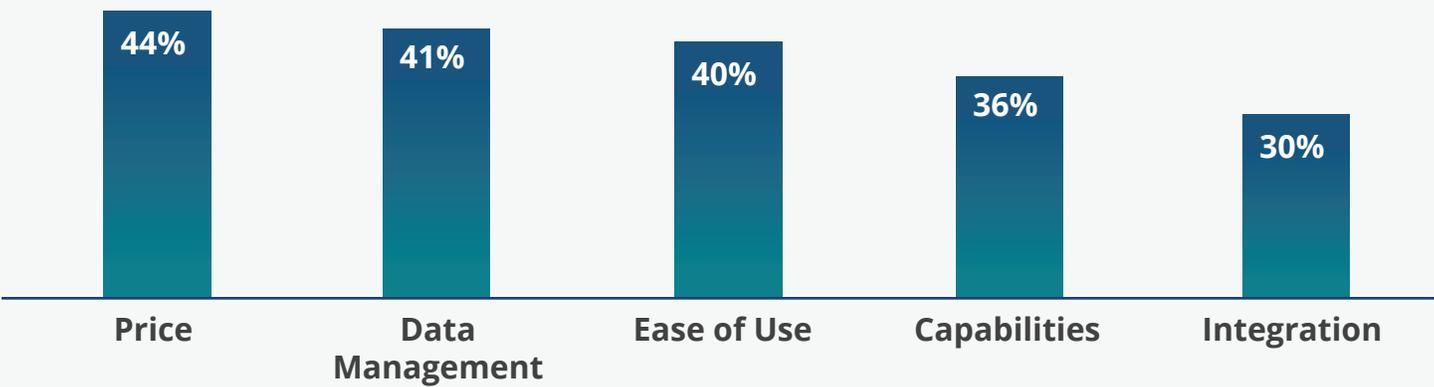
According to Aptitude Research, 44% of companies invested in new technology in 2020 and one in four companies are looking to replace their ATS. Most companies are going through some type of talent acquisition transformation today.

When asked about the top pain points in talent acquisition technology, companies identified price, data management, ease of use, and product capabilities. Additionally, one in three companies identified integration as a top challenge. These challenges are a result of the complex nature of talent acquisition technology and the number of solutions in place. On average, companies are using ten or more talent acquisition solutions and 51% of enterprise companies use more than one ATS. This complexity results in companies overspending without being able to strategically manage data.



On average, companies are using ten or more talent acquisition solutions and 51% of enterprise companies use more than one ATS.

Figure 1: Top Pain Points With TA Technology



Before companies look externally at providers, they must examine the reality of talent acquisition technology, including:

- **Price:** Price is one of the top differentiators for organizations considering a talent acquisition system. Since many factors influence pricing, it is nearly impossible to compare different pricing models for these systems. The most important thing companies need to consider is what they are spending for every aspect of product capabilities, implementation, and upcoming releases. For example, 24% of companies pay “more than expected” for implementation services. Companies can combat this challenge by asking detailed questions on what is included in pricing and what additional costs are for features and services.
- **Data:** Data is one of the biggest challenges with talent acquisition technology. Over the past few years, many TA teams have struggled to manage disparate systems and an influx of data. The primary challenge companies face is not necessarily the quantity of data, but rather the accuracy and consistency of that data. Aptitude Research found that less than one-third of companies are very satisfied with their data’s accuracy, quality, and integrity.
- **Ease of Use:** Companies are relying on antiquated systems that do not provide a positive experience to recruiters, hiring managers, or candidates. Ease of use and simplicity are becoming considerations as companies evaluate providers. Ease of use becomes an important conversation in areas such as career sites, apply, scheduling, and onboarding.





Key Drivers

Efficiency Leads the Way

Improving efficiency is the key driver when evaluating technology providers. Companies are looking at providers to improve time to fill, increase recruiter productivity, and improve overall decision-making in talent acquisition technology. Improved efficiency benefits the candidate as well as the employer by helping candidates receive communications, stay informed, and move through the process. Over the past few years, companies moved away from talking about efficiency in favor of experience and quality. The reality is that recruiters and hiring teams need help. The average time to fill a position is 45 days and many companies, especially in high-volume industries, cannot afford to wait that long. Efficiency benefits employers by improving productivity and benefits candidates by improving the experience.

Reducing bias is also a key driver this year for 18% of companies. As companies look to improve their approach to diverse hiring and ensuring inclusivity, reducing bias through every stage of talent acquisition is critical. Some companies are looking at providers to blind resumes or interviews, while others are using AI matching and solutions to improve their job descriptions and communication with candidates. Some companies are investing in services from their technology providers to provide insights into what they are doing and action items into what needs to change.

Figure 2: Key Drivers for Investing in Talent Acquisition Technology



- 7%** Automating end-to-end TA
- 11%** Managing applicant volume
- 14%** Improving candidate experience
- 15%** Moving away from disparate solutions to one provider
- 18%** Reducing bias
- 35%** Improving efficiencies



A New Model

Ten years ago, the talent acquisition technology market was comprised of multiple providers offering stand-alone products in defined categories such as background screening, job boards, ATS, assessments, and onboarding. Today, the market has exploded with thousands of providers and new players entering each month. Additionally, the lines have blurred. Many of these providers offer several solutions in talent acquisition or have created new categories of technology, making the buyer's decision much more complicated.

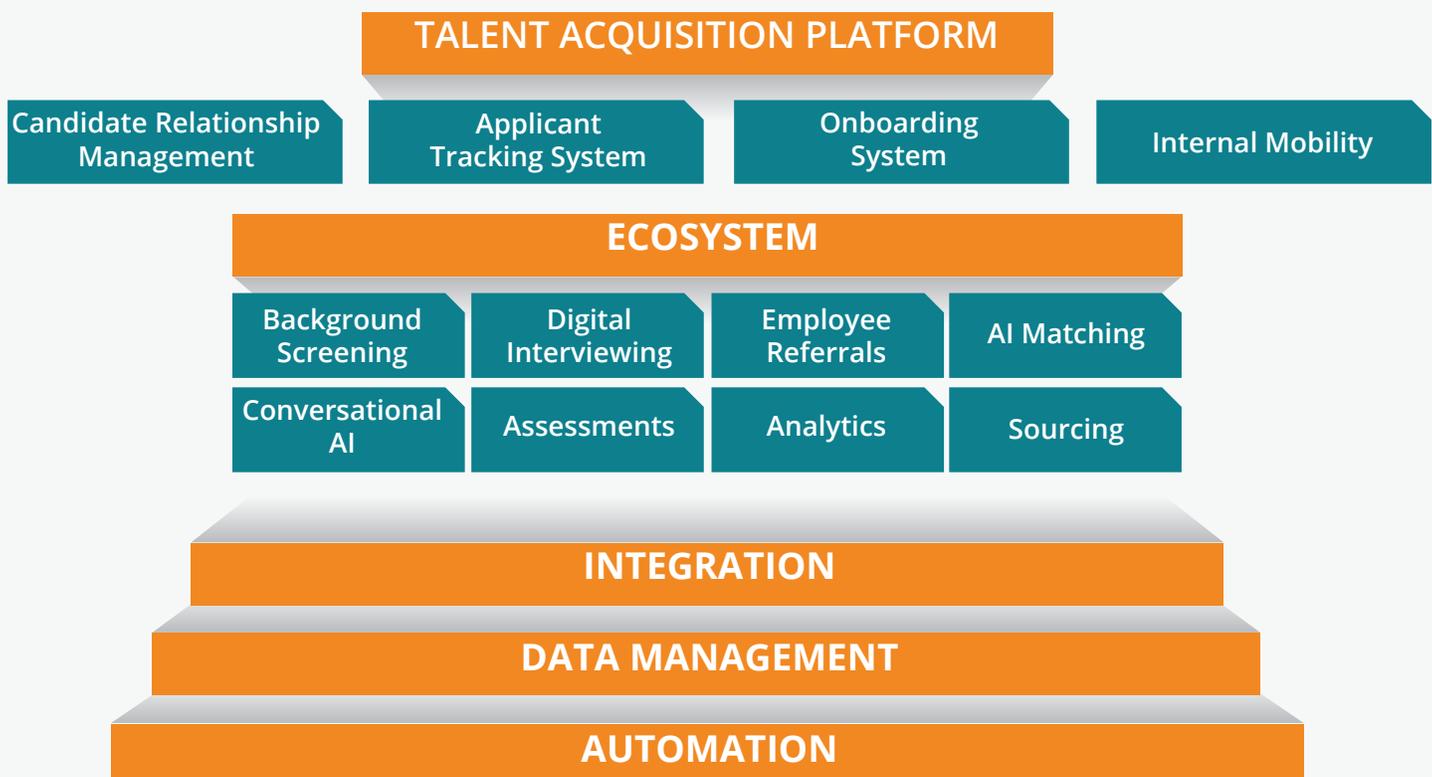
When evaluating technology providers to support talent acquisition, companies should start by looking at what they need and then begin to consider partners.

The modern talent acquisition technology stack includes three layers:

- 1. Talent Acquisition Big Four:** Four major technology solutions: CRM, ATS, onboarding, and internal mobility
- 2. Ecosystem:** An ecosystem of solutions to enhance the value of integrated talent acquisition
- 3. The Foundation:** The foundation of integration, data, and automation

When combined, these categories represent a holistic approach to strategic talent acquisition.

Figure 3: The Talent Acquisition Framework





The talent acquisition platform includes the following four systems:

- **CRM or Recruitment Marketing Platform:**

Often referred to as the “pre-applicant platform,” this solution manages outbound sourcing, inbound recruitment marketing and employer branding, and integrates with any ATS. A valuable CRM or Recruitment Marketing Platform includes capabilities that maintain the employer brand, foster candidate relationships, and enhance messaging and communication efforts.

- **ATS:**

An ATS encompasses the pre-hire lifecycle including candidate acquisition, requisition management, job postings, search capabilities, interview management, communications, and reporting. These systems foster a positive candidate experience through company career site branding, online employee referral programs, candidate self-service applications, pre-screening questions, assessments, global configuration, social and mobile capabilities, integration, contact management, compliance, and in many cases, support for high-volume recruiting.

- **Onboarding System:**

An onboarding system includes forms management, tasks management, and a new hire portal. Forms management is the collecting, tracking, and managing of new hire forms such as W-4s, I-9s, etc. Tasks management ensures that all onboarding activities are completed and automated. A new hire portal engages new hires in the company culture. The onboarding system sets the new hire up for long-term success by providing information on learning and development programs, succession plans, and performance goals.

- **Internal Mobility:**

Internal mobility includes the capabilities to recruit internal talent and advance internal hires within the organization. Talent acquisition now has more responsibility for internal mobility. In fact, 58% of companies surveyed for this report are using or planning to use internal mobility capabilities this year. Internal mobility is comprised of two levels. The first level includes capabilities to engage with internal talent through career sites, job postings, and communication. The second level of internal mobility includes a full talent lifecycle approach and consistent experience from recruitment to succession planning, career development, and performance management.



The ecosystem includes a wide range of solutions that should integrate with all three systems.

This layer of technology will look different for every company. Some of the categories include:



Assessments:

Solutions based on science that look at skills, personality, and behaviors to identify the right fit.



Programmatic Job Advertising:

Automating the buying and selling of ads to remove human negotiation, predict performance, and streamline advertising.



Background Screening:

Tools to check drug use, employment verification, education verification, and criminal background.



Job Search Engine:

Solutions to search millions of job listings across the web.



Digital Interviewing:

Solutions to support interview scheduling, video interviewing, and branding.



Online Reference Check Solutions:

Solutions that automate the reference check process and provide a talent pool of passive candidates.



Employer Branding:

Solutions to enhance and strengthen branding through video, communication, and messaging.



Employee Referrals:

Automation to support the employee referral process.



Job Distribution:

Capabilities to manage all job posting activities, integrations, and analytics.



Conversational AI:

Intelligent chat that engages with candidates and improves efficiency in talent acquisition.



AI Matching:

Using AI to match jobs with candidates and candidates with jobs.



Search Technology:

Ability to search for candidates using keywords or semantic search.



The foundation layer supports the talent acquisition tech stack and includes integration, data management, and automation. Companies with a foundation that consists of these three areas are more successful with technology implementation and adoption.

- **Integration:** The practice of successfully integrating new talent technology into existing talent acquisition and HR technology. Without integration, companies lack consistency in experience, data, and delivery.
- **Data Management:** The practice of collecting, maintaining, and using data securely and efficiently to drive talent decisions. Without proper data management, companies face issues with data accuracy, data quality, and trust.
- **Automation:** The practice of making a system or process operate automatically through technology. Without automation, companies face inefficiency through manual processes. AI gives companies the insights and intelligence to make better decisions and reduce bias.

Companies with a strong foundation in place are companies that consider integration, data management, and automation before they start to evaluate providers. When asked what they would change about their approach to technology, every company interviewed for this report stated that they would start on their foundation before sending an RFP. Unfortunately, most companies do not consider the foundational layer until during the evaluation phase and after implementation (see Figure 4). Less than half of companies are asking these questions in advance and talent acquisition often has little input. The foundation should be one of the key requirements when evaluating providers, and companies that start this process early are able to see greater success.

Figure 4: Timeframe for Considering Foundational Elements

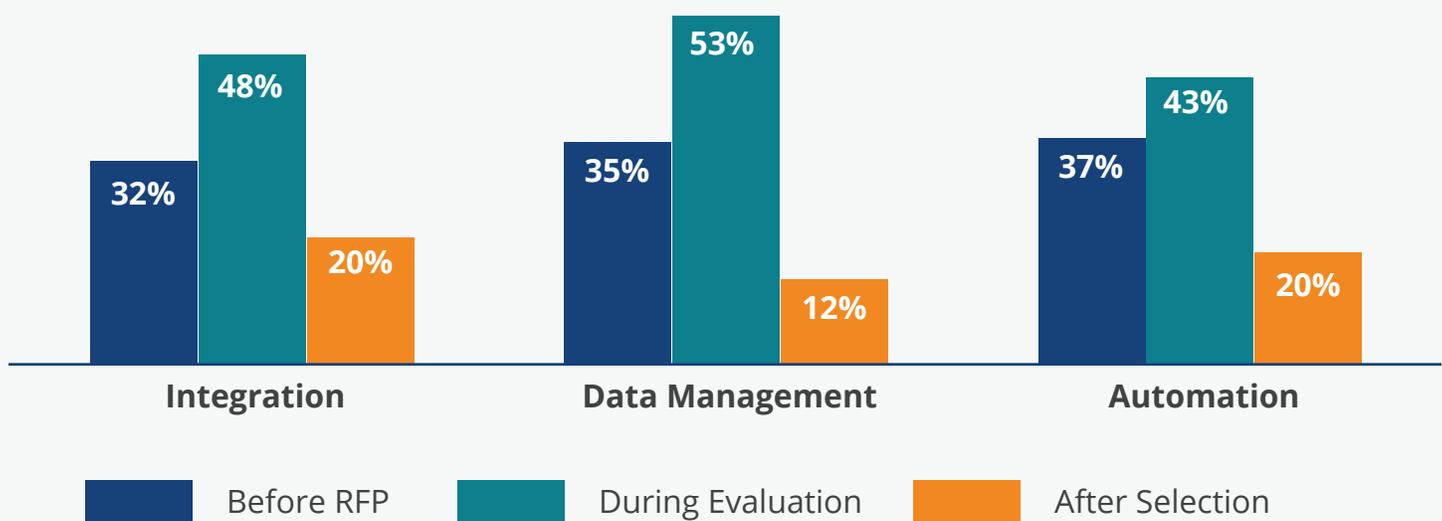


Figure 5: Providers by Product Suite

	CRM	ATS	ONBOARDING	INTERNAL MOBILITY
	✓	✓	✓	✓
	✓	✓	✓	✓
	✓	✓	✓	✓
	✓	✓	✓	✓
		✓	✓	
	✓	✓	✓	✓
	✓	✓	✓	✓
	✓	✓		✓
	✓	✓	✓	✓
	✓	✓	✓	✓
	✓	✓	✓	✓
	✓	✓		✓
	✓	✓	✓	✓

* Infinite Computer Solutions has acquired IBM's talent acquisition suite.



Market Analysis: A Closer Look at Key Players

Market Trends

Over the past year, the talent acquisition market has changed dramatically. During a year of uncertainty, companies are taking time to rethink their current talent strategies and distinguish what is working from what is not. Solution providers have responded by increasing their partnerships and product offerings, and by providing innovation for the first time in many years. As organizations begin to demand more from their existing providers, we are seeing the following differentiators in the market:

- **Diversity, equity, and inclusion**
- **CRM/recruitment marketing platforms**
- **AI matching**
- **Skills framework**

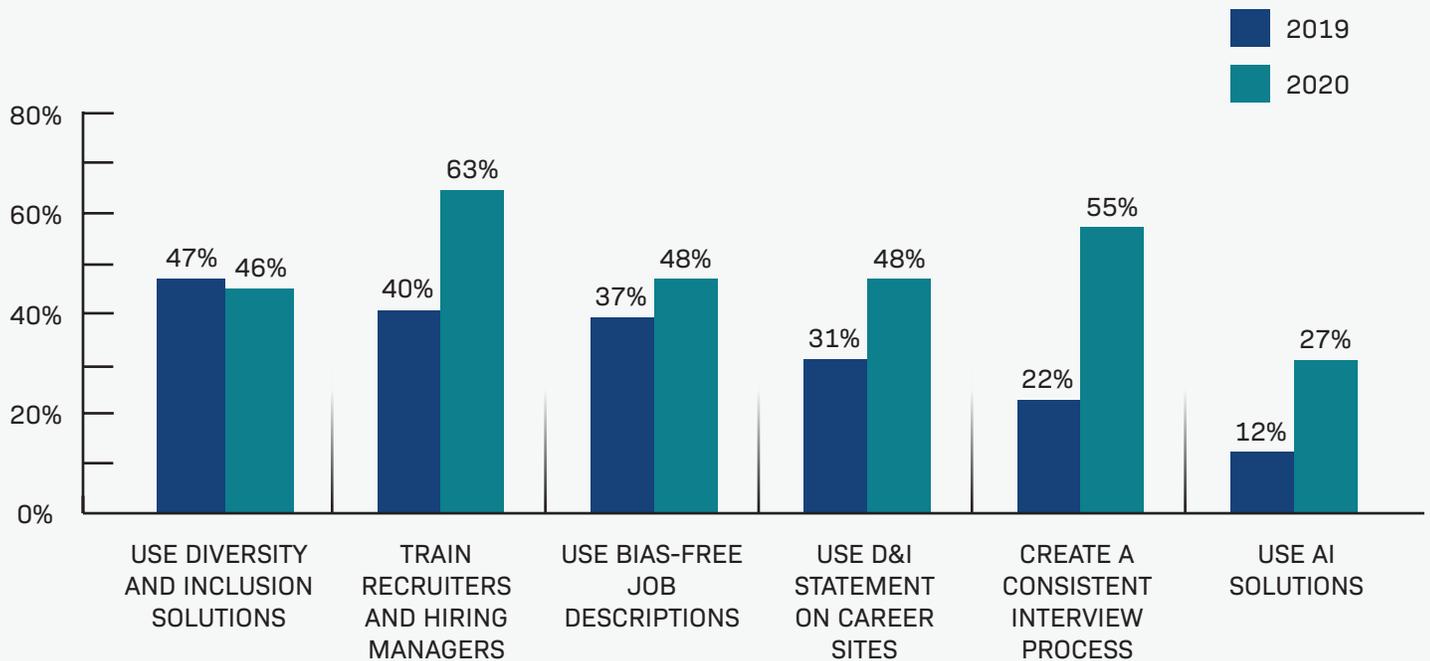
Diversity, Equity, and Inclusion

According to Aptitude Research, nearly 90% of companies are concerned with reducing bias in their talent acquisition process. When talent acquisition leaders are asked what actions they take to reduce bias, most companies focus on training programs. Sixty-three percent (63%) of companies in this study are relying on training to improve DEI (See Figure 6). While these programs can provide insight and education, they often just check a box to reduce bias and not fundamentally address the problem.

Did You Know?

90% of companies are concerned with reducing bias in their talent acquisition process.

Figure 6: Reducing Bias in Talent Acquisition



Companies are looking at their talent acquisition providers to do more to help improve diversity hiring. They are looking at the company culture, products that reduce bias, and services that offer more than a check-the-box approach. Despite the importance of DEI in talent acquisition technology partnerships, not every provider is walking the walk.

Companies evaluating providers should consider three areas:

- **Company Culture:** Does this provider have a dedicated DEI role? Has the provider made changes internally to improve diversity? Does this provider have a diverse leadership team?
- **Product Capabilities:** Does this provider include blinded resumes or blinded interviews to reduce bias? Does this provider consider how ethical AI and AI matching can reduce bias by reaching more candidates and providing a fair process? Does this provider have deep analytic insights into DEI? Does this provider offer intelligent writing capabilities to remove bias?
- **Services:** Does this provider offer education, training, or support for helping companies improve diverse hiring?

This study evaluated providers that are excelling in all three of these areas (company culture, product, and services). The ERP and talent management providers (ADP, Oracle, SAP, and Workday) have made commitments to DEI in their broad product portfolios, but this section will call out a few of the best-of-breed providers for their efforts in DEI specific to talent acquisition.

Figure 7:

Best of Breed Providers With a Strong Commitment to DEI

Provider	Commitment
	DEI education, training, maturity model, and take-home assessments, dedicated DEI role and improved diversity of executive team
JOBVITE	Job Description Grader, company communication to convey it's commitment to diversity and inclusion, Jobvite's Bias Blocker to de-identify resumes and chat transcripts, and analytics to track the progress of DEI recruiting initiatives
	Dedicated DEI role, changes to company culture, diverse leadership team, services for customers, and product roadmap focused on reducing bias
	Deep analytics, intelligent writing, intelligent selection, blinded resumes, bias-free descriptions, services and maturity model, demonstrated case studies, and leadership commitment
	Dedicated DEI role, AI matching capabilities to reduce bias, diversity hiring toolkit that includes diversity and inclusion maturity model and success pillars, and diversity hiring assessment



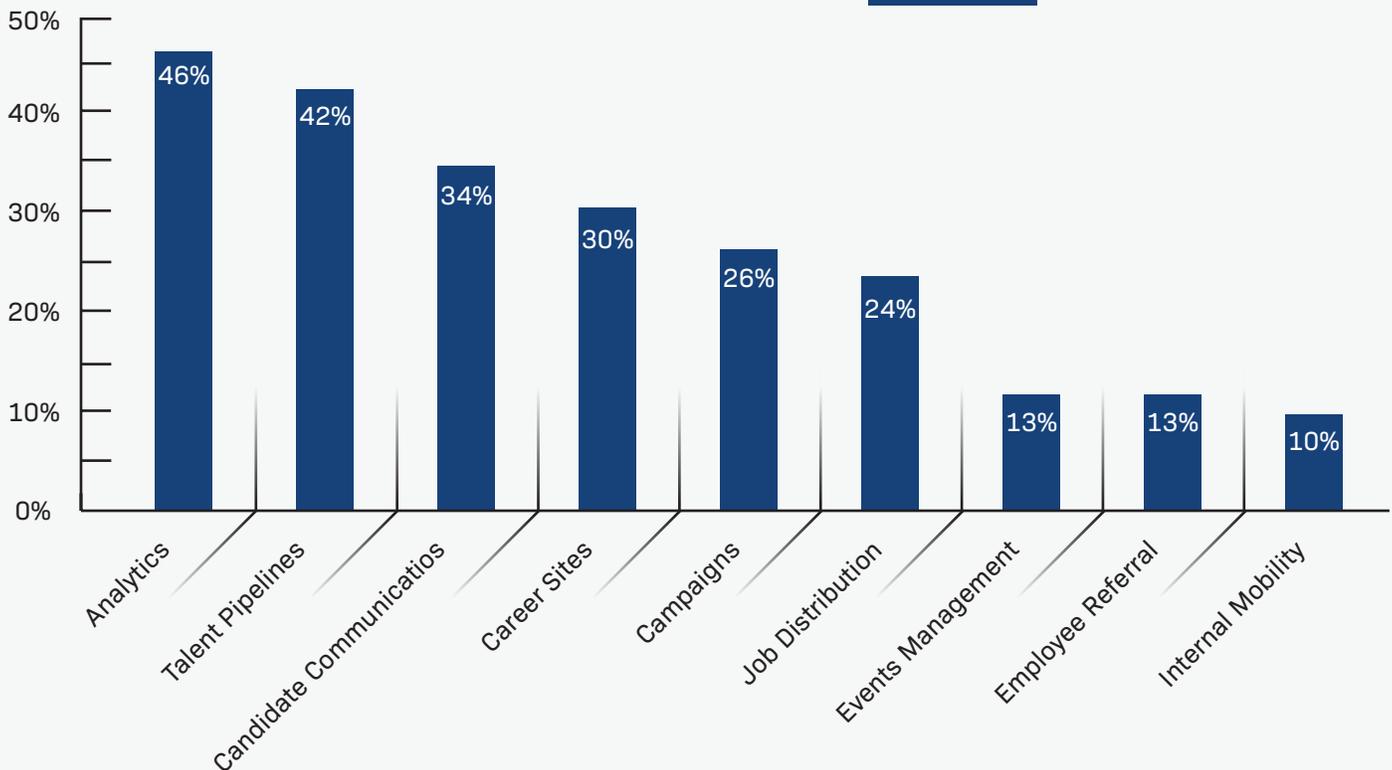


A CRM system has become a critical component of any successful talent acquisition strategy. Seventy-four percent (74%) of enterprise organizations plan to invest in pre-applicant capabilities over the next year. These organizations recognize the importance of attracting, nurturing, and converting leads into applicants – particularly in a time when the competition for talent is on the rise, availability of skilled talent is low, and candidate expectations are continuing to mature. As talent acquisition professionals are being held more accountable, a recruitment marketing platform is a necessary investment. Despite this increased momentum around recruitment marketing, organizations are still confused about where to look for a partner and if that partner should be their ATS.

- **Sixty-four percent (64%) of companies spend more on their CRM/recruitment marketing platform than their ATS**
- **Forty-six percent (46%) of companies stated that analytics is the most critical capability in CRM**

When considering CRM, companies are looking for a provider that can help them engage and nurture with talent before they apply. Enterprise organizations cited analytics, campaign management, and communication as the key requirements in a CRM solution (see Figure 8).

Figure 8: Key Benefits of CRM



Companies evaluating Recruitment Marketing and CRM providers are considering if they want to use their ATS providers or stand-alone providers. Many of the ATS providers have expanded their capabilities in CRM, while others have acquired leading stand-alone providers. It is important to note that Avature is the only provider included in this report that has a strong heritage in CRM and recruitment marketing. The following chart indicates the providers with strong CRM and recruitment marketing capabilities as part of their products.

Figure 9: Providers With Strong Recruitment Marketing/CRM Solutions

 Avature















Case Study:

INGRAM MICRO

With more than \$42 billion in annual revenue, Ingram Micro delivers a full spectrum of global technology and supply chain services to businesses around the world. Deep expertise in technology solutions, mobility, cloud, and supply chain solutions enables its business partners to operate efficiently and successfully in the markets they serve. The company boasts more than 32,000 employees globally in 54 different countries and is looking to support rapid growth. Dozens of acquisitions have helped Ingram Micro broaden its services offerings, including becoming the industry's leading Cloud Marketplace and a go-to provider of commerce fulfillment solutions. Rapid growth and business focus expansion has led the Ingram Micro talent team to work even harder to bring diverse teams together to cohesively execute on company strategic and financial objectives.

The Challenge:

Ingram Micro's U.S. applicant tracking system was antiquated, so as it looked to bring on a new ATS, it turned to Jobvite. Before Jobvite, the company had six different ATS providers in place. Ingram Micro was looking for a new technology platform that could streamline its hiring into one unified platform.

The Solution:

Ingram Micro was able to streamline sourcing, provide a mobile experience and use various features, like reporting and mobile integrations, to develop their talent pipeline and modernize their recruiting system.

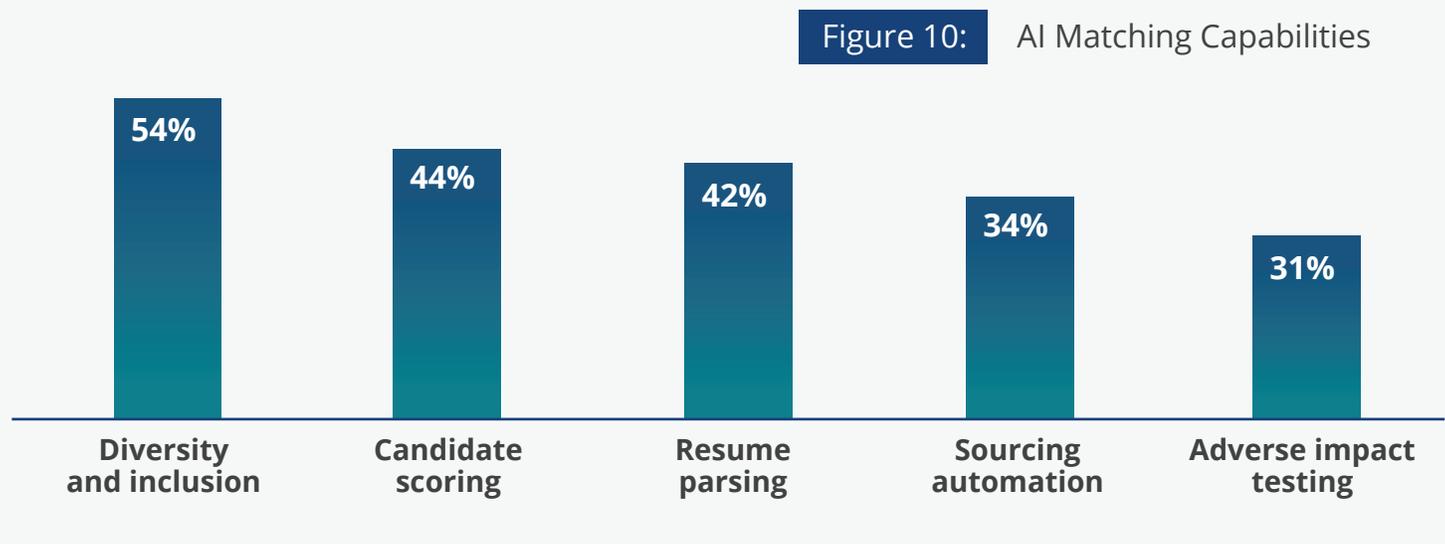
The Results:

Through referrals, social and mobile recruiting, Ingram Micro gained increased transparency into its talent pipeline – finding the best sources to invest in and growing its applicant pool by 40% while traffic to the career site increased by 186%.

AI Matching

It's hard to find a conversation in TA tech that does not include AI matching. ATS providers are enhancing their capabilities to connect jobs to candidates and candidates to jobs. Providers like HiredScore and Eightfold have gained momentum in the past year while SeekOut, a search and sourcing provider, announced that it raised \$65 million in Series B funding, expanding its matching capabilities. All eyes are on AI matching. In our latest study, 34% of companies stated that they are using some type of matching, and they are two times more likely to improve diverse sources and three times more likely to improve quality of hire.

Although companies understand the value of AI matching, they do not always know where to go to find a technology partner. Aptitude Research found that the top drivers for investing in AI matching include diversity, equity, and inclusion; candidate scoring; resume parsing; and sourcing automation (see Figure 10).



The biggest trend in AI matching is ATS vs. stand-alone providers. Companies and buyers that are committed to ethical AI are looking at stand-alone providers, while companies focused on efficiency AI are looking at their ATS providers. Companies have to consider what data they are using to match and what skills are available on candidate profiles.

Figure 11: Characteristics of Ethical AI and Efficiency AI

Ethical AI 	Efficiency AI 
Data Transparency	Recruiter Productivity
Candidate Consent	Candidate Scoring
Published Methodologies	ATS Workflow Integration
Reduced Bias	Save Time

Skills and Capabilities

Skills were a priority for the talent management market a decade ago and they are making a big comeback in 2021. Skills are becoming the new currency for hiring decisions. Companies can provide a fairer hiring process and make smarter hiring decisions to enrich upskilling and internal mobility. Companies can also identify skills gaps across the organization to plan and prepare for the future. The challenge is that a skills foundation requires significant investment from providers. Companies must consider providers that have built a robust skills library and have spent the time to understand what drives hiring decisions. Much of the focus on skills is being driven by Workday's commitment in this area. Figure 12 highlights some of the providers that are focused on skills.



Skills were a priority for the talent management market a decade ago and they are making a big comeback in 2021.
Skills are becoming the new currency for hiring decisions.

Figure 12: Providers With a Focus on Skills





Mergers and Acquisitions

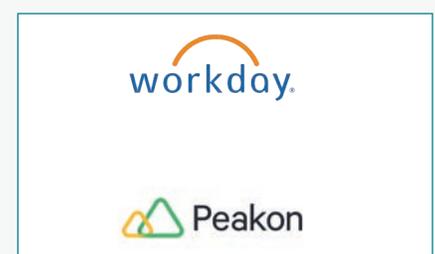
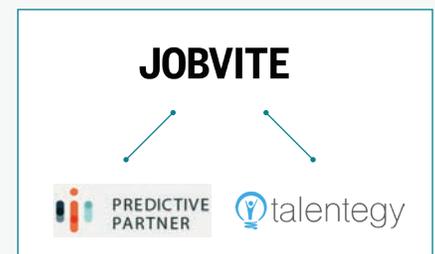
Since we last published the Aptitude Index Report, providers have taken more investment from venture capital and private equity firms, increased partnerships and alliances, and acquired smaller providers. Investment increased significantly in 2020 and continues to be a focus in 2021. Providers are looking to support product, sales and marketing, and customer support. According to Aptitude Research, only 13% of companies identified the amount of money a provider has raised as a key criteria in decision-making. Companies should consider a provider's investment history for the following reasons:

- **It may impact leadership and retention for the provider**
- **Providers may be able to execute on their product roadmaps or they may change their product roadmaps based on the investor**
- **Customers may experience some growing pains that will impact product, culture, and support**

Mergers and acquisitions have also increased in the past year. Providers are looking for partners to help expand their global footprint, customer base, or product portfolio. Conversational AI, analytics, video and branding were driving many of these decisions. Figure 13 includes the major acquisitions in talent acquisition in 2020.

Figure 13:

Acquisitions in 2020



Case Study:



Valvoline is an Altru and iCIMS customer. Valvoline uses iCIMS Video Studio on their career pages and job descriptions to humanize the Valvoline brand and engage candidates through employee testimonial videos. Because Video Studio makes it simple and cost-effective to leverage employee-generated videos, Valvoline also uses it to engage and connect their virtual workforce. For example, they use Video Studio to highlight employee birthdays, work anniversaries, philanthropic causes (i.e., season of giving campaigns), and other internal virtual team building events and collaboration such as “kitchen karaoke”.

Heritage:

With a few exceptions, the core strength of these solution providers is found in talent acquisition, although many of them offer other talent management solutions (including performance management, succession planning, and compensation). Figure 14 represents the heritage of each provider. Heritage is important when considering the deep domain expertise and commitment to talent acquisition. It is interesting to note that most of the providers in this report have their heritage in talent acquisition, which is a shift from previous ATS reports we have published.

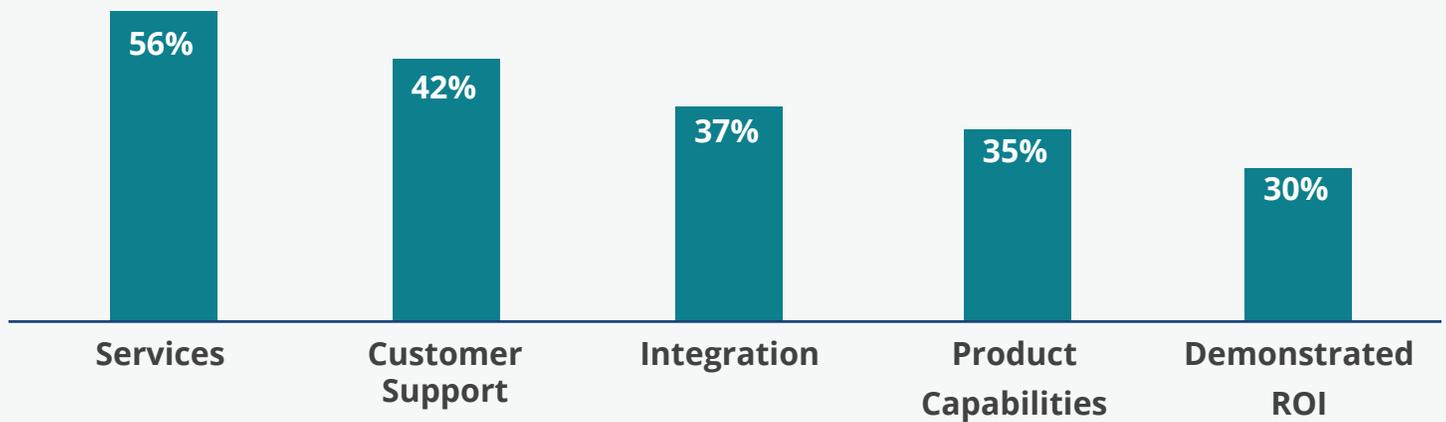
Figure 14: Heritage of Providers





When evaluating what is most critical when selecting a provider, companies identify services, customer support, integration, and product capabilities (see Figure 15). Companies are looking for true partnership and that comes from a commitment to customers, deep domain expertise, and dedicated support. This criteria came to light over the past year as companies adapted to change and needed providers that would be willing to work with them through a time of tremendous transformation.

Figure 15: Key Criteria for Selection



During our briefings, demos, and customer interviews, we discovered that many providers have worked to support clients in new ways. Some of the support that companies received included:

- **New product bundles to support areas such as high-volume needs, internal mobility, or healthcare**
- **Additional automation to support remote recruitment and limited TA staff and resources**
- **Support for furloughed employees through engagement, portals, or educational materials**
- **Additional education and training to support remote recruitment and improve morale**
- **Removal of replacement costs to support companies looking to switch to a new provider with limited budgets**
- **Improved communication capabilities through text, Microsoft Teams, conversational AI, Slack, and collaboration platforms**

Case Study: Maryland Emergency Management Agency

In early April, the Maryland Emergency Management Agency (MEMA) reached out to SmartRecruiters' partner, Allegis Global Solutions, asking for help in rapidly hiring healthcare professionals to combat the COVID-19 outbreak—both immediately and in the foreseeable future.



The SmartRecruiters and Allegis team partnered on a quick turnaround to support the state's urgent need to build talent pipelines and attract physicians, nurses, clinical, and non-clinical staff as quickly as possible.

Ordinarily, the size and scope of such a project would warrant a more measured approach. However, 2020 changed expectations. Everything was discussed, scoped, designed, developed, and launched – including the training of program managers – in under 36 hours.

In those 36 hours, the provider's service and support really stood out. There was never a "we can't do this" or "there is not enough time" moment. The SmartRecruiters team was engaged, supportive, and intent on putting a plan into action that would get the state of Maryland the personnel it needed to protect its citizens.



Buyer Personas

Understanding Decision-Making

As talent acquisition becomes more complex, so does the role of the recruiter and the talent acquisition function within companies. Recruiters must juggle multiple hats to be successful. No longer focused solely on relationship building or administrative tasks, the modern recruiting function requires a new set of skills and competencies that often seem contradictory. Talent acquisition professionals have to build long-term relationships with candidates, interpret data, sell and market their employer brand, and consider a more flexible workforce which are all responsibilities that did not exist a decade ago. While this presents new opportunities for talent acquisition departments to align with business goals, it can make the process of selecting the right technology feel overwhelming.

Several roles in the talent acquisition function measure the success of TA technology initiatives.

A few of these roles include:

- **Recruiting Operations Professionals:** Forty-two percent (42%) of companies leveraging a recruitment marketing platform have a dedicated operations role, compared to 22% of companies not using them.
- **Candidate Experience Manager:** The Candidate Experience Manager role is influencing decisions around TA tech decisions and candidate communication tools. Aptitude Research found that 24% of companies have this dedicated role.
- **Digital Specialists:** Some companies are adding digital specialists to support their digital transformation. This role can help evaluate and adopt digital solutions that can improve efficiencies and the overall experience using mobile solutions, AI, automation, and video. Aptitude Research found that 12% of companies have this dedicated role.
- **Data Scientists:** Industries such as financial services hire data scientists to join their talent acquisition teams and help them leverage analytics. Data scientists can help to evaluate AI and predictive analytics solutions. Eight percent (8%) of companies have a data scientist role on their talent acquisition team.

The Role of IT

IT is also influencing many of the talent acquisition technology decisions today. According to this study, one in three companies stated that IT is more involved in TA tech decisions this year. IT can create roadblocks for TA leaders looking to drive change and transformation, since their primary focus is on integration and efficiency. They prefer the integrated providers to providers that may offer a better experience and more robust capabilities.

Many companies lack the dedicated resources and underestimate the needs and expectations of IT to build integrations. Providers downplay the challenges of working with partners and the willingness to work with their competitors. And IT and HRIT are typically preoccupied with other priorities. In fact, one in three talent acquisition professionals surveyed said that IT views talent acquisition integration as a low priority. If a talent acquisition team does not conduct due diligence and collect proper documentation from their providers, it is challenging to get IT to prioritize these projects.

With new responsibilities and so many new products in the market, it's easy for talent acquisition professionals to lose sight of their own internal needs when evaluating solutions. Instead, many companies think they need to have it all. When evaluating providers, companies tend to rely on word of mouth instead of looking at their own requirements. This type of mentality creates serious barriers to creating a long, meaningful relationship with a solution provider. Aptitude Research has made a conscious decision not to include any type of ranking or rating in this report. There is no "best" solution in talent acquisition. Instead, there are a handful of leading providers that may or may not meet the unique hiring needs of different organizations. Understanding these unique needs and key requirements is a critical exercise in evaluating and selecting the right technology partner.





What It Is:

An Internal Needs Analysis is an exploration of an organization's strengths and weaknesses, focusing on internal factors.

Why It Is Important:

Companies need to understand what requirements they have before they can begin to know what technology providers they need.

How To Do It:

SWOT analysis, interviews with key stakeholders, assessment of existing technology solutions, budget planning, long-term vision, alignment with corporate objectives, and readiness assessment.

Questions To Ask:

- **What is the formal process for evaluating technology and who is involved?**
- **What is the cost to your organization if you lose talent or do not hire quality candidates?**
- **Do stakeholders look at projects individually or as a portfolio?**
- **What is the budget cycle at your company?**
- **What resources do you need and are they available?**
- **Who will be a champion for this project?**
- **What other solutions does this need to integrate with at our organization?**
- **When do you need it implemented?**
- **How will you measure success?**

Understanding the different personas is one-way organizations can begin to provide clarity around their needs and figure out which solution is the right fit. Many solution providers try to develop buyers' personas to identify, nurture, and engage buyers in a way that builds a long-term relationship. Furthermore, these solution providers develop buyer personas to understand the behaviors, motivators, challenges, and preferences of their target audience. It would be helpful if companies looking to invest in these systems could understand what these personas are and how providers can support them along the customer journey. Below are several buyer personas that Aptitude Research has created based on proprietary research, and an analysis of what providers are best suited to support their needs.

Figure 16: Buyer Personas

The Traditionalist	The Integrator	The Analyst	The Innovator
<p>Organizations that are looking for a familiar solution that can do what an ATS has traditionally managed, while looking toward the future. These companies are looking for a provider with deep domain expertise in talent acquisition technology.</p> <p>-----</p> <p>These buyers may include operations, talent acquisition leaders, and CHROs.</p>	<p>Organizations that are looking for a solution that offers a complete talent management suite or ERP solution. They want a solution that can pull in performance data or succession plans into the hiring process through an integrated platform.</p> <p>-----</p> <p>These buyers may include IT, CHROs, talent acquisition and HR leaders, and administrators.</p>	<p>Organizations that are looking to support decisions through data and insights. These companies want interactive dashboards, predictive analytics, and AI capabilities to help inform hiring decisions.</p> <p>-----</p> <p>These buyers may include data scientists, CHROs, and VPs of talent acquisition.</p>	<p>Organizations that are looking for a best-of-breed, next generation talent acquisition platform. These companies are willing to take risks and try new strategies and technology to engage with candidates in a new way, improve efficiencies, and give recruiters and hiring managers a better experience.</p> <p>-----</p> <p>These buyers may include talent acquisition leaders, employer brand specialists, recruitment marketing specialists, digital specialists, and candidate experience managers.</p>
			

In addition to understanding buyer personas, another way organizations can narrow their list of providers is by looking at target market. Below is the list of providers based on what markets they target. **This report does not focus on the SMB market although some of these providers do support SMB customers with under 250 employees.**

Figure 17: Providers by Target Market (Company Size)

Mid-Market <i>(250- 4999 employees)</i>	Enterprise <i>(Over 5,000 employees)</i>	Global Enterprise <i>(Support 30+ language; global offices and data centers)</i>
		
		
		
		
		
		
		
		
		
		
		

*iCIMS and SmartRecruiters are two providers that have expanded their growth in the global enterprise market.



A Guide to Using This Report

The Aptitude Index Report includes 13 vendor profiles that were compiled through Aptitude Research's in-depth analysis of each provider, our extensive experience covering this market, customer interviews, and external research through sites such as G2Crowd and Glassdoor. Each profile is divided into three main sections:

- **Company Background:** History, leadership, customers, and employees
- **Product Information:** Products, development technology, multilingual support, partners, and customer support
- **Aptitude Insights:** Our proprietary analysis, a look at differentiators, and roadmaps

Below is a guide to help companies navigate through each profile and understand the information we believe is important when considering a talent acquisition partner.

Company Background

What It Includes:

- **History:** Outlines the year founded, heritage of the provider (what solutions they started offering first), offices, revenue, mergers and acquisitions, and investments.
- **Leadership:** Examines the background of the CEO, the percentage of women on the leadership team, and retention of the leadership team. It also looks at the CEO's GlassDoor rating and the appointment of a dedicated DEI role.
- **Employees:** Highlights the number of employees and percentage focused on research and product development, sales, and customer support.
- **Customers:** Examines the number of customers and target market. It also looks at G2Crowd scores, a customer rating site.
- **Customer Acquisitions:** Lists up to six new customers for each of the providers in the report.
- **What's New:** Highlights the changes in company, product, or roadmap over the past two years.
- **Support During COVID-19:** Looks at the way providers supported customers through change and uncertainty in 2020 and 2021.

Why It Is Important:

The company background helps customers and prospects get an understanding of the provider, the culture, priorities, and financial viability. Similar to any relationship, companies must understand who the provider is and what their culture says about them in order to form a true partnership.

Product Information

What It Includes:

The information included in the solution profile places the organization's talent acquisition offerings in the context of the human capital management (HCM) landscape (Figure 18) and the rest of its solution capabilities. It also examines what products the provider offers, delivery model (SaaS or On Premise), release schedule (how many times a year is there a new release), data centers, languages, and any services provided.

Why It Is Important:

Companies should understand what products and product suites are offered by their providers. Most providers go to market with either a talent acquisition suite, a talent management suite, or ERP. Yet, it is not always clear what is included or what they are offering. This section provides clarity around the product suite. Each profile includes a highlighted landscape of what's included from the provider. According to Aptitude Research, 38% of companies are leveraging an ERP, 36% are leveraging a talent acquisition suite, and 10% a talent management suite for Talent Acquisition capabilities.

According to Aptitude Research, 38% of companies are leveraging an ERP, 36% are leveraging a talent acquisition suite, and 10% a talent management suite for Talent Acquisition capabilities.

Figure 18: HCM Products



Integration, Security, and Communication Capabilities:

This year’s Aptitude Index Report includes additional analysis on integration, security, and communication capabilities. A summary of some of the key capabilities that we explored across CRM, recruitment marketing, and onboarding can be found in the Appendix of this report.

Security

Comply with DOE, federal, state and local regulations	
Provide access to all modules with a single login	
Ability for administrator to restrict data access by role, IP, ID and report	
SOC 2, Type II certified	
Ability to monitor and track virus attacks, denial of service, etc.	
Offsite back-up of all customer data	
Documented back-up process	

Integration

Standard integrations with background screening providers	
Standard integrations with third-party CRM, assessment and onboarding providers	
Support for web service API integrations that meet standard web logic	
Integrate with third party video interview providers	
Integrated toolsets for security administrators	

Communication

Text/SMS	
Intelligent Chat	
Messaging - WhatsApp	
Messaging - WeChat	
Microsoft Teams	
Slack	

We also addressed data management and how providers could respond to the following questions:

- What other talent acquisition providers do you currently integrate with, and can you provide examples and documentation?
- What are your standard integrations with third-party providers?
- Do you offer support for web service API integrations that meet standard web logic?
- Do you provide integration toolkits for administrators?
- What type of support do you offer before, during, and after the integration process?
- Does the HRIS vendor certify these integrations?

This section also includes a roadmap of up to four capability enhancements or product enhancements that are planned for the next year.

Aptitude Insights

What It Includes:

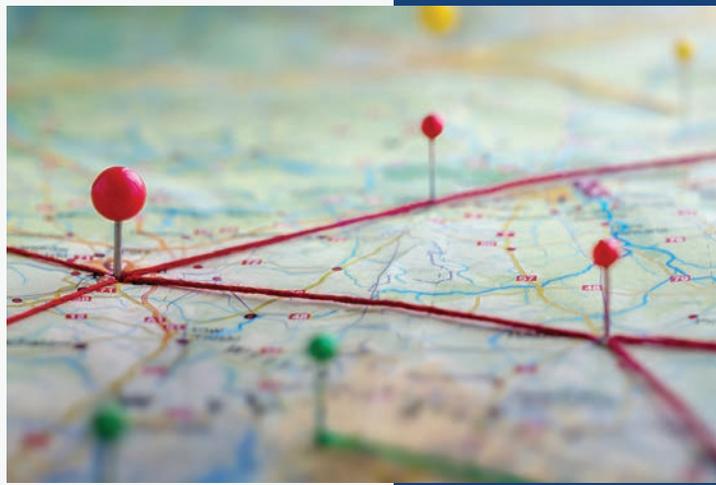
Aptitude Insights offers our observations and analysis of each of the providers, including their key differentiators and areas of improvement. To create these insights, Aptitude Research examined the following product capabilities in demonstrations and briefings in order to assess key strengths, understand the forward-looking roadmap, and formulate its insights on the solution overall.

Why It Is Important:

Most companies are not able to see the full picture of a provider beyond a website or demo. They understand that they should empower individuals, but do not have the right strategies and tools in place. Today's human capital experience economy requires technology to be focused on this experience and improve the success of talent acquisition efforts.

Each analysis includes:

- **Insights:** Aptitude Research's insights into where providers are focused and what they are prioritizing in the next year. It also includes a summary of the provider's target market.
- **Key Differentiators:** This report helps highlight key differentiators, as well as areas of improvement and growth. Organizations must still consider their own unique requirements when evaluating this section.
- **Strengths and Opportunities:** This section provides Aptitude Research's analysis of each vendor's areas of strength and opportunities for improvement.
- **Bottom Line:** This section summarizes what sets each provider apart from their competitors.
- **Target Audience:** This section indicates which market the provider serves – either SMB, Mid-Market, Enterprise, or Global Enterprise.



The Buyer's Journey

A Closer Look

Organizations must consider the strengths and weaknesses of each provider through the buyer's journey, from organizational readiness to selection to implementation and beyond. Below are a few questions to consider when evaluating providers:

Organizational Readiness:

During this phase, solution providers often offer a variety of support materials to help educate customers on the market and identify their own requirements. Some of the differentiators that provide a stronger customer experience include:

- **Access to Research Institutes with educational information and both in-house and third-party research**
- **Webinars to help educate prospects on key trends and best practices**
- **ROI analysis to help prospects build a business case for investing in technology**
- **Customer conferences or user groups where prospects are invited to connect with other customers and learn more**

Selection:

This phase typically involves the identification of use cases, RFP/RFI collection, customer references, on-site demonstrations, short listing, and negotiation. Some of the differentiators for selection include:

- **Strong customer support and services**
- **Customer acquisition and retention rates**
- **Mobile-responsive design**
- **Strong partnerships and integration with the larger ecosystem**
- **Level of innovation and product enhancements**

Implementation:

Most companies are not prepared for implementation – regardless of how many times they may have purchased a solution. Implementation can require additional resources, time, and money. And, too often, companies do not take the time to understand their own requirements before implementing a system. Many solution providers are notorious for misleading customers with unrealistic timeframes or resources that may cost extra or are not available.

Several ways that solution providers differentiate themselves across implementation include:

- **Implementation resources included in the cost**
- **Implementation support team to help meet expectations and set goals**
- **Administrative tools to support integration**
- **Educational materials to support companies**

Adoption:

Only three percent of companies using an ATS use all of its functionality. Companies need to look at not only how their provider will partner with them during implementation, but also how they will make that relationship stick after year one, year two, and beyond. Below are a few of the ways providers differentiate themselves for adoption:

- **Change management resources**
- **Customer advisory boards and councils**
- **Customer feedback sessions and “Idea Labs” where customers are free to voice concerns and connect with each other**
- **High customer retention rates**

Each of these profiles highlights differentiators across the customer journey and looks for things that may not be obvious on a website or in a demo.



Vendor Profile:



Company Description

ADP is a leading payroll provider with recruitment solutions that include Recruitment Process Outsourcing (RPO), a talent acquisition platform, and talent acquisition consulting. ADP also supports companies with contingent workforce management through its WorkMarket, a platform to source, manage, and pay an extended workforce of contractors and freelancers.

A screenshot of the ADP Salary Benchmark tool interface. The interface is divided into two main sections: 'Offer Request' and 'Offer Letter'. The 'Offer Letter' section is active, showing details for a job titled '#56 - Java Developer' in Atlanta, GA. The job is currently in a 'Pending Approval' status. Below the job details, there is a section for 'ADP Salary Benchmark' for a 'Java Software Engineer' in the 'Business Services' industry in Atlanta. A salary distribution chart is shown, indicating a median base compensation of \$80,203, with a range from \$49.8K to \$140.7K. The chart also shows the 10th, 25th, 75th, and 90th percentiles of the salary data.

Offer Request | Offer Letter

Requisitions | Create Req | Help

< CANDIDATE LIST | Career Sit2 | CONTACT: 77348349394893 hg@gmail.com | STATUS: OF - Pending Approval | as of 3/26/21 4:40 PM

#56 - Java Developer | LOCATION: Atlanta, GA 30005 | RECRUITER: Sharanya Analytics | HIRING MANAGER: Multi-Owner Group

ADP Salary Benchmark

Compensation Insights by ADP DataCloud

ADP JOB TITLE	INDUSTRY	LOCATION
Java Software Engineer	Business Services	Atlanta

ADP job title doesn't match? [FIND A MATCH](#) | Don't belong to this Industry? [SELECT AN INDUSTRY](#)

Results displayed are based on salary information across 95 employees within 27 organizations.

MEDIAN BASE COMPENSATION	RANGE	10th	25th	Median	75th	90th
\$80,203	\$49.8K - \$140.7K	\$49,769	\$62,876	\$80,203	\$107,725	\$140,749

Data as of: October 01, 2020

Offer Letter

Customer Wins 2020-2021

- Transportation Staffing Organization (3,500 employees)
- Healthcare Organization (30,000 employees)
- Charitable Organization (2,000 employees)
- Banking/Investment Organization (3,100 employees)
- Athletic/Leisure Club Organization (3,000 employees)
- Construction Organization (1,470 employees)

Recent Announcements

- Improved candidate and recruiter experiences
- Events management capabilities
- Easy apply solution
- Compensation analytics in its talent acquisition platform
- New partners in ADP Marketplace (more than 530 total)

Customer Support During COVID-19

- **Improved Efficiency:** Improve efficiency and response during the pandemic. For example, ADP supported a national grocery chain by creating modified workflows, new career sites, and improved apply process. The company was able to process 55,000 candidate applications per day for three weeks and hired 32,000 workers in the same time period.
- **Enhanced Capabilities:** Improved communication and capabilities to support remote recruitment including: video interview, two-way chat, text to apply, easy apply to support high volume hiring.
- **Return to Work Toolkit:** Included communication, scheduling, health screening, biometric screening, touchless kiosks, and Data Cloud reporting and analytics.
- **Compliance:** Education to clients on changing COVID-19 regulations.

Company Background



History

- **Year Founded:** 1949
- **Private or Public:** Public (NASDAQ: ADP)
- **Heritage:** Payroll
- **Offices:** Roseland, NJ (HQ); over 100 offices worldwide
- **Revenue:** \$14.6 Billion
- **Mergers & Acquisitions:** The Right Thing (2013), Virtual Edge (2006)

Customers

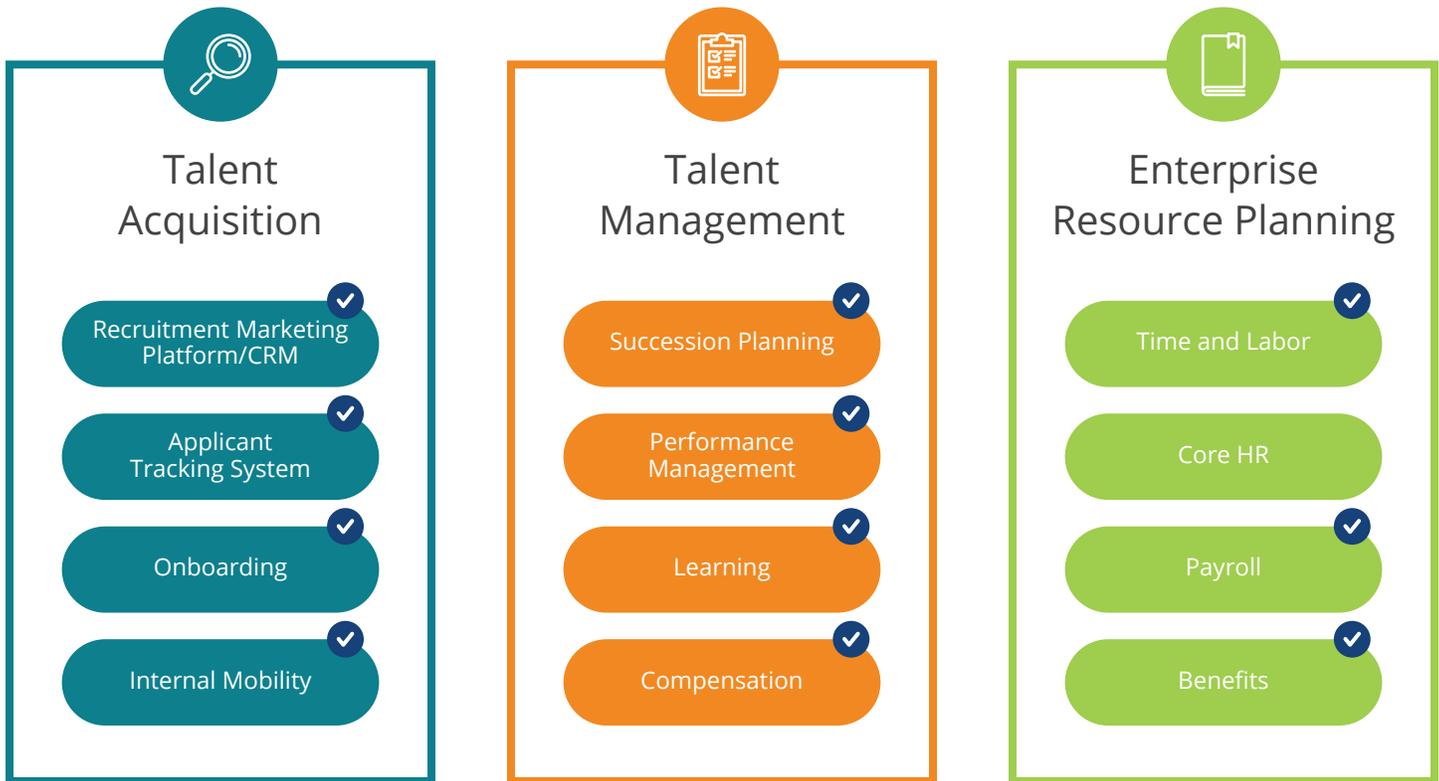
- **Number of Customers:** 440 (Talent Acquisition)
- **Target Market:** Mid-Market, Enterprise, Global Enterprise
- **Target Vertical:** All industries
- **G2Crowd review:** 4.1/5

Leadership

- **CEO:** Carlos Rodriguez
- **Glassdoor:** CEO approval rating of 93%
- **The Executive Team:** Women represent 20% of the executive team
- **Investment:** Not disclosed
- **DEI Executive:** Yes (Bob Locket)

Employees

- **Number of Employees:** 58,000
- **% Employees in R&D:** Not disclosed
- **% Employees in Sales/Marketing:** Not disclosed
- **Glassdoor rating:** 4.0/5



Products	Recruitment Marketing, ATS, Onboarding, Background Screening, Talent Management Suite, Payroll
Delivery Model	SaaS
Release Schedule	Quarterly updates (plus 2-3 times/month for minor updates)
Data Centers	Multiple data centers globally
Development Technology	Not disclosed
Languages	ADP solutions are offered in 20 languages
Services	Recruitment Process Outsourcing, AIRS recruiter training, implementation services, change management services, client support services, screening and selection services, onboarding
Partners	530+ partners in the ADP marketplace

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	No
Messaging - WeChat	No
Microsoft Teams	No
Slack	No



Aptitude Analysis

Every year that we publish the Index Report, ADP is a provider that surprises me with the robust capabilities it offers, and innovative thinking to enhance the candidate experience. Despite a strong heritage in payroll, ADP is a powerful talent acquisition systems contender. Over the past two years, ADP has improved its candidate and recruiter experiences, enhanced recruitment marketing capabilities, integrated compensation analytics into talent acquisition, and focused on reducing bias.

ADP has improved its recruitment marketing capabilities with career sites, candidate password-less logins, and programmatic job advertising (through a partnership with Pandologic). It has also leveraged text/SMS capabilities, introduced an easy apply process with a simplified candidate profile, and integrated with Indeed and ZipRecruiter. Its candidate experience is mobile-optimized and includes text and chat capabilities.

One differentiator for ADP is the integration of compensation analytics in its talent acquisition solutions. ADP pays one out of six workers in the United States. It has access to extensive compensation data across roles, titles, and geographies that other providers do not. As a result, recruiters and hiring managers have access to pay data insights and more competitive job postings. ADP helps customers as both a technology and services partner. It supports end-to-end talent acquisition and has made investments in DEI transformation across all hiring activities.

-
- **Areas of Strength:** Recruitment marketing, contingent workforce, marketplace
 - **Areas of Improvement:** Limited onboarding, limited candidate communication capabilities

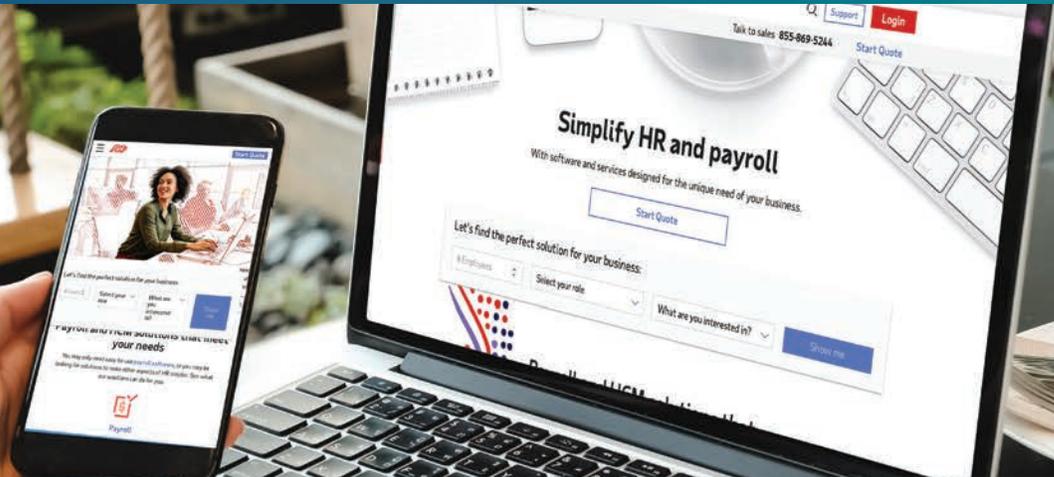


- Skills insights and matching
- Embedded compensation analytics (powered by ADP Data Cloud)
- Advanced job board integrations (LinkedIn, ZipRecruiter, etc.)
- Upgraded e-I-9 onboarding experience

Key Differentiators

- 1 Breadth of its marketplace:** With over 500 partners, ADP provides seamless integration across all areas of talent acquisition and talent management. A couple of examples include integration with programmatic job advertising provider Pandologic, which allows companies to streamline all advertising and reduce spend, and integration with VidCruiter, which allows companies to interview candidates remotely.
- 2 Access to data:** ADP helps clients access more insights through the ADP DataCloud. The ADP DataCloud is powered by reporting, benchmarking, data exchange, and analytics. It provides talent acquisition clients with predictive time to hire, empowers hiring managers to make better decisions throughout the hiring process, and streamlines collaboration with recruiters.

- 3 **Compensation analytics:** One differentiator for ADP is the integration of compensation analytics in the talent acquisition solutions. ADP pays one out of six workers in the United States, and has unparalleled access to pay data across roles, titles, and geographies. With this integration, recruiters and hiring managers have access to pay data insights and more competitive job postings.



The Bottom Line

Key Characteristics:

- End-to-End Talent Acquisition
- Product Innovation
- Marketplace

Best Suited For:

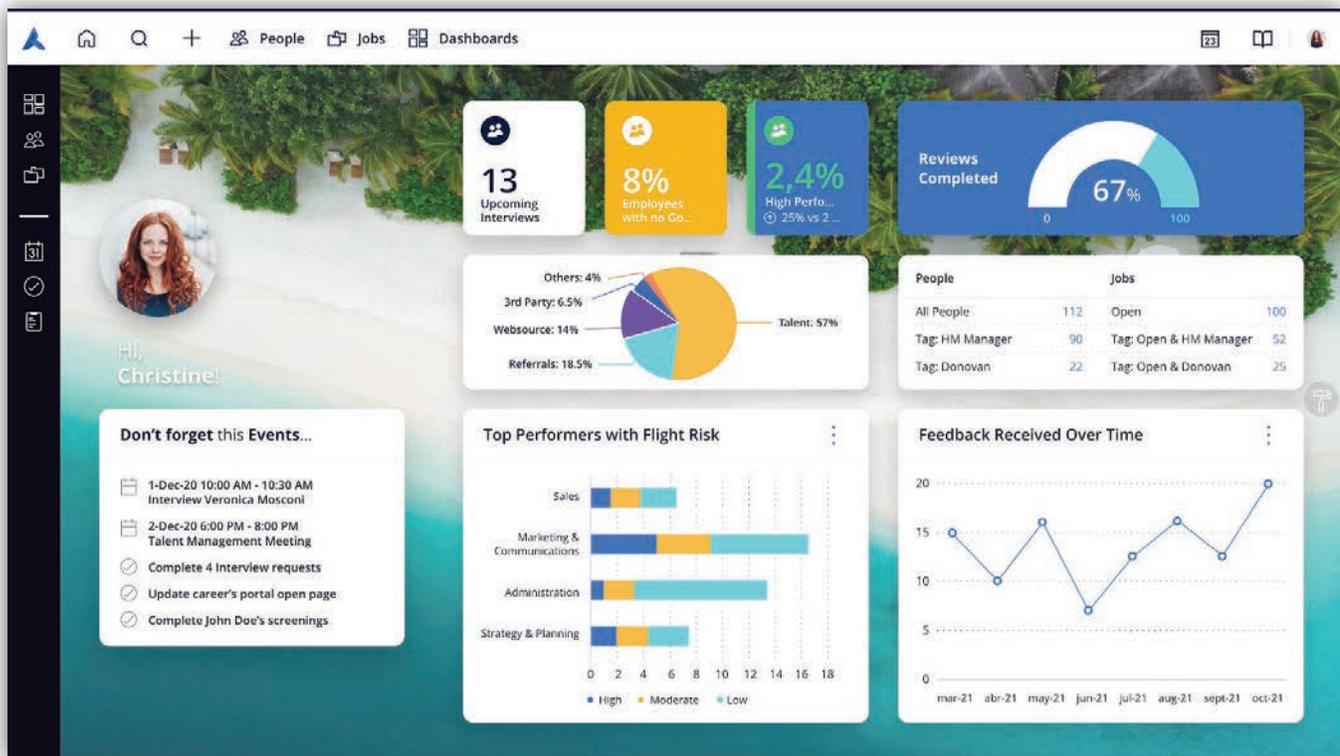
- **Mid-Market:** 1,000-5,000 employees
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Over 5,000 employees globally

Vendor Profile:



Company Description

Avature is an end-to-end Talent Acquisition and Talent Management platform that helps companies attract, recruit, develop and retain talent. Avature's platform is organically built with seamless integration across its solutions, consistent data and experiences, and flexible software that supports business driven solutions.



Customer Wins 2020-2021

+50 new enterprise customers across North America, EMEA and APAC

Recent Announcements

- Launched Contingent Workforce Management platform
- Integration with WeChat
- Launch of Avature Video
- Expanded into talent management with performance, succession, and internal mobility
- 500+ features deployed in 2020 (65% customer-driven)

Customer Support During COVID-19

- **Zero Service Delays:** Since the start of the pandemic, Avature has functioned at 100% capacity and had no near-term (0 to 3 months) or mid-term (3 to 9 months) service delivery delays in any region of the world.
- **Business Continuity Plan:** Avature implemented a business continuity plan immediately after the pandemic started, and put comprehensive measures in place to address “local” issues relating to the virus.
- **Creative Packaging And Pricing:** Avature partnered with clients to help meet their needs with creative packaging and pricing to include functionality from other products in the platform. Avature expanded email capabilities for customers to keep candidates/employees informed at all times, as well as the DNA solution to update employees.
- **Video Capabilities:** Avature accelerated its development of video capabilities this year to support companies in a remote environment across its entire platform, from talent acquisition (onboarding, career sites) to talent management (performance, feedback, succession, learning).

Company Background



History

- **Year Founded:** 2005
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** Madrid, London, Munich, Vienna, Barcelona, Bilbao, Shenzhen, Melbourne, Sydney, New York, North Carolina, Buenos Aires, and Córdoba
- **Revenue:** Not disclosed
- **Mergers & Acquisitions:** Not disclosed

Customers

- **Number of Customers:** 650+
- **Target Market:** Enterprise, Global Enterprise
- **Target Vertical:** All (Healthcare, Retail)
- **G2Crowd review:** 4.3/5

Leadership

- **CEO:** Dimitri Boylan
- **Glassdoor:** CEO approval rating of 89%
- **The Executive Team:** Women represent 45% of the executive team
- **Investment:** No funding
- **DEI Executive:** No

Employees

- **Number of Employees:** 840
- **% Employees in R&D:** 1 sales / 11 engineer ratio, with +300 developers
- **% Employees in Sales/Marketing:** 10%
- **Glassdoor rating:** 4.2/5




Talent Acquisition

- Recruitment Marketing Platform/CRM ✓
- Applicant Tracking System ✓
- Onboarding ✓
- Internal Mobility ✓



Talent Management

- Succession Planning ✓
- Performance Management ✓
- Learning ✓
- Compensation



Enterprise Resource Planning

- Time and Labor
- Core HR
- Payroll
- Benefits

Products	CRM, ATS, Onboarding, Performance, Succession, Learning, Internal Mobility, Events Management, Campus Recruiting, Employee Experience, Video Interviewing, Retail Recruiting, Contingent Workforce Management
Delivery Model	SaaS
Release Schedule	Agile Development Cycle (periodic nondisruptive releases)
Data Centers	New York, New Jersey, Shanghai, Frankfurt, Amsterdam, Moscow
Development Technology	Ubuntu 18 (OS server), NGINX (WebServer) and MariaDB 10.1.45 (database server). Juniper SRX firewalls, and Junos IDS/IPS & UTM (Unified Threat Management) on the gateways
Languages	33 languages in over 100 countries
Services	Account management, implementation, technical services, technical support, training, integration support
Partners	1000+ partners

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	In roadmap
Messaging - WeChat	Yes
Microsoft Teams	No (Developed its own video interviewing solution)
Slack	In roadmap



Aptitude Analysis

Avature is an end-to-end talent acquisition platform that includes CRM, ATS, onboarding, and internal mobility. It offers talent acquisition and talent management solutions in the same platform, allowing for single login and seamless interaction between all TA initiatives. Over the past two years, it has expanded into contingent workforce management and talent management (performance, succession, and learning) providing consistent data and a consistent experience. Avature is a sophisticated talent acquisition platform designed to meet the needs of the modern CHRO with strengths across integration, flexibility, automation, and experiences. Its “ServiceNow approach” to talent acquisition technology supports adaptability and agility to help companies keep pace in a changing environment. Thirty-five percent (35%) of Avature’s revenue goes to R&D.

While many of the providers in this report started in ATS and expanded into recruitment marketing, Avature’s heritage began as a leading CRM provider. With its campaign functionality, analytics, referrals, events management, and career sites, it is one of the few providers that can go head-to-head with stand-alone recruitment marketing players. AI and smart automation are a foundation of the platform, helping companies reduce bias throughout the process and make better decisions using AI matching, semantic search, and strategic sourcing.

Avature can support truly complex, global organizations. It is well suited for global enterprise companies with its sophisticated technology, data centers in North America, Europe, and APAC (including Germany, Russia, and China), and private cloud environment with highly secure hosting. By expanding beyond talent acquisition into talent management, Avature provides depth in functionality and integration for enterprise organizations looking to meet the needs of both IT and HR.

-
- **Areas of Strengths:** Global capabilities, data and security, integration
 - **Areas of Improvement:** Limited communication capabilities, lack of awareness for breadth of solutions

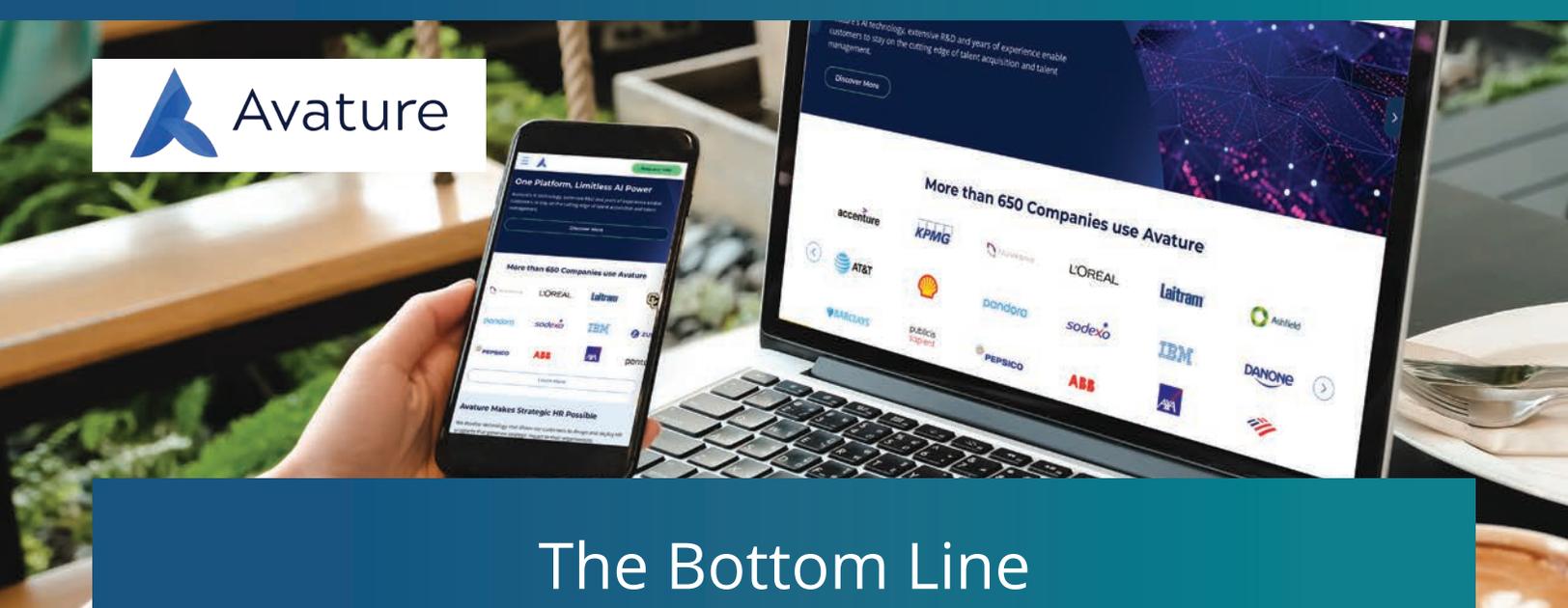


- **Agility:** Avature's roadmap is focused on delivering increased adaptability and agility for organizations to keep pace today
- **Flexibility:** It is committed to providing greater data model flexibility, personalization capabilities, and DIY tools for enterprise-level companies to design the platform they use to execute their talent strategy and make changes as and when needed

Key Differentiators

- 1 **Flexibility:** Avature provides flexibility to help companies with different needs and expectations. It includes a built-in portal builder, custom APIs, and tools that allow customers to reconfigure while in production. Its integration layer, Avature Junction, gives companies more flexibility and self-service options to manage integrations. Avature offers creative packaging and pricing to bring functionality from other products in the platform. This flexibility includes CRM, onboarding, and performance management capabilities in the ATS. One other way that Avature provides flexibility is through experiences. It creates any number of portals with tailor-made user experiences, distinct workflow, and advanced personalization features.

- 2 **AI and Smart Automation:** Avature has invested significantly in its AI and smart automation capabilities with over a decade of text processing, semantic search and machine learning. Its AI-platform includes matching candidates with the right jobs, optimized sourcing and semantic search, and reducing bias through transparency. Its ethical AI approach allows companies to see and customize decision-making in the process.
- 3 **Security:** For over 15 years, Avature has provided data processing services designed to advance the fundamental privacy principles of notice, choice, access, use and disclosure. It allows customers to define differentiated configurations of the SaaS platform to achieve compliance with their specific privacy obligations in the jurisdictions where they operate. These data controller options, when combined with mature organizational controls, technical safeguards, and data localization capabilities in both Russia and China, present comprehensive privacy compliant data processing options. Avature maintains compliance with all major internationally binding privacy regulations, treaties, and conventions.



The Bottom Line

Key Characteristics:

- End-to-End Talent Acquisition and Talent Management
- Strong Foundation (Integration, Automation, Data)
- Best-of-Breed for both IT and HR

Best Suited For:

- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Over 5,000 employees globally

Vendor Profile:



Company Description

Cornerstone helps organizations recruit, train, and manage their people. Cornerstone acquired Saba in 2020 and is now offering TalentLink to enterprise and global enterprise customers. Its recruitment platform includes recruitment marketing, ATS, onboarding and internal mobility.

The screenshot displays a recruitment software interface for a candidate named Jamie Gill, a Principle Full Stack Engineer. The interface is divided into several sections:

- Left Sidebar:** A list of candidates under the heading "Prescreening". Jamie Gill is highlighted.
- Header:** Shows the candidate's name "Gill, Jamie" and title "Principle Full Stack Engineer".
- Match Score:** A green circular progress indicator shows a 70% MATCH.
- Contact Information:** Email: jamegill3@dispostable.com, Phone: +44 07515199933.
- OVERVIEW Table:**

Candidate ID	Application date	Application Status	Sourcing Channel
28084	11/05/2020	Open	Match
- CV Section:** Includes a resume card for Mr Jamie Gill with contact details and a profile description.
- Right Panel:** A "Tags" section with a "Highlighted" dropdown, a search bar for "Add new tag", and a grid of icons. Below this, there are tags for "Finance" (Javaee Test) and "IT Skills" (AWS, C++ expert, Power BI, Project Manager, Sharepoint).

Customer Wins 2020-2021

- Epson
- Fagron
- InterQuest Group
- McDonald's France
- myjobscotland
- West Midlands
- Wiltshire Council

Recent Announcements

- Acquisitions of Saba (2020)
- Launched Skills Engine

Customer Support During COVID-19

- **Educational Resources:** Provided information to help companies adapt to the pandemic and remote work.
- **Cornerstone Cares:** Access to free and timely learning content and resources for employees.
- **Remote Work Essentials:** Offered resources to help companies adapt to working from home and managing employee well-being.

Company Background



History

- **Year Founded:** 1999
- **Private or Public:** Private
- **Heritage:** Talent Management
- **Offices:** Santa Monica with over 20 offices around the world
- **Revenue:** \$840M
- **Mergers & Acquisitions:** Saba (2020), Clustree (2020)

Customers

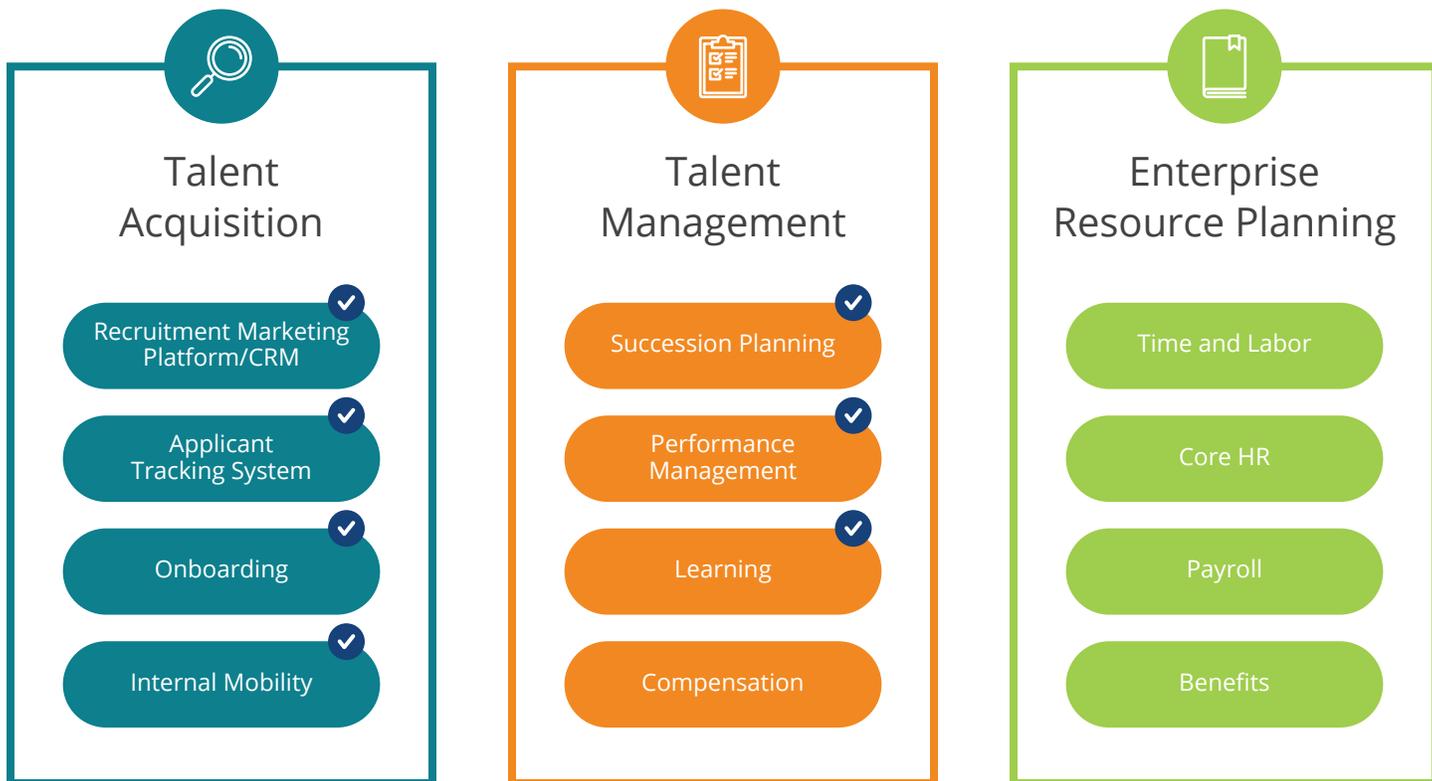
- **Number of Customers:** 600
- **Target Market:** Enterprise, Global Enterprise
- **Target Vertical:** All industries
- **G2Crowd review:** 3.2/5

Leadership

- **CEO:** Phil Saunders
- **Glassdoor:** CEO approval rating of 82%
- **The Executive Team:** Women represent 33% of the executive team
- **Investment:** Not disclosed
- **DEI Executive:** No

Employees

- **Number of Employees:** 3,000
- **% Employees in R&D:** Not disclosed
- **% Employees in Sales/Marketing:** Not disclosed
- **Glassdoor rating:** 3.7/5



Products	CRM, ATS, Onboarding, Internal Mobility, Learning, Content, Careers, Performance, Succession Planning
Delivery Model	SaaS
Release Schedule	Quarterly
Data Centers	Globally dispersed
Development Technology	React Developer Tools, Material-UI, Java, AWS
Languages	47
Services	Not disclosed
Partners	50+

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	No
Messaging - WeChat	No
Microsoft Teams	Scheduling Only
Slack	No



Aptitude Analysis

Cornerstone's enterprise talent acquisition platform, TalentLink, is the result of its acquisition of Saba in 2020 and Saba's previous acquisition of Lumesse in 2018. TalentLink is a leading global talent acquisition platform with capabilities from recruitment marketing to onboarding. Cornerstone's original recruitment solution is still available for SMB and mid-market customers. Cornerstone's differentiators include its recruitment marketing, AI matching, and internal mobility capabilities.

Cornerstone's recruitment marketing includes personalized content, employee-generated videos, and chatbots to show applicants a view of the company and answer their questions 24/7. Its campaign management and job distribution capabilities allow companies to target talent more effectively. Its skills engine enables AI matching for employers and candidates. One unique differentiator is Cornerstone's support of both contingent and performance hires. It is not a Vendor Management System (VMS), but offers visibility into total talent and analytics to help companies with any hiring needs.

Cornerstone's recruitment solutions are fully integrated with other talent management modules such as onboarding, performance management, and succession planning. It provides companies using other talent management solutions with a unified data model and user experience. A candidate profile created during recruitment will be transitioned to onboarding once a candidate accepts an offer. Recruiters also have access to performance data and succession planning information.

- **Areas of Strength:** Skills engine, AI matching, onboarding
- **Areas of Improvement:** UX, limited integration with collaboration and messaging providers

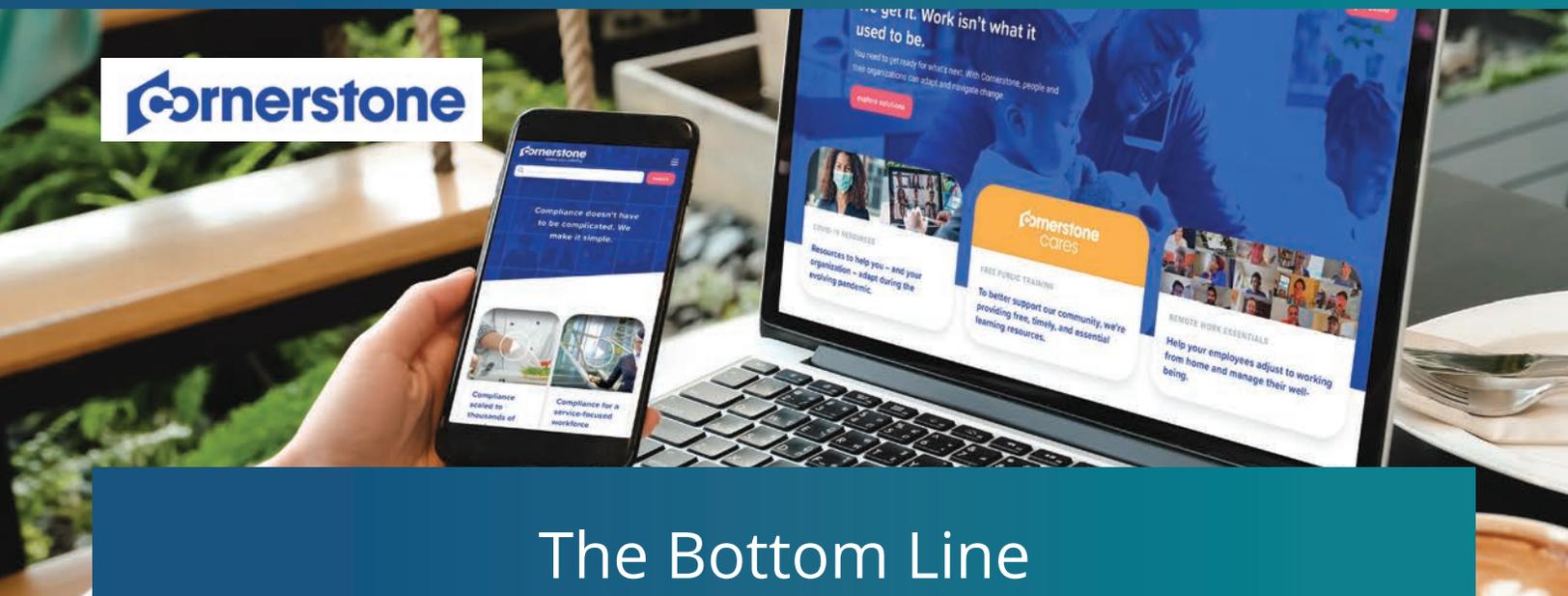


- **User Experience:** Improved user experience for both candidates and recruiters
- **Candidate Engagement:** Improved CRM and recruitment marketing capabilities
- **Intelligence:** Enhanced AI and machine learning throughout its recruiting product
- **Unification:** Continued focus on unification between TA and talent management

Key Differentiators

- 1 **Global expertise:** Cornerstone is one of the few providers with a proven record of supporting global clients. The acquisition of Saba in 2020 expanded its global reach. With over 30% of its customers coming from international companies, a presence in over 200 countries, and support for over 40 languages, Cornerstone is one of the truly international talent acquisition systems on the market. It has made a large investment in understanding the complexity of local markets and establishing direct sales efforts in both Europe and Asia.
- 2 **Skills engine:** Cornerstone has developed a robust skills engine over the past few years. Skills is foundational to the talent acquisition platform. With the ambiguity in talent acquisition today, Cornerstone is helping employers and candidates understand the skills at both an organizational and individual level. In talent acquisition, skills can help strengthen matching capabilities, career path and internal mobility, and the new hire experience.

- 3 **Integration:** Cornerstone's recruitment solutions are fully integrated with other talent management modules such as onboarding, performance management, and succession planning. It provides companies using other talent management solutions with a unified data model and user experience. A candidate profile created during recruitment will be transitioned to onboarding once a candidate accepts an offer. Recruiters also have access to performance data and succession planning information. Training can be assigned to users while they are onboarding, and they have a preboarding functionality that provides new hire access prior to first day of work.



The Bottom Line

Key Characteristics:

- Talent Acquisition and Talent Management
- Skills Engine
- Total Talent

Best Suited For:

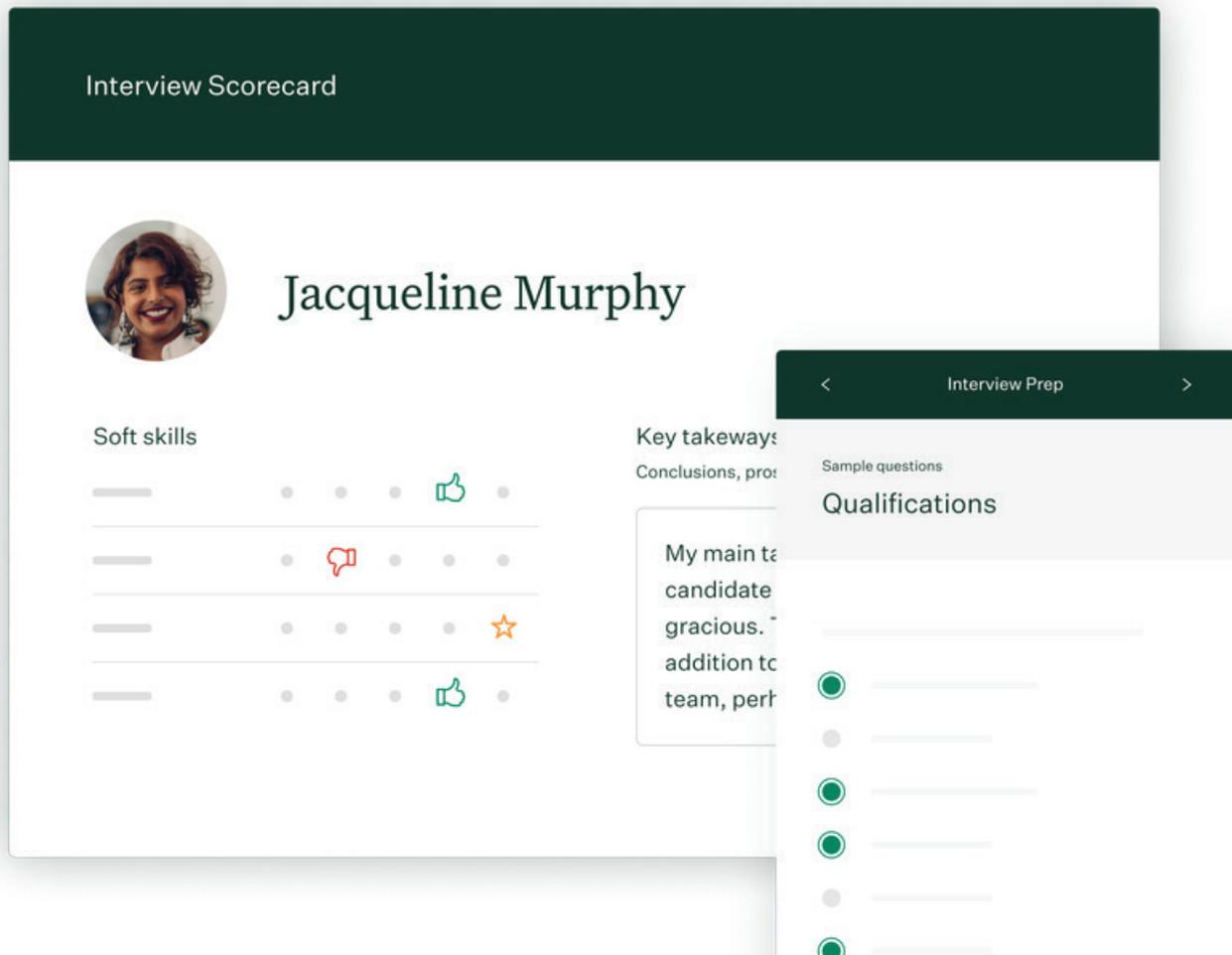
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Over 5,000 employees globally

Vendor Profile:



Company Description

Greenhouse is a next generation talent acquisition platform that supports end-to-end talent acquisition with CRM, ATS, onboarding and internal mobility. Its goal is to help companies find the best candidates, conduct more focused interviews, and make data-driven hiring decisions.



Customer Wins 2020-2021

- Credit Karma
- Toast
- Rivian
- Interpublic Group (IPG)
- StubHub, Inc.
- Verisign

Recent Announcements

- \$500M majority acquisition from TPG in early 2021
- More diverse leadership team and dedicated DEI hire in March 2020
- Opened an EMEA office in Dublin (January 2020)
- Expanded professional services to include integration and implementation support
- Moved up market with 28% of ARR from companies with 1,000+ employees

Customer Support During COVID-19

- **Internal COVID Playbooks:** Guides to help their Customer Success team understand what was most relevant to customers as they navigated the impact of COVID-19 on their businesses.
- **Customer Analysis:** Focus on supporting customers in three main workflows: hiring and onboarding remotely, managing pipeline, and automating workflows.
- **Customer Resources:** Webinars, one-pagers, courses, eBooks, and guides on automating, remote hiring, and maintaining pipelines.
- **Customer Support:** Enhanced customer support to support different challenges from layoffs and hiring freezes to influx of applicants.

Company Background



History

- **Year Founded:** 2012
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** New York, Denver, San Francisco, Dublin (Ireland)
- **Revenue:** Not disclosed
- **Mergers & Acquisitions:** Parklet (2015)

Customers

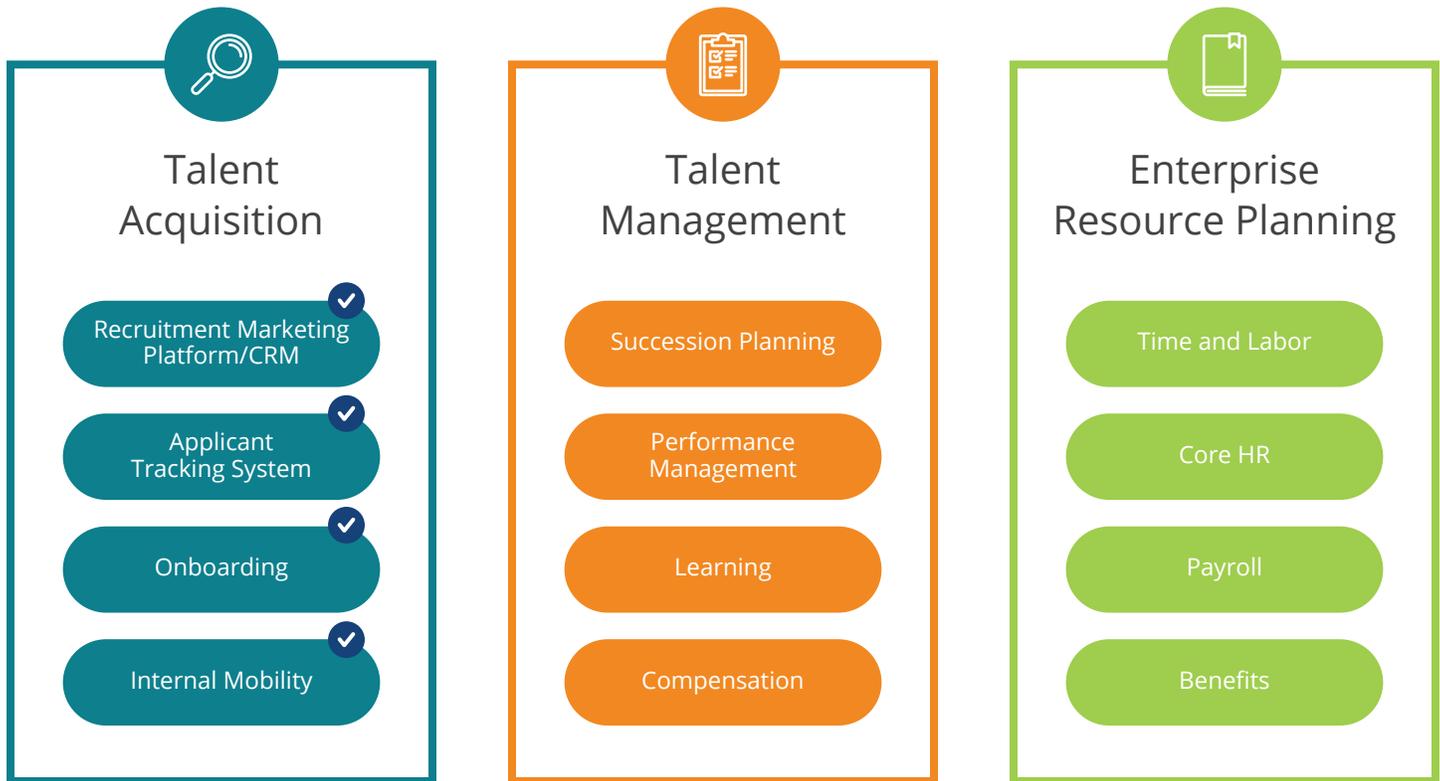
- **Number of Customers:** 4,500+
- **Target Market:** SMB, Mid-Market, Upper Mid-Market, Enterprise
- **Target Vertical:** All Industries
- **G2Crowd review:** 4.3/5

Leadership

- **CEO:** Daniel Chait
- **Glassdoor:** CEO approval rating of 90%
- The Executive Team: Women represent 45% of the executive team
- **Investment:**
Funding: Series D, \$110.1M
Acquisition: TPG, The Rise Fund., \$500M
- **DE&I Executive:** Yes (Jamie Adasi)

Employees

- **Number of Employees:** 353
- **% Employees in R&D:** 21%
- **% Employees in Sales/Marketing:** 26%
- **Glassdoor rating:** 4.3/5



Products	CRM, ATS, Onboarding, Internal Mobility, Inclusion (DEI), Events app
Delivery Model	SaaS
Release Schedule	Daily. Monthly is an option for enterprise customers.
Data Centers	AWS US-East (Virginia), AWS US-West (Oregon)
Development Technology	AWS and built on Ruby on Rails
Languages	Greenhouse solutions are available in six languages (interviewer experience), Greenhouse Career Pages can be translated into 19 languages.
Services	Implementation/implementation strategist, project management, technical consultants, technical account management, data migration Not disclosed data migration engineer, strategic consultant
Partners	360+

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	No
Intelligent Chat	No
Messaging - What's App	Yes
Messaging - WeChat	No
Microsoft Teams	No
Slack	Yes



Aptitude Analysis

Greenhouse is a truly modern talent acquisition system. It balances a simple user experience with sophisticated technology to help companies make better hiring decisions through every stage of the recruitment process. Its technology roadmap is influenced both by customer requests and its talent acquisition “Hiring Maturity” methodology, which supports companies on their journey to more strategic hiring. In early 2021, TPG and its Rise Fund acquired a majority stake in Greenhouse for approximately \$500 million, allowing the provider to enhance its product capabilities, expand upmarket, and invest more heavily in professional services and customer support. Greenhouse is committed to the talent acquisition market for the long game.

Greenhouse’s differentiators include an exceptional recruiter experience, onboarding solution, and analytics. Its recruiter experience starts with structured interviews, which provide scorecards on candidates that are powered by interview data instead of resume data. Advanced structured interviews allow companies to choose key attributes and include justification for ratings. Its onboarding solution offers two tiers: Greenhouse Onboarding (a new hire experience including document management) and Greenhouse Welcome (a new hire engagement platform).

Over the past year, Greenhouse has diversified the industries it supports, moved up market, and increased its partnerships in the ecosystem. It has also invested in DEI in its company, products, and services. It has improved diversity of its leadership team and hired a dedicated role for diversity and inclusion. It offers education and services, and has developed capabilities to interrupt bias at every stage from sourcing to interviewing and hiring.

-
- **Areas of Strength:** Onboarding, DEI, structured interviews/hiring
 - **Areas of Improvement:** Limited CRM functionality, limited communication capabilities



- **Empower Inclusive and Collaborative Hiring:** Creating features that streamline permissions and tasks, create a structured approach to hiring team accountability, bring more aspects of the hiring process online, and expand opportunities for a more inclusive hiring process, such as candidate pronouns and name pronunciation.
- **Enable Organizations To Move Up the Greenhouse Hiring Maturity Curve:** Strengthening the Hiring Manager experience with embedded intake and roundups, actionable workflows and visibility from enhanced dashboards.
- **Automate and Refine High Volume Hiring at Scale:** Focusing on native offerings such as enhanced pipeline automation, job ad management, automated outbound sourcing, self-scheduling features, and in-app candidate texting.

Key Differentiators

- 1 **Hiring Maturity Assessment:** Greenhouse has developed a hiring maturity assessment to help companies understand how to be more strategic in talent acquisition. To date, over 700 companies have taken the assessment. Its approach to structured hiring enforces equitable and objective recruiting processes, and its reporting gives recruiters visibility into what is working and what needs to improve.

2 Onboarding: Greenhouse is one of the few providers offering innovative onboarding solutions. Greenhouse Onboarding builds a new hire experience from automating logistics (such as administrative paperwork and document management) to helping familiarize new hires with company culture and policies. Greenhouse Welcome is a platform built to help create an engaging remote welcome experience by helping new employees explore their new company. The product aims to help introduce new hires to a company's culture, mission, and values and instill a sense of connection and belonging in employees.

3 Structured Interviews: Greenhouse, with its scorecard functionality and its focus on best practices, helps guide recruiters and hiring managers to make the right decisions. It doesn't force them into the decisions, but it shows them what the obvious answers are and then lets them decide. The job of a talent acquisition professional has become so complex that this level of simplicity and guidance goes a long way. Combined with its advanced analytics, recruiters get a clear picture of how to make the best decisions around their talent.



The Bottom Line

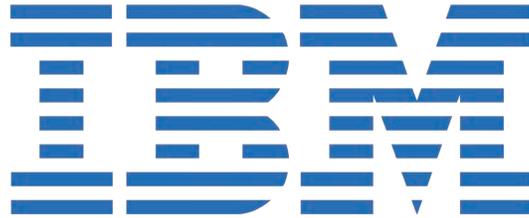
Key Characteristics:

- End-to-End Talent Acquisition
- Strategic Talent Acquisition Maturity
- Strong Onboarding

Best Suited For:

- **Mid-Market:**
1,000-5,000 employees

Vendor Profile:



Company Description

Infinite Computer Solutions has acquired IBM's talent acquisition suite including BrassRing, Lead Manager, and Onboard. The provider is in a period of transition.

The screenshot displays the IBM Kenexa BrassRing dashboard. At the top, it says "Hello, [redacted]". The dashboard is divided into several sections:

- 15 Candidates for review:** Lists four candidates: DJ (121BR Software Engineer), MJ (124BR Senior Software Engineer), GC (124BR Senior Software Engineer), and MD (124BR Senior Software Engineer).
- 5 forms to complete:** Lists three forms: Feedback form for [redacted] (12172BR Software Engineer), Additional details form for [redacted] (12173BR Software Engineer), and Start date form for [redacted] (12172BR Software Engineer).
- 5 Offers awaiting approval:** Lists three offers: Offer form for [redacted] (12172BR Software Engineer), New Hire form for [redacted] (12173BR Senior Software Engineer), and Offer form for [redacted] (12172BR Software Engineer).
- 5 Reqs awaiting approval:** Lists three requests: 12170BR Software Engineer Approval Request, 12172BR Senior Software Engineer Approval Request, and 12178BR Software Engineer Approval Request.
- 5 Reqs to view:** Lists three requests: 12170BR Software Engineer, 12172BR Senior Software Engineer, and 12178BR Software Engineer.

Customer Wins 2020-2021

IBM is not going to market for new customers at this time

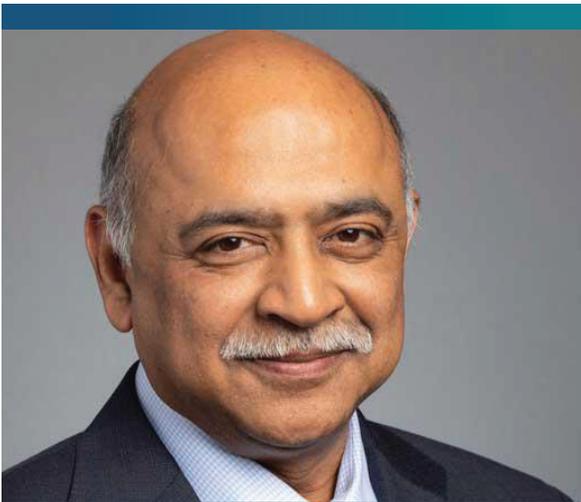
Recent Announcements

- Interview Manager functionality with calendar integrations and scheduling capabilities
- eLinks Dashboard to provide authenticated access with a simple hiring manager experience
- Enhancements to recruiter and hiring manager experience
- Candidate Zone for candidates to check status and access forms, assessments, and communication
- Offer acceptance process with eSignature available

Customer Support During COVID-19

- **Onboarding:** Enhanced onboarding capabilities and revamped I-9 process to support remote recruiting.
- **Support:** Provided additional support for hiring teams that had hiring freezes or changes in hiring and stopped using the system.
- **Client Slack:** Offered slack channels for customers to connect with each other.
- **Hiring:** High-volume hiring to the extreme – 30,000 job requisitions opened for a single client in one day, with 50,000 hires within a month.

Company Background



History

- **Year Founded:** 1987 (Kenexa) now part of IBM (1911)
- **Private or Public:** Public (NYSE: IBM)
- **Heritage:** Talent Acquisition
- **Offices:** Operates in over 170 countries around the world
- **Revenue:** \$81 billion
- **Mergers & Acquisitions:** BrassRing (2006)

Customers

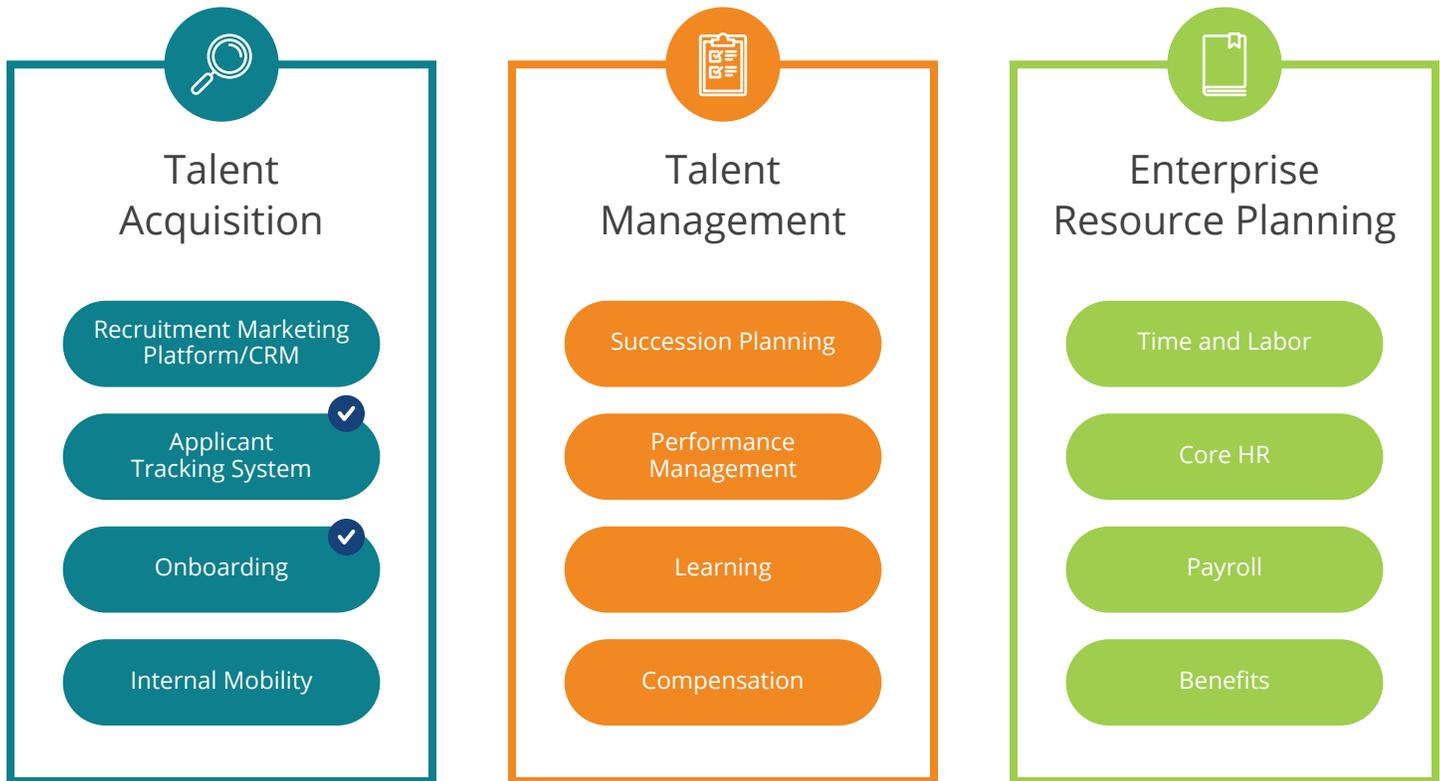
- **Number of Customers:** Not disclosed
- **Target Market:** Global Enterprise, Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 3/5

Leadership

- **CEOs:** Arvind Krishna
- **Glassdoor:** CEO approval rating of 87%
- **The Executive Team:** Women represent 14% of the executive team
- **Investment:** No
- **DEI Executive:** Yes (Tia Silas)

Employees

- **Number of Employees:** 345,000+
- **% Employees in R&D:** Not disclosed
- **% Employees in Sales/Marketing:** Not disclosed
- **Glassdoor rating:** 3.9/5



Products	ATS, Lead Manager CRM, Onboarding
Delivery Model	SaaS
Release Schedule	Predominantly monthly
Data Centers	USA, EMEA
Development Technology	Not disclosed
Languages	Variable by product; offered in over 40 languages
Services	Recruitment Process Outsourcing through GBS, implementation services, change management services, customer support teams, data integration services, training, webinars
Partners	100+

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	Planned
Messaging - WeChat	No
Microsoft Teams	Planned
Slack	No



Aptitude Analysis

In 2020, IBM announced end-of-market for its BrassRing talent acquisition product. In 2021, Infinite Computer Solutions announced the acquisition of IBM's talent acquisition suite including BrassRing. BrassRing has an updated user experience, strong configurability, and global support. It has rules automation built throughout the platform so that candidates can move through seamlessly, saving recruiters time and improving the overall experience.

IBM has introduced Interview Manager in the past year to better support scheduling and interview communication. It offers integration with Outlook and Google Calendars. Its Candidate Zone allows candidates to see their status, view assessments, and access communication, including offer documents. IBM's Lead Manager solution (CRM) is built on the BrassRing platform and includes stacking leads, campaign management, and integrations with Recruitment Marketing products. When used with the ATS, customers can track conversion rates from the time they engage with candidates up until they receive the offer, as well as automate the updates between lead and candidate throughout the process. It is not clear at this time how Infinite Computer Solutions will support BrassRing customers.

-
- **Areas of Strength:** Global capabilities, interview scheduling, analytics
 - **Areas of Improvement:** No longer going to market, limited CRM functionality, uncertainty about future



- Capabilities to help clients reduce bias throughout the TA lifecycle
- New Hire Zone to provide communication and a consistent experience between candidates and new hires
- Skills-based job recommendations for candidates
- eVerify webservice upgrade
- New administrator user experience for the Data Insight Tool, its reporting module

Key Differentiators

- 1 Global Provider:** BrassRing continues to support global companies who have varied and unique talent acquisition needs, with over 40 languages and dialects, while complying with country-specific regulatory requirements. But at the same time, it has invested heavily in an improved user experience for both recruiters and the candidate experience.
- 2 High-Volume:** BrassRing offers a streamlined hiring process that allows companies to handle large applicant volume and empower recruiters to quickly identify quality candidates during peak hiring seasons. Its solution has a strong history of supporting companies with both hourly and high-volume needs. BrassRing's unique rules automation manager (RAM) helps companies use automated triggers to advance qualified candidates through all stages of the hiring process automatically and with no manual interaction.

- 3 **Skills-Based Focused:** IBM uses skills and competencies to strengthen every product, both for talent acquisition and talent development. Its Talent Frameworks product allows companies to build job profiles that can help inform decisions on who to attract for quality hires and who to retain and engage once onboard.



The Bottom Line

Key Characteristics:

- Global Provider
- Strong Services and Technology
- Strong Interview Management

Best Suited For:

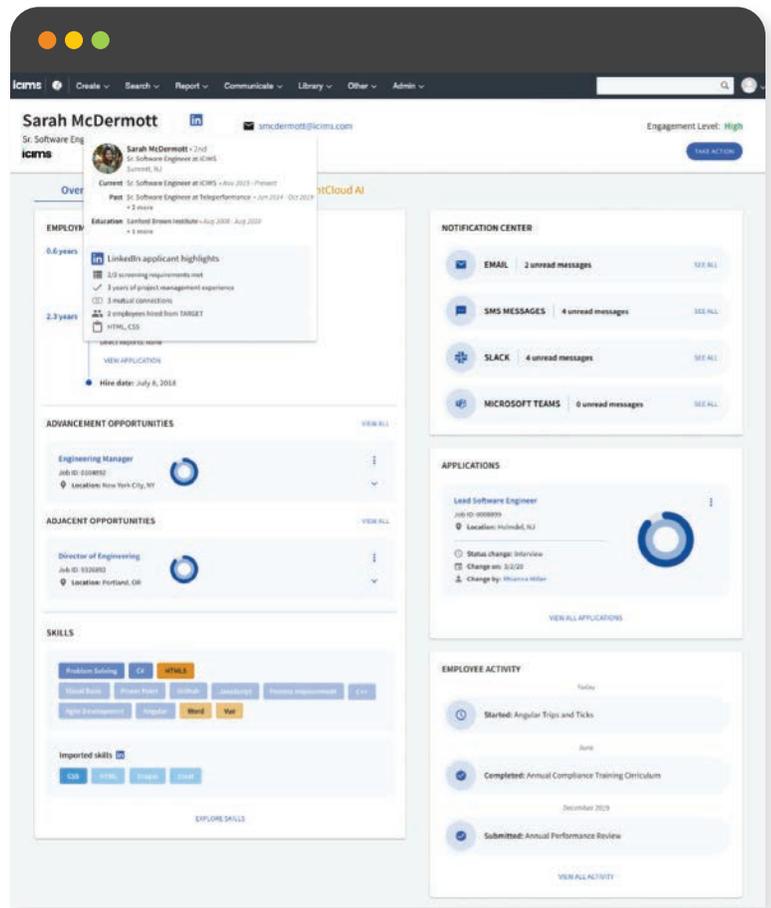
- **Enterprise:**
Over 5,000 employees
- **Global Enterprise:**
Over 5,000 global employees

Vendor Profile:



Company Description

iCIMS is a Talent Cloud provider that enables organizations to attract, engage, hire and advance talent. It is an end-to-end talent acquisition platform that offers a Talent Cloud marketplace of partners to support everything from recruitment marketing to onboarding talent. iCIMS is a Vista Private Equity portfolio company.



Customer Wins 2020-2021

- Alaska Airlines
- Michelin
- PwC
- Volkswagen
- L'Oreal
- Target

Recent Announcements

- New CEO, Steven Lucas
- Three acquisitions (Opening.io, Altru Labs, EASYRECRUE) and the subsequent launch of iCIMS Video Studio
- Microsoft Teams partnership
- Refreshed iCIMS brand
- Global presence with 8 offices worldwide & 1,100 employees

Customer Support During COVID-19

- **Connecting Customers Portal:** During the early stages of the pandemic, iCIMS launched a free career portal to encourage customers to share job openings with each other. This portal, called Connecting Customers, connected those who were recently furloughed or laid off with new opportunities at organizations that were rapidly hiring.
- **“Furlough Portals”:** iCIMS quickly developed career portals so employers could easily invite their furloughed employees back to work.
- **Promotional Offers:** At the start of the pandemic, iCIMS provided promotional offers to its customers and prospects. This included discounted product trials, pricing and packaging bundles.
- **Monthly Insights Reports:** iCIMS offered its customers complimentary access to hiring insights. These monthly reports were based on data from more than 2.4 million recruiters and team leader/hiring managers worldwide, and 120 million applications from 200 countries and territories.

Company Background



History

- **Year Founded:** 2000
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** Holmdel, Matawan, New York City, London, Paris, Madrid, Milan, Dublin
- **Revenue:** \$285 Million
- **Mergers & Acquisitions:** Jobmagic (2012), TextRecruit (2018), Jibe (2019), Opening.io (2020), EASYRECRUE (2020), Altru Labs (2020)

Customers

- **Number of Customers:** 4,300+
- **Target Market:** Enterprise, Mid-Market
- **Target Vertical:** Healthcare, manufacturing, retail, technology and financial services
- **G2Crowd review:** 4.1/5

Leadership

- **CEO:** Steve Lucas
- **Glassdoor:** CEO approval rating of 68%
- **The Executive Team:** Women represent 42% of the executive team
- **Investment:** Owned by Vista Private Equity
- **DEI Executive:** Yes (Chinor Lee)

Employees

- **Number of Employees:** 1,100+
- **% Employees in R&D:** 28%
- **% Employees in Sales/Marketing:** 28%
- **Glassdoor rating:** 4.1/5




Talent Acquisition

- Recruitment Marketing Platform/CRM ✓
- Applicant Tracking System ✓
- Onboarding ✓
- Internal Mobility ✓



Talent Management

- Succession Planning
- Performance Management
- Learning
- Compensation



Enterprise Resource Planning

- Time and Labor
- Core HR
- Payroll
- Benefits

Products	Recruitment Marketing, ATS, Onboarding, Talent Cloud Marketplace, Talent Assessments, Video Interviewing, Video Studio, Career Sites, Text Engagement, CRM, Offer Management, Talent Cloud AI
Delivery Model	SaaS
Release Schedule	Quarterly
Data Centers	8 global hosting sites + 6 disaster recovery cloud hosting sites
Development Technology	Amazon AWS & Azure
Languages	iCIMS solutions are offered in 100+ languages
Services	24/7/365 technical support, higher platform availability and faster disaster recovery through iCIMS Premium Success. Implementations, integrations, tech support and training are all managed by iCIMS in-house team. Programs include: Service and Advisor Partner Program; Customer Advisory Council and CHRO Advisory Board; and Customer Community for networking, knowledge sharing resources and rewards.
Partners	700+ contracted partners

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes (Text Recruit)
Intelligent Chat	Yes (Digital Assistant)
Messaging - WhatsApp	Yes
Messaging - WeChat	No
Microsoft Teams	Yes
Slack	No (Planned for 2021/2022)



Aptitude Analysis

Today's iCIMS looks like a different company from when we last published this report in 2017. It has expanded its global reach with eight offices, acquired four leading providers, broadened its partnerships beyond HCM, and enhanced its product and UX. Once known as a strong customer service provider, iCIMS has become a software company that designs solutions for both the candidate and employer. These experiences have been enhanced through the acquisition of Altru Labs, providing a video studio to strengthen branding through employee-generated videos, and a strategic partnership with Microsoft Teams, which allows recruiters and managers to live in the flow of work and collect live interview feedback in iCIMS without a separate login.

Other notable changes to iCIMS include search, AI Matching and dynamic candidate profiles. iCIMS' career site search is now powered by Google and offers a digital assistant to help candidates find relevant information. iCIMS has invested considerably in its AI Matching capabilities – connecting candidates to the right jobs and jobs to the right candidates through ethical AI standards. The dynamic candidate profile makes matching easier by updating the activity of a candidate and integrating with public profiles like LinkedIn. It is a single, cross-platform candidate profile that gives recruiters centralized visibility into a candidate's activity across iCIMS' products and access to candidate data, actions and insights from third-party systems. These dynamic candidate profiles highlight skills that candidates identified and imported from LinkedIn, as well as notifications from text, Microsoft Teams, Slack or other communication channels.

iCIMS is shifting to a mid-market player to an enterprise provider through its product capabilities and roadmap. Its marketplace now includes 700+ contracted partners across areas that include recruitment marketing, screening, assessments and conversational AI. It is committed to offering seamless integration with ecosystem providers and core systems, reducing the total cost of ownership and burden placed on organizations.

-
- **Areas of Strength:** Communication capabilities, Microsoft Teams partnership, customer support
 - **Areas of Improvement:** DEI services and capabilities, CRM confusion (offering multiple solutions with some limited functionality)

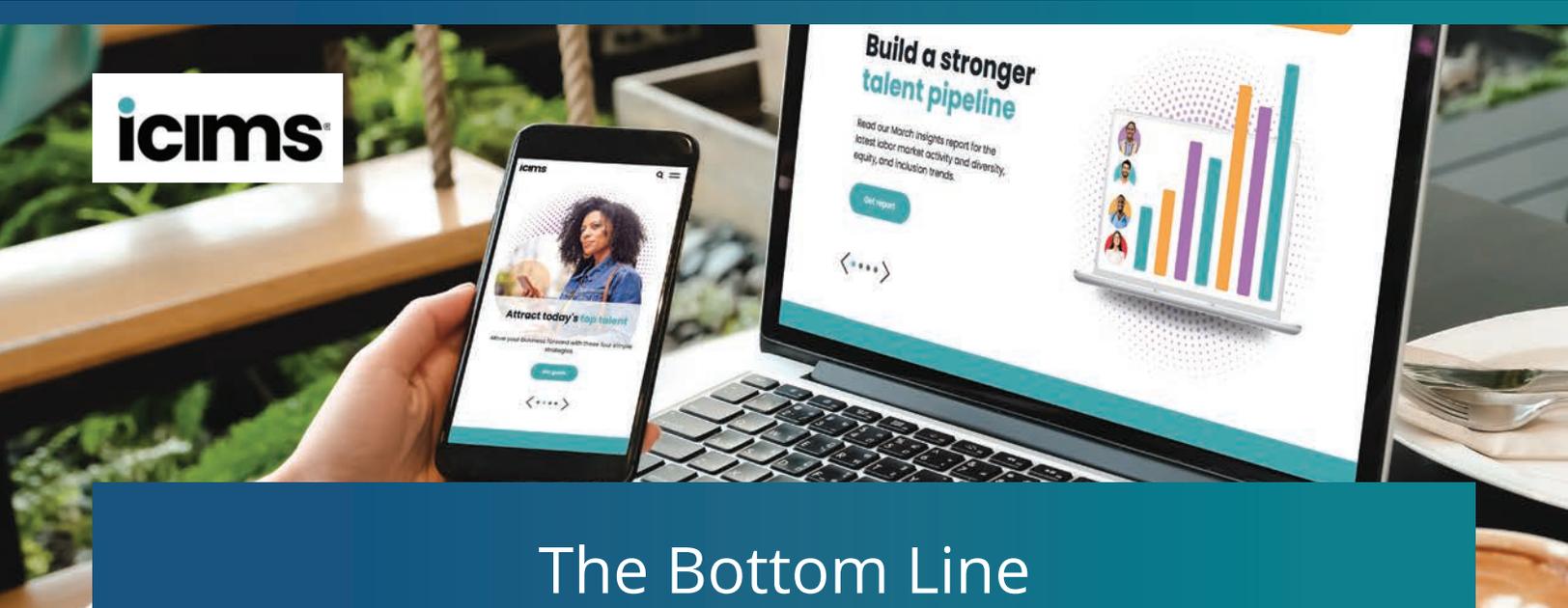


- **Deep Understanding Of Individuals:**
Data-driven understanding of an individual's skills, potential and interests
- **Personalized, Engaging Experiences:**
Consumer-like experiences delivered via multichannel communications, with content, in the flow of work
- **Agility, Scale And Automation:** Solutions that enable customers to pivot quickly and scale to changing business needs

Key Differentiators

- 1 **Microsoft Teams partnership:** iCIMS for Microsoft Teams accelerates virtual hiring by bringing the recruiting process into the hiring team's flow of work. Hiring managers and recruiters can collaborate to make decisions on moving candidates forward. Remote teams can easily provide instant candidate feedback with data captured in the iCIMS ATS. Recruitment workflows are brought into the tools that teams are already using and engaging with, improving the team-based hiring experience. iCIMS for Microsoft Teams also collects feedback from interview panelists in their flow of work and does not require a new login.

- 2 **Communication capabilities:** iCIMS has made investments in the way it communicates with candidates on multiple channels including video, text, intelligent chat and messaging. The acquisition of TextRecruit has enabled customers across multiple industries to improve candidate engagement. The recent acquisition of Altru Labs provides companies with a simple way to showcase their brand and connect with candidates through iCIMS Video Studio. Altru Labs' video capabilities will be integrated into iCIMS career site, CRM, offer, onboard, ATS and text products.
- 3 **Dynamic candidate profiles:** iCIMS' Dynamic Candidate Profiles allow companies to access consistent candidate information across all iCIMS products. Profiles include AI-driven recommendations and skills pulled from a candidate's resume and LinkedIn profile. Each profile includes notifications from text, Microsoft Teams, Slack or messaging.



The Bottom Line

Key Characteristics:

- End-to-End Talent Acquisition
- Product Innovation
- Marketplace

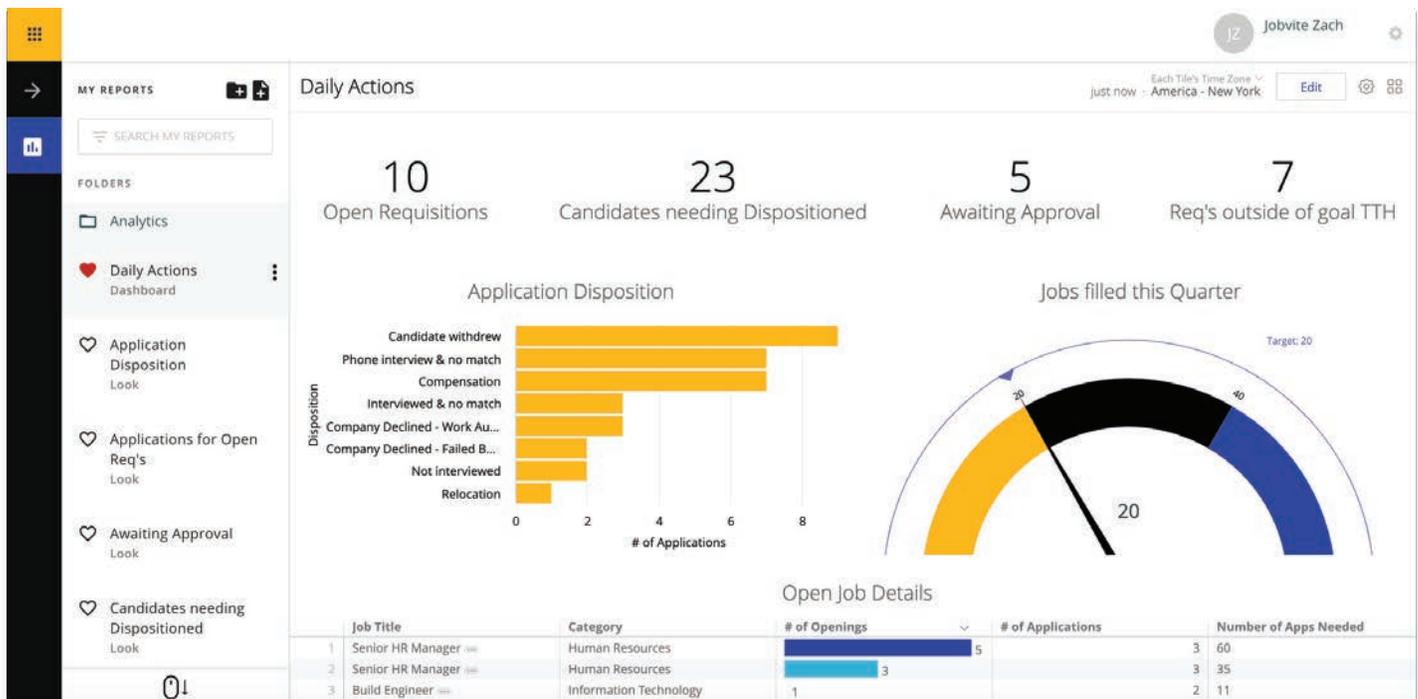
Best Suited For:

- **Mid-Market:** 1,000-5,000 employees
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Over 5,000 employees globally

JOBVITE

Company Description

Jobvite is an end-to-end talent acquisition suite with solutions that include recruitment marketing, ATS, onboarding, candidate communication, referrals, and internal mobility. Its Talemetry Recruitment Marketing suite helps companies improve the candidate experience and engage with talent before they apply.



Customer Wins 2020-2021

- Revera Living
- Brightview Landscaping
- Guitar Center
- Syneos Health (expansion)
- Ingram Micro (expansion)
- Service King

Recent Announcements

- Acquisitions of Talentegy and Predictive Partner
- Launched Job Description Grader
- Launched Jobvite Academy
- Expanded its EVOLVE Framework to include end-to-end talent acquisition
- Increased investment in DEI

Customer Support During COVID-19

- **Jobvite Academy:** Jobvite Academy is a learning center for TA teams to modernize their recruiting skills and helps recruiters and hiring teams adjust and adapt to change and transformation. Jobvite is building a community of learners in talent acquisition and connecting people to training and certification opportunities.
- **Additional Services:** Jobvite strengthened its service offerings to include the AI Innovation Lab, campaign management support, change management support, and remote recruitment support.
- **Solution Packages:** Jobvite has helped companies with specific needs including healthcare, high-volume, and internal mobility.
- **COVID Relief Packages For Impacted Businesses:** Jobvite proactively managed realigning contracts with customers hardest hit by the pandemic, including adjusting payment terms and hibernating accounts.

Company Background



History

- **Year Founded:** 2006
- **Private or Public:** Private
- **Heritage:** Talent Acquisition (ATS, CRM)
- **Offices:** Indianapolis (HQ), San Mateo, Kitchener, Ontario, Bangalore, India
- **Revenue:** Not disclosed
- **Mergers & Acquisitions:** Talemtry (2018), Rolepoint (2018), Canvas (2018), Predictive Partners (2020), Talentegy (2020)

Customers

- **Number of Customers:** 2300+
- **Target Market:** Mid-Market, Enterprise
- **Target Vertical:** All Industries (Strong in Healthcare, Manufacturing, Financial Services)
- **G2Crowd review:** 4.2/5

Leadership

- **CEO:** Aman Brar
- **Glassdoor:** CEO approval rating of 80%
- **The Executive Team:** Women represent 35% of the executive team
- **Investment:** Owned by K1 Investments
- **DEI Executive:** No

Employees

- **Number of Employees:** 325
- **% Employees in R&D:** 36%
- **% Employees in Sales/Marketing:** 32%
- **Glassdoor rating:** 3.9/5




Talent Acquisition

- Recruitment Marketing Platform/CRM ✓
- Applicant Tracking System ✓
- Onboarding ✓
- Internal Mobility ✓



Talent Management

- Succession Planning
- Performance Management
- Learning
- Compensation



Enterprise Resource Planning

- Time and Labor
- Core HR
- Payroll
- Benefits

Products	CRM, ATS, Career Sites, Onboarding, Internal Mobility, Talent Analytics, Employee Referrals, Candidate Communication, Texting, Video, High-volume recruitment, D&I Pack
Delivery Model	SaaS
Release Schedule	Quarterly
Data Centers	Data stored in (AWS) data centers in Virginia. For EU-based customers, Jobvite is a participant of the EU-US Privacy Shield Framework
Development Technology	AWS (primary). Java, Linux, Windows, Aurora, MySQL, Solr, and Snowflake are all supported.
Languages	40+ languages on the candidate side and 10 languages on the internal side
Services	Annual and quarterly reviews, implementation services, recurring services, campaign acceleration services, campaign management services, program management, AI Innovation labs
Partners	Over 350 partners

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	No
Messaging - WeChat	No
Microsoft Teams	No - (Planned for 2H 2021)
Slack	No - (Planned for 2H 2021)



Aptitude Analysis

Jobvite is committed to helping talent acquisition and hiring teams improve every aspect of talent acquisition from recruitment marketing to onboarding. It has experienced significant growth over the past year with changes to leadership, product, roadmap, and customer support. It has made five acquisitions over the past two years to expand its offerings and enhance its analytical and communication capabilities. Additionally, Jobvite has strengthened its values-based company culture and employer brand, resulting in a 95% customer satisfaction rate.

Jobvite is focused on customer support and partnership. Customers are involved in product roadmap decisions, educational frameworks (EVOLVE), and Jobvite Academy (online learning center and certification program). Jobvite has a long history of meeting the needs of customers as they grow with support and product capabilities. Hulu had less than 100 employees when they engaged with Jobvite, and has had exponential growth since then, at almost 3,000 employees today. UPMC, while providing healthcare throughout Pittsburgh, has nearly doubled in size to over 90,000 employees since first implementing Jobvite products.

Jobvite continues to invest in innovation and product development. Over the past year, it has made improvements to its interface offering a more holistic experience across solutions; launched a complimentary Job Description Grader to identify gender and racial bias in job descriptions; and improved its AI and analytical capabilities through acquisitions of Talentegy and the Predictive Partner team. One key differentiator for Jobvite is its recruitment marketing and CRM capabilities (powered by the Talemtery acquisition). It has improved personalization, enhanced referrals and internal mobility, and improved candidate communication. Jobvite also provides its customers with all three LinkedIn integrations: Unified Search, Recommended Matches, and Apply Connect.

-
- **Areas of Strength:** CRM/recruitment marketing, AI and analytics, education/framework
 - **Areas of Improvement:** Opportunities to expand globally, integration with collaboration tools



JOBVITE

- **NextGen Experience:** NextGen Experience is the future vision in which the Jobvite and Talemetry suite of applications have a unified, holistic UX
- **Improved Candidate Experience:** Providing access to candidate data, omni-channel campaign management, next generation candidate experience (as part of NextGen Experience listed above), and advanced sequencing for campaigns
- **Data and Analytics:** Developing and launching persona-driven, AI-enhanced dashboards, in-app benchmarking, and AI-driven recommendations to ensure that its customers have access to consistent data
- **Services:** Maintaining enterprise leadership by solving more challenges for complex organizations, including advancing the EVOLVE framework, supporting sophisticated business processes, providing HR systems integrations, and offering enhancements to strategic services

Key Differentiators

- 1 **Deep domain expertise:** Jobvite has deep domain expertise across all areas of talent acquisition, from recruitment marketing to onboarding. Its strategic acquisitions of Talemetry, Canvas, Rolepoint, the Predictive Partner team, and Talentegy bring deep functionality and strengthen customer support. While many of the providers in this report have limited CRM/recruitment marketing solutions, Jobvite is one of the leading providers that competes and wins deals against many of the stand-alone recruitment marketing platforms. Jobvite's expertise in talent acquisition enhances its customer services, including Jobvite Academy, a learning center for TA leaders and their teams to modernize their recruiting skills via development and certification opportunities.

2 Product innovation: Jobvite has stayed committed to talent acquisition and focuses on product innovation in areas such as communication, CRM/recruitment marketing, and analytics. Its approach to analytics allows customers to solve for disparate data sources, access diversity insights, choose from multiple visualization options, and send analytics directly to managers without downloading a spreadsheet. Jobvite’s Job Description Grader is another example of product innovation. Launched in 2021, this product allows any company to improve and reduce bias within job descriptions.

3 Partnership: Jobvite has built a strong, values-based culture through change and transformation. This culture is evident in its leadership, product development, marketing and sales, and customer success teams. It is committed to delivering success to customers through its product roadmap and EVOLVE Talent Acquisition Framework, a tech-agnostic assessment to help companies evaluate their level of maturity used during implementation and in customer quarterly business reviews.



The Bottom Line

Key Characteristics:

- End-to-End Talent Acquisition
- Education and Partnership
- Recruitment Marketing/CRM

Best Suited For:

- **Mid-Market:** 1,000-5,000 employees
- **Enterprise:** Over 5,000 employees

Vendor Profile:



LEVER

Company Description

Lever's Talent Relationship Management platform (TRM) offers candidate relationship and ATS capabilities in an integrated solution. It includes automation, intelligence, and design in its products to help companies think about talent and teamwork-enabled growth.



Customer Wins 2020-2021

- Netflix
- Atlassian

Recent Announcements

- New CEO, Nate Smith
- Robust analytics offering with integration with Tableau
- Fast Resume Review offering
- Growth in upmarket
- New office in Toronto

Customer Support During COVID-19

- **Candidate Experience:** Launched Fast Resume Review to support candidates looking for jobs.
- **Recruiter Experience:** Improved Automation to help recruiting teams do more with less and provide more ease of use throughout the product.
- **Remote Hiring:** Lever released an integration with Zoom following the move to work-from-home to support remote interviewing and hiring.

Company Background



History

- **Year Founded:** 2012
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** San Francisco, Toronto
- **Revenue:** \$40 million+
- **Mergers & Acquisitions:** Not disclosed

Customers

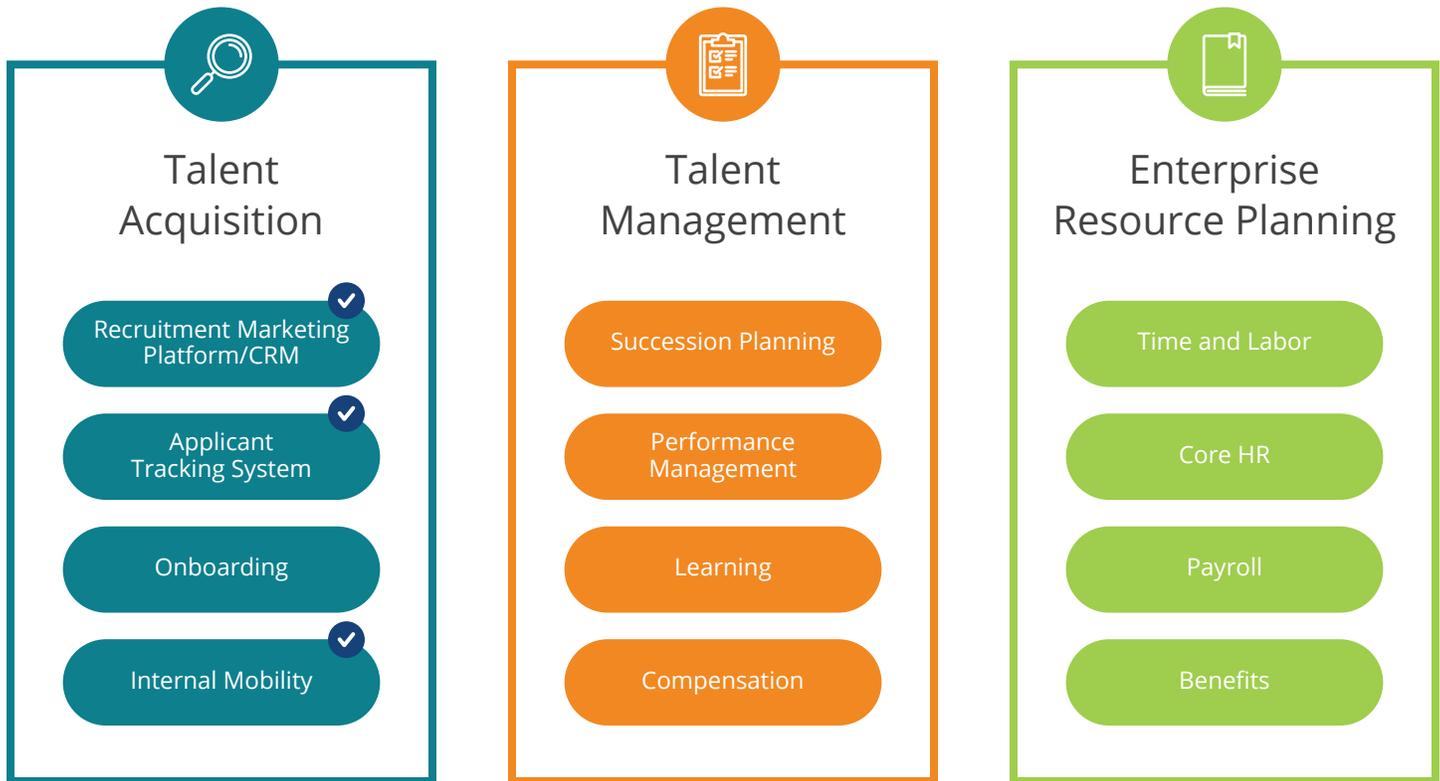
- **Number of Customers:** 3,300+
- **Target Market:** SMB, Mid-Market, Upper Mid-Market
- **Target Vertical:** Healthcare, Technology, Financial Services, Fiotech
- **G2Crowd review:** 4.1/5

Leadership

- **CEO:** Nate Smith
- **Glassdoor:** CEO approval rating of 96%
- **The Executive Team:** Women represent 40% of the leadership team
- **Investment:** \$73M in total funding
- **DEI Executive:** Yes (Annie Lin)

Employees

- **Number of Employees:** 140+
- **% Employees in R&D:** 28%
- **% Employees in Sales/Marketing:** 28%
- **Glassdoor rating:** 4.6/5



Products	CRM, ATS
Delivery Model	SaaS
Release Schedule	Quarterly (with minor releases regularly)
Data Centers	AWS
Development Technology	DerbyJS, a collaborative and real-time open source JavaScript framework invented by Lever co-founder Nate Smith
Languages	English
Services	Lever provides three different levels of service options for its clients (Care, Preferred, Premium) to choose from based on their investment and support needs.
Partners	100+ partners

Security

Comply with DOE, federal, state and local regulations	No
Provide access to all modules with a single login	No
Ability for administrator to restrict data access by role, IP, ID and report	No
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	No
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	No

Communication

Text/SMS	No
Intelligent Chat	No
Messaging - WhatsApp	No
Messaging - WeChat	No
Microsoft Teams	No - (Planned for 2021)
Slack	Yes



Aptitude Analysis

Lever's most significant change since we published the last report is its growth up market and across industries. No longer focused on high-growth tech companies, Lever has expanded into industries that include mortgage, biotech, and healthcare. It has added some global clients and an office in Toronto. Companies looking to scale are turning to Lever for ease of use and capabilities in both CRM and ATS.

Lever's differentiators include its investment in analytics this year. It offers visual insights and integration with Tableau and other analytics plugins to help companies understand their data and take action. One thing that sets Lever apart from other providers in this report is its company culture. It is the only provider in this report that was founded by a woman and has the highest Glassdoor ratings. The commitment it makes to its employees enables a better customer experience. It has also invested in DEI with a dedicated role, capabilities to reduce bias in the hiring process, and its product roadmap.

Instead of following a traditional ATS development path, Lever commits to and executes on enhancements that benefit their customers. It has enhanced the product with proactive sourcing, talent intelligence, requisition approvals, Tableau integrations, and self-scheduling capabilities. Lever has gained momentum in a very crowded market.

-
- **Areas of Strength:** CRM capabilities, DEI support in company and product, analytics
 - **Areas of Improvement:** Limited onboarding capabilities, limited candidate communication

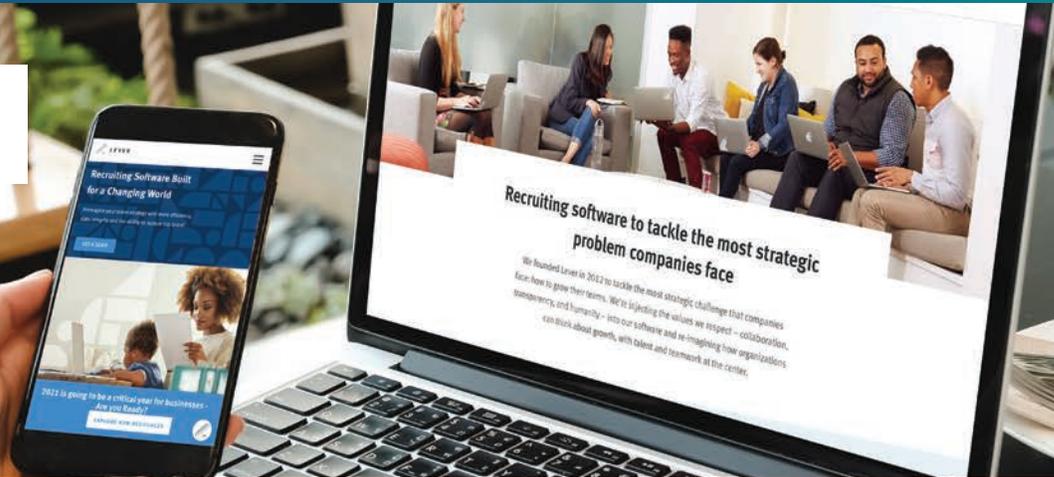


- **DEI:** Increasing its investment in DEI capabilities and making features more accessible in the product
- **Recruiter efficiency:** Automating recruiter tasks and providing recruiters with data to drive decisions
- **Partnerships:** Increasing partnerships across talent acquisition and HCM

Key Differentiators

- 1 **Analytics:** Lever's differentiators include its investment in analytics this year. It offers visual insights and integration with Tableau and other analytics plugins to help companies understand their data and take action.
- 2 **CRM and ATS:** Over the past decade, most companies have been asking their ATS providers to include a CRM solution or CRM functionality. While many providers have taken steps to offer a CRM module as an option in their product portfolio, Lever includes its CRM and ATS as a single solution. Lever is a candidate-centric product that provides a consistent candidate experience and enables organizations to build relationships with candidates. Lever Nurture extends this vision while unifying all activity within a single platform.

- 3 **Feedback:** Feedback and collaboration is at the core of this solution – making it easy and necessary for recruiters and hiring managers to share information on candidates, include feedback, and do follow-ups. One example is their approach to rejecting candidates. Lever understands that “reject” is not always the best option and provides the context and communication around why someone was either rejected or did not move forward in the system.



The Bottom Line

Key Characteristics:

- Robust CRM and ATS
- Strong Analytics
- Commitment to DEI

Best Suited For:

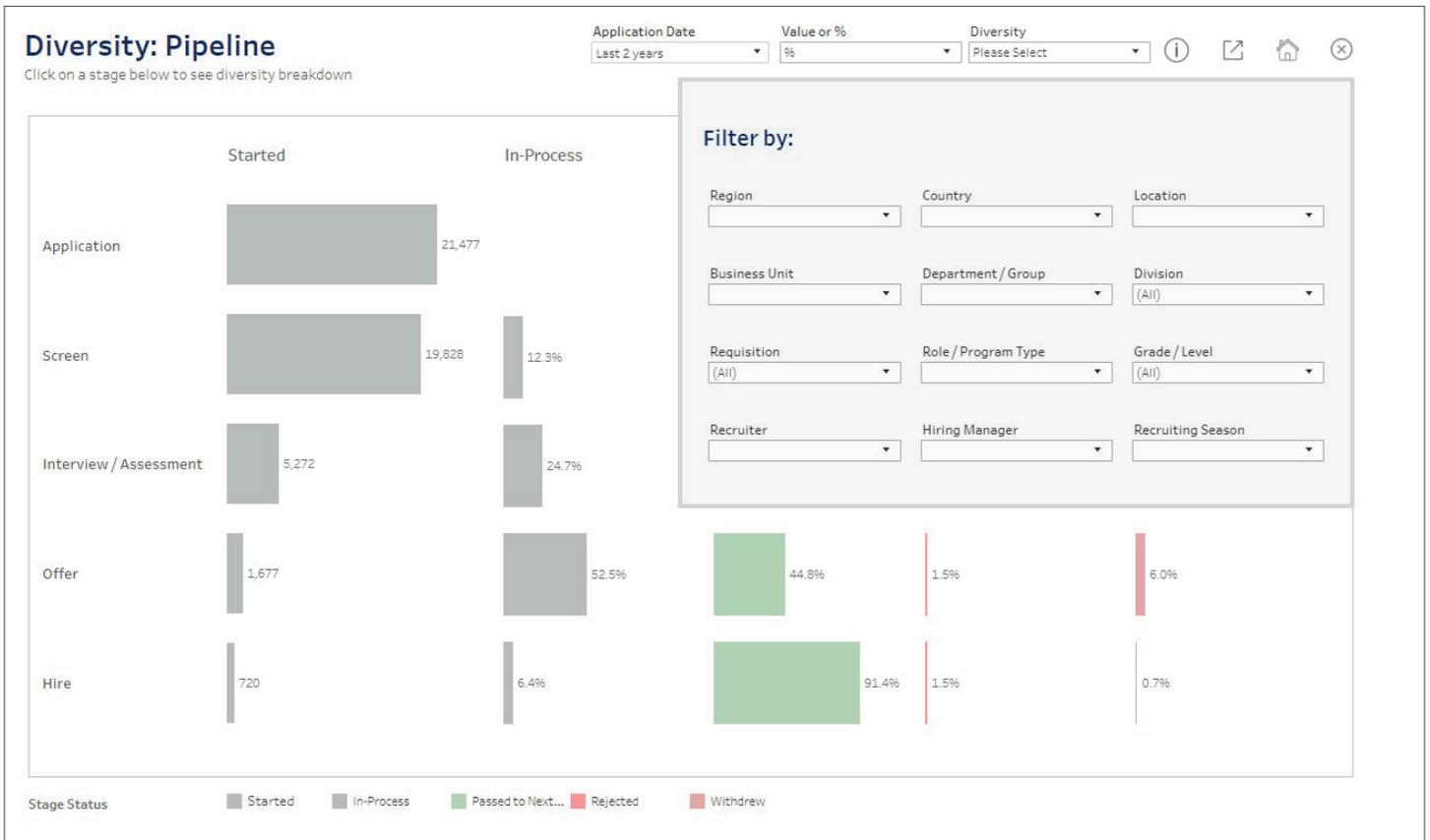
- **SMB Market:** Under 1,000 employees
- **Mid-Market:** 1,000-5,000 employees

Vendor Profile:



Company Description

Oleeo is an end-to-end recruitment enablement platform and next generation ATS that includes high-volume recruitment, campus recruitment, internal mobility, diversity recruiting, recruitment processing, and virtual recruiting. Through intelligence, Oleeo streamlines recruiting with data-driven automation, dynamic workflows, and bulk processing.



Customer Wins 2020-2021

- Korn Ferry
- British Armed Forces
- Lazard
- Imperial NHS Trust
- Police Scotland

Recent Announcements

- Enhanced DEI capabilities
- Launched Recruitment Enablement Platform
- Expanded recruitment marketing and talent pool capabilities
- Improved Reporting and Analytics

Customer Support During COVID-19

- **Video Interviewing:** Launched video interview scheduling tools to support remote interviews and communication.
- **Remote Work:** Enhanced its remote working security configuration to support remote recruitment.
- **Internal Mobility:** Redeployed internal mobility tools and offered wider integrations with assessment and video providers.
- **Engagement:** Enhanced its broader talent nurturing and provided integration with virtual events platforms.

Company Background



History

- **Year Founded:** 1995
- **Private or Public:** Private
- **Heritage:**
Talent Acquisition
- **Offices:** London, Scarsdale
- **Revenue:** £10m+
- **Mergers & Acquisitions:**
Not disclosed

Customers

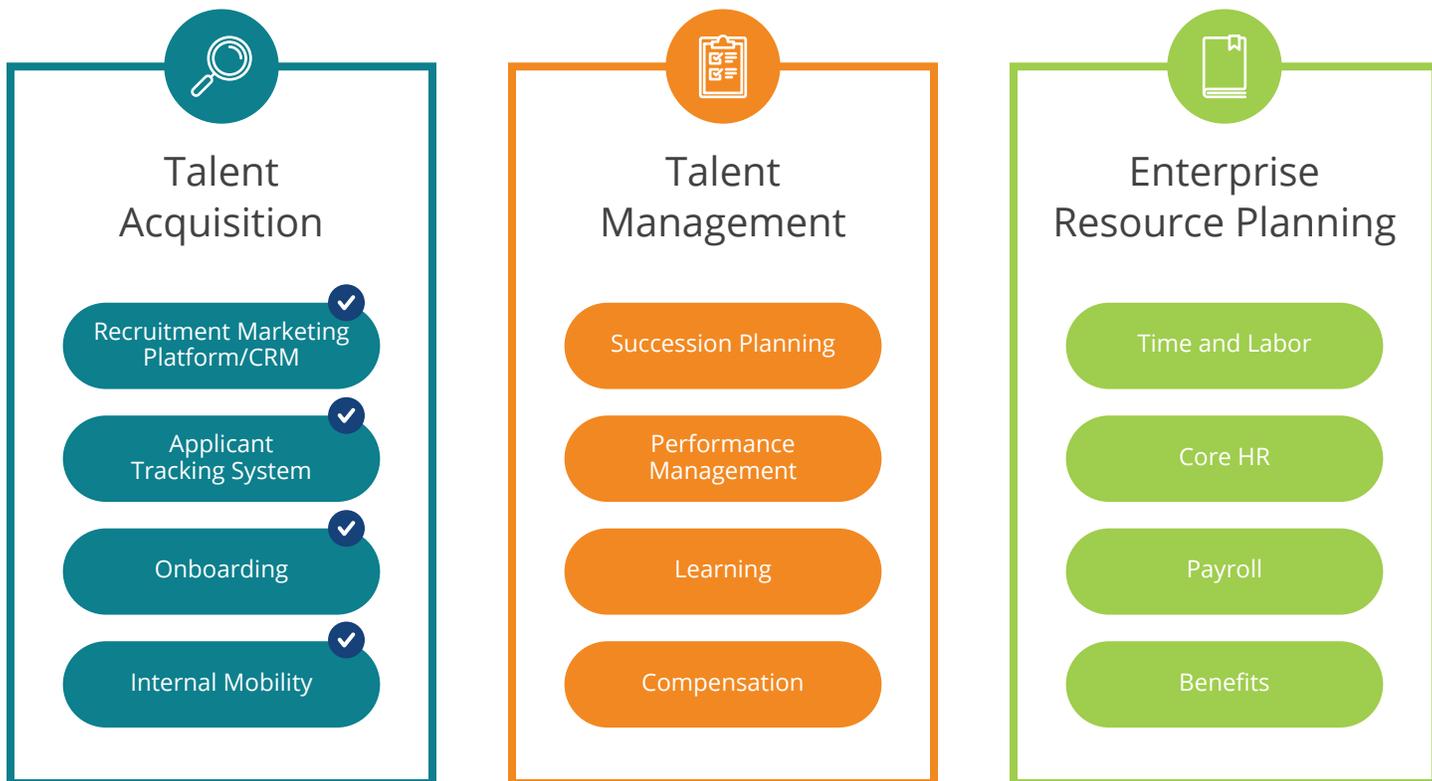
- **Number of Customers:** 400+
- **Target Market:** Enterprise, Global Enterprise
- **Target Vertical:** All Industries
- **G2Crowd review:** 4.2/5

Leadership

- **CEO:** Charles Hipps
- **Glassdoor:** CEO approval rating of 96%
- **The Executive Team:** Women represent over 30% of the executive team
- **Investment:** Not disclosed
- **DEI Executive:** No

Employees

- **Number of Employees:** 120
- **% Employees in R&D:** 5%
- **% Employees in Sales/Marketing:** 10%
- **Glassdoor rating:** 4.3/5



Products	Recruitment Marketing, ATS, Onboarding Internal Mobility, Campus Recruitment, Events Management, Volume Recruitment, Government Recruitment, Police Recruitment, Diversity Tech Stack
Delivery Model	SaaS
Release Schedule	Monthly updates
Data Centers	Worldwide coverage
Development Technology	Machine Learning & Data Science
Languages	Oleeo solutions are offered in English with translation available
Services	Applicant tracking, diversity & inclusion, full recruitment technology
Partners	50+ partners

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	No
Messaging - WeChat	No
Microsoft Teams	Yes
Slack	No



Aptitude Analysis

Oleeo is an end-to-end recruitment enablement platform with strong differentiators in recruitment automation/AI, diversity, equity and inclusion, and campus recruiting/events. It has demonstrated a commitment to improving efficiency and experience through its product, leadership, and customer support. Oleeo's Recruiting Enablement platform provides recruiters with the tools they need to be successful in attracting, recruiting, and hiring quality talent. These tools automate the administrative tasks of talent acquisition and allow recruiting and hiring teams to make data-driven decisions focused on quality and fairness.

Oleeo has focused on providing automation and AI-driven technology through every stage of talent acquisition, from sourcing to onboarding. It deploys multiple workflows and insights to enable strategic data-led talent acquisition that supports complex talent acquisition needs. Its approach to diversity, equity, and inclusion is more strategic and effective than many of its ATS peers. It is interrupting bias at every stage of talent acquisition from diversity sourcing capabilities to assessments (blinded names, panel decision-making, and response focused screening) to offer and hire. It provides comparative scoring on diversity hiring so companies can see how decisions are being made and so they can provide a fair and equitable experience.

Oleeo is a next generation ATS for companies committed to improving efficiency (through enablement) and experience (through diversity, equity, and inclusion insights). Oleeo is best suited for enterprise and mid-market companies across all industries.

- **Areas of Strength:** Recruitment automation, DEI transformation, campus recruiting
- **Areas of Improvement:** Limited multilingual capabilities, UX



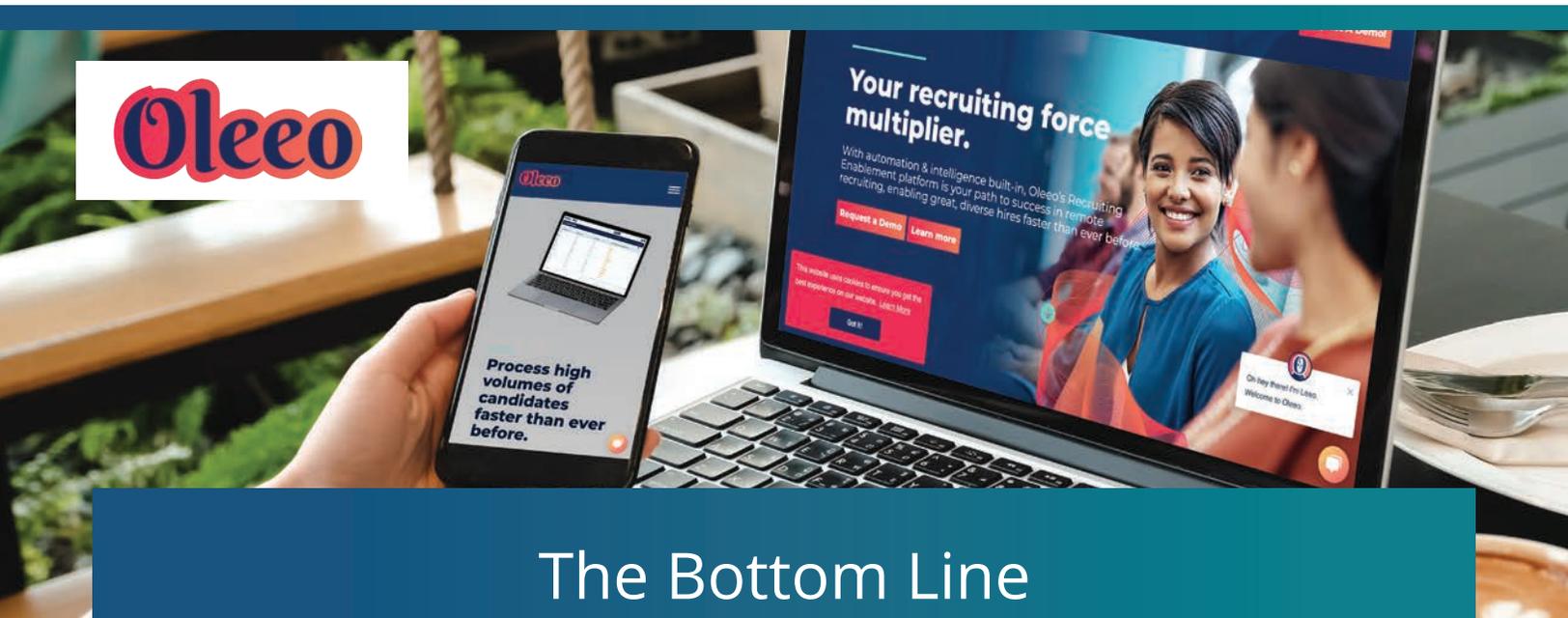
- **Candidate Experience:** Enhanced job agent and candidate portal to provide an improved candidate experience
- **Communion:** WhatsApp integration to provide two-way communication with candidates
- **AI matching:** Matching capabilities to connect candidates to jobs and jobs to candidates
- **Insights for Diversity Benchmarking:** Continuing to provide powerful DEI analytics

Key Differentiators

- 1 **Leadership:** Oleeo is one of the few providers in this report that included its CEO in the demo and company briefing. CEO Charles Hipps founded Oleeo over 25 years ago with the goal of improving the efficiency and effectiveness of talent acquisition. He is an engaging, product leader that is passionate about automation/AI and diversity, equity, and inclusion.

2 Events Management: With a strong customer base in campus recruitment, Oleeo Events helps companies with both in-person and virtual events. It makes event management easy, automating candidate registration, check-ins, and profile creation, as well as dynamic pre-event and onsite candidate workflows.

3 Diversity, Equity, and Inclusion: Oleeo's approach to diversity, equity, and inclusion is more strategic and effective than many of its ATS peers. It is interrupting bias at every stage of talent acquisition from diversity sourcing capabilities to assessments (blinded names, panel decision-making, and response focused screening) to offer and hire. It provides comparative scoring on diversity hiring so companies can see how decisions are being made and how they can provide a fair and equitable experience.



The Bottom Line

Key Characteristics:

- End-to-End Talent Acquisition
- Powerful Analytics and Automation
- Diversity, Equity, and Inclusion

Best Suited For:

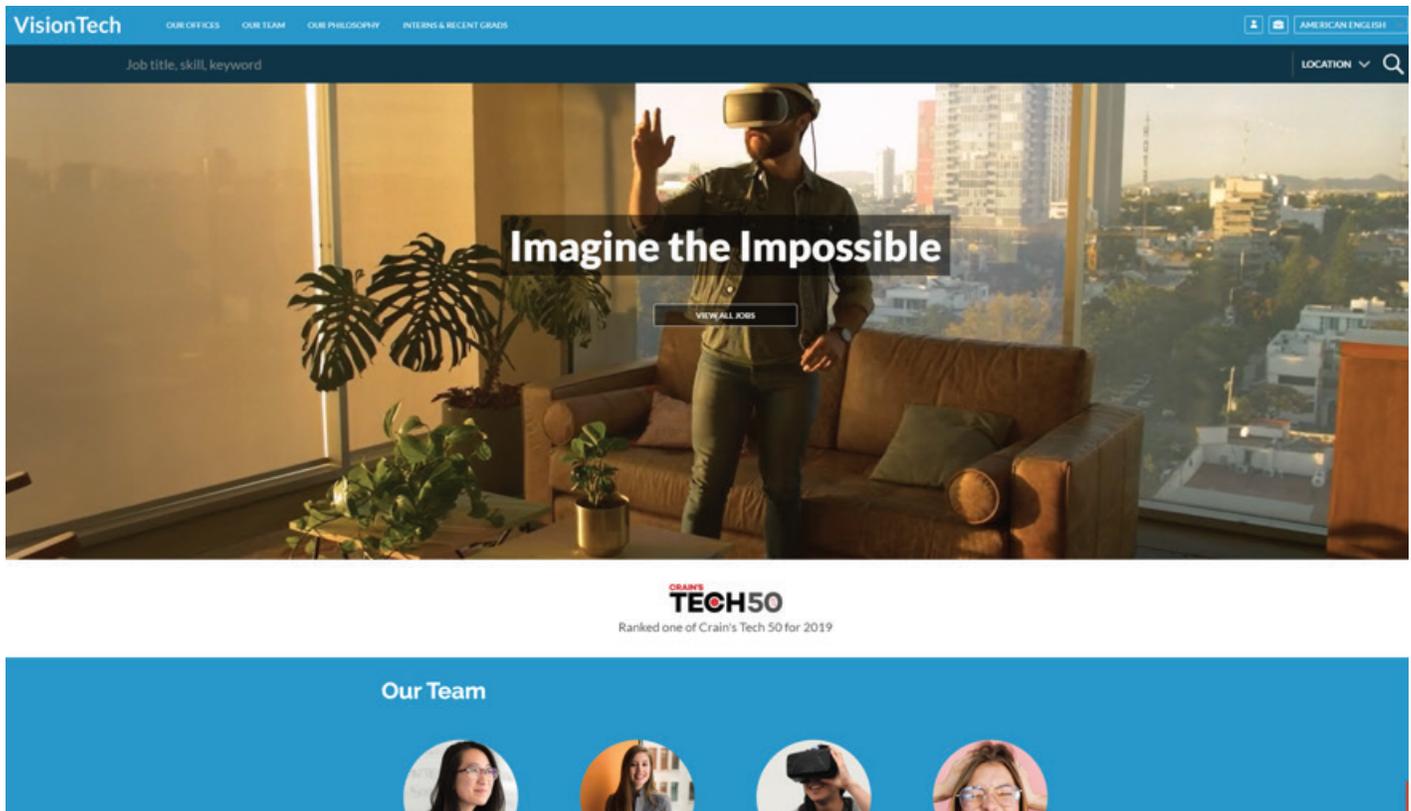
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Over 5,000 employees globally

Vendor Profile:



Company Description

Oracle Recruiting (OR) is a fully-unified talent acquisition solution built into Oracle Fusion Cloud Human Capital Management (HCM) that includes recruitment marketing, sourcing, recruitment automation, and onboarding. Oracle's broad HCM platform provides one experience, data model, security, and design to support every stage of the employee lifecycle.



Customer Wins 2020-2021

Not disclosed

Recent Announcements

- Consumer grade candidate experience (digital assistant, skills assistant, job discovery)
- Candidate Relationship Management (CRM)
- Recruiter efficiency (offer automation, interview scheduling)
- Enhanced internal mobility

Customer Support During COVID-19

Oracle's Employee Care Package within Oracle Fusion HCM was launched in June 2020 and updated in February 2021 and includes:

- COVID-19 testing and vaccine tracking capabilities and analytics for HR teams
- Automated guidance for employees and candidates returning to work
- Return to Workplace guidance (safety, training, processes)
- Oracle Help Desk to support HR teams and employees/candidates

Company Background



History

- **Year Founded:** 1977
- **Private or Public:** Public (NYSE: ORCL)
- **Heritage:** ERP and HRMS provider
- **Offices:** For a list of global offices, visit: <http://www.oracle.com/>
- **Revenue:** Not disclosed
- **Mergers & Acquisitions:** Taleo (2012), SelectMinds (2008)

Customers

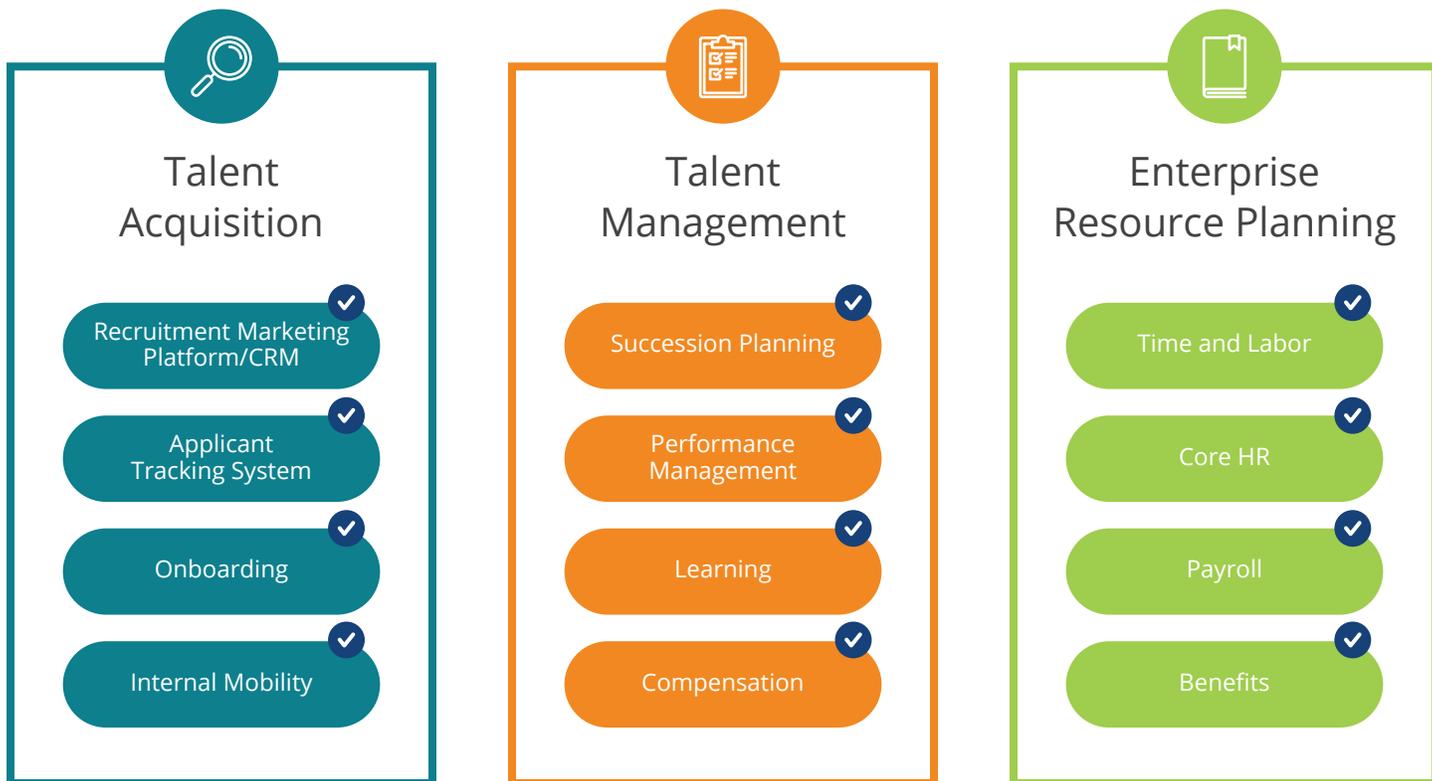
- **Number of Customers:** Not disclosed
- **Target Market:** Mid-Market, Enterprise, Global Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 4/5

Leadership

- **CEO:** Safra Catz
- **Glassdoor:** CEO approval rating of 81%
- **The Executive Team:** Women represent 45% of the executive team
- **Investment:** Not disclosed
- **DEI Executive:** Yes (Traci Wade)

Employees

- **Number of Employees:** 135,000
- **% Employees in R&D:** Not disclosed
- **% Employees in Sales/Marketing:** Not disclosed
- **Glassdoor rating:** 3.7/5



Products	ERP, EPM, HCM, Supply Chain, Customer Experience (These products are in Oracle Fusion Cloud Application Suite, but does not represent the full product list)
Delivery Model	SaaS
Release Schedule	Quarterly
Data Centers	Global data centers
Development Technology	Not disclosed
Languages	Oracle solutions are offered in 25+ languages
Services	Not disclosed
Partners	100+

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes*
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

* Assessments (CRM & ONB capabilities included with Oracle)

Communication

Text/SMS	Yes
Intelligent Chat	Yes (Digital Assistant)
Messaging - WhatsApp	No
Messaging - WeChat	No
Microsoft Teams	Yes
Slack	Yes



Aptitude Analysis

Oracle Recruiting is a strong talent acquisition solution with the deep functionality of a best-of-breed provider, along with the unified architecture and consistency from a full HCM platform. Oracle is no longer actively selling Taleo in the market. As part of their transition to the Oracle Cloud HCM, Taleo customers are moving to Oracle Recruiting (OR) and have the option to continue to use Taleo as a stand-alone product. The focus and drive for Oracle moving forward is OR.

Some OR differentiators include recruitment marketing, CRM, internal mobility, and recruiter automation. OR has some impressive sourcing capabilities, including a branding engine, AI matching, and digital assistants. Customers can organize passive candidates, run automated nurturing campaigns via email, and leverage interactive digital tools to create more candidate engagement. Internal mobility is also a differentiator. Companies have access to the full talent lifecycle data with consistent experiences through onboarding and talent management. The simple employee application process, as well as submitting referrals and endorsements, happens within employee self-service. There are additional opportunities for growth through gig assignments. Oracle is committed to helping companies improve recruiter efficiency by automating and monitoring processes from source to hire and by personalizing experiences.

OR's candidate experience is the most significant change and improvement from past talent acquisition solutions. Its comprehensive design and digital tools provide candidates with a personalized and engaging experience, while DEI capabilities, including anonymized applicant sifting, provide a fair and inclusive process. This personalized candidate experience extends into onboarding through Journeys, which brings all journeys together in the employee lifecycle for a consistent experience. We can expect Oracle to continue to invest enhancements to the candidate, recruiter, and hiring manager experiences over the next year.

-
- **Areas of Strength:** CRM capabilities, Internal Mobility (unification), DEI capabilities
 - **Areas of Improvement:** Limited insight into revenue and business metrics, requires broader Oracle Cloud HCM deployment



- **Automation & AI:** Enhanced recruiting automation with AI-powered workflows to dynamically orchestrate complex hiring processes at scale and reduce time-to-hire
- **CRM Enhancements:** Add capabilities to further segment prospect audiences, campaign across additional communication channels, and manage events for seamless engagement of early pipeline talent
- **Offer Capabilities:** Create compelling offers that support more complex package definition and acceptance criteria, along with AI-powered compensation predictions to reduce errors and re-negotiation

Key Differentiators

- 1 **Unification:** Oracles' all-in-one approach provides users with one solution, design, experience, and platform. It offers a unified experience, data, and security across all of its solutions. This integrated approach makes it easier for recruiting teams to build relationships with external talent, hire internally, model foundational processes, and manage data. While other vendors consider CRM an add-on or integration to ATS, Candidate Relationship Management is an intrinsic part of OR. This empowers organizations to approach recruiting as a way to market its employer brand and build relationships with prospective talent.

2 Internal Mobility: Internal mobility is also a differentiator. Companies have full talent lifecycle access to data with consistent experiences through onboarding and talent management. Employees have a simple apply process, receive referrals through employee self-care, and have opportunities for growth through gig and temporary assignments.

3 Candidate Experience: Oracle has made significant improvements to the candidate experience in ORC. Its comprehensive design and digital tools provide candidates with a personalized and engaging experience while DEI capabilities in its CRM and ATS provide a fair and inclusive process. This personalized candidate experience extends into onboarding through Oracle's Journeys, which bring all journeys together in the employee lifecycle for a consistent experience.



The Bottom Line

Key Characteristics:

- End-to-End HCM and ERP
- Global Provider
- Integration with HCM and business solutions

Best Suited For:

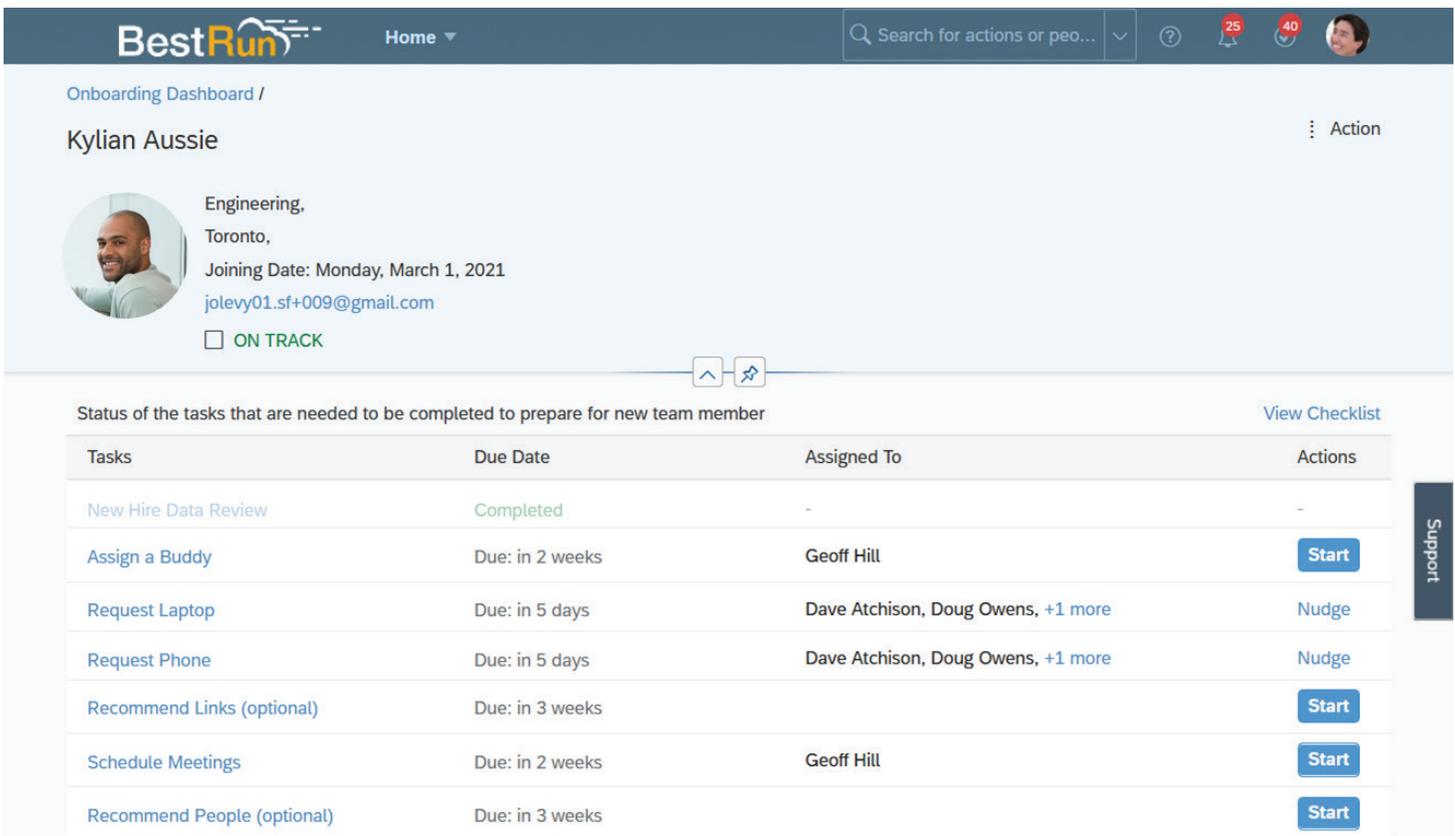
- **Mid-Market:** 1,000-5,000 employees
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Over 5,000 employees globally

Vendor Profile:

SAP SuccessFactors

Company Description

SAP SuccessFactors talent acquisition solution helps companies source, engage, and hire the right talent. It is an end-to-end solution that includes sourcing capabilities, CRM, ATS and onboarding to support a variety of talent acquisition strategies, including internal mobility, mass hiring, and diversity recruiting. It can be implemented as a stand-alone or as part of the SAP SuccessFactors Human Experience Management (HXM) suite.



The screenshot shows the SAP SuccessFactors Onboarding Dashboard for a new team member named Kylian Aussie. The dashboard includes a navigation bar with the BestRun logo, a search bar, and notification icons. The main content area displays the employee's profile, including their name, department (Engineering), location (Toronto), joining date (Monday, March 1, 2021), and email address (jolevy01.sf+009@gmail.com). A status indicator shows the onboarding process is "ON TRACK". Below the profile, there is a table of tasks that need to be completed to prepare for the new team member. The table has columns for Tasks, Due Date, Assigned To, and Actions. The tasks listed are: New Hire Data Review (Completed), Assign a Buddy (Due: in 2 weeks, Assigned To: Geoff Hill), Request Laptop (Due: in 5 days, Assigned To: Dave Atchison, Doug Owens, +1 more), Request Phone (Due: in 5 days, Assigned To: Dave Atchison, Doug Owens, +1 more), Recommend Links (optional) (Due: in 3 weeks), Schedule Meetings (Due: in 2 weeks, Assigned To: Geoff Hill), and Recommend People (optional) (Due: in 3 weeks). Each task has a corresponding action button (Start or Nudge). A "Support" button is visible on the right side of the dashboard.

Tasks	Due Date	Assigned To	Actions
New Hire Data Review	Completed	-	-
Assign a Buddy	Due: in 2 weeks	Geoff Hill	Start
Request Laptop	Due: in 5 days	Dave Atchison, Doug Owens, +1 more	Nudge
Request Phone	Due: in 5 days	Dave Atchison, Doug Owens, +1 more	Nudge
Recommend Links (optional)	Due: in 3 weeks		Start
Schedule Meetings	Due: in 2 weeks	Geoff Hill	Start
Recommend People (optional)	Due: in 3 weeks		Start

Customer Wins 2020-2021

SAP SuccessFactors continues to grow its talent acquisition client base by double digits year over year. This includes clients in a range of geographies and industries, including professional services, consumer products, healthcare, and high tech.

Recent Announcements

- Shift to Human Experience Management (HXM)
- Improvements to the candidate experience
- Continued enhancements to onboarding solution which now shares a common data structure with SuccessFactors Employee Central
- Launched reimagined home page and digital assistant (conversational AI)
- Continued expansion of ecosystem with new partners and improved integrations

Customer Support During COVID-19

- **Customer Empowerment Events:** Virtual events and engagements to help customers adapt to new approaches for recruitment and onboarding.
- **Candidate Engagement:** Enabled customers to provide timely communications with easy-to-update career sites and nurture campaigns to keep the talent pipeline warm.
- **Internal Mobility:** Internal mobility capabilities paired with SAP SuccessFactors Learning to help support upskilling, reskilling, and internal hires.
- **Virtual Onboarding:** Helped customers ensure zero disruption during pandemic with automated, digital workflows including e-Signature for all paperwork.
- **Mass Hiring:** Support for companies with mass hiring needs in a short period of time during the pandemic, including healthcare, retail, and telecommunications.

Company Background



History

- **Year Founded:** 1972
- **Private or Public:** Public (NYSE: SAP)
- **Heritage:** ERP
- **Offices:** 50+ global offices
- **Revenue:** \$27 Billion EUR
- **Mergers & Acquisitions:** SuccessFactors (2011), Jobs2Web (2011)

Customers

- **Number of Customers:** 3,800
- **Target Market:** Mid-market, Enterprise, Global Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 4.0/5

Leadership

- **CEO:** Christian Klein
- **Glassdoor:** CEO approval rating of 96%
- **The Executive Team:** Women represent 40% of the executive team
- **Investment:** Not disclosed
- **DEI Executive:** Yes (Judith Williams)

Employees

- **Number of Employees:** 102,000
- **% Employees in R&D:** Not disclosed
- **% Employees in Sales/Marketing:** Not disclosed
- **Glassdoor rating:** 4.6/5




Talent Acquisition

- Recruitment Marketing Platform/CRM
- Applicant Tracking System
- Onboarding
- Internal Mobility



Talent Management

- Succession Planning
- Performance Management
- Learning
- Compensation



Enterprise Resource Planning

- Time and Labor
- Core HR
- Payroll
- Benefits

Products	SAP SuccessFactors Recruiting (sourcing, CRM, ATS); SAP SuccessFactors Onboarding (onboarding, crossboarding, offboarding); Talent Management suite; SAP SuccessFactors Employee Central (Core HR) & Payroll; Human Experience Management (HXM) suite
Delivery Model	SaaS
Release Schedule	Biannual
Data Centers	17 data centers across Asia, Europe, North America, Oceania, South America (specific to SAP SuccessFactors)
Development Technology	Not disclosed
Languages	43 languages
Services	Implementation, process optimization, training and certifications, account management, adoption, and customer support
Partners	21,000 partner companies globally; 70+ app partners specific to talent acquisition

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	No
Messaging - WeChat	No
Microsoft Teams	Planned
Slack	No



Aptitude Analysis

SAP SuccessFactors' talent acquisition solutions supports 3,800 recruitment customers and 2,800 onboarding customers in 123 countries. It offers a comprehensive suite of solutions, including sourcing capabilities, CRM, ATS, and onboarding solutions. SAP SuccessFactors places a strong emphasis on customer partnership, with an active global customer advisory board and 75% of new features being driven by customer requests and feedback. SAP SuccessFactors' vision for talent acquisition moving forward is around experience. Its Human Experience Management platform puts people at the center of what drives business decisions and includes improved capabilities for the candidate, recruiter, and hiring manager.

SAP SuccessFactors has made significant improvements to the candidate experience since the last report. Over the past two years, SAP SuccessFactors has invested in CRM capabilities that include campaign management, analytics, and talent pipelines. Customers can now nurture candidates via personalized campaigns, build external and internal talent pipelines, and track activity to analyze candidate engagement and campaign effectiveness. Quick Apply for SAP SuccessFactors offers a single screen and simple application process. Candidate communication is improved through personalization and automation, with an opportunity to provide feedback through embedded candidate surveys powered by Qualtrics.

Onboarding has also improved with a responsive design and consistent experience, custom workflows for onboarding, crossboarding, and offboarding, and triggering tasks through rules-based automation. SAP's onboarding is also now integrated with SAP SuccessFactors Employee Central. SAP's partnership program has expanded this year as well to include over 70 certified partners specific to talent acquisition.

-
- **Areas of Strength:** Candidate engagement, onboarding, experience surveys
 - **Areas of Improvement:** Limited advanced CRM capabilities, messaging app integration



SAP SuccessFactors

- **Candidate Experience:** Candidate job search reimaged, additional experience survey touchpoints, continued focus on enabling diverse recruiting
- **Recruiter Experience:** Simplified application management, continued enhancements to support large multi-location, multi-language organizations (simplified job postings, career site management)
- **Onboarding:** Reimagined homepage, additional offboarding capabilities, new hire experience enhancements
- **Commitment To Updates:** Continued investment in key updates to help ensure global compliance for all customers

Key Differentiators

- 1 **Candidate experience:** SAP SuccessFactors has made improvements to its user experience and designed it for the needs of the candidate throughout the entire talent acquisition journey. It includes experiences tailored for specific candidates and roles and provides consistency with the new hire and employee experiences.
- 2 **High-volume hiring support:** SAP SuccessFactors supports high-volume hiring needs. Customers can post multiple positions to a single requisition, use bulk offer and approval capabilities, and leverage evergreen requisitions. Customers can also schedule interviews with integrations to calendars.

- 3 **Feedback:** Through Qualtrics, SAP SuccessFactors can embed candidate and new hire surveys in the product. Surveys collect candidate and new hire satisfaction data and feedback, and help recruiters and hiring managers take actions to improve the overall experience.



SAP SuccessFactors 

The Bottom Line

Key Characteristics:

- End-to-End solution
- Human Experience Management
- Analytics

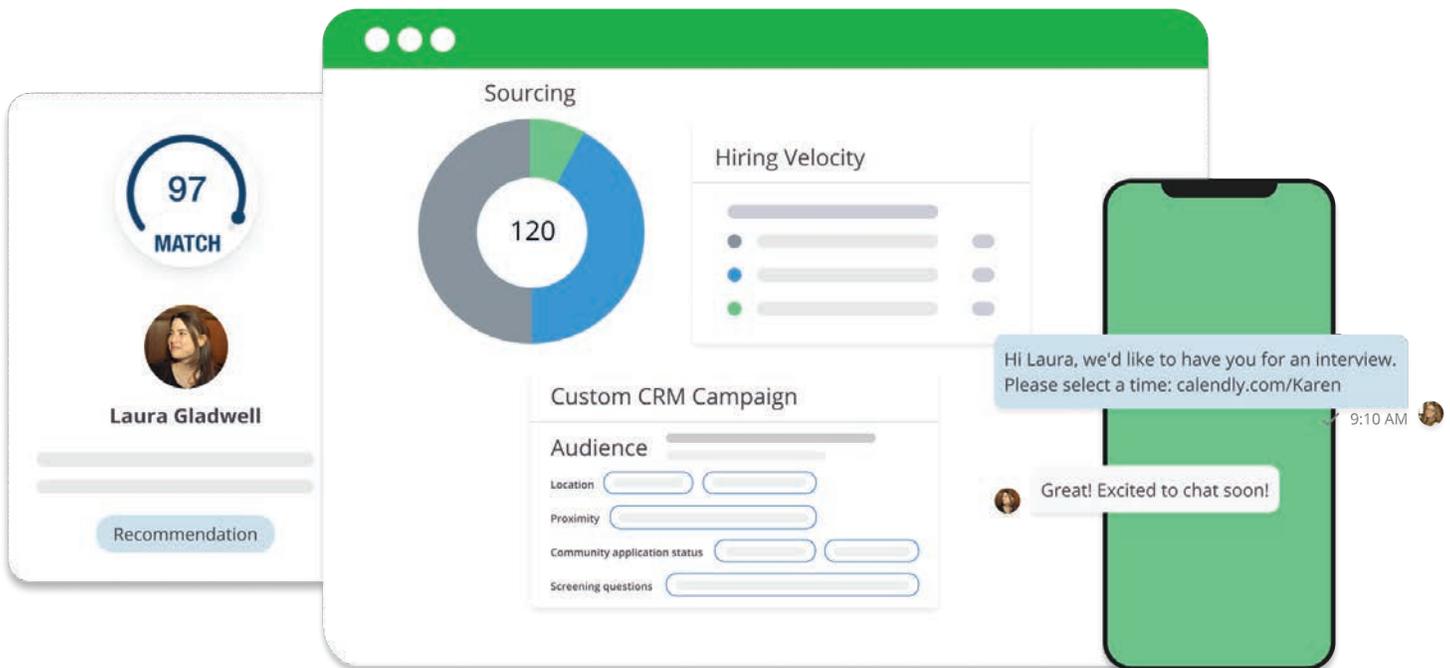
Best Suited For:

- **Mid-Market:** 1,000-5,000 employees
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Over 5,000 employees globally

SmartRecruiters

Company Description

SmartRecruiters is a modern end-to-end talent acquisition suite that includes CRM, ATS, internal mobility, AI matching, advertising, texting, and chatbot communication solutions. Its Hiring Success model provides technology and services to help improve the candidate, recruiter, and hiring manager experiences.



Customer Wins 2020-2021

- H&M
- LinkedIn
- Twitter
- Deloitte
- Mattel, Inc.
- McDonald's

Recent Announcements

- 2020 record year growth
- Transition to a permanent "remote-first" company
- Acquisition of jobpal
- Enhanced DEI capabilities and solutions
- Hired a Chief Diversity Officer, Rocki Howard

Customer Support During COVID-19

- **ATS Upgrade Program:** Companies can replace their ATS at the same price or for less, without any replacement costs.
- **Diversity Hiring Toolkit:** Solutions that include a diversity and inclusion maturity model, success pillars, and a diversity hiring assessment.
- **Nurse Relocation Program:** Hiring program in partnership with Allegis Group to support healthcare organizations hiring nurses in the state of Maryland during the pandemic.

Company Background



History

- **Year Founded:** 2010
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** San Francisco, Spokane, London, Paris, Berlin, Krakow
- **Revenue:** Not disclosed
- **Mergers & Acquisitions:** Jobspotting (2017), jobpal (2020)

Customers

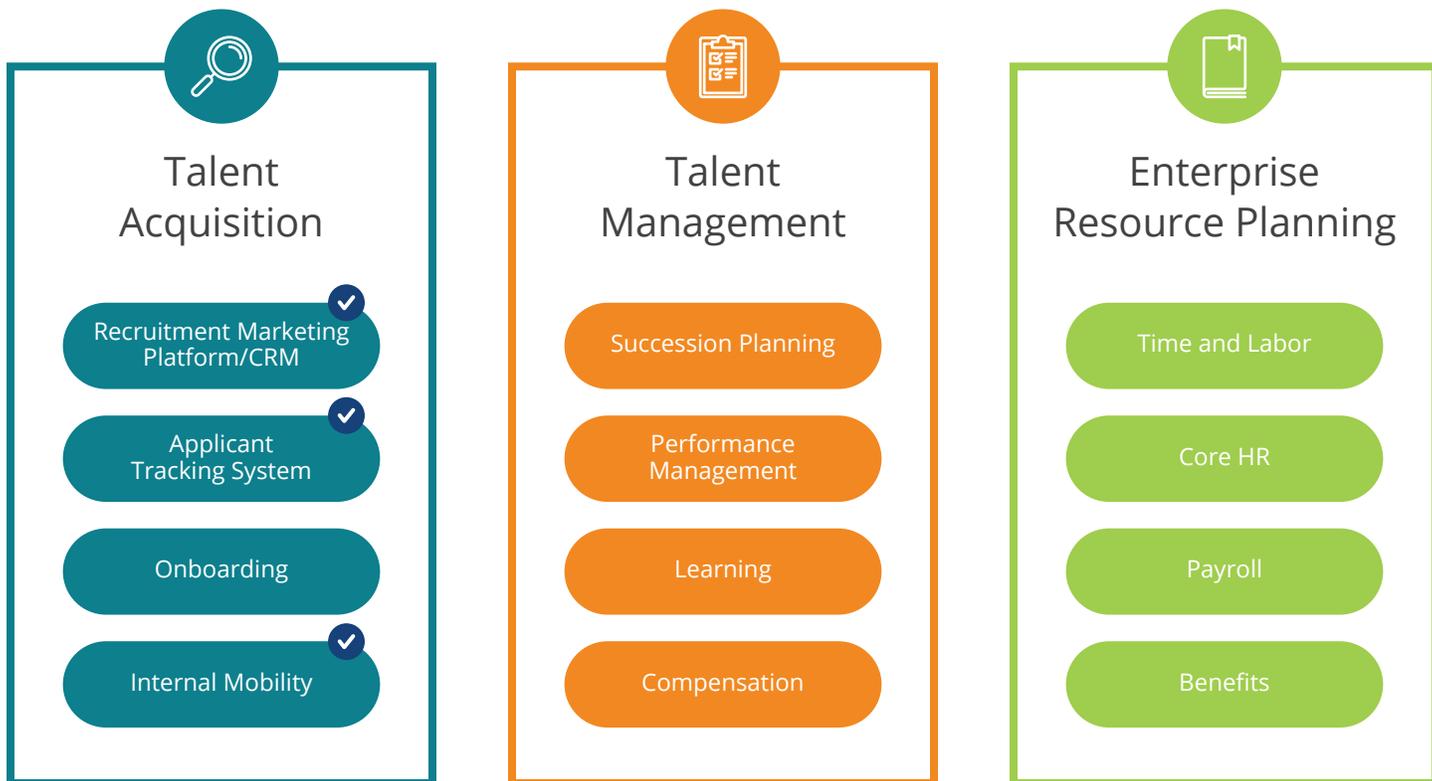
- **Number of Customers:** 4,000+
- **Target Market:** Mid-Market, Enterprise, Global Enterprise
- **Target Vertical:** All Industries
- **G2Crowd review:** 4.3/5

Leadership

- **CEO:** Jerome Ternynck
- **Glassdoor:** CEO approval rating of 89%
- **The Executive Team:** Women represent 50% of the executive team
- **Investment:** \$50M Series D
- **DEI Executive:** Yes (Rocki Howard)

Employees

- **Number of Employees:** 320
- **% Employees in R&D:** 35%
- **% Employees in Sales/Marketing:** 60%
- **Glassdoor rating:** 4.1/5



Products	CRM, ATS, Internal Mobility, Candidate Communication, AI Matching, Advertising
Delivery Model	SaaS
Release Schedule	Quarterly
Data Centers	San Francisco, Krakow (Poland), Frankfurt (Germany)
Development Technology	Java on top of AWS
Languages	SmartRecruiters solutions are available in 33 languages
Services	Hiring success insights (custom built analytical infrastructure), new module expertise and execution, talent acquisition advisory services, and admin as a service (assisted management of ats configurations)
Partners	600+

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	Yes
Messaging - WeChat	Yes
Microsoft Teams	Yes
Slack	Yes



Aptitude Analysis

SmartRecruiters is a product company with strong services and deep domain expertise across all areas of talent acquisition. It has remained steadfast in its vision and commitment to improve talent acquisition and define hiring success for companies, even during times of uncertainty and change. It has experienced significant growth during the past year with over 200 new customers, 100 new employees, and 150 new product features launched. SmartRecruiters is a provider that competes comfortably in the enterprise and global enterprise markets today. APAC is becoming a growing market for SmartRecruiters.

Several differentiators for SmartRecruiters include: candidate communication, AI matching, and advertising. Its SmartMessage solution includes WhatsApp integration and a unified inbox, while SmartPal (through the jobpal acquisition) includes conversational AI and integration with both WhatsApp and WeChat. SmartRecruiters offers programmatic advertising through SmartJobs to help streamline advertising and reduce costs. It also has increased its capabilities in internal mobility this year to include a better employee experience and redeployment features.

SmartRecruiters is one of the few best-of-breed providers to hire a chief diversity officer this year. It has committed to diversity in its leadership team, product capabilities, roadmap, and services. Its Diversity Hiring Toolkit includes a diversity and inclusion maturity model, success pillars, and a diversity hiring assessment. SmartRecruiters is also focused on customer partnership, and has responded and met 1,800 user requests this year. It listens to what its customers want and focuses on developing solutions for a more modern talent acquisition function. SmartRecruiters is a company that's not afraid to take risks, but still maintains a strong commitment to customer success and product development.

-
- **Areas of Strength:** Global capabilities, communication capabilities, DEI
 - **Areas of Improvement:** Lack of onboarding capabilities (planned for 2021), limited CRM functionality



SmartRecruiters

- **Enhancements To Smartmobility:** Internal matching to discover internal talent, an Employee Talent Profile to highlight career aspirations, skills tagging to assist matching, and integration with HCM and social profiles
- **Enhancements To Smartjobs:** Diverse sourcing to provide a marketplace of diverse sourcing options and candidates
- **Dei Initiatives For Candidates:** Diversity enhancements including accessibility options, diverse job descriptions, and removing bias from the recruitment process

Key Differentiators

- 1 **Innovation:** SmartRecruiters has invested in research and product development, and has partnered with companies across all areas of talent acquisition. It has enhanced candidate communication with messaging integration, text capabilities, and conversational AI. It has gone deeper in internal mobility and AI matching to connect jobs with candidates and candidates with jobs. And, it has automated job advertising to help companies reach a broader talent pool, while reducing costs.
- 2 **Partnership:** SmartRecruiters offers a complete talent acquisition platform that can support recruiters, hiring managers, and candidates throughout the attract, recruit, and hiring phases. Its marketplace helps companies navigate the complex talent acquisition ecosystem and make the right decisions about what solutions they are using. And, its Hiring Success model allows companies to improve strategies for attracting and recruiting talent.

- 3 **Integration:** SmartRecruiters is committed to providing more seamless integration to customers. Integrations can be configured to third-party providers, and customers have the ability to control their own integrations without filing a ticket within the platform. Its marketplace includes over 600 partners across all areas of recruitment.



The Bottom Line

Key Characteristics:

- End-to-End Talent Acquisition
- Product Innovation
- Marketplace

Best Suited For:

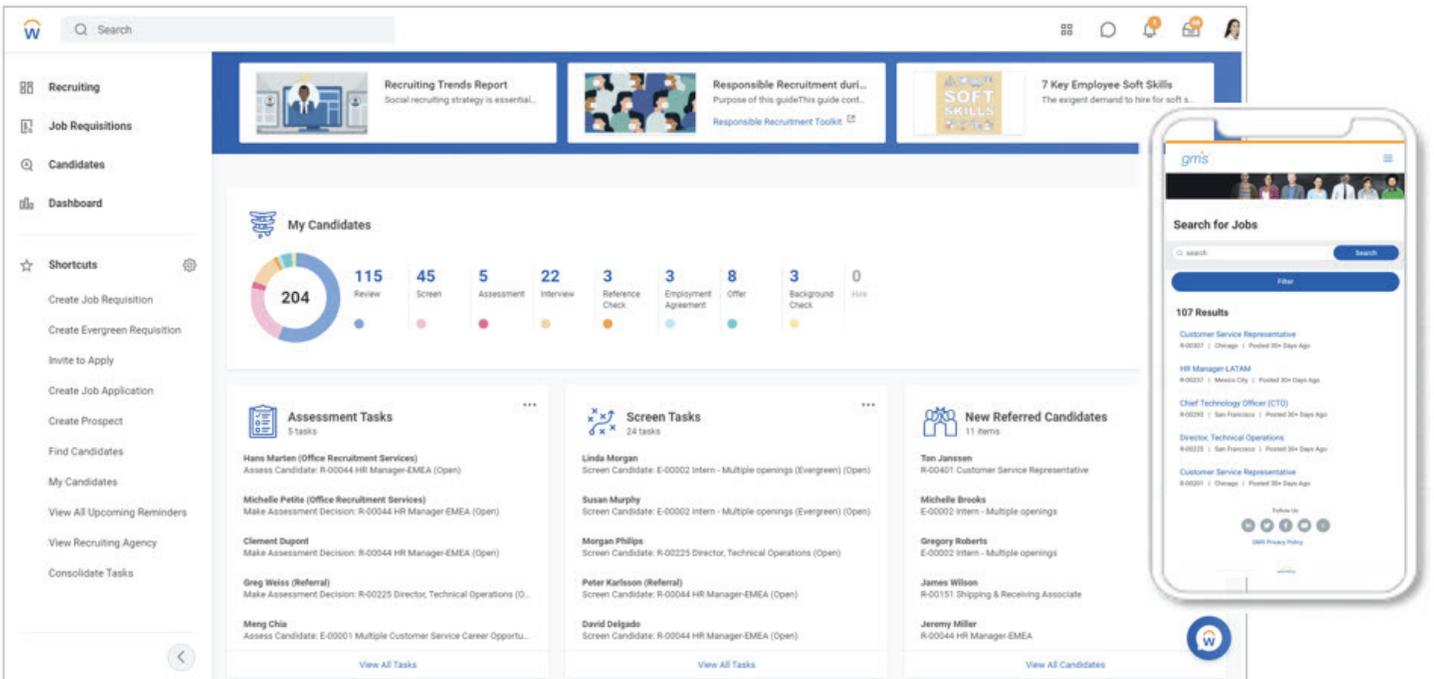
- **Mid-Market:** 1,000-5,000 employees
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Global headquarters and over 5,000 employees

Vendor Profile:



Company Description

Workday is an Enterprise Management Cloud provider that includes solutions for finance, HR, planning, and spend management. Its talent acquisition solution, launched in 2014, helps companies recruit top talent, develop and verify their skills, and guide them toward the next step in their career.



Customer Wins 2020-2021

- GE
- PF Chang's
- Petco
- Maersk
- Wounded Warrior Project
- The Ohio State University

Recent Announcements

- Growth in Workday Recruiting with over 2,600 customers
- Enhanced candidate experience and recruiter experience capabilities
- Acquisition of Peakon
- Strengthened Skills Cloud solution
- Over 200 ecosystem partners (135% growth)

Customer Support During COVID-19

- **Workday Community Portal:** Through the Workday Community website, Workday put together step-by-step guides and on-demand webinars to help customers navigate through COVID-19 use cases.
- **Adjusted Roadmap And New Features:** Workday adjusted their roadmap and accelerated delivery of features to support customers' needs during COVID-19. For example, Workday accelerated releases of the ability to regenerate offers and integration with web conference tools to support virtual interviews.
- **Remote Recruiting:** Workday enhanced product capabilities in communication, interviewing, and onboarding to support remote recruitment.

Company Background



History

- **Year Founded:** 2005
- **Private or Public:** Public (NASDAQ: WDAY)
- **Heritage:** Cloud Financial Management & HCM
- **Offices:** For a list of global offices, visit <http://workday.com>
- **Revenue:** \$4.32 billion
- **Mergers & Acquisitions:** Cape Clear (2008), Identified (2014), GridCraft (2015), MediaCore (2015), Platfora (2016), Pattern (2017), SkipFlag (2018), Rallyteam (2018), Stories.bi (2018), Adaptive Insights (2018), Trusted Key (2019), Scout RFP (2019), Peakon (2021)

Customers

- **Number of Customers:** 2600+ Workday Recruiting customers
- **Target Market:** Global Enterprise, Enterprise, Mid-Market
- **Target Vertical:** All
- **G2Crowd review:** 4/5

Leadership

- **CEO:** Aneel Bhusri & Chano Fernandez
- **Glassdoor:** CEO approval rating of 97%
- **The Executive Team:** Women represent 45% of the executive team
- **Investment:** Workday has its own investment arm, Workday Ventures
- **DEI Executive:** Yes (Carin Taylor)

Employees

- **Number of Employees:** 12,500
- **% Employees in R&D:** Not disclosed
- **% Employees in Sales/Marketing:** Not disclosed
- **Glassdoor rating:** 4.3/5



Talent Acquisition

Recruitment Marketing Platform/CRM ✓

Applicant Tracking System ✓

Onboarding ✓

Internal Mobility ✓



Talent Management

Succession Planning ✓

Performance Management ✓

Learning ✓

Compensation ✓



Enterprise Resource Planning

Time and Labor ✓

Core HR ✓

Payroll ✓

Benefits ✓

Products	Financial Management, Spend Management, HCM, Talent Management, Learning, Recruiting, Analytics, Platform Extensions, Student, Enterprise Planning, Payroll, Workforce Management, Professional Service Automation
Delivery Model	SaaS
Release Schedule	Twice per year (in March and September)
Data Centers	Global data centers
Development Technology	Not disclosed
Languages	30+
Services	Not disclosed
Partners	230+

Security

Comply with DOE, federal, state and local regulations	Yes
Provide access to all modules with a single login	Yes
Ability for administrator to restrict data access by role, IP, ID and report	Yes
SOC 2, Type II certified	Yes
Ability to monitor and track virus attacks, denial of service, etc.	Yes
Offsite back-up of all customer data	Yes
Documented back-up process	Yes

Integration

Standard integrations with background screening providers	Yes
Standard integrations with third-party CRM, assessment and onboarding providers	Yes
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integrated toolsets for security administrators	Yes

Communication

Text/SMS	Yes
Intelligent Chat	Yes
Messaging - WhatsApp	Planned
Messaging - WeChat	Planned
Microsoft Teams	Yes
Slack	Yes



Aptitude Analysis

All eyes are on Workday in the talent acquisition space. It has quickly become one of the largest providers since its 2014 Workday Recruiting launch, with over 2,600 customers in 35 countries across a wide range of industries. Workday has been strategic with its approach to recruitment – focusing on operational excellence in 2016, recruiter experience in 2019, and candidate experience in 2020. Its vision is to become a strategic advisor through the talent acquisition lifecycle, enabling equitable hiring and personalized experiences. It is executing on this goal by continuing to invest in both its products and the roadmap. One differentiator is the company's research-driven approach to recruitment solutions, with 2,800 hours of interviews, 400+ brainstorming sessions, and design partner groups.

The advantage Workday provides to organizations starts with its enterprise management cloud, which is based on a unified data core that delivers consistent data, experiences, and skills across the entire HCM suite. Workday has invested significantly in a foundation that includes skills ontology, inference, validation, and integration. Workday Skills enables its customers to improve internal mobility and matching both candidates to jobs and jobs to candidates. The skills cloud enables more equitable hiring, with capabilities including suggested jobs, re-labeling gender identify fields, DEI data capture, masked candidate screening, and diversity pipelines.

Workday has improved its recruiter experience since the last report with greater collaboration capabilities, bulk offer management, and robust analytics that include diversity dashboards. Workday provides high-volume recruiting, scaling to meet the needs of large organizations with dynamic seasonal demands. The most significant changes over the past year have included candidate experience capabilities, such as improved UI (decreased clicks and improved efficiency), enhanced apply flow, a personalized candidate home, and candidate skills matching.

-
- **Areas of Strength:** Global capabilities, skills cloud, DEI capabilities
 - **Areas of Improvement:** Limited sophisticated CRM capabilities, market misperceptions around Workday Recruiting



- **Candidate Experience:** Enhanced job search, enhanced job posting, and messaging (SMS)
- **Recruiter Experience:** Candidate skills matching, plan to add job requisition creation, and actionable resume review
- **Hiring Teams:** Interview management enhancements and in-progress job requisitions via WD Assistant (chatbot)

Key Differentiators

- 1 **Skills Cloud:** Workday's Skills Cloud powers its HCM solutions, including recruitment, to strengthen candidate profiles, support hiring decisions, offer a fair and inclusive experience, and enhance internal mobility. Its Skills Cloud includes four layers: Skills Ontology (to manage the millions of skills), Skills Inference (to identify and suggest skills when candidates do not provide it in their profiles), Skills Validation (to verify if someone really has the skills they identify), and Skills Outcomes (that leverage an organization's comprehensive skills data, along with HCM data, providing a contextual and complete picture).

2 **Research-driven approach:** The misperception around Workday is that talent acquisition is not a priority. However, Workday takes a very strategic approach to recruitment that includes significant customer input and research. Its research-driven approach to recruitment solutions includes 2,800 hours of interviews, 400+ brainstorming sessions, and design partner groups.

3 **A comprehensive, unified HCM suite:** Workday offers a complete solution for the entire talent lifecycle, including strategic workforce planning, through screening and selection, onboarding, learning, succession planning, and core HR. All of these capabilities are in one solution – creating a consistent experience, rich source of data, and ability to manage talent based on skills.



The Bottom Line

Key Characteristics:

- End-to-End Talent Acquisition
- Product Innovation
- Marketplace

Best Suited For:

- **Mid-Market:** 1,000-5,000 employees
- **Enterprise:** Over 5,000 employees
- **Global Enterprise:** Global headquarters and over 5,000 employees

Appendix I:

Key Capabilities for Talent Acquisition Systems



ATS

Recruiter Experience:

- **Requisition Management:** Are there configurable tabs and fields that are based on user groups?
- **Job Advertisement:** Do you have third-party advertising and insight on advertising expenses so recruiters can make the best decisions?
- **Pre-Screening Questions:** Do we have the ability to search a library or have clients use their library to include questions during multiple phases of the recruitment process?
- **Candidate Approval:** Can we reject candidates or advance them and categorize them? Can we look at approval by list or chart? Can we look at status by source, by applicant date or by distance?
- **Dashboards:** Are dashboards all configurable that show a range of recruitment metrics in a simple format?
- **Candidate Communication:** Do we have options for templates so that recruiters can quickly notify candidates and hiring managers of status? Is there two-way communication through SMS, messaging or email?

Hiring Manager Experience:

- **Collaboration:** Are there options for secure collaboration with recruiters and hiring teams throughout the process?
- **Mobile-Responsiveness:** Do we have the ability to quickly approve requisitions, candidates and offers on a mobile device?
- **Interview Scheduling:** Can we easily schedule interviews without leaving the system?

Candidate Experience:

- **Career Page:** Can we link to social channels and be able to connect with someone at the company?
- **Feedback:** Can we show feedback on status throughout the process?
- **Apply:** Can we use social profiles to view the status? Is there the ability to apply as a guest? Is this mobile enabled?

CRM

- Are candidates manually added/removed by users and workflows?
- Does the system search candidates on Google and LinkedIn?
- Does the system track candidate engagement levels?
- Can the system track and store all candidate engagement and visit history?
- Can the system search candidate pools using multiple criteria?
- Do companies have visibility into all job applications?
- Does the system allow for user's notes on candidate profiles?
- Can companies post candidate information back to the ATS?
- Does the system include email and message templates to use with the candidate's communication and workflow?
- Can companies see a candidate's application completed status feeding back from the ATS?

Onboarding

Forms Management:

- Do you support I-9 compliance and eVerify?
- Do you have automated forms completion?
- Do you have eSignature?
- Do you integrate with ATS or HRMS providers?
- Do you have forms compliance?

Tasks Management:

- Do you have automated scheduling?
- Do you have manager dashboards?
- Do you automate assignments?
- Do you automate reminders and notifications?

Socialization:

- Do you have a new hire portal?
- Do you have new hire communication (SMS, messaging, conversational AI)?
- Do you have video capabilities?
- Do you offer mentoring and coaching?
- Do you integrate with learning management systems and learning content?
- Do you have collaboration capabilities?



This section of the report provides a list of many of the providers that fall under the talent acquisition ecosystem. The ecosystem includes a wide range of solutions that should be able to integrate with all three platforms. It includes some (but not all) of the providers in the ecosystem. Many companies have existing relationships with third-party providers; having a platform that will integrate with those solutions should be a major factor in decision-making.

AI Matching and Talent Intelligence

Avrio (www.avrioai.com)

Brilent (www.brilent.com)

Eightfold (www.eightfold.ai)

HiredScore (www.hiredscore.com)

Ideal (www.ideal.com)

iMocha (www.imocha.io)

PredictiveHire (www.predictivehire.com)

Assessments

Assess Systems

(www.assesssystems.com)

ExactHire

(www.exacthire.com)

General Dynamics

(www.generaldynamics.com)

HackerRank

(www.hackerrank.com)

HireVue

(www.hirevue.com)

Hogan Assessments

(www.hoganassessments.com)

Modern Hire

(www.modernhire.com)

Outmatch

(www.outmatch.com)

Pearson

(www.pearson.com)

PeopleMatter

(www.peplematter.com)

PI Worldwide

(www.piworldwide.com)

Plan Source

(www.plansource.com)

Predictive Hire

(www.predictivehire.com)

Profiles International

(www.profilesinternational.com)

Pymetrics

(www.pymetrics.com)

Traitify

(www.traitify.com)

Wonderlic

(www.wonderlic.com)

Talent Sonar

(www.talentsonar.com)

Analytics

Survale (www.survale.com)

SwoopTalent (www.swooptalent.com)

Tableau (www.tableau.com)

Talentegy (www.talentegy.com)

Vettd (www.vettd.ai)

Background Screening

Accusource

(www.accusource.com)

Chequed

(www.chequed.com)

CrimCheck

(www.crimcheck.com)

Data Facts

(www.datafacts.com)

Equifax

(www.equifax.com)

First Advantage

(www.firstadvantage.com)

Good Hire

(www.goodhire.com)

HackerRank

(www.hackerrank.com)

HireRight

(www.hireright.com)

Justifacts

(www.justifacts.com)

Kentech

(www.kentech.com)

Onfido

(www.onfido.com)

Sterling Background Screening

(www.sterlingcheck.com)

Verified First

(www.verifiedfirst.com)

Campus Recruiting

College Recruiter

(www.collegerecruiter.com)

Handshake

(www.handshake.com)

Wayup

(www.wayup.com)

Yello

(www.yello.com)

Conversational AI

AllyO (www.hirevue.com)

Hourly (www.wearehourly.com)

Mya (www.mya.com)

Paradox (www.paradox.com)

Talkpush (www.talkpush.com)

Tengai (www.tengai-unbiased.com)

XOR (www.xor.ai)

DEI

Blendoor (www.blendoor.com)

Kanarys (www.kanarys.com)

SeekOut (www.seekout.com)

Talvista (www.talvista.com)

Textio (www.textio.com)

Digital Interviewing

HireVue (www.hirevue.com)

JobOn (www.jobon.com)

Modern Hire (www.modernhire.com)

Outmatch (www.outmatch.com)

Sonru (www.sonru.com)

Online Reference Check

Checkster (www.checkster.com)

SkillSurvey (www.skillsurvey.com)

Programmatic Advertising

Appcast

(www.appcast.io)

Joveo

(www.joveo.com)

Pandologic

(www.pandologic.com)

Radancy

(www.radancy.com)

Talent Nexus

(www.talentnexus.com)

Vonq

(www.vonq.com)

Recruitment Marketing

Ascendify

(www.ascendify.com)

Beamery

(www.beamery.com)

Clinch

(www.clinchtalent.com)

Phenom

(www.phenom.com)

Symphony Talent

(www.symphonytalent.com)

Talent Brew

(www.talentbrew.com)

Sourcing

Job Boards and Aggregators

CareerBuilder

(www.careerbuilder.com)

College Recruiter

(www.collegerecruiter.com)

Indeed (www.indeed.com)**The Ladders** (www.theladders.com)**LinkUp** (www.linkup.com)**Monster** (www.monster.com)**The Muse** (www.themuse.com)**US Jobs** (www.usjobs.com)**Vet jobs** (www.vetjobs.com)**ZipRecruiter** (www.ziprecruiter.com)

AI-Driven Sourcing

SeekOut (www.seekout.com)**Talenya** (www.talenya.com)**Visage Jobs** (www.visagejobs.com)

Talent Pipelines

CandidateID

(www.candidateID.com)

Entelo

(www.entelo.com)

LinkedIn

(www.linkedin.com)

Recruitment Process Outsourcing

Allegis Group

(www.allegisgroup.com)

AMN Healthcare

(www.amnhealthcare.com)

AMS

(www.weareams.com)

Aon Hewitt

(www.aon.com)

Cielo

(www.cielo.com)

FutureStep

(www.futurestep.com)

PeopleScout

(www.peoplescout.com)

Randstad SourceRight

(www.randstadsourceright.com)

Seven Step RPO

(www.sevensteprpo.com)

Talent2

(www.talent2.com)

WilsonHCG

(www.wilsonHCG.com)

About Aptitude Research

Aptitude Research is a leading human capital management (HCM) research and advisory firm. Our in-depth research and vendor assessments help HR leaders develop a deep understanding of the HCM technology landscape, including talent acquisition and engagement, to ultimately make better purchase decisions.

Our flagship research, The Aptitude Index Report: Talent Acquisition Systems (2021), delivers a comprehensive look at talent acquisition trends and technology. This knowledge, combined with our consulting and advisory services, enables companies to save time, money and improve the recruiting, hiring and workforce management experience.

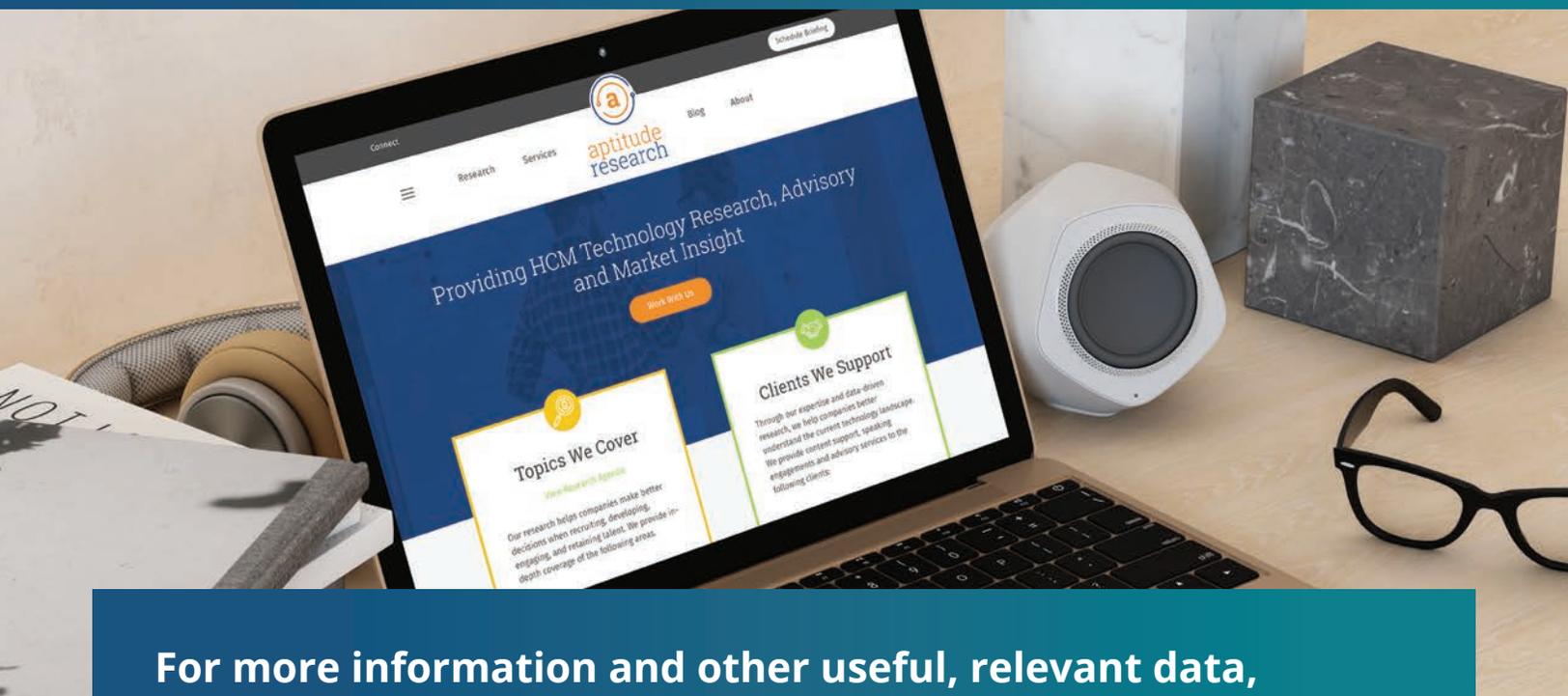
Founded by leading analyst Madeline Laurano and based in the Boston area, Aptitude Research provides a wealth of HCM expertise to companies, vendors and investors. View our recent and upcoming research at www.AptitudeResearch.com or connect with us on Twitter or LinkedIn.

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