



APTITUDE
RESEARCH PARTNERS

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APTITUDE INDEX REPORT

TALENT ACQUISITION SYSTEMS

2017

THE ATS IS NO LONGER ENOUGH

OCTOBER 2017



APTITUDE
RESEARCH PARTNERS

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About the Report

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 what providers might meet their unique requirements. As the market becomes more complex, organizations must take a step back and reexamine what is driving success, and ask new questions around technology decisions. The final section of this report includes profiles of ATS providers describing their attributes along these criteria.

INTRODUCTION

The More Things Change, the More They Stay the Same

In 2017, the talent acquisition systems market has grown significantly with an increased demand for more innovative and effective technology solutions. Organizations are being more judicious when evaluating technology, and providers are keeping up with a market that seems to change at the speed of light. The biggest shift in the past year is the realization that the Applicant Tracking System (ATS) as a stand-alone product is not enough. In order to be efficient and provide a positive candidate experience, organizations need capabilities that engage talent both before they apply for a job and after they accept an offer. Consistency in this experience throughout every stage of the candidate's journey has become the "holy grail" of talent acquisition.

Many of the providers in this report are investing in Candidate Relationship Management (CRM) solutions and onboarding solutions to help meet this need. Over the past year, providers have enhanced interview management capabilities, dabbled with Artificial Intelligence (AI), provided more options for employee referrals, and improved analytics and dashboards. It has been a busy year. And although much has changed, many of the historic challenges in this technology still persist. Companies are still overwhelmed when trying to navigate this market and providers have trouble simplifying their solutions. In fact, Aptitude found that 51% of companies are investing in multiple ATS systems.

Today, the talent acquisition system remains the backbone of modern recruitment function. Yet, Aptitude Research found that only 20% of companies are satisfied with their primary provider. Why are so many companies disgruntled with a system that is so critical to the way they attract and recruit talent?

Only
20%
of companies are
satisfied with their
ATS Provider

Many times, the dissatisfaction is the result of the company's not understanding its own internal needs or looking solely at price or product capabilities to find the right provider. These companies become so easily distracted by the complexity and the bells and whistles of these systems that they forget the basic challenges they are trying to solve.

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 as well as in-depth analysis on each of the fifteen providers who qualified for this report.

This year, we are providing more analyst insights, user experience ratings, and a SWOT analysis. We are also including more information in each profile about integration, security, and advanced capabilities.

Unlike other tools in the market, this study 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	2	3	4
Encouraging organizations to consider and identify their own internal needs before evaluating a partner, rather than merely finding a provider.	Providing clarity to the complex landscape of talent acquisition technology.	Highlighting the differentiators of each provider across the customer journey. These differentiators are often found in the leadership, support, services, and vision of the product.	Providing analysis of the culture, customer support, and engagement of each provider. These are the differentiators that are easy to overlook in a demo or on the provider's website.

RESEARCH METHODOLOGY

The Index Report is a comprehensive study that examines the current and future states of the talent acquisition system market. This study is the combination of three major research initiatives conducted by Aptitude Research Partners in 2016.

Quantitative Research: Through a 2017 research study of over 400 organizations across a wide range of industries and company sizes, Aptitude identified the key trends and challenges that customers are facing when selecting and implementing a talent acquisition system.

Qualitative Research: Aptitude conducted a series of customer interviews from April 2017 to October 2017 to learn more about what companies are looking for in a talent acquisition solution and what they would like to see in a partner.

Solution Provider Analysis: Aptitude conducted 2-4 hour briefings and demos with each of the providers included in this report. During these sessions, company background, product background, and a product demonstration were all carefully considered.

Below are the criteria for inclusion in the report:

Criterion	Description
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 partner 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): ADP, Cornerstone OnDemand, gr8 People, Greenhouse, IBM (Kenexa), iCIMS, Jobvite, Lever, Oracle, Newton Software, PeopleFluent, SAP, SmartRecruiters, Symphony Talent, and Workday.

TOP 10 TRENDS

1. THE MARKET WILL CONSOLIDATE IN THE NEXT 2 YEARS

Market consolidation in talent acquisition technology is inevitable with too many providers doing too many different things. Aptitude's 2017 research found that over 50% of companies are investing in 3 or more ATS systems and 3 or more primary sourcing tools. As 70% of companies invest in recruitment marketing solutions, ATS providers have an opportunity to make the technology landscape simpler for their customers and we can expect some acquisitions in this area.

2. TALEO CUSTOMERS AREN'T NECESSARILY LEAVING

Many of the next generation talent acquisition systems are waiting for a mass exodus of Taleo customers. But the reality is that many companies are planning to stick with Taleo. They need a provider that can support a global enterprise organization, provide the scalability and security they need, and can integrate with their Human Resource Management System (HRMS). In the ATS world, global providers are few and far between.

3. THE MAD RUSH TO MOVE UPMARKET

Every best-of-breed provider included in this report is trying to move upmarket. This year, the growth that many of these providers experienced in the SMB and mid-markets no longer seems to be enough. These providers are flexing their muscles by creating new partnerships, establishing a European presence, and demonstrating security and scalability that enterprise clients require. Moving upmarket can be challenging as customers often require more support and the sales cycle can be much longer. Only time will tell how these providers that were at one time considered the darlings of the SMB market will win favor with the enterprise market.

4. INTERVIEW MANAGEMENT IS A DIFFERENTIATOR...STILL

Interviewing is an opportunity for providers to empower interviewers with more information and better insights. Providers that differentiate from their competition offer more than scheduling. They offer interview management with capabilities that include self-scheduling, selecting a location, providing instructions and invite details, offering information about the employer to the candidate, and the ability to include attachments.

TOP 10 KEY TRENDS

5. AWS IS THE STANDARD

Many of the next generation providers are built on Amazon Web Services development technology and/or are chosen to be part of the AWS Connectors program. With several options for Infrastructure as a Service (IaaS) providers, AWS seems to be the platform of choice in the ATS world. This year, several of the more traditional providers are moving to AWS as well. AWS is a leading platform and enables providers to scale and innovate.

4. RECRUITMENT MARKETING WILL BE A “MUST-HAVE”

Often referred to as the “pre-applicant platform,” recruitment marketing manages outbound sourcing, inbound recruitment marketing, and employer branding. It integrates with any ATS. A Recruitment Marketing Platform includes capabilities that maintain the employer brand, foster candidate relationships, and enhance messaging and communication efforts. The most critical capabilities in these systems include: Career Site, SEO, Employee Referrals, and Talent Communities. Basically, it improves the front-end of your recruiting process and tackles most of what the ATS could never do. Any provider that does not include some CRM or a full recruitment marketing solution risks losing customers or prospects.

Case Study: Shopify

Shopify is a fast-growing, Canadian eCommerce platform that employs 2500 workers. In order to power its growth, Shopify needed to streamline its sourcing activities and build stronger relationships with candidates. Shopify invested in an integrated CRM and ATS platform through Lever to improve sourcing and double the engagement of passive candidates.

In 5 years, Shopify has grown from 550 employees to 2500 employees (600 hires were made this year). It has made more than 380 of those hires from proactive sourcing and receives a 42% response rate to cold recruiting emails. By leveraging an integrated recruitment marketing and ATS solution, Shopify has not only improved its sourcing initiatives but also, hiring manager satisfaction and overall efficiencies.

TOP 10 KEY TRENDS

7. DIVERSITY HIRING IS A PRIORITY

Aptitude Research Partners identified improving diversity and inclusion efforts to be a top three priority for organizations in 2017. Many of the providers in this report are prioritizing diversity hiring and offering organizations capabilities such as anonymous screening, job description checkers, and bias detection.

8. THE MARKETPLACE IS STILL CONFUSING

While the concept of a marketplace in HCM makes sense, the reality is that not all marketplaces bring value. Many providers that have announced a “marketplace” are offering nothing more than a list of partners and an open API. One way for companies to distinguish between a marketplace and market hype is to look for a positive customer experience, some level of certifications, and insights or recommendations.

9. INTERNAL MOBILITY IS A DIFFERENTIATOR

In order for talent acquisition to be successful, organizations must think about both internal and external talent. According to research Aptitude launched this month, over 70% of companies plan to increase their investment in solutions and strategies to support the process of moving talent from role to role within an organization. Internal mobility is a strategic priority for companies that want to improve the quality of hires and at the same time save costs.

10. WORKDAY IS THE ELEPHANT IN THE ROOM

No surprise, most of the providers in this report view Workday as a future threat. They fear that as more and more companies move to Workday, IT will push to move away from best-of-breed. The ATS market is still very much a best-of-breed market so the next few years will be interesting to watch as Workday develops recruiting products and continue to gain market share.

WHAT'S CHANGED THIS YEAR

This year's Index Report has been updated to reflect changes in the market and key differentiators of the leading providers. Our goal for the 2017 Report was to get more technical with information about architecture, security, and integration. As many of the providers in this report are trying to move upmarket, we felt it was important to go deeper in our analysis. Below is a list of some of the new sections of the report.

Integration: As more providers are offering ecosystems and marketplaces, we included more information on how providers are integrating with third-party providers and what their platforms offer for integration and support.

Security: Few providers in this report can truly support a global enterprise client. As companies look to expand globally, we believe that security is an important differentiator.

Advanced Capabilities: We evaluated providers based on some of the advanced capabilities we are seeing in the market, including events management, internal mobility, employee referrals, and CRM capabilities.

SWOT Analysis: We replaced the customer journey section of the report with a SWOT analysis to show where providers have strengths, weaknesses, opportunities, and threats.

Investment: Many of the providers in this report have received a considerable amount of investment. We called this out in the beginning of each profile, as financial viability is a key differentiator.

More Analyst Insight: We included more insight into what impressed us about each provider and what companies should consider when evaluating these solutions.

New Providers: This year gr8 People and Symphony Talent were both included in this report.

THE TALENT ACQUISITION LANDSCAPE

The Talent Acquisition Technology Landscape has become crowded, complex, and overwhelming. With thousands of providers in the market and new categories that seem to emerge every month, it is difficult to understand what role the ATS plays in the broader landscape. Not long ago, companies relied solely on a handful of solutions to manage recruitment. Today, they have many options and a full ecosystem of solutions to consider.

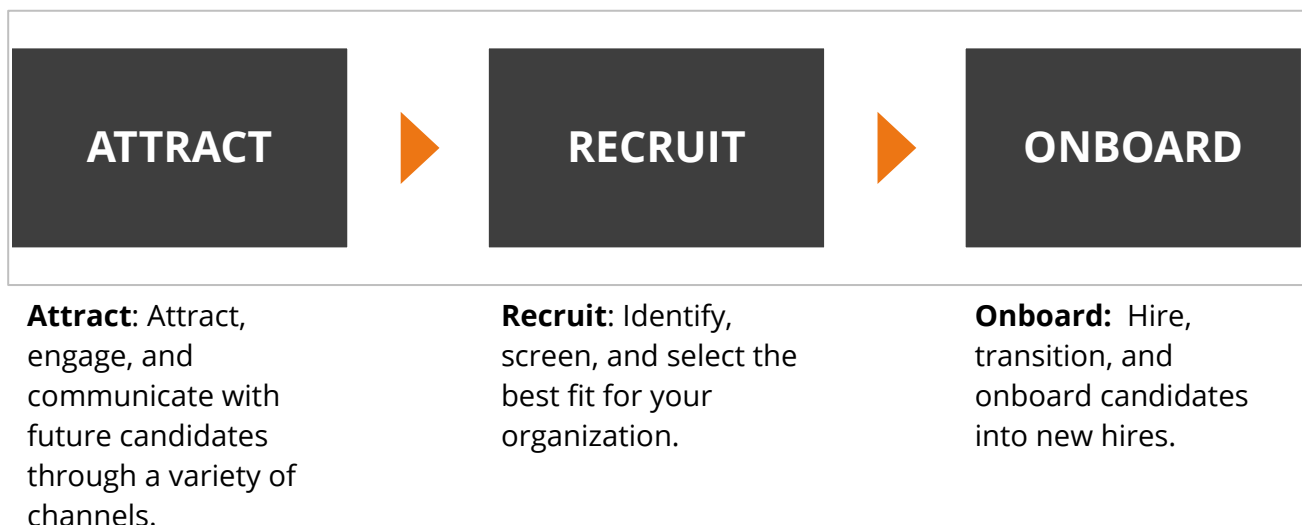
Today, the choices seem endless. As a result, many companies are making uneducated or impulsive decisions that could prove to be costly and damaging to their overall talent acquisition. This confusion is leading to dissatisfaction, as organizations struggle to create a smooth candidate process using disparate solutions. In fact, 20% companies are either dissatisfied or indifferent to their current technology.

Companies need to start evaluating their talent acquisition system. The first step is to realize that talent acquisition is its own suite of solutions and deserves its own technology stack. Several years ago, the biggest trend in HCM was the integrated talent management suite, or a way for organizations to build consistency throughout all of their talent processes. Although this integrated model has provided tremendous value to the overall business, many recruitment functions and candidates have lost their way. By focusing solely on broader talent management, these technologies have failed to address the growing complexities of talent acquisition and the importance of a positive candidate experience.

Many companies are beginning to take a step back, reexamining their recruitment processes and employing the same rigor around the integrated talent acquisition model as they did around the integrated talent management model. They are finding that the talent acquisition system manages the core of a recruitment strategy, but not all of it. The section of the report will help provide clarity around where the talent acquisition system fits into the broader landscape or recruitment technology.

At the most basic level, talent acquisition is categorized in three main processes: Attract, Recruit, and Hire (see Figure 1). These areas are the trifecta of any successful talent acquisition function. Organizations need them all to execute a strategic vision, improve efficiencies, identify quality talent, and provide a consistent candidate experience.

Figure 1: Talent Acquisition Trifecta

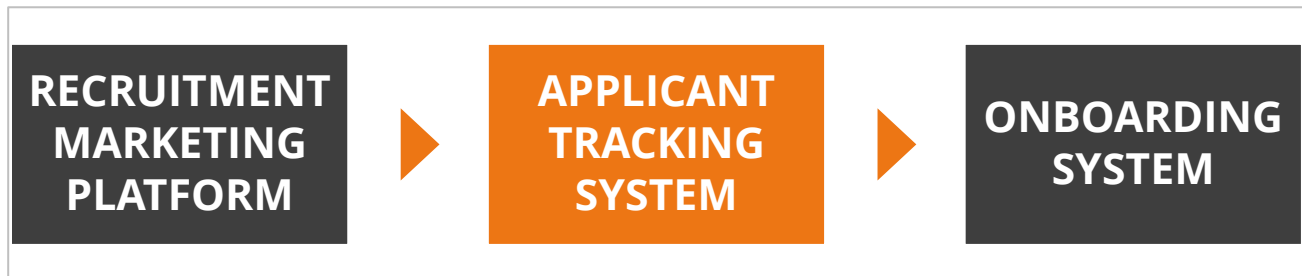


When combined, these categories represent a holistic approach to strategic talent acquisition that needs support from the right technology stack.

The Aptitude Research Partners talent acquisition technology landscape model includes three major systems that align with this trifecta as well as an ecosystem of solutions to enhance the value of integrated talent acquisition (see Figure 2).

Figure 2: Talent Acquisition Landscape

Talent Acquisition Platforms



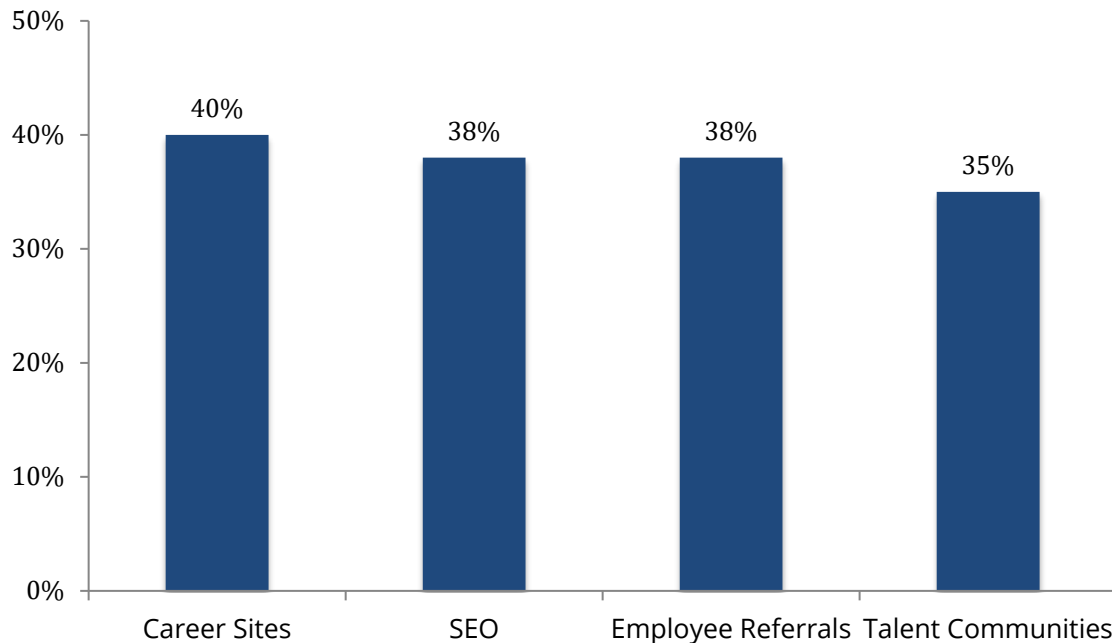
Ecosystem



The three main systems include: Recruitment Marketing Platform, ATS, and Onboarding System.

- **Recruitment Marketing Platform:** Often referred to as the “pre-applicant platform”, this solution manages outbound sourcing, inbound recruitment marketing, and employer branding. It integrates with any ATS. A Recruitment Marketing Platform includes capabilities that maintain the employer brand, foster candidate relationships, and enhance messaging and communication efforts. The most critical capabilities in these systems include: Career Site, SEO, Employee Referrals, and Talent Communities (see Figure 3). Basically, it improves the front-end of your recruiting process and tackles most of what the ATS could never do. Aptitude’s 2016 Hire, Engage, and Retain survey found that 70% of companies are planning to invest in a Recruitment Marketing Platform in 2016.

Figure 3: Recruitment Marketing Platform Capabilities



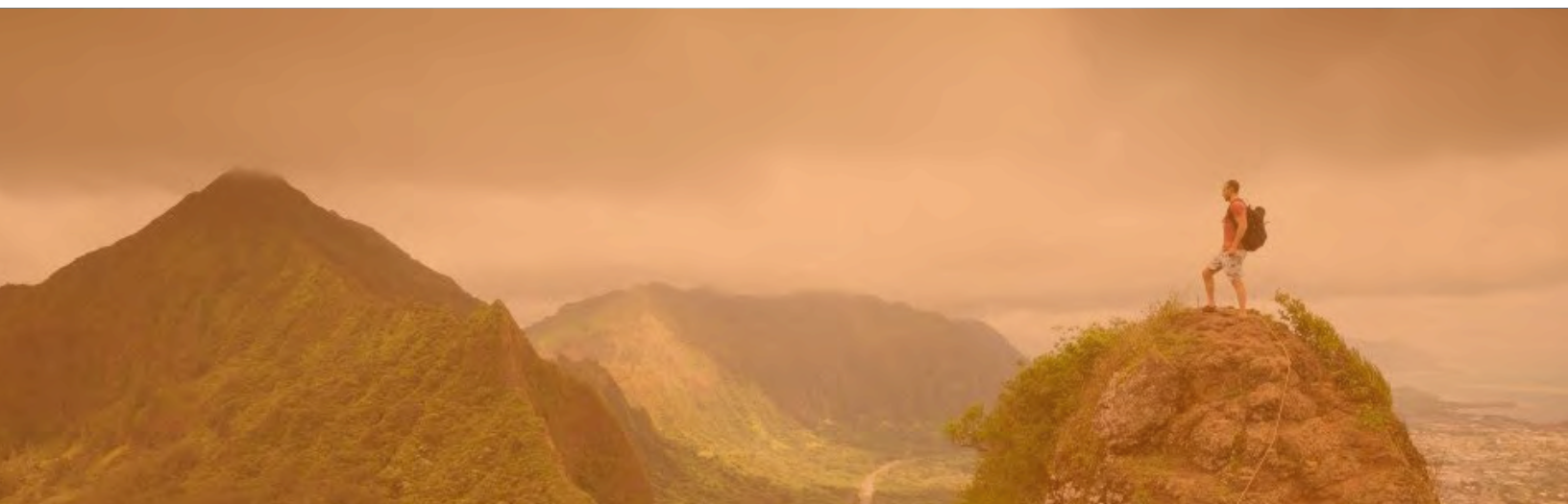
Source: Aptitude Research Partners 2016, n=367

- **ATS:** With nearly 70% of companies investing in an ATS, this market is the most mature in talent acquisition. An ATS encompasses the entire 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 collects, tracks, and manages new hire tax, benefit, and organizational forms. Tasks Management ensures that all onboarding activities are completed and automated. A New Hire Portal engages new hires into the company culture through a new hire portal. 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.

The ecosystem includes a wide range of solutions that should be able to integrate with all three platforms. 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. The ecosystem includes some of the following categories:

- **Assessment** - Tools that provide a science for identifying the right fit;
- **Background Screening** - Tools to check drug use, employment verification, education verification, and criminal background;
- **CRM** - Manage all the relationships and marketing for sourcing active and passive candidates;
- **Digital Interviewing** - Tools to support interview scheduling, video interviewing, and branding;
- **Forms Management** - A solution that automates new hire forms;
- **Job Distribution** - Manage all job posting activities, integrations, and analytics;
- **Job Matching** - Take job seekers' qualifications and matches them with employers' requirements;
- **Job Search Engine** - Search millions of job listings across the web;
- **Online Reference Check Solutions** - Solutions that automate the reference check process and provide a talent pool of passive candidates;
- **Referral Network** - Automate the employee referral process;
- **Resume Sourcing** - Identify resumes online from job boards, ATS, and social networking sites;
- **Search Technology** - Ability to search for candidate using keyword or semantic search;
- **Social Media** - Leverage the power of social media to create branding and source jobs;
- **Talent Communities** - Create ongoing relationships with a community of talent.

The appendix of this report contains a list of providers within the talent acquisition ecosystem. While not a complete list of every provider or category, it illustrates the broad network of solutions delivering the modern recruitment experience.



Case Study: Project Hope

Project Hope is a non-profit that makes a positive impact on global health challenges facing people around the world. With over 900 employees in 30 countries, Project Hope needed a talent acquisition system that could be customized, provide the necessary security, and be accessible to workers in remote areas.

Project Hope selected Cornerstone OnDemand for several reasons including integration with their learning, performance, and succession solutions (all through Cornerstone) and a modern user experience. Additionally, Project Hope was looking for a partner that truly supported its values and culture. The provider even organized a team to run in support of Project Hope at the LA Marathon.

The Marketplace Momentum

While the concept of a marketplace in HCM makes sense, the reality is that not all marketplaces bring value. Many providers that have announced a “marketplace” are offering nothing more than a list of partners and an open API. One way for companies to distinguish between a marketplace and market hype is to look for a positive customer experience, some level of certifications, and insights or recommendations. Some providers are still immature in their marketplace.

Below are a few questions to consider for a marketplace include:

- Can you make transactions for third party applications right in the ATS platform?
- Is there a certification program for providers in the marketplace?
- What extra costs will you need to consider?
- What happens if you no longer want to invest in a provider in the marketplace?
- Are there recommendations or ratings for the providers in the marketplace?
- Are there API Connectors in place?
- Can you develop your own solutions right in the platform?

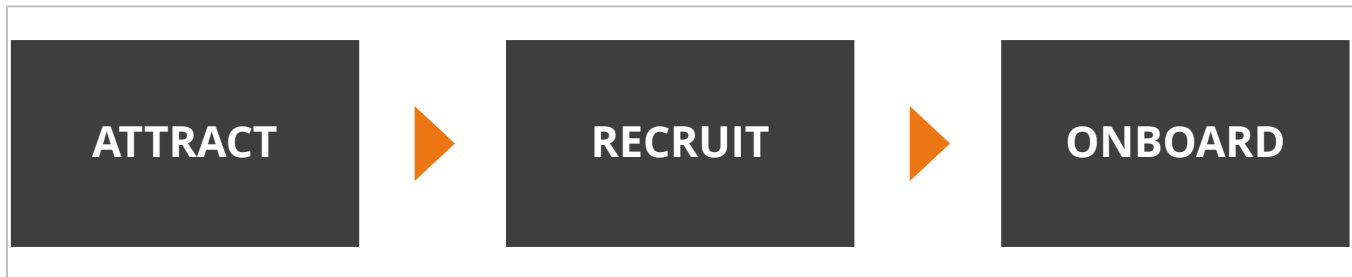
Top Partnerships in 2017

We identified ten providers that impressed us this year and that we believe are bringing great value to their ATS partners. These providers are offering expertise, a positive user experience, and increased adoption. Note: This list does not include the recruitment marketing platforms.

Below are ten of the providers to watch this year:



The providers included in this report have at a minimum an ATS but may also offer a recruitment marketing platform and/or an onboarding system. Several of the providers also include third-party solutions that are integrated with their ATS, such as assessments or sourcing solutions.



PROVIDERS OFFERING THE COMPLETE TALENT ACQUISITION TRIFECTA



BUYERS' PERSONAS: UNDERSTANDING YOUR INTERNAL NEEDS FIRST

As talent acquisition becomes more complex, so does the role of the recruiter and the talent acquisition function.

Recruiters must juggle multiple hats in order 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. Data analysis and relationship-building is one example. Talent acquisition professionals have to be able 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 makes the process of selecting the right technology feel overwhelming. With new responsibilities and so many new products in the market, it is 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 (nearly 80% of companies) 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 Partners 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.

INTERNAL NEEDS ANALYSIS

What It Is:

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 and alignment with corporate objectives, readiness assessment.

Understanding the different Personas is one way organizations can begin to provide clarity around their needs and what solutions 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 buyers. It would be helpful if companies looking to invest in these systems could understand what these personas are and what providers can support them along the customer journey.

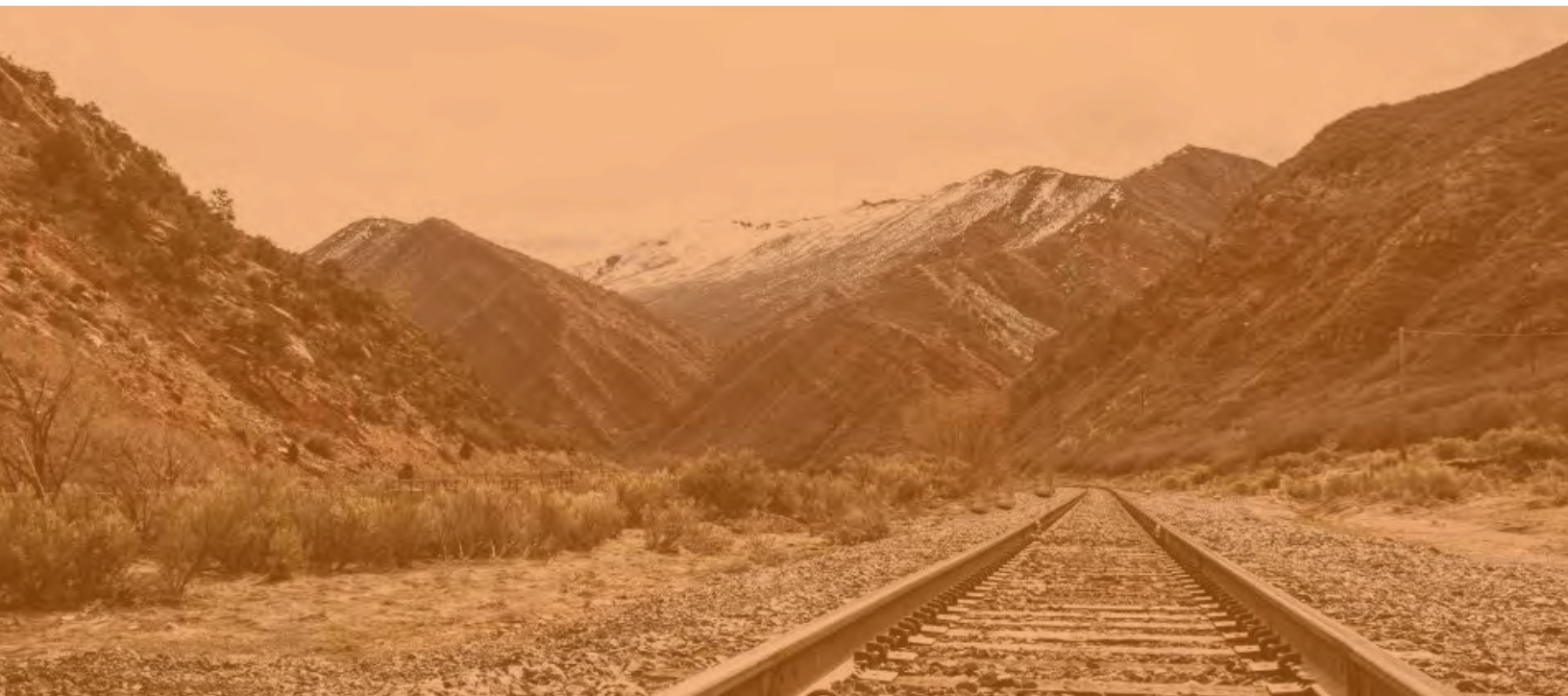
Below are several Buyers' Personas that Aptitude has created based on proprietary research and an analysis of what providers are best suited to support their needs.

THE EXPERT	THE INTEGRATOR	THE SIMPLICIST	THE INNOVATOR
Organizations that are looking for a familiar solution that can do what an ATS has traditionally managed while looking towards the future. These companies are looking for a provider with deep domain expertise in talent acquisition.	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.	Organizations that are looking for a solution that understands the pain points of recruiters and candidates and makes the task of finding talent and finding a job a simple one. These companies prioritize ease of use and a positive user experience.	Organizations that are looking for a next generation talent acquisition platform. These companies are willing to take risks and try new strategies and technology options to engage with candidates in a new way.
IBM iCIMS Jobvite Newton Software SmartRecruiters	ADP Cornerstone OnDemand Oracle PeopleFluent SAP Workday	iCIMS gr8 People Greenhouse Jobvite Newton Software SmartRecruiters	ADP gr8 People Lever SmartRecruiters Symphony Talent

“ 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. ”

In addition to understanding the buyer's persona, 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.

SMB (> 100 employees)	Mid-Market (101-2499 employees)	Enterprise (Over 2500 employees)	Global Enterprise (support over 10 languages and 3+ global offices)
Lever Newton Software	gr8 People Greenhouse iCIMS Jobvite Lever Newton Software SmartRecruiters	ADP Cornerstone OnDemand IBM iCIMS gr8 People Jobvite Oracle SAP PeopleFluent SmartRecruiters Symphony Talent	ADP Cornerstone OnDemand IBM Oracle SAP SmartRecruiters Workday



A GUIDE TO USING THIS REPORT

This report includes 15 profiles that were compiled through Aptitude's research of each provider, our extensive experience covering this market, and external research through sites such as G2Crowd and Glassdoor.

Each profile is divided into three main sections:

1. Company Background
2. Product Information and Capabilities
3. Key Decision Factors

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

COMPANY BACKGROUND

What it Includes: The information included in the company background examines the history of the company, the leadership, the employees and the customers.



- **History** outlines the year founded, heritage of the provider (what solutions they started offering first), offices, revenue, mergers & acquisitions, growth rate, and any rewards or recognition;
- **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;
- **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.
- **Investors** highlights the amount of investment, series and investor or each provider.
- **Customer Acquisitions:** up to 10 new customers for each of the providers in the report.

Why It Is Important: The company background helps customers and prospects get an understanding of the provider, the culture, priorities and financial viability. Currently, only 43% of companies view their providers as a true partner. Similar to any relationship, companies must understand who the provider is and what their passions and culture says about them in order to form a true partnership.

PRODUCT INFORMATION AND CAPABILITIES

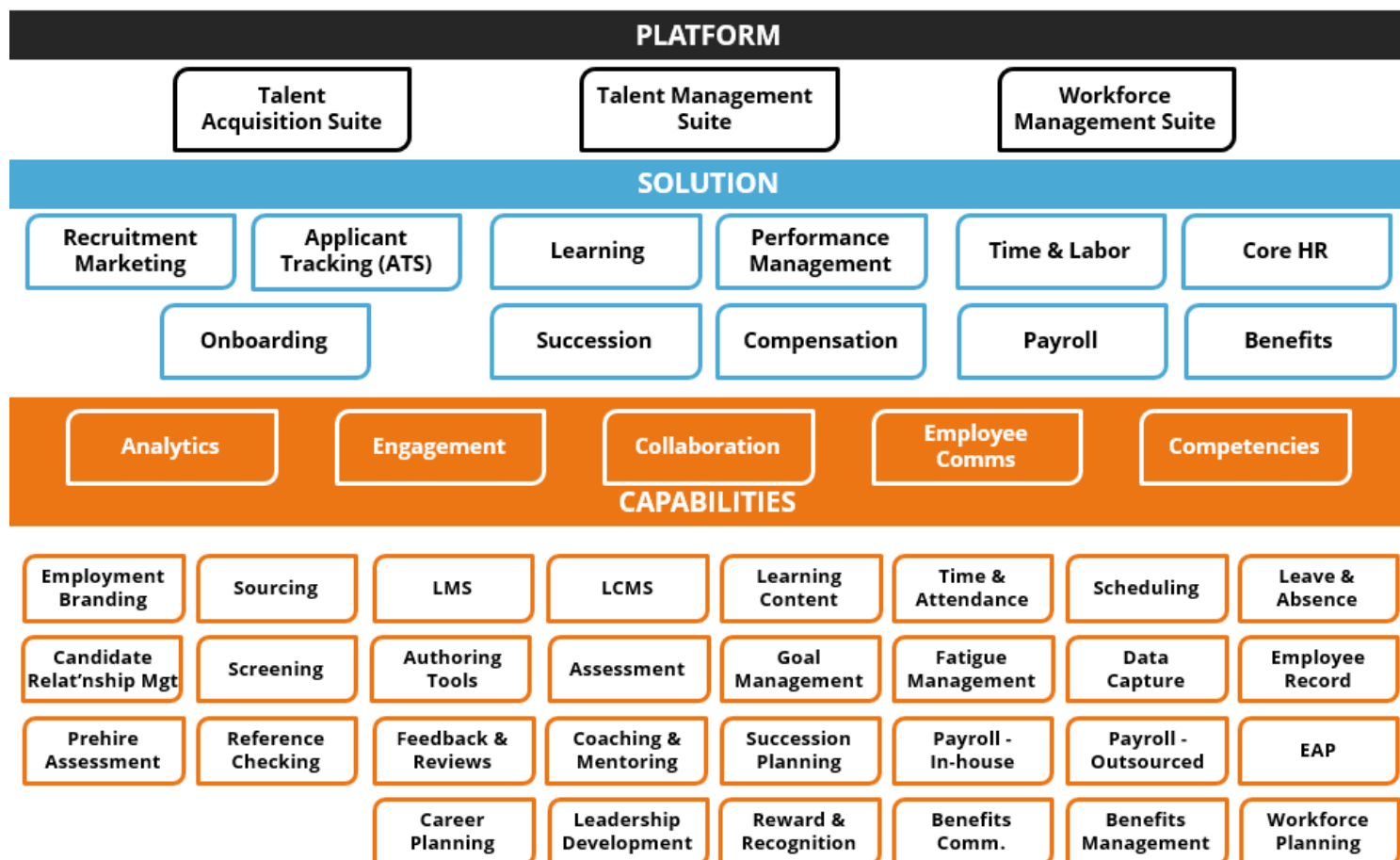


SOLUTION PROFILE

What It Includes: The information included in the solution profile places the organizations talent acquisition offerings in the context of the human capital management landscape (Figure 4) 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 suite are offered by their providers. Most providers go to market with either a talent acquisition suite, 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 (see Figure 5). Each profile includes a highlighted landscape of what is included from the provider. According to Aptitude Research Partners, 33% of companies are leveraging an ERP, 36% are leveraging a talent acquisition suite, and 13% a talent management suite for Talent Acquisition capabilities.

Figure 4: HCM Landscape



INTEGRATION, SECURITY, and ADVANCED CAPABILITIES

This year's Index includes additional analysis on integration, security and advanced capabilities

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
SAS-70 Certified
Ability to include a way to monitor and track virus attacks, denial of service, etc
Offsite back-up of all customer data
Documented back-up process
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
Interview Scheduling
Event Management
CRM
Internal Mobility
Employee Referral
Apply as a Guest
Multiple Location Requisitions

- Many of these requirements above were based on feedback from The Talent Function

INSIGHT AND ANALYSIS



ANALYST INSIGHT

The analyst insight is a new addition to this year's report. It provides Aptitude's observations and analysis of each of the providers including their key differentiators and areas of improvement.

In order to create these insights, Aptitude 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.

Recruiter Experience:

- **Requisition Management:** configurable tabs and fields that are based on user groups;
- **Job Advertisement:** third-party advertising and insight on advertising expenses so recruiters can make the best decisions;
- **Pre-Screening Questions:** the ability to search a library or have clients use their own personal library to include questions during multiple phases of the recruitment process;
- **Candidate Approval:** can reject candidates or advance them and categorize them; can look at approval by list or chart; can look at status by source, by applicant date, or by distance;
- **Dashboards:** all configurable that show a range of recruitment metrics in a simple format;
- **Candidate Communication:** options for templates so that recruiters can easily notify candidates and hiring managers of status.

Hiring Manager Experience:

- **Collaboration:** options for easy collaboration with recruiters and hiring teams throughout the process;
- **Mobile-Responsiveness:** the ability to easily approve requisitions and candidates and offers on a mobile device;
- **Interview Scheduling:** easily schedule interviews without leaving the system.

Candidate Experience:

- **Career Page:** link to social channels and be able to connect with someone at the company;
- **Feedback:** feedback on status throughout the process;
- **Apply:** can use social profiles, mobile and can view status and the ability to apply as a guest.

Why It's important: According to Aptitude's research, only 36% of companies have improved the candidate experience in 2017. But the reality is that most companies are not clear about where to start. 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 improving the success of talent acquisition efforts.

USER EXPERIENCE

One key differentiator between providers is the user experience for recruiters, hiring managers, candidates and the mobile experience. Experience is an important criteria for selection and sometimes these decisions are subjective based on the organization's experiences and priorities. Aptitude included its own user experience rating for each of the providers in this report. We looked at an experience that was simple, actionable and easy to use. Providers were rated as either having an average experience or an exceptional experience.

	Average	Exceptional
Recruiter Experience		
Candidate Experience		
Hiring Manager Experience		
Mobile Experience		

SWOT ANALYSIS

We included a SWOT (Strengths, Weaknesses, Opportunities, and Threats – Figure 5) section to this report to help highlight key differentiators as well as areas of improvement and growth. Organizations must still consider their own unique requirements when evaluating this section. For example, a company that is not global should not necessarily be concerned with a provider's ability to support an international organization.

Figure 5: SWOT Analysis



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 identifying their own requirements.

Some of the differentiators that provide a stronger customer experience include:

- Research Institutes with educational information and both in-house and third-party research
- Webinars to help educate prospects on key trends and best practices
- Customer conferences 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

Mobile-Responsive Design	CRM	Onboarding
ADP Cornerstone OnDemand Greenhouse IBM iCIMS Jobvite Lever Lumesse Newton Software SmartRecruiters Workday	IBM iCIMS gr8 People Greenhouse Jobvite Lever Oracle PeopleFluent Symphony Talent SmartRecruiters	IBM iCIMS gr8 People Greenhouse Jobvite Oracle PeopleFluent SAP Newton Software

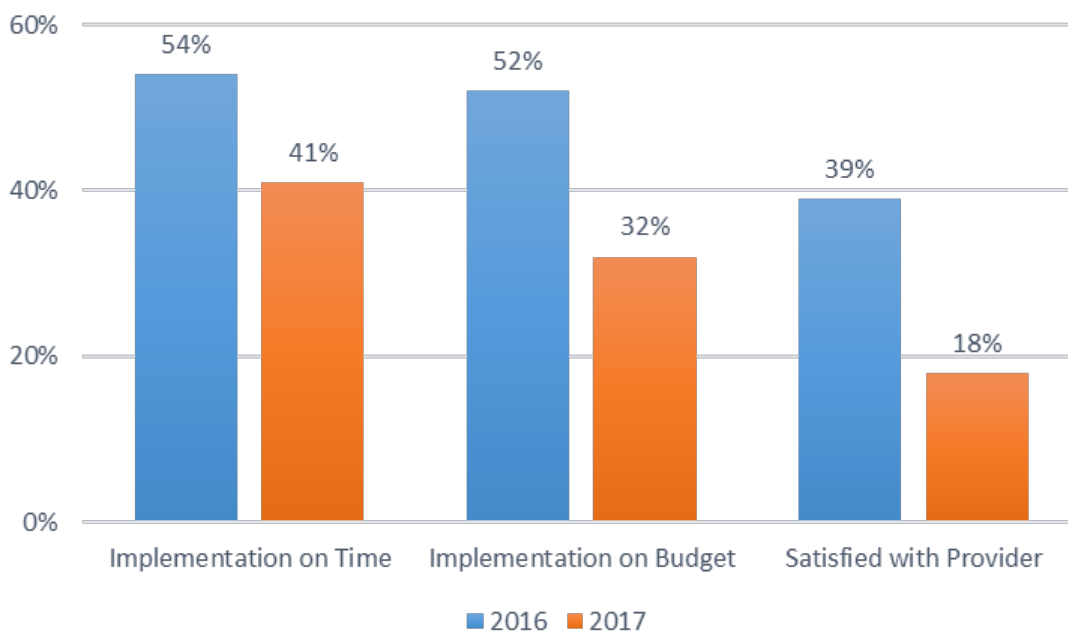
Implementation

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. Over the past year, companies cited that more implementation were not delivered on time or on budget and satisfaction with providers dropped by 20% (Figure 6).

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
- Educational materials to support companies

Figure 6: Implementation Success



Adoption

Only 20% of companies are satisfied with their provider once a solution has been implemented. 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 1, year 2, and ongoing.

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.

Special Thanks

Aptitude Research Partners would like to acknowledge three individuals who helped us improve and enhance this year's report through their feedback, insights, and expertise.



Naomi Lee Bloom
Managing Partner,
Bloom & Wallace



Elaine Orler
CEO, Talent Function,
Co-founder, The Talent Board



Gerry Crispin
Principal & Co-Founder,
CareerXroads

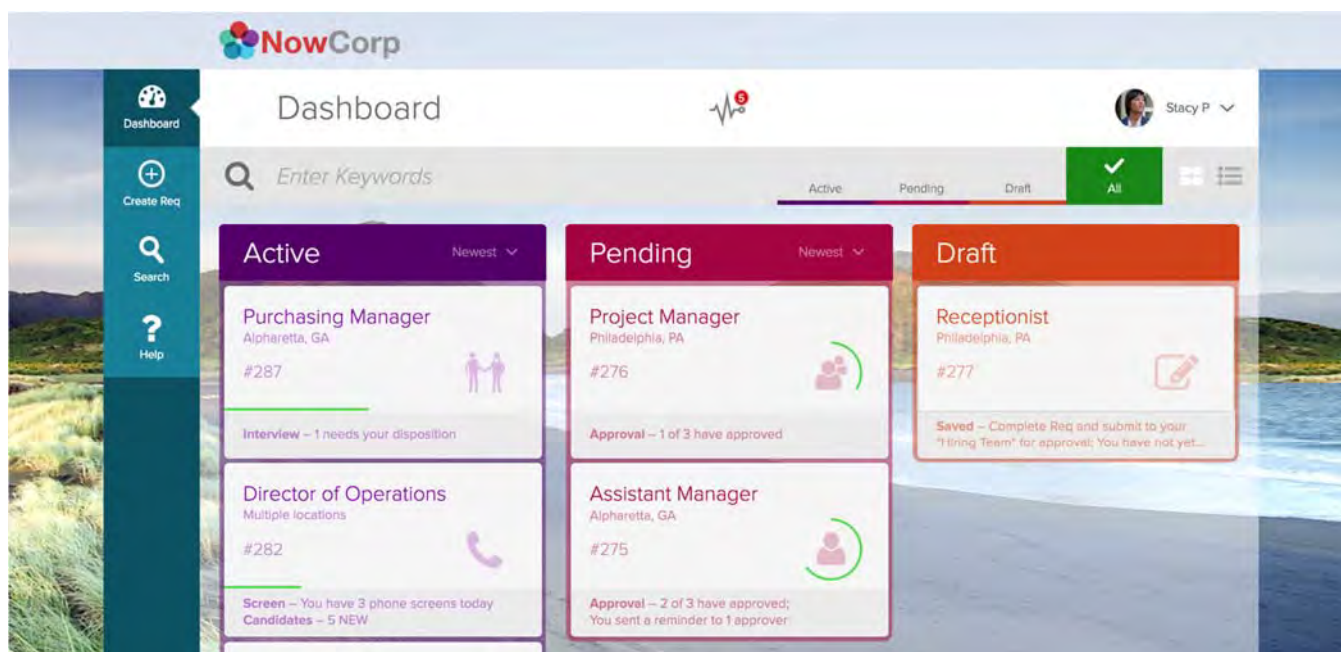
VENDOR PROFILE:

ADP



ADP's vision for recruitment is to help organizations improve efficiency, candidate satisfaction, and employer branding. Its Recruitment Management solution launched in September 2013 and now has over 650 customers. It can be offered as a standalone solution, fully integrated with wider Vantage HCM suite, or as part of a Recruitment Process Outsourcing (RPO) solution leveraging ADP's recruiting experts. Customers have access to ADP's Marketplace and ADP's DataCloud.

October 2017





COMPANY HISTORY

HISTORY

- **Year Founded:** 1949
- **Private or Public:** Public
- **Heritage:** Payroll
- **Offices:** Roseland, NJ (HQ); Over 100 offices around the world
- **Revenue:** \$12.4 billion
- **Growth Rate:** 8%
- **Mergers & Acquisitions:** The Right Thing (2011); Virtual Edge (2006)

LEADERSHIP

- **CEO:** Carlos Rodriquez
- **Glassdoor:** 86% Approval Rating of CEO
- **The Executive Team:** Average tenure is 15-20 years and 15% of the Executive team is female.

CUSTOMERS

- **Number of Customers:** 650
- **Target Market:** Mid-Market, Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 4.1/5



EMPLOYEES

- **Number of Employees:** 55,000
- **% Employees in R&D:** N/A
- **% Employees in Sales/Marketing:** N/A
- **Glassdoor rating:** 3.5/5



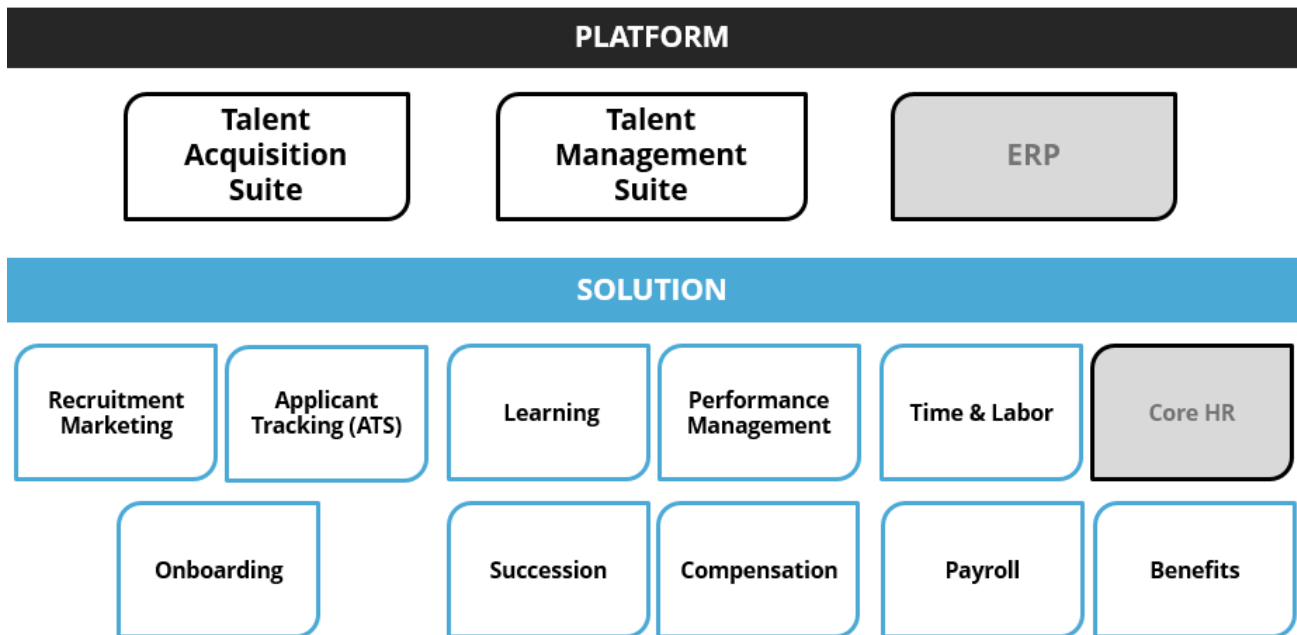
CUSTOMER ACQUISITIONS IN THE PAST YEAR

ADP does not disclose new customer acquisitions.



PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	Recruitment Marketing; ATS; Onboarding; Background Screening; Talent Management Suite; Payroll
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	N/A
DATA CENTERS	N/A
DEVELOPMENT TECHNOLOGY	N/A
LANGUAGES	Candidate UX is Available in 18 languages
SERVICES	Recruitment Process Outsourcing; AIRS Recruiter Training; Implementation Services; Change Management Services; Client Support Services
PARTNERS	100+ in the marketplace and over 500 in the pipeline



PRODUCT INFORMATION

SECURITY AND BACKUP

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 II Type 2 Certified	Yes
Ability to include a way 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

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	No
CRM	No
Internal Mobility	Yes
Employee Referral	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHTS

It might sound surprising, but ADP is one of the more innovative providers included in this report. ADP has made improvements to critical areas of the ATS including contextual search, interview scheduling, and diversity hiring. For interviews, users can select location, self-schedule, send invite details and information, and include attachments. To support diversity hiring, ADP looks across organizations to create a list of individuals based on skills, without having to make judgement based on race or gender. Recruiters are given the data and insight they need to make the right decisions around talent. In analytics, dashboards and heat maps show recruiters where candidates are coming into the system. Recruiters can perform all basic tasks without leaving the platform and have access to advanced analytics.

ADP has an exceptional user experience. Last year, Aptitude recognized its advanced user experience for candidates and hiring managers and this year, it has made improvements to the recruiter experience as well.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Average
- Hiring Manager Experience: Exceptional
- Mobile Experience (including Hiring Manager App): Exceptional

ROADMAP

Forthcoming features:

- User Experience
 - Candidate
 - New hire
 - Hiring manager
 - Recruiter
- Openness and Integration
- Analytics and Insights
- Global Capabilities

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

INNOVATION



The ADP of 2017 can be characterized as innovative and forward-thinking. ADP brings the combination of compliance and innovation to its recruitment solutions. Compliance and expertise includes a deep history in supporting complex, global organizations as well as smaller companies. While innovation can be found in the latest product enhancements, it is impressive how fast ADP is now going to market with many of its initiatives. The Marketplace, which includes over 200 apps, predictive analytics, and its advanced UX design are a few examples. ADP's Innovation Lab, located in Chelsea, NY, is a testament to this provider's commitment to staying cutting edge.

SERVICES



Unlike many of the next generation talent acquisition systems, ADP has the resources to support companies through the customer journey – before, during, and after implementation. Additionally, its Recruitment Process Outsourcing (RPO) services help companies handle many of the administrative and strategic initiatives that cannot be supported through in-house resources or through technology.

INSIGHT



ADP helps clients drive more insight 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.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Candidate and hiring manager user experience</p> <p>Interview scheduling</p> <p>Support for diversity recruitment</p> <p>Mobile responsive solution</p> <p>Integration with compensation to support pay equity</p> <p>Marketplace of integrated providers</p>	<p>Perceived by some as a traditional recruitment provider</p> <p>Lack of recruitment marketing solution and capabilities</p>	<p>Become a market leader in user experience</p> <p>Provide recruiters with solutions to support important initiatives such as diversity hiring and pay equity</p>	<p>Next generation talent acquisition providers that are perceived as more innovative</p> <p>Providers with a heritage and dedicated focus to talent acquisition</p> <p>Providers that have a CRM and integrated ATS</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Responsive Design

Comprehensive Onboarding

Partner Marketplace

BEST SUITED FOR

Enterprise: Over 2500 employees

Global Enterprise: support over 10 languages and 3+ global offices

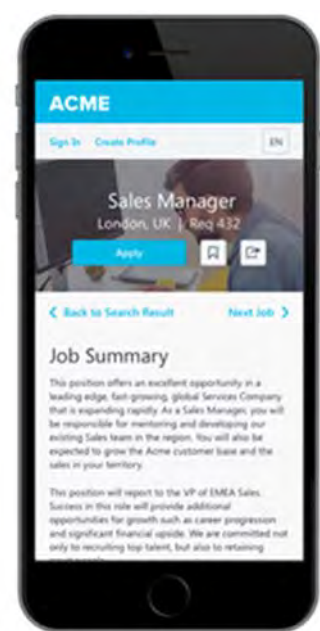
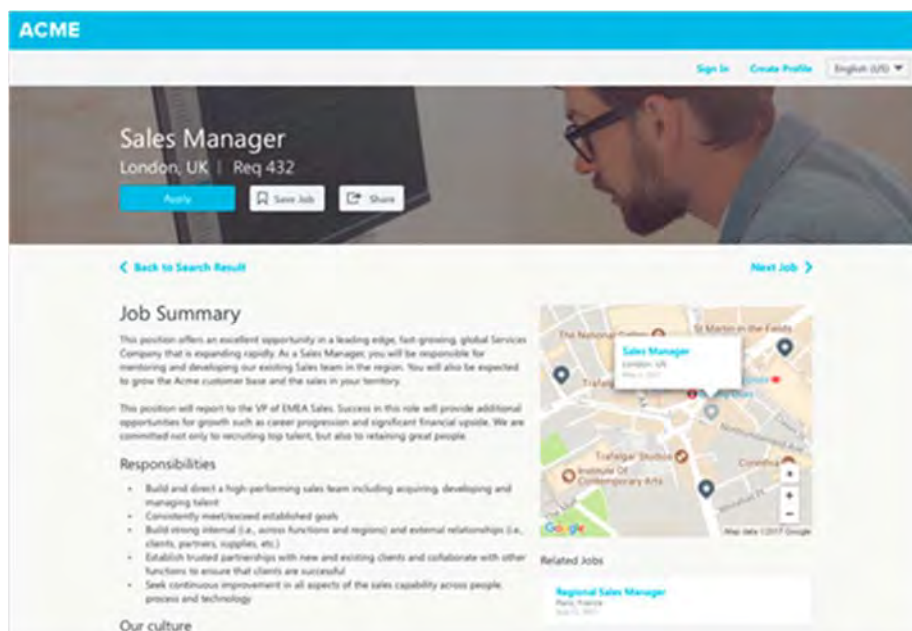
VENDOR PROFILE:

Cornerstone OnDemand



Cornerstone OnDemand helps companies recruit, manage, and retain talent. It enables global enterprise solutions as well as government agencies, hospitals, non-profits, and schools to more effectively manage the entire employee lifecycle. Its software and services are used by over 32 million people in 192 countries and in 42 languages.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 1999
- **Private or Public:** Public
- **Heritage:** Talent Management
- **Offices:** Santa Monica (CA) with over 20 offices around the world
- **Revenue:** \$423.2 million in FY2016
- **Growth Rate:** 25%
- **Mergers & Acquisitions:** Sonar6 (2009); Evolv (2014)

LEADERSHIP

- **CEO:** Adam Miller
- **Glassdoor:** 96% Approval Rating of CEO
- **The Executive Team:** Average tenure is 5 years and 27% of the Executive team is female

CUSTOMERS

- **Number of Customers:** 3000+
- **Target Market:** Mid-Market, Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 3.9/5



EMPLOYEES

- **Number of Employees:** 2,000
- **% Employees in R&D:** Over 30%
- **% Employees in Sales/Marketing:** N/A
- **Glassdoor rating:** 4.2/5

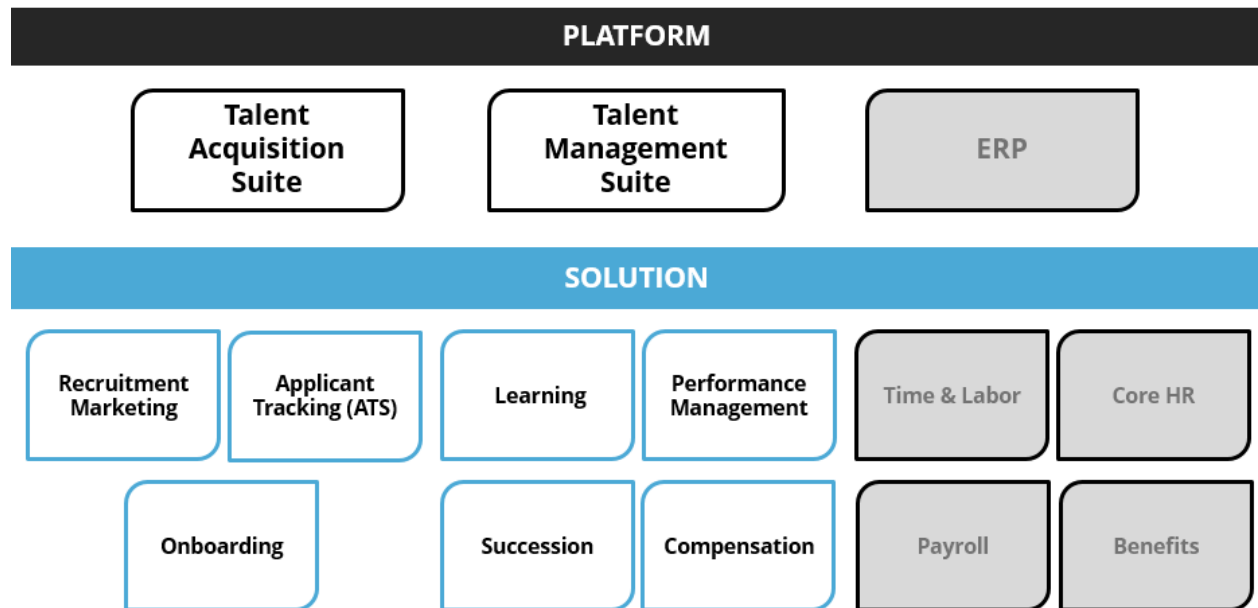


CUSTOMER ACQUISITIONS IN THE PAST YEAR

Cornerstone OnDemand has grown its recruiting client base by nearly 20% over the last 12 months to almost 600 total clients. This includes clients in a wide range of industries, including retail, manufacturing, healthcare, financial services and the public sector.

PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	Unified Talent Management; ATS, Selection; Performance; Learning; Succession; Core HR; Compensation; Onboarding
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	Quarterly
DATA CENTERS	Los Angeles, CA; London, UK (Additional data centers coming for Paris and Frankfurt in 2018)
DEVELOPMENT TECHNOLOGY	Backend: SQL Server Business Layer: C# Front-end: .NET 4.5, CSS, Ajax, JQuery
LANGUAGES	43 languages
SERVICES	Client Services; Content Services; Implementation Services; Technology Consulting; Business Consulting; Educational Consulting
PARTNERS	100+

PRODUCT INFORMATION

SECURITY AND BACKUP

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 include a way 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

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	No
CRM	No
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	Yes
Multiple Location Requisitions	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHTS

2017 was a stellar year for Cornerstone OnDemand. Not only did the provider exceed revenue targets and close the largest contract to date with the U.S. Postal Service, but it also made significant enhancements to its talent acquisition solution. Recruitment is clearly a priority for the talent management provider and it is evident in the product, the partnerships, and the team (including bringing on industry expert Sarah Brennan). 2018 will be a true test to see if Cornerstone continues its momentum and can keep pace with a market that is constantly changing.

Product enhancements over the past year include new responsive UI for job postings, the ability to apply as a guest and with SEEK, multiple requisition locations, Google maps integration, employee referral capabilities to share, manage, and track referrals, and a new UI for the applicant profile.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Average
- Recruiter Experience: Exceptional
- Hiring Manager Experience: Average
- Mobile Experience: Exceptional

ROADMAP

Forthcoming features:

- Streamlined mobile candidate experience
- Career center for internal mobility efforts to include a refreshed UI and job alerts
- Improved search capabilities with the ability to take action on a search
- Talent pipeline solution for internal and external talent with robust search capabilities

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

GLOBAL EXPERTISE



Most talent acquisition providers cannot support global enterprise customers. CSOD is an exception. With over 30% of its customers coming from international companies, presence in 192 countries, and support for 43 languages, CSOD 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.

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 transitions to onboarding once a candidate accepts an offer. Recruiters have access to performance data and succession planning information. Training can be assigned to users while they are onboarding. Differentiator for Onboarding is preboarding functionality that provides new hire access prior to first day of work.

SELECTION



Cornerstone's Selection solution allows companies to uncover candidates who are the right fit at the point of the application. Using Realistic Job Previews, Job Simulations, and Assessments, Cornerstone Selection makes it easier to exclude ill-equipped applicants. Selection utilizes scoring and machine learning to help companies make science-based decisions, improving quality of hire. This solution is particularly powerful for high-volume industries and for companies needing highly skilled workers.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Includes both a recruitment and selection solution</p> <p>Offers a united talent management platform</p> <p>Full integration with other areas of talent management</p> <p>Financial viability and staying power</p>	<p>Lack of CRM solution</p> <p>Still considered a learning management or post-hire solution by some companies</p>	<p>Partner with recruitment marketing and CRM or build capabilities</p> <p>Increase visibility in recruitment market</p>	<p>Next generation solutions that have CRM and ATS solutions integrated</p> <p>2nd and 3rd generation buyers that are not aware of a talent acquisition solution from Cornerstone OnDemand</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Responsive Design

High-Volume Hiring

Selection Science Solution

BEST SUITED FOR

Enterprise: Over 2500 employees

Global Enterprise: support over 10 languages and 3+ global offices

VENDOR PROFILE:

gr8People



gr8 People was founded in 2009 with a vision to create a One-Experience Talent Platform to recruit. A single version of gr8 People across all customers where talent professionals could bring sourcing, marketing, collaboration, hiring and, on-boarding strategies to life while delivering candidate experiences that are simple, accommodating, and personalized.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 2009
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** Newtown, PA
- **Revenue:** Does Not Disclose
- **Growth Rate:** 450%
- **Mergers & Acquisitions:** N/A

LEADERSHIP

- **CEO:** Diane Smith and Jayne Kettles
- **Glassdoor:** Approval Rating of CEO
- **The Executive Team:** Average tenure is 5 years and 40% of the Executive team is female.
- **Investment:** Series A from Delancey Partners; Randstad Innovation Fund

CUSTOMERS

- **Number of Customers:** 100+ Contracted Customers
- **Target Market:** Enterprise
- **Target Vertical:** All
- **G2Crowd review:** N/A

EMPLOYEES

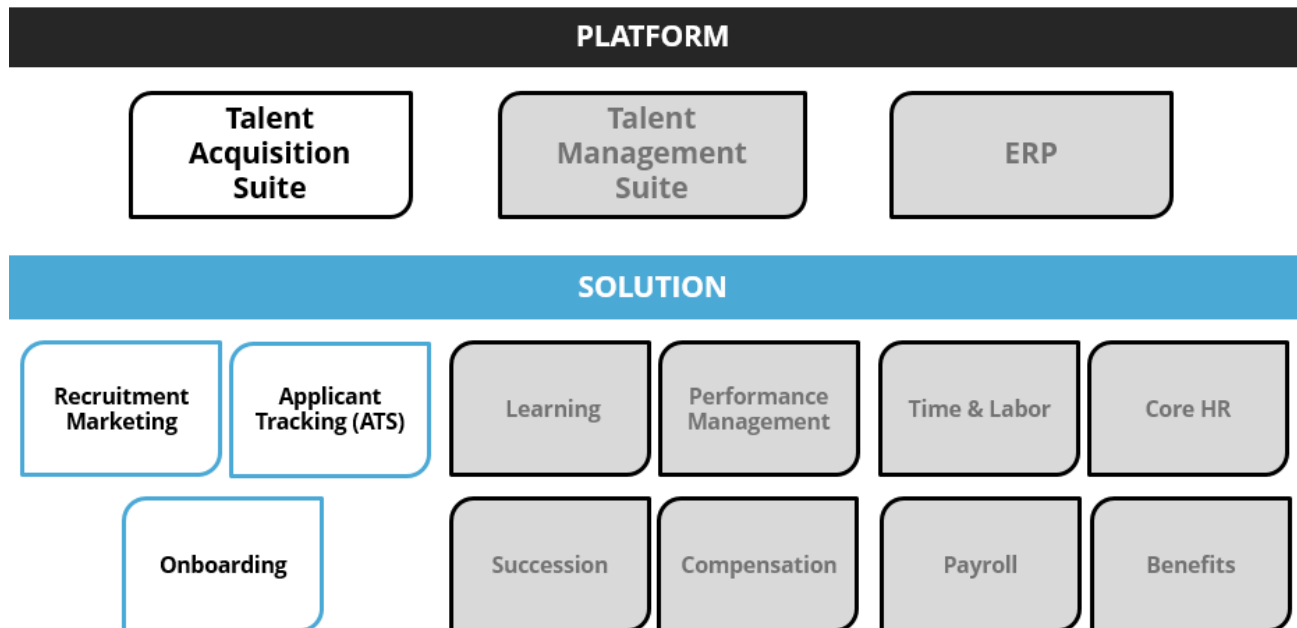
- **Number of Employees:** 40+
- **% of Employees in R&D:** 25%
- **% of Employees in Sales/Marketing:** 20%
- **Glassdoor rating:** N/A

CUSTOMER ACQUISITIONS IN THE PAST YEAR

Randstad, AMN Healthcare, Sevenstep, Informatica, Pivot Physical Therapy, EA, Ratner, Talbot's, NBC Universal, Netflix.

PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	Candidate Relationship Management (Recruitment Marketing); ATS; Onboarding
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	4-5 updates a year
DATA CENTERS	US- West Coast; US-East Coast; London, UK
DEVELOPMENT TECHNOLOGY	Cloud-Based
LANGUAGES	Multiple languages
SERVICES	Personalized support and consultation; training and university; pre-implementation planning, global implementation; self-service implementation; adoption
PARTNERS	50+

PRODUCT INFORMATION

SECURITY AND BACKUP

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	Yes
Ability to include a way 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

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	Yes
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHT

Everything about gr8 People feels different from other ATS solutions – from its user experience, to the use of robotics/AI, to the personalization that runs deep in the product. It aims to provide the candidate engagement (through its “Personalization Studio”) and experience that most ATS providers lack. The beauty of gr8 People is that it combines deep expertise (the same founders developed VirtualEdge – later acquired by ADP) with next generation innovation. It is a product that is not trying to recreate the wheel, but instead aims to transform talent acquisition into something different.

Key differentiators include its strong partnerships with RPO (Recruitment Process Outsourcing), demonstrating its support for large, complex organizations in a variety of industries. Additionally, its dynamic workflow engine allows companies to manage and automate every aspect of talent acquisition from nurturing leads to onboarding. Finally, its unified experience from recruitment marketing through the ATS. gr8 People provides data points for the entire experience.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Exceptional
- Hiring Manager Experience: Exceptional
- Mobile Experience (including Hiring Manager App): Exceptional

ROADMAP

Forthcoming features:

- SMS two-way campaigns
- Campus Recruiting/Event Management
- Enhanced time-based analytics
- Onboarding module
- Candidate feedback
- Enhancements to campaign management

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

ONE EXPERIENCE



Strategic talent acquisition is defined by the experiences of candidates, recruiters, and hiring managers. Organizations are able to deliver higher quality talent, improve recruitment efficiencies, and align more closely with business objectives when the experience is consistent. While many ATS providers still struggle to modernize and improve the experience for both recruiters and candidates, gr8 People has prioritized the experience. This provider differentiates itself by creating a consistent, single experience with one code-base from sourcing to onboarding.

PARTNERSHIPS



One way that gr8people has experienced significant growth over an extended period of time is through its partnerships with RPO companies such as Randstad Sourcergight, Sevenstep, AMN Healthcare and Advanced RPO. This partnership channel has enabled gr8 People to expand into the global market, supporting highly complex organizations across a wide variety of industries. gr8 People also has a comprehensive, trusted marketplace with integrations into the leading recruitment providers.

SERVICES



Services and customer support are core to gr8 People's value proposition. Customers have access to pre-implementation planning services, self-service implementation, and integration and data-migration services. gr8 People University provides comprehensive instructional programs for customers and partners.

INSIGHT AND ANALYSIS

APTITUDE SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>One experience from sourcing to onboarding</p> <p>Major RPO partnerships give credibility as a global provider</p> <p>Personalization studio to design career sites and support branding</p> <p>Strong data visualization with analytics tools that sit on top of data tier structure</p>	<p>Needs more visibility as an enterprise and global enterprise leading provider</p> <p>Needs more awareness for its full product suite (recruitment marketing, ATS, onboarding)</p>	<p>Continued momentum moving up market</p> <p>Continued growth selling directly to enterprise corporations</p> <p>Potential opportunity to move down market</p>	<p>New competitors entering the market</p> <p>Lack of awareness of product leadership and customer base</p> <p>Potential consolidation of CRM and ATS providers</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

One Experience

Dynamic Workflow Engine

Strong Partnerships

BEST SUITED FOR

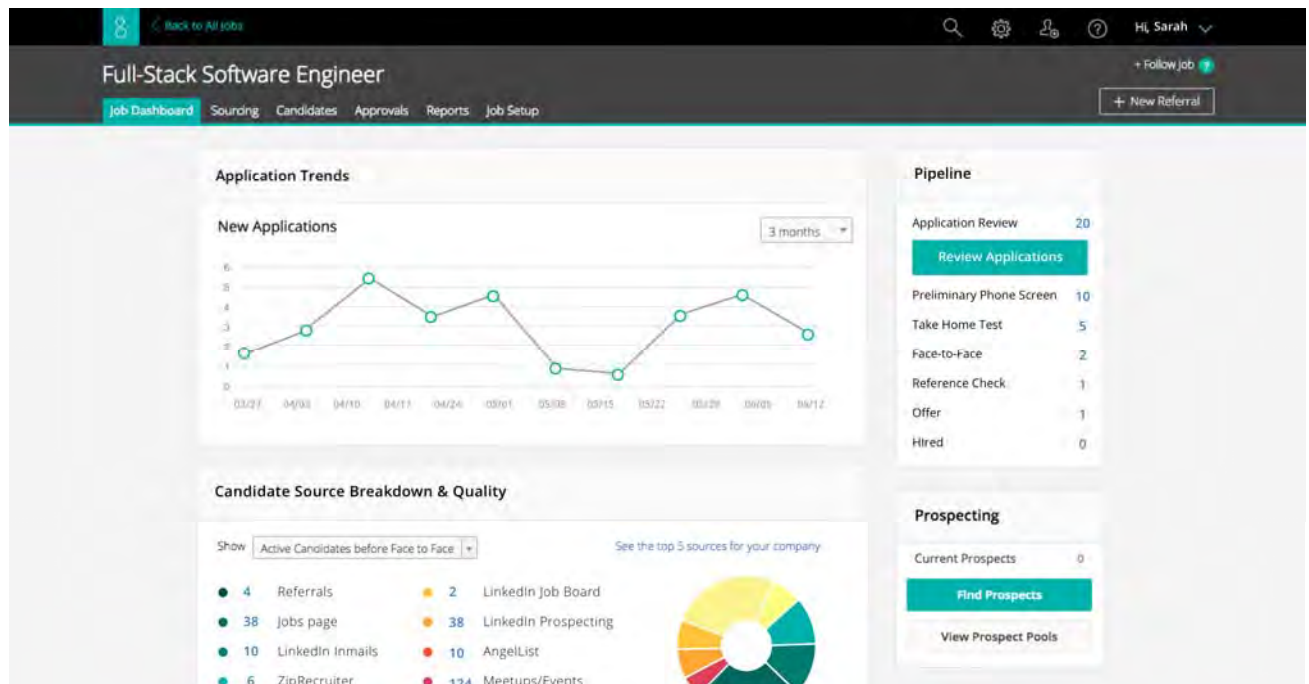
Enterprise: Over 2,500 employees

VENDOR PROFILE: Greenhouse Software



Greenhouse is a next generation talent acquisition platform designed to optimize the entire recruiting process. Its goal is to help companies find better candidates, conduct more focused interviews, and make data-driven hiring decisions. It also includes an onboarding system that engages new hires.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 2012
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** New York, NY; San Francisco, CA
- **Revenue:** N/A
- **Growth Rate:** 110%
- **Mergers & Acquisitions:** Parklet (2015)

LEADERSHIP

- **CEO:** Dan Chait
- **Glassdoor:** 99% Approval Rating of CEO
- **The Executive Team:** Average tenure is 3-4 years and 38% of the Executive team is female
- **Investments:** \$60.1M. Lead investors include Benchmark Capital, Thrive Capital, and Social Capital.

CUSTOMERS

- **Number of Customers:** 2000+
- **Target Market:** Mid-Market
- **Target Vertical:** All – Heavy focus on technology, finance, media, e-retail, consulting, agencies
- **G2Crowd review:** 4.3/5



EMPLOYEES

- **Number of Employees:** 220
- **% Employees in R&D:** 30%
- **% Employees in Sales/Marketing:** 35%
- **Glassdoor rating:** 4.6/5



CUSTOMER ACQUISITIONS IN THE PAST YEAR

Taco Bell Corporation, PGA of America, Wargaming, Cars.com, BetterCloud, HootSuite Media, Global Atlantic Financial Corporation

PRODUCT INFORMATION

SOLUTION PROFILE

PLATFORM

Talent
Acquisition
Suite

Talent
Management
Suite

ERP

SOLUTION

Recruitment
Marketing

Applicant
Tracking (ATS)

Learning

Performance
Management

Time & Labor

Core HR

Onboarding

Succession

Compensation

Payroll

Benefits

PRODUCTS	CRM; ATS; Onboarding
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	Monthly
DATA CENTERS	AWS US-East (Virginia); AWS US – West (Oregon)
DEVELOPMENT TECHNOLOGY	Hosted on AWS and built on Ruby on Rails
LANGUAGES	N/A
SERVICES	Client Services; Implementation Services; Technology Consulting
PARTNERS	200

PRODUCT INFORMATION

SECURITY AND BACKUP

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 include a way 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
Integration toolsets for Security Administrators	Yes

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	Yes
CRM	Yes
Internal Mobility	No
Employee Referral	Yes

INSIGHTS AND ANALYSIS

ANALYST INSIGHTS

Greenhouse transforms the ATS from an administrative tool to an experience solution and task management tool. Greenhouse, with its scorecard functionality and its focus on best practices, is a product that guides 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. It also holds recruiters and hiring managers accountable by driving and reinforcing the right behaviors.

Over the past year, it has diversified the industries it supports, moved up market, and increased its partnerships in the ecosystem. Key differentiators include a commitment to structured interviews and an objective interview process. It also organizes and collects all data in multiple ways to allow recruiters more effective ways to search for candidates.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Exceptional
- Hiring Manager Experience: Exceptional
- Mobile Experience (including Hiring Manager App): Exceptional

ROADMAP

Forthcoming features:

- Internationalization: Strengthening the product for international users through partnerships, scalability and security
- Reporting: Improving reporting capabilities

INSIGHTS AND ANALYSIS

KEY DIFFERENTIATORS

GUIDANCE TO BETTER OUTCOMES



Greenhouse, with its scorecard functionality and its focus on best practices, is a product that guides 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.

CANDIDATE SCORECARD



The scorecard summary contains every rating from every interview, and it's invaluable at the end of the process, when your hiring team gathers to decide who should get the job offer. It shows several things at a glance, including the interview summary and what gaps exist.

INTERVIEW MANAGEMENT



In addition to scheduling an interview and managing candidates, Greenhouse provides Interview Kits that integrate seamlessly into the current process without any additional work. When someone schedules an interview, Greenhouse includes a link to the Interview Kit right in the calendar invite. The interviewers will find out when they're scheduled to meet with a candidate using the same calendar they've always used – but now they also have a world of information about the applicant at their fingertips, including their scorecard and questions to ask. Finally, the system provides a recommendation on whether this candidate would be a good fit based on the custom questions.

INSIGHTS AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Collaboration for recruitment teams</p> <p>Advanced interview management</p> <p>End-to-end talent acquisition solution</p> <p>Advanced analytics</p>	<p>Viewed as primarily a mid-market solution for technology companies</p>	<p>Go-to-market with integrated CRM and ATS solution</p> <p>Expand customer base in the enterprise market</p>	<p>New competitors entering the market</p> <p>Rapidly changing technology landscape</p> <p>Potential consolidation of CRM and ATS providers</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Responsive Design

Advanced Metrics and Analytics

Strong Interview Management

BEST SUITED FOR

Mid-Market: 101-2499 employees

Enterprise: 2500 employees +

VENDOR PROFILE:

IBM Kenexa



In 2011, IBM acquired Kenexa, a leading provider of recruiting and talent management solutions, to deliver a unique combination of cloud-based technology and consulting services that integrates both people and processes. Since that time, IBM has made significant investments in overhauling the user experience of these solutions as well as introducing a new set of Watson Talent capabilities, a continuous listening platform to drive engagement, and new analytic capabilities.

October 2017



COMPANY HISTORY

HISTORY

Year Founded: 1987 (Kenexa) now part of IBM (1911)
Private or Public: Public
Heritage: Talent Acquisition
Offices: Operates in over 170 countries around the world
Revenue: \$81 billion
Growth Rate: N/A
Mergers & Acquisitions: BrassRing (2006); Acquired by IBM (2011)

LEADERSHIP

- **CEO:** Ginny Rometti
- **Glassdoor:** 55% Approval Rating of CEO
- **The Executive Team:** Less than 15% of the executive team is female

CUSTOMERS

- **Number of Customers:** : IBM Does Not Disclose
- **Target Market:** Enterprise, Global
- **Target Vertical:** All
- **G2Crowd review:** 3.1/5



EMPLOYEES

- **Number of Employees:** 388,000 (IBM)
- **% Employees in R&D:** IBM Does Not Disclose
- **% Employees in Sales/Marketing:** N/A
- **Glassdoor rating:** 3.3/5

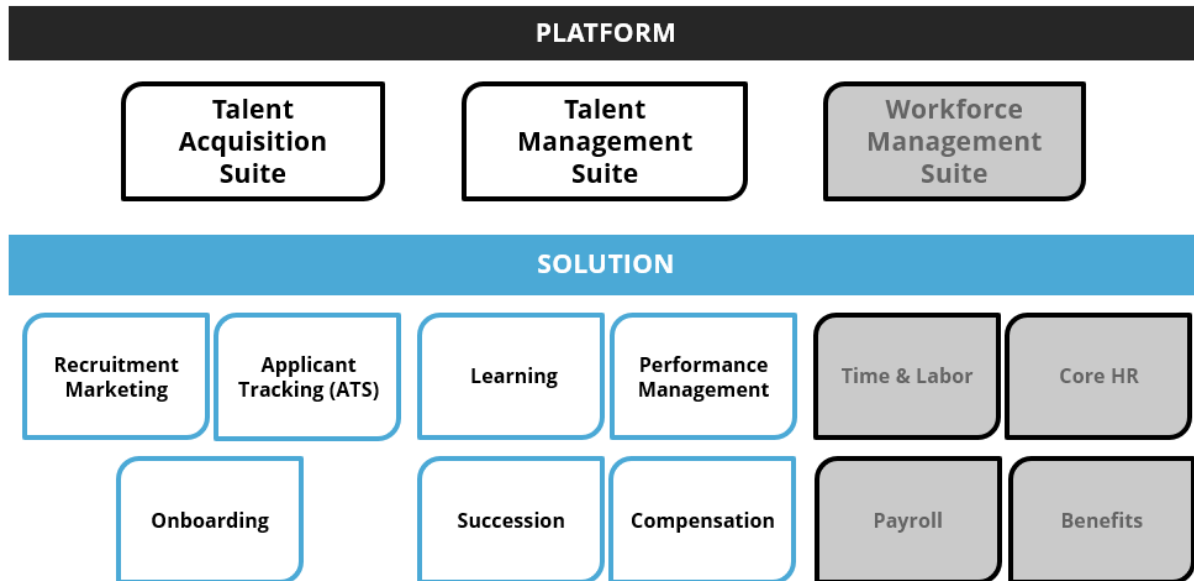


CUSTOMER ACQUISITIONS IN THE PAST YEAR

IBM does not disclose customer acquisitions but the company continues to acquire new customers and appreciate its customer base across the globe.

PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	Talent Acquisition Suite: ATS; Recruitment Marketing (CRM); Assessments; Analytics; Cognitive Recruiting; Career Development; Learning; Analytics; Watson Talent
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	Predominantly monthly
DATA CENTERS	USA, EMEA, China
DEVELOPMENT TECHNOLOGY	IBM Does Not Disclose
LANGUAGES	Variable by product; Over 50 languages
SERVICES	Recruitment Process Outsourcing; employer branding; implementation services; change management services; customer support teams; data integration services; research institute; training; webinars
PARTNERS	100+

PRODUCT INFORMATION

SECURITY AND BACKUP

Comply with DOE, Federal, State, and Local Regulations	Yes
Provide access to all modules with a single login	No
Ability for Administrator to restrict data access by role, IP, ID, and report	Yes
SAS-70 Certified	Yes
Ability to include a way 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
Integration toolsets for Security Administrators	Yes

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	Yes
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	No
Multiple Location Requisitions	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHTS

IBM is the ATS most likely to disrupt talent acquisition. The power of IBM's talent acquisition solution can be found in Watson – IBM's supercomputer that combines Artificial Intelligence (AI) and sophisticated analytical software for optimal performance as a "question answering" machine. Watson enhances talent acquisition and the candidate experience by allowing organizations to create a "data-driven success profile." It uses knowledge, skills, and the data within organizations (ex: performance and succession data) to help companies better identify quality hires. These Watson recruitment capabilities are currently in early adoption and planned for general availability in 2018. The challenges IBM faces are first, that Watson is sold as a separate product so only customers that make the investment will see the value. Second, many companies (especially 2nd and 3rd generation buyers) still view the product as a legacy product from the original BrassRing or Kenexa days.

Additional key differentiators include its ability to support global enterprise organizations (over 40 languages), its strong assessment business, and advanced capabilities including internal mobility. IBM uses data to help candidates find the right path and provides them with options and training opportunities.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional (with the use of Watson)
- Recruiter Experience: Exceptional
- Hiring Manager Experience: Average
- Mobile Experience (including Hiring Manager App): Exceptional

ROADMAP

Forthcoming Features:

- Make the Watson recruitment capabilities generally available; then expanding from there to modernize HR with Watson to provide cognitive computing that can change the way companies source, recruit and onboard talent
- Continue to invest in the user experience
- New user experience improvements to improve the speed and quality with which teams can source for talent

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

BALANCING SCALABILITY AND USER EXPERIENCE



IBM Kenexa continues to be the leader in supporting 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 (enabling them to make data-driven decisions using Watson Talent) and the candidate experience (guiding job seekers through a personalized conversation).

HIGH-VOLUME RECRUITMENT



IBM 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. IBM'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.

SERVICES



IBM is well known for its recruitment services, and talent acquisition is no exception. Its strong Recruitment Process Outsourcing services are some of the strongest and most reputable in this space. It can help organizations understand its own processes, and tackle the administrative areas such as sourcing and screening, as well as more strategic elements of talent acquisition.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Watson enhances talent acquisition initiatives and the candidate experience</p> <p>Industry vertical expertise, e.g. IBM 's Retail Customer Advisory Group and Working Committee</p> <p>Global solution providing scalability and security</p> <p>Advanced capabilities in sourcing, internal mobility, and compliance</p>	<p>Viewed by some organizations as a legacy solution</p> <p>Watson is sold separately so some customers do not benefit from its enhancements</p>	<p>Continue to invest in CRM and recruitment marketing capabilities</p> <p>Bring awareness to Watson's role in existing solutions</p>	<p>Next generation systems that begin to move up market</p> <p>Workday's growing presence in recruitment</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Responsive Design

Internal Mobility

Assessments and Sciences

BEST SUITED FOR

Enterprise: Over 2500 employees

Global Enterprise: support over 10 languages and 3+ global offices

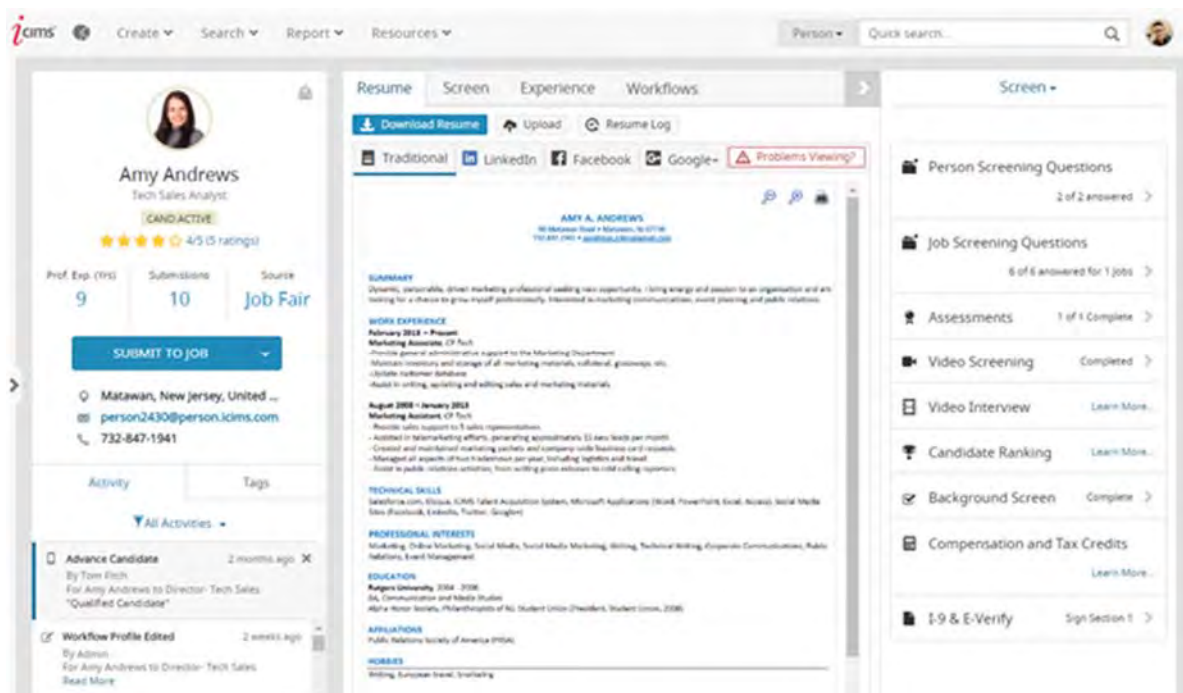
VENDOR PROFILE:

iCIMS



iCIMS's mission is to help win the war for talent by delivering a comprehensive, pure SaaS platform and a superior customer experience. iCIMS' PaaS framework, UNIFI, allows employers to expand the capabilities of their core talent acquisition technology by integrating with the largest partner ecosystem in talent acquisition to help them attract, find, screen, and manage candidates.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 2000
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** Matawan, NJ; London, UK
- **Revenue:** \$150 million+
- **Growth Rate:** Not Disclosed
- **Mergers & Acquisitions:** Jobmagic (2012)

LEADERSHIP

- **CEO:** Colin Day
- **Glassdoor:** 92% Approval Rating of CEO
- **The Executive Team:** Average tenure is 10 years and 20% of the Executive team is female.
- **Investment:** No Outside Investment

CUSTOMERS

- **Number of Customers:** 3,500 Contracted Customers
- **Target Market:** Mid-Market, Enterprise
- **Target Vertical:** All with strengths in healthcare, manufacturing, retail, technology and financial services
- **G2Crowd review:** 4.5/5



EMPLOYEES

- **Number of Employees:** 650
- **% Employees in R&D:** 21%
- **% Employees in Sales/Marketing:** 33%
- **Glassdoor rating:** 3.9/5

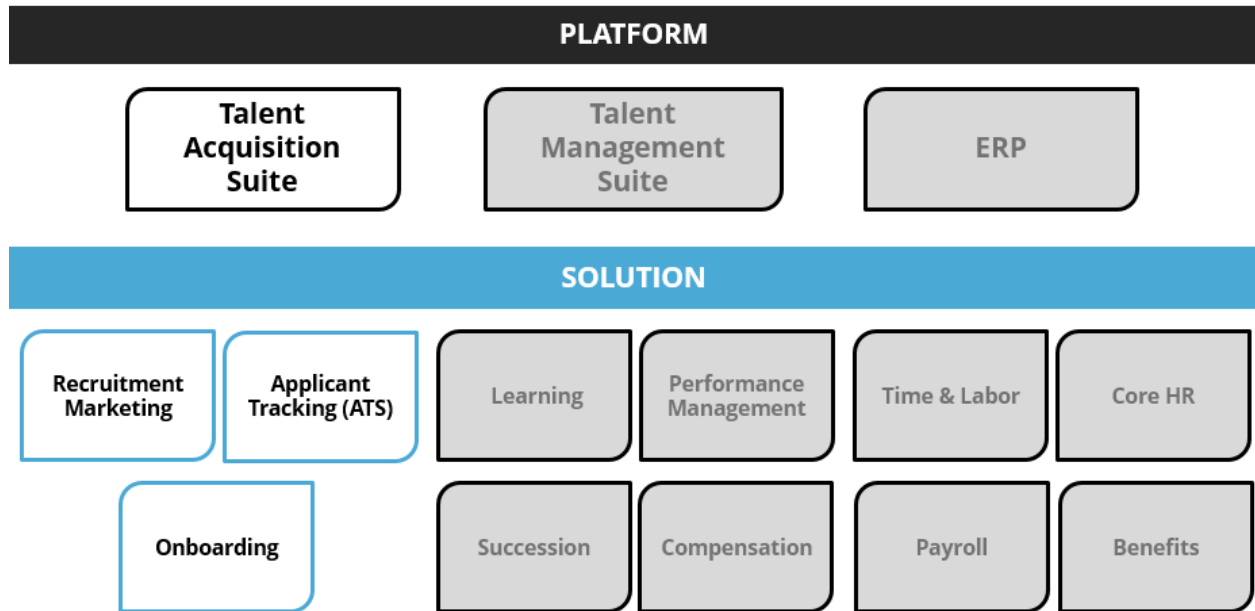


CUSTOMER ACQUISITIONS IN THE PAST YEAR

Chandon, Emory University, HVHC Inc., A Highmark Company, Northwest Permanente, Paper Source, Seattle Children's Hospital, Smash Burger, Spanx, UnityPoint Health, Wellstar

PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	Recruitment Marketing (Connect); ATS (Recruit); Onboarding (Onboard); UNiFi
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	4-6 updates a year
DATA CENTERS	Virginia, US; Ontario, Canada; Germany, EU
DEVELOPMENT TECHNOLOGY	Java and XML
LANGUAGES	Over 100 languages
SERVICES	Personalized support and consultation; iCARE™ Customer Site; complimentary training; customer support available 24 hours- 5 days a week; webinars; Customer Advisory Council; connectors for integration with third-party providers
PARTNERS	200+

PRODUCT INFORMATION

SECURITY AND BACKUP

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 II Type 2 Certified	Yes
Ability to include a way 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

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	Yes
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHT

By all definitions, iCIMS is one of the greatest success stories in HCM technology. It is a privately-held company with a consistent growth rate. It is a company that continues to grow through its strong partnerships, stellar reputation, and dedicated leadership.

iCIMS's strengths are not in product innovation but rather in its deep expertise in talent acquisition and its exceptional customer service. It has maintained strong customer satisfaction and high customer retention rate even during periods of high growth.

iCIMS is also one of the few providers in this report that offers a complete end-to-end talent acquisition suite that includes recruitment marketing (Connect), an ATS (Recruit), and an onboarding solution (Onboard). Currently, 50% of its customers are using at least two modules. Launched in 2016, iCIMS UNIFI enables customers to easily shop for, integrate, and build recruiting tools that work with the iCIMS Talent Acquisition Suite.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Average
- Hiring Manager Experience: Average
- Mobile Experience (including Hiring Manager App): Exceptional

ROADMAP

Forthcoming features:

- Improve User Experience and Usability
- Optimization of Google jobs search and job search recommendations
- Platform localization through Language Packs
- Improved search
- More robust interview management capabilities

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

SUPERIOR CUSTOMER SUPPORT



Since its inception, iCIMS has differentiated itself with its superior customer experience. As it has grown, it has maintained a high level of customer support and satisfaction. The iCIMS iCARE includes a variety of resources available to iCIMS's clients including account managers, implementation managers, project managers, integration specialists, technical support engineers, and training specialists. Customer Events include webinars and half-day events in several cities across the country. iCIMS has received 28 customer awards to date.

MARKETPLACE



The iCIMS Marketplace is populated by providers that seamlessly integrate with iCIMS, including job advertising, background checking, assessments, video screening, payroll, ERPs, and other talent management solutions. The iCIMS Marketplace also features information and customer reviews for many service providers and consultancies within the workforce management space. Customers who elect to integrate with iCIMS Marketplace solutions will ultimately be able to report on performance across these channels within their iCIMS Talent Platform. Companies can test out solutions in the HCM market before making a decision, analyze their effectiveness within the iCIMS Talent Platform, and then decide to use it or swap it out for another recruitment marketing vendor all through the iCIMS Marketplace.

FINANCIAL GROWTH



Notable financial highlights include surpassing \$150 million in ARR. iCIMS' customer base is highly diversified, represented by the fact that no customer accounts for more than two percent of annual revenue. As companies grow and expand, iCIMS can scale with them while providing the same quality of customer support that they are accustomed to receiving.

INSIGHT AND ANALYSIS

APTITUDE SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Hiring Insights to educate customers</p> <p>Highly configurable</p> <p>Financial viability</p> <p>Mobile Hiring Manager App makes it easy for managers to review and approve candidates</p> <p>Exceptional customer support</p>	<p>Recruiter user experience is not as advanced as some of the next generation providers</p> <p>Not yet viewed as a global talent acquisition provider</p>	<p>Continued momentum moving up market</p> <p>Continued growth as a leading talent acquisition provider</p> <p>Continued development of recruitment marketing solution (Connect)</p>	<p>New competitors entering the market</p> <p>Rapidly changing technology landscape</p> <p>Potential consolidation of CRM and ATS providers</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

End-to-End Talent Acquisition

Exceptional Customer Support

Partner Marketplace

BEST SUITED FOR

Mid-Market: 1,000-2,500 employees

Enterprise: Over 2,500 employees

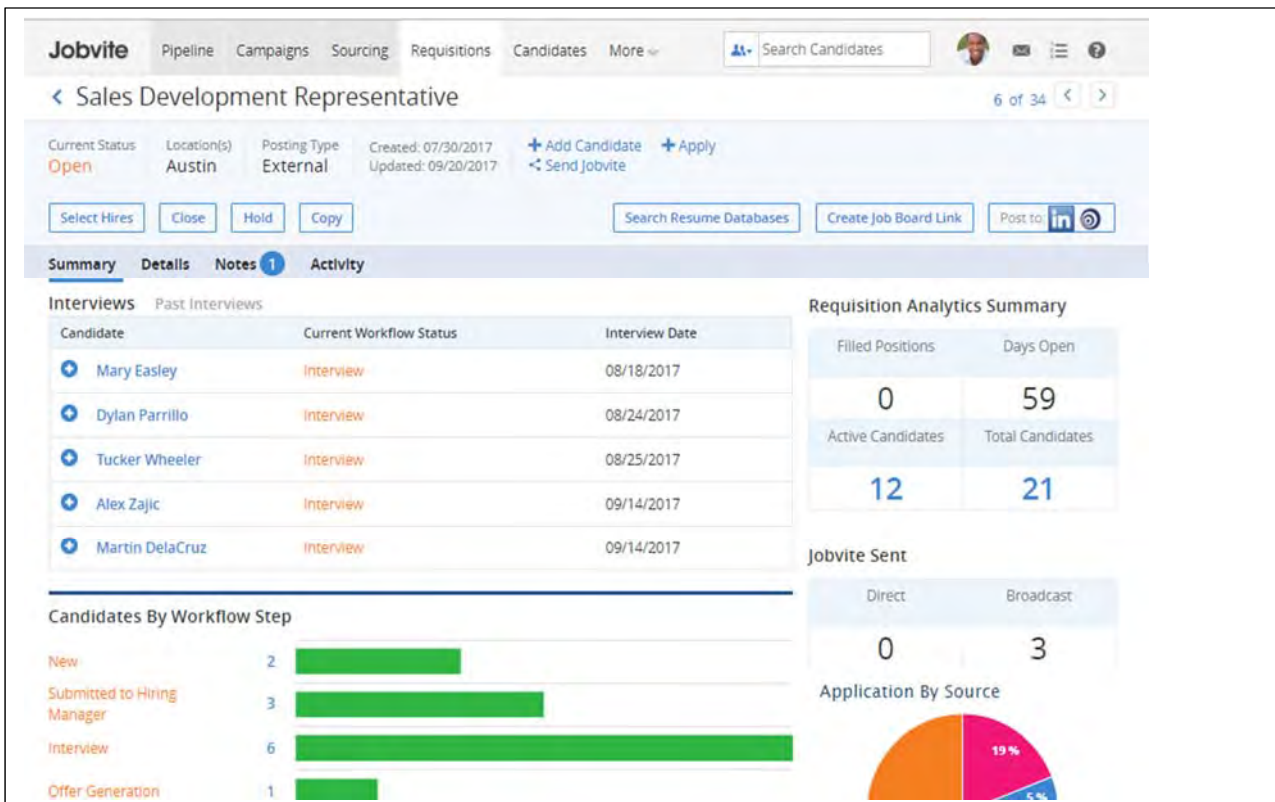
VENDOR PROFILE:

Jobvite

Jobvite

With a strong history in recruiting software, Jobvite offers a comprehensive and analytics-driven recruiting platform to thousands of customers in 160 countries. Their solutions include recruitment marketing, an ATS system, an onboarding system, social sourcing, video interviewing, and employer branding.

October 2017



Jobvite Pipeline Campaigns Sourcing Requisitions Candidates More

< Sales Development Representative 6 of 34

Current Status: **Open** Location(s): **Austin** Posting Type: **External** Created: 07/30/2017 Updated: 09/20/2017 [+ Add Candidate](#) [+ Apply](#) [Send Jobvite](#)

[Select Hires](#) [Close](#) [Hold](#) [Copy](#) [Search Resume Databases](#) [Create Job Board Link](#) [Post to LinkedIn](#)

Summary Details Notes **1** Activity

Interviews Past Interviews

Candidate	Current Workflow Status	Interview Date
Mary Easley	Interview	08/18/2017
Dylan Parrillo	Interview	08/24/2017
Tucker Wheeler	Interview	08/25/2017
Alex Zajic	Interview	09/14/2017
Martin Delacruz	Interview	09/14/2017

Candidates By Workflow Step

Step	Count
New	2
Submitted to Hiring Manager	3
Interview	6
Offer Generation	1

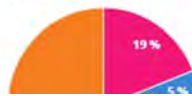
Requisition Analytics Summary

Filled Positions	Days Open
0	59
Active Candidates	Total Candidates
12	21

Jobvite Sent

Direct	Broadcast
0	3

Application By Source




COMPANY HISTORY

HISTORY

- **Year Founded:** 2006
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Headquarters:** San Mateo, CA
- **Revenue:** \$30M-\$40M
- **Growth Rate:** 31%
- **Mergers & Acquisitions:** N/A

LEADERSHIP

- **CEO:** Dan Finnian
- **Glassdoor:** 86%
- **The Executive Team:** Average tenure is 5 years and 31% of the Executive team is female
- **Investment:** \$55.45 M Total Funding
 - \$25M Series D – Catalyst Investors
 - \$15M Series C – Trident Capital
 - \$8.25M Series B – ATA Ventures
 - \$7.2M Series A – CMEA Capital

CUSTOMERS

- **Number of Customers:** 1900
- **Target Market:** Mid-Market, Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 3.9/5



EMPLOYEES

- **Number of Employees:** 225
- **% Employees in R&D:** 35%
- **% Employees in Sales/Marketing:** 30%
- **Glassdoor rating:** 4.1/5

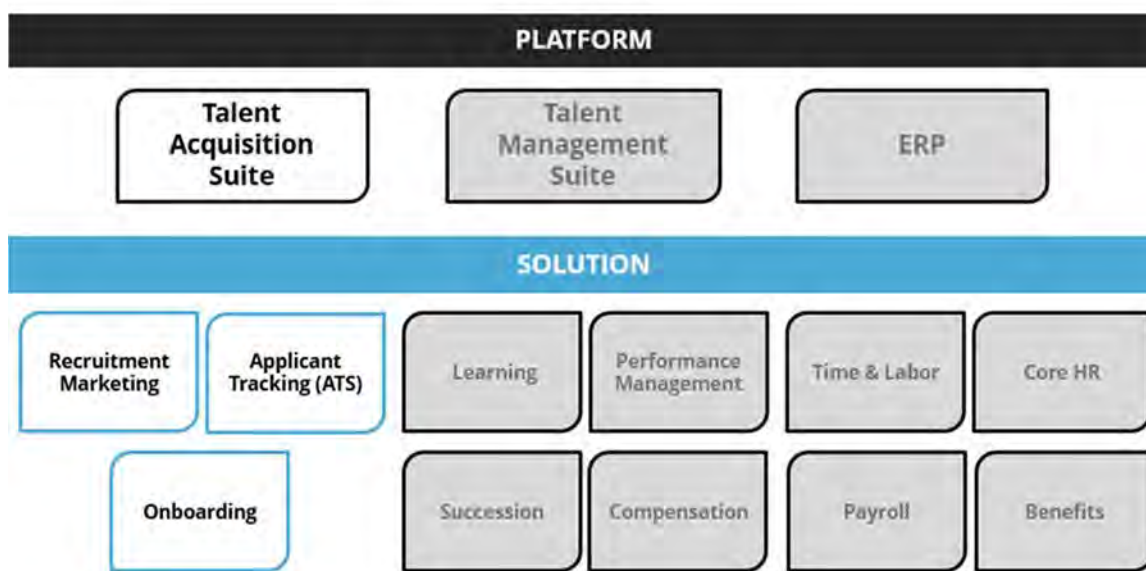


CUSTOMER ACQUISITIONS IN THE PAST YEAR

Genuine Parts Company
 Partners In Health
 Gannett
 La-Z-Boy
 Dent Wizard
 HAVAS Creative
 Mitsubishi Caterpillar Forklift America

Dunkin Brands
 Xylem
 Mercy Health

PRODUCT INFORMATION



PRODUCTS	Recruitment Marketing Platform; Sourcing; ATS; Onboarding; Employer Branding; Video Interviewing; Scheduling
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	Monthly
DATA CENTERS	Amazon Web Services
DEVELOPMENT TECHNOLOGY	Java
LANGUAGES	Recruiter: English, English (UK), Spanish, German, French, French Canadian, Italian, Swedish, Chinese (Traditional), Chinese (Simplified); Candidates: includes languages previously mentioned plus can customize additional ones based on need.
SERVICES	Dedicated Account Representative; Candidate Needs Assessment; Configuration and Training; Campaign Creation; Ongoing Services
PARTNERS	100+

PRODUCT INFORMATION

SECURITY AND BACKUP

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 II Type II Certified	Yes
Ability to include a way 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

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	Yes
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	Yes
Multiple Location Requisitions	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHTS

Jobvite is a leading provider with a strong commitment to improving the way companies attract and recruit talent. It understands what challenges recruiters face and what expectations candidates have from an employer. Best practices are built into the product to help companies recruit smarter and improve the candidate experience. Jobvite is a provider that helps companies tackle important objectives including veteran hiring and pay equity. For example, it offers companies an option for individuals to apply for a job with a military profile and translates their skills to the current job market.

Jobvite differentiates itself by providing deep functionality and expertise in all areas of talent acquisition, from sourcing to onboarding. It is a provider not simply building solutions to check off boxes. Jobvite invests heavily in developing robust solutions and strong integrations. Most of the next generation providers are hyper-focused on Jobvite – which is typically an indication that it is doing something right.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Average
- Hiring Manager Experience: Exceptional
- Mobile Experience: Exceptional

ROADMAP

- **Predictive Analytics and AI** – Advanced algorithms and machine learning capabilities that will arm recruiters with the data and insights to make better decisions and empower them to match the right candidates to a job, predict time-to-fill, and reduce bias.
- **Analytics and Reporting enhancements** – Upgrades and enhancements to the reporting platform, including additional visualizations and executive dashboards and a connector that will make it easy for customers to report on Jobvite data with the BI tool of their choice.
- **Optimization of Core Recruiting Process** – Usability improvements and optimization enhancements across the core recruiting processes such as requisition, candidate, interview, and offer letter management.

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

END-TO-END TALENT ACQUISITION



Although many providers claim to offer end-to-end talent acquisition, not many actually do. Jobvite is an exception. This provider is committed to being a leading talent acquisition provider and offers a comprehensive suite of solutions to handle everything from employer branding to attracting talent through onboarding. The entire suite is developed on one code and fully integrated. Analytics and advanced reporting gives clients a full view of the candidate's entire journey. Each of the products has the depth in functionality to compete individually or as a complete suite.

DEEP DOMAIN EXPERTISE



With a clear understanding of the challenges, strategies, and solutions that recruiters need to compete for talent, Jobvite has built best practices into the product, but at the same time, it is highly configurable. In requisition management and offer management, for example, it has automated these processes to help guide employers but also made them very configurable. The services and technology it provides customers include tools and resources to help companies be more successful in their talent acquisition efforts.

MOBILE



Jobvite has made a considerable investment in its mobile capabilities to ensure a positive experience for both recruiters and candidates. Customers have a mobile counterpart to the entire product, making it easy for candidates to apply for jobs and to share jobs and information about an employer.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

Strengths	Weaknesses	Opportunities	Threats
<p>Strong growth</p> <p>One code base</p> <p>Best practices built into the product</p> <p>End-to-end talent acquisition with deep functionality from sourcing to onboarding</p>	<p>Perception that it is a mid-market company</p> <p>Lack of awareness of services, security, and scalability</p>	<p>Expand up-market</p> <p>Continue to expand globally</p> <p>Continue to expand global partnerships</p>	<p>New competitors entering the market</p> <p>Rapidly changing technology landscape</p> <p>Potential consolidation of CRM and ATS providers</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Responsive Design

Comprehensive Solutions

Advanced Analytics

BEST SUITED FOR

Mid-Market: 1,000-2,400 employees

Enterprise: Over 2500 employees

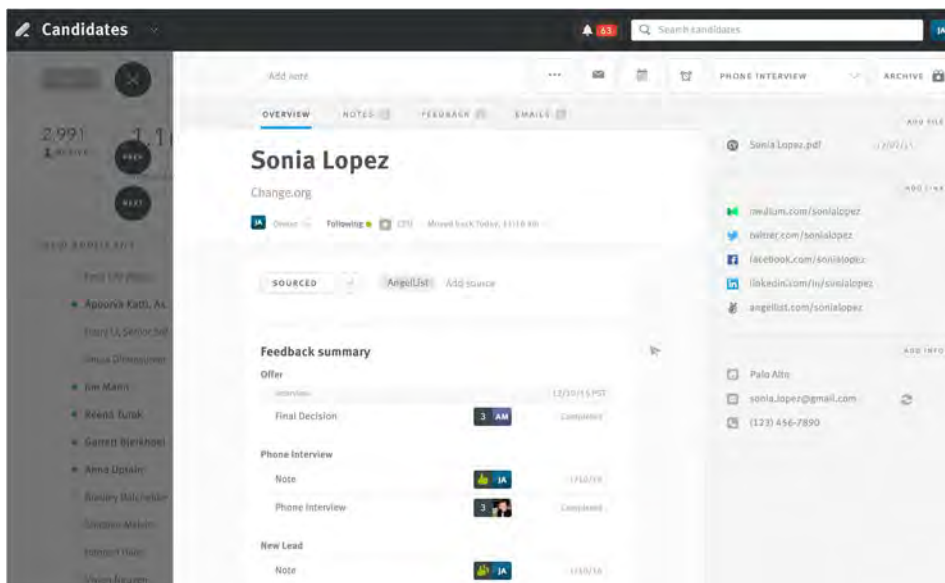
VENDOR PROFILE:

Lever



Lever was founded to tackle one of the most strategic challenges that companies face: how to grow their teams. It injects automation, intelligence and strong design into its products and re-imagines how organizations can think about growth, with talent and teamwork at the center. After five years, Lever now supports teams at companies such as Lyft, Quora, Netflix, Yelp and more.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 2012
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** San Francisco, CA
- **Revenue:** > \$10 million
- **Growth Rate:** N/A
- **Mergers & Acquisitions:** N/A

LEADERSHIP

- **CEO:** Sarah Nahm
- **Glassdoor:** 93% Approval Rating of CEO
- **The Executive Team:** 43% of the Executive Team is female. Executives include a mixture of leaders at Fortune 50 companies, entrepreneurs, and industry experts.
- **Investment:** \$40 million of Series C funding (Total funding raised to date is \$73 million)

CUSTOMERS

- **Number of Customers:** >1400
- **Target Market:** SMB, Mid-Market
- **Target Vertical:** All – focus on Technology
- **G2Crowd review:** 4.6/5



EMPLOYEES

- **Number of Employees:** 125
- **% Employees in R&D:** 35%
- **% Employees in Sales/Marketing:** 45%
- **Glassdoor rating:** 4.5/5

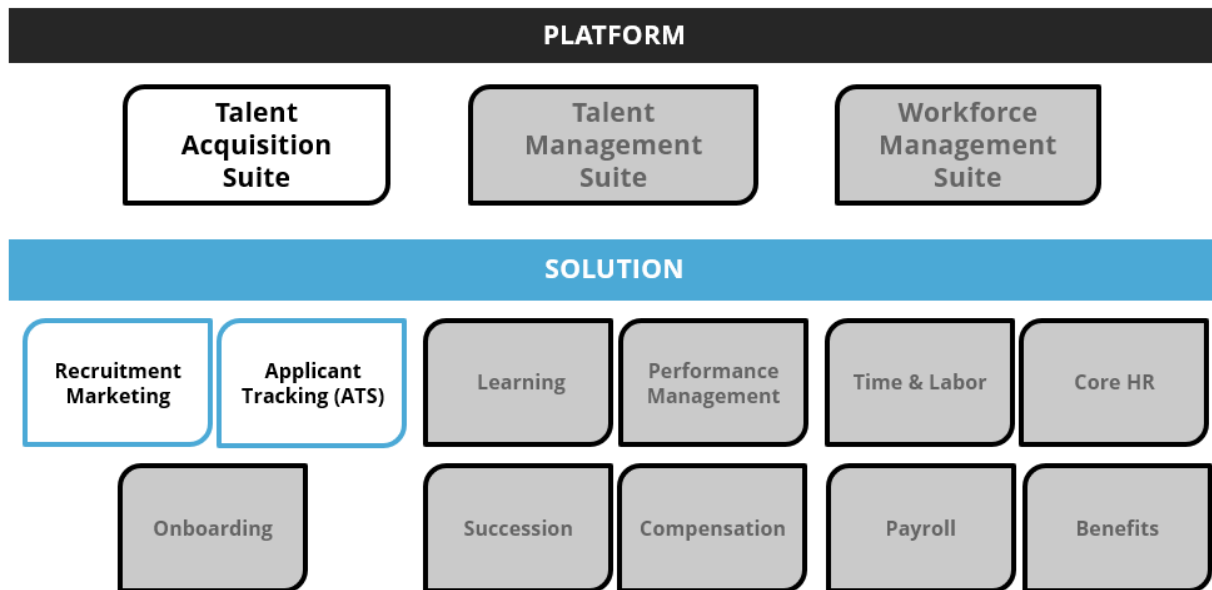


CUSTOMER ACQUISITIONS IN THE PAST 12 MONTHS

Boston Red Sox, Cirque Du Soleil, Hot Topic, Siteminder, Medallia, Etsy, Paylocity, Interbrand, Brooks Running, Blue Bottle Coffee

PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	ATS; CRM
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	Major releases 2/Quarter; Minor releases on an ongoing basis
DATA CENTERS	All Lever computing and storage is provided by Amazon Web Services. AWS is a secure infrastructure vendor, compliant with SOC 2/3.
DEVELOPMENT TECHNOLOGY	DerbyJS, a collaborative and real-time open source JavaScript framework invented by Lever co-founder Nate Smith
LANGUAGES	UI is in English only, but the product supports all Unicode languages, meaning it can parse resumes, support text, and power search for all Unicode languages
SERVICES	Free training; implementation support; webinars
PARTNERS	50+

PRODUCT INFORMATION

SECURITY AND BACKUP

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 II Type II	Yes
Ability to include a way 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

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	No
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	Yes
Multiple Location Requisitions	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHT

In the ATS market, all eyes are on Lever. The provider has grown significantly over the past year, acquiring new customers, successfully diversifying its industries, and making strides to move up market. Lever has a very strategic and well-executed roadmap. Instead of following a traditional ATS development path, it commits to and executes on enhancements that benefit their customer. Lever has enhanced the product with proactive sourcing, talent intelligence, requisition approvals, Office 365 integrations, and self-scheduling capabilities. It has also achieved Soc 2 Type II certification, ensuring that it can keep its clients' sensitive candidate data secure.

Lever has established a recognizable brand and gained momentum in a very crowded market. With differentiators that include integrated sourcing solutions, one-click prospecting tools, and complete candidate journey analytics, Lever shows no signs of slowing down. The true test over the next year will be in how the provider continues to acquire enterprise customers and demonstrates its ability to scale.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Exceptional
- Hiring Manager Experience: Exceptional
- Mobile Experience: Exceptional

ROADMAP

Forthcoming Features:

- Continued investment in Nurture (CRM) product
- Enhancements to internal mobility and employer referral capabilities
- Continued momentum upmarket with a focus on partnerships, security and scalability

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

COLLABORATION



Lever takes a refreshingly modern view of the Applicant Tracking System. For a company so new to the recruitment space, it seems to understand the nuances of what recruiters and hiring managers need better than many of the traditional providers. 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 shaky relationship of hiring managers and recruiters has hindered many talent acquisition departments. Lever provides a way for companies to bridge the gap and make collaboration easy.

COMPREHENSIVE REPORTING AND CLEANLINESS OF DATA



Lever’s reporting capabilities track the metrics, such as conversion rates, that recruiters need to make better decisions throughout the candidate’s entire journey. Lever’s reporting is very different from what recruiters would have access to in a traditional ATS and also includes CRM metrics. Reports are all customizable and can be exported easily. Through this reporting, recruiters and hiring managers can drive action through analysis of aggregate activity and decisions.

COMBINATION OF 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.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Integrated CRM and ATS</p> <p>Cleanliness of data</p> <p>Integration with Google and Microsoft 365</p> <p>Complete analytics of end-to-end talent acquisition</p> <p>Self-scheduling interviews</p>	<p>Still viewed as a mid-market provider despite some growth up market</p> <p>Lacks an onboarding solution</p>	<p>Continue to grow in the enterprise market</p> <p>Continue to partner with providers inside and outside talent acquisition</p> <p>Expand professional services and customer support teams</p>	<p>Other next generation providers that build out CRM and ATS solutions</p> <p>Other providers that offer an onboarding solution that is included in the ATS deal</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Responsive Design

Strong CRM Solution

Exceptional UI

BEST SUITED FOR

SMB: Less than 100 employees

Mid-Market: 101-2499 employees

VENDOR PROFILE:

Newton Software

(a Paycor Company)

newton

Newton is designed to meet every user where they are without changing the way they work. It offers a product that is simple, cloud-based, and universally optimized to work on any smartphone, tablet, operating system, and browser with nothing to install or download. In 2015, Newton Software was acquired by Paycor.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 1999
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** San Francisco, CA; Shanghai, China; Fort Collins, CO
- **Revenue:** \$10 million
- **Growth Rate:** 50%
- **Mergers & Acquisitions:** Acquired by Paycor (2015)

LEADERSHIP

- **CEO:** Joel Passen and Steve Hazelton
- **Glassdoor:** 100% Approval Rating of CEO
- **The Executive Team:** Average tenure is 5 years and 0% of the Executive team is female.

CUSTOMERS

- **Number of Customers:** 2300
- **Target Market:** SMB, Mid-Market
- **Target Vertical:** All
- **G2Crowd review:** 4/5



EMPLOYEES

- **Number of Employees:** 80
- **% Employees in R&D:** 30%
- **% Employees in Sales/Marketing:** 30%
- **Glassdoor rating:** 5/5

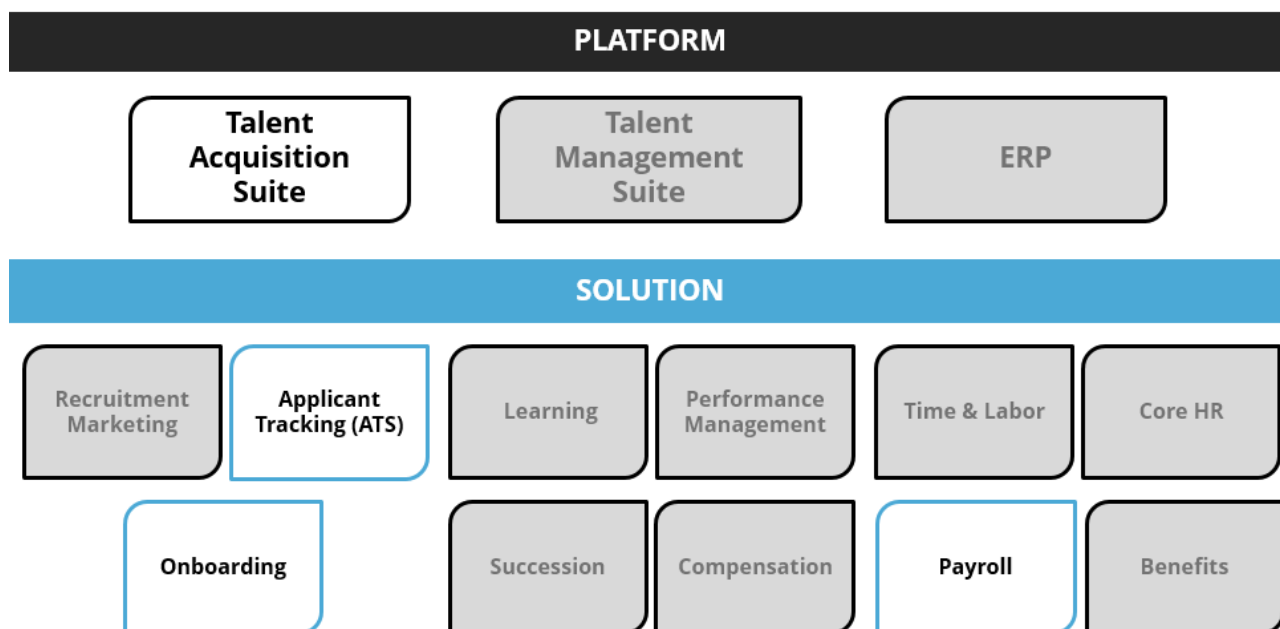


CUSTOMER ACQUISITIONS IN THE PAST YEAR

Newton Software does not disclose new customer acquisitions.

PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	ATS; Onboarding; Payroll
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	6-8 weeks
DATA CENTERS	Shanghai, China; Fort Collins, CO
DEVELOPMENT TECHNOLOGY	Java
LANGUAGES	Localized in English with Spanish language application processes
SERVICES	Client Services; Content Services; Implementation Services; Technology Consulting; Business Consulting; Educational Consulting
PARTNERS	30+

PRODUCT INFORMATION

SECURITY AND BACKUP

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	Yes
Ability to include a way 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
Integration toolsets for Security Administrators	Yes

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	No
CRM	No
Internal Mobility	Yes
Employee Referral	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHTS

The key feature of Newton Software is its simplicity. It is optimized for use on any smartphone, tablet, or operating device. It uses simple drag and drop functionality and also serves as a publishing site once a job has been approved. Newton posts to career sites, job boards, and social media, and allows recruiters to buy jobs on other sites using point of click purchasing. Best-in-class methodology is built into the product to help recruiters make the best decisions about how to move candidates through the process.

The candidate experience is optimized for any smartphone, tablet, or operating system. Candidates can share jobs and connect with recruiters and hiring managers. Newton's Cloud Apply lives on employers' careers pages and empowers job seekers to submit resumes stored in cloud services or on a computer. Job seekers can use any device or computer they choose to complete the job application process and will be impressed with how simple the process is. Newton also provides candidate acknowledgement templates to let candidates know where they stand in the application process.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Average
- Recruiter Experience: Average
- Hiring Manager Experience: Average
- Mobile Experience: Exceptional

ROADMAP

Forthcoming features:

- Advanced recruiting agency management including representation management functionality
- Text messaging
- Deeper email integration with Outlook and Gmail
- Quality of hire metrics

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

MARKETPLACE



Newton's marketplace is different from other providers because it looks at recruiting spend and can make purchases without leaving the platform. It is much more than a list of ecosystem partners. It gives companies the insight they need to make better decisions about the talent acquisition solutions they plan to use and how they are integrated with Newton.

SMART ALERTS



What sets Newton apart from other recruiting software is that Newton is designed to work the way that recruiting works. It has recruiting knowledge built in so users can need very little customization. Green is go. Red is no.TM is a flexible process. Smart alerts trigger action and encourage decision making. Overall, Newton keeps the process simple. Recruiters face no confusion and nothing new to learn.

RECRUITMENT ANALYTICS



While many analytics solutions are overly complicated, Newton's analytics and interactive dashboards are designed with the recruiter in mind. It provides information in a simple format. Newton is designed to be user-friendly for both recruiters and hiring managers, allowing users to do what they need to do with very few clicks. Newton's reporting features empower companies to zoom into areas of interest in real time. Interactive, easy-to-read graphs and charts allow users to drill into the recruiting program and tell the story behind important events and trends.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Deep domain expertise in talent acquisition</p> <p>Advanced onboarding solution</p> <p>Simple solution designed to solve challenges that recruiters face</p> <p>Integration with Paycor solutions</p>	<p>Lack of a CRM solution</p> <p>Needs more visibility as a leading talent acquisition provider</p>	<p>Become the leading solution in the SMB market as other solutions try to move up market</p> <p>Develop recruitment marketing or CRM capabilities</p>	<p>Next generation providers that are gaining more momentum in the market</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Responsive Design

Simply and Intuitive Solution

Partner Marketplace

BEST SUITED FOR

SMB: Less than 100 employees

Mid-Market: 101-2499 employees

VENDOR PROFILE:

Oracle



Oracle Talent Acquisition Cloud is a fully integrated talent acquisition solution that includes recruitment marketing and employee referrals to source talent, recruitment automation, and onboarding.

October 2017

Oracle did not participate in the demo and briefing required for this report analysis.



COMPANY HISTORY

HISTORY

- **Year Founded:** 1977
- **Private or Public:** Public
- **Heritage:** ERP
- **Offices:** Offices locations all over the world
- **Revenue:** N/A
- **Growth Rate:** N/A
- **Mergers & Acquisitions:**
2004 PeopleSoft; 2011 Taleo

LEADERSHIP

- **CEO:** Mark Hurd
- **Glassdoor:** 70% Approval Rating of CEO
- **The Executive Team:** 15% of the Executive team is female.

CUSTOMERS

- **Number of Customers:** N/A
- **Target Market:** Global Enterprise; Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 3.5/5



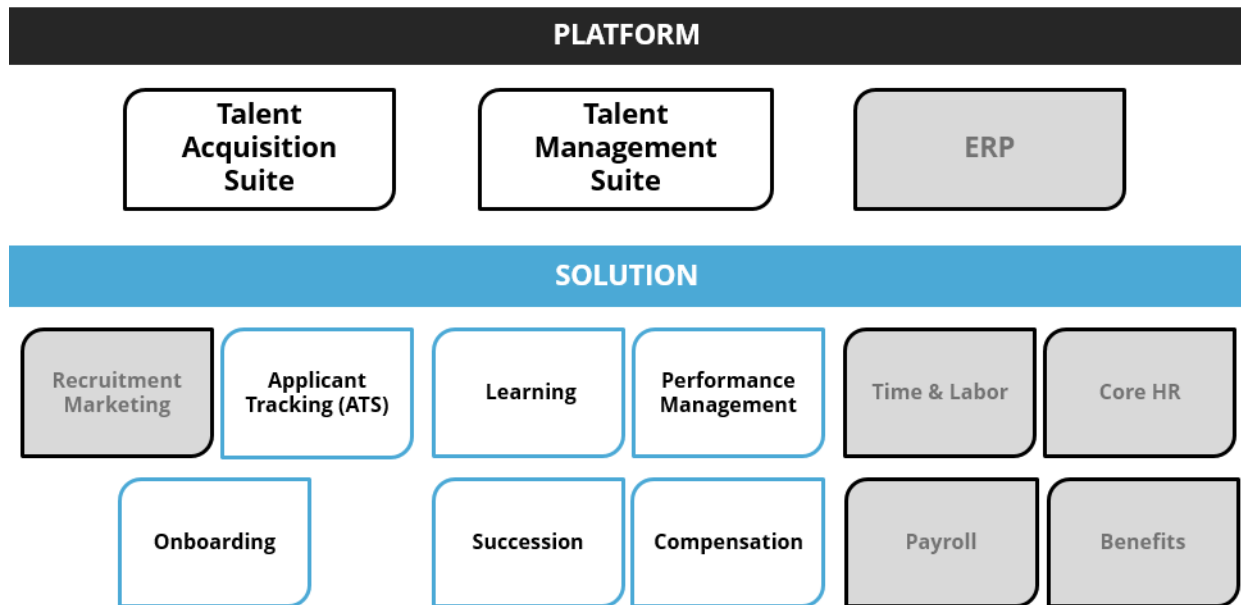
EMPLOYEES

- **Number of Employees:** 10,000+
- **% Employees in R&D:** N/A
- **% Employees in Sales/Marketing:** N/A
- **Glassdoor rating:** 3.3/5



PRODUCT INFORMATION

SOLUTION PROFILE



THE BOTTOM LINE

KEY CHARACTERISTICS

Strong Onboarding Solution

Strong Integration

Complete HCM

BEST SUITED FOR

Enterprise: Over 2,500 employees

Global Enterprise: Global Over 10,000

VENDOR PROFILE:

PeopleFluent



PeopleFluent's talent acquisition suite includes collaborative workspaces that reflect the way people work and learn today. Products include a talent acquisition platform, onboarding solution, and vendor management system. PeopleFluent also includes an Affirmative Action solution that can support diversity and inclusion efforts. These solutions enable PeopleFluent to help companies with their end-to-end talent acquisition needs.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 1997
- **Private or Public:** Private
- **Heritage:** Talent Acquisition/Talent Management
- **Offices: US:** Waltham, MA; Raleigh, NC; Irving, TX; Austin, TX; Santa Barbara, CA; New Orleans, LA; Palo Alto, CA **Global:** London, UK; Montreal, Canada
- **Revenue:** N/A
- **Growth Rate:** N/A
- **Mergers & Acquisitions:** Bedford Funding Acquired PeopleFluent (2010)

LEADERSHIP

- **CEO:** Charles Jones
- **Glassdoor:** 66% Approval Rating of CEO
- **The Executive Team:** Average tenure is 5 years and 40% of the Executive team is female.

CUSTOMERS

- **Number of Customers:** 5,000
- **Target Market:** Enterprise
- **Target Vertical:** Healthcare, Hospitality, Food and Beverages, Financial Services, Manufacturing, Retail
- **G2Crowd review:** 3.4/5



EMPLOYEES

- **Number of Employees:** 600
- **% Employees in R&D:** 35%
- **% Employees in Sales/Marketing:** 26%
- **Glassdoor rating:** 3.5/5

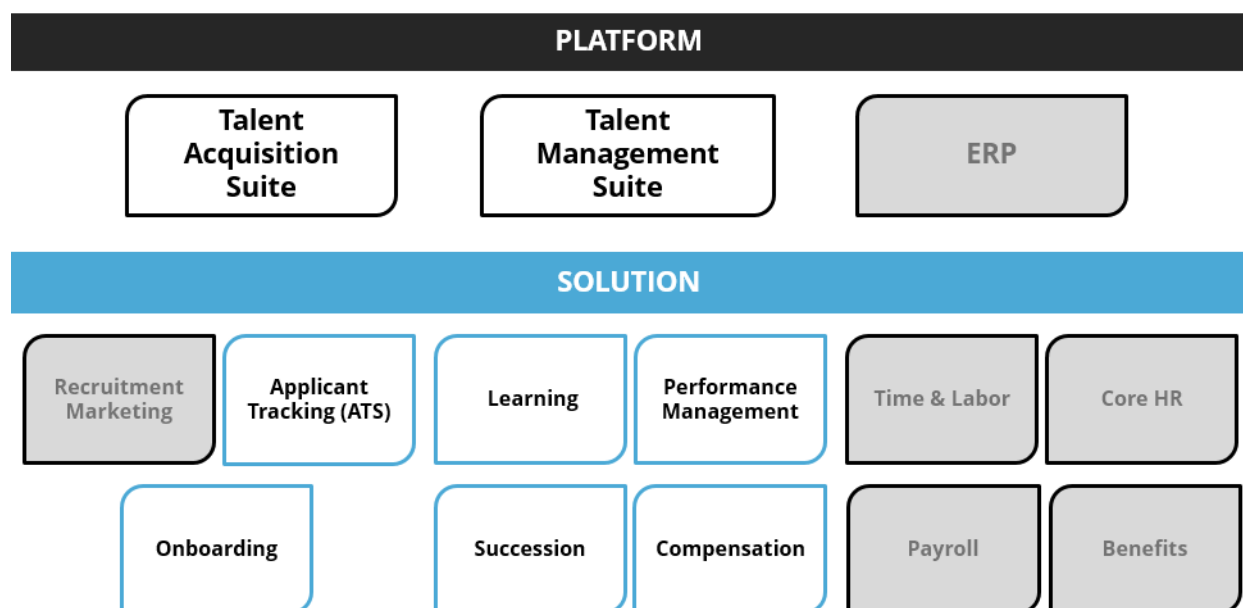


CUSTOMER ACQUISITIONS IN THE PAST YEAR

PeopleFluent did not disclose new customer acquisitions.

PRODUCT INFORMATION

SOLUTION PROFILE



PRODUCTS	Recruitment Management System (ATS); Onboarding; Performance; Compensation; Learning; Succession Planning; Vendor Management System; Affirmative Action Solution (CAAMS); Org Publisher
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	Agile Development with continuous releases
DATA CENTERS	Multiple Data Centers in North America; London; Canada
DEVELOPMENT TECHNOLOGY	Development tools include Java technologies, Apache/Tomcat, Oracle database, Microsoft Visual Studio IDE and Microsoft SQL Server, Cruze Control .NET build tools, Microsoft C#, IOS and iPad Objective C Core Frameworks, Visual Basic, and Rally Agile project management system.
LANGUAGES	20 languages
SERVICES	Implementation services; change management services; customer support teams; data integration services; research institute; training; webinars; strategy consultants
PARTNERS	150+

PRODUCT INFORMATION

SECURITY AND BACKUP

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 Certification	No
Ability to include a way 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	No
Integration toolsets for Security Administrators	Yes

ADVANCED CAPABILITIES

Interview Scheduling	No
Event Management	No
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	Yes
Multiple Location Requisitions	Yes

INSIGHT AND ANALYSIS

USER EXPERIENCE

PeopleFluent offers an integrated talent management suite. Its key differentiator is that it gives organizations a view into total talent – internal hires and external hires, as well as their contingent workforce. PeopleFluent's Career Portal is a responsive design model that will work on any device. It provides candidates with content and context (i.e., recently reviewed jobs). Video is also incorporated through the product and can be leveraged in multiple areas by clients looking to use video as a tool to engage and deliver a powerful employer branding message. PeopleFluent is one of the few providers in this report that can support globally complex workflows. Multiple candidate portals are available and can be offered in multiple languages for global organizations.

The greatest challenge that PeopleFluent faces is that it is unable to keep pace with the market. It has experienced high turnover resulting in slow product development and customer churn over the past few years. This provider supports some very large, global brands, but in order to remain a key player, it will need to rethink its own strategy and demonstrate stability and organizational growth.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Average
- Recruiter Experience: Average
- Hiring Manager Experience: Exceptional

ROADMAP

Forthcoming features:

- Soc II Type II Compliance
- Enhanced capabilities for CRM and internal mobility

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

COLLABORATION



PeopleFluent includes collaboration throughout the product. Not only can hiring managers, recruiters, and candidates provide feedback and communicate often, but video and social capabilities are embedded holistically throughout the solution.

TOTAL TALENT ACQUISITION



PeopleFluent is the only provider in this report that can truly support a contingent workforce through their Vendor Management System. PeopleFluent's comprehensive solution includes interactive video and highly collaborative workspaces that reflect the way people work and learn today. Companies can promote their employment brand, while also improving the candidate experience. Diversity and inclusion capabilities are also embedded holistically throughout the PeopleFluent suite, and within recruiting offerings specifically. The company can support configuring requisitions with diversity objectives in mind, expanding talent pools for diversity and inclusion, and improved diversity reporting and analytics. The company also has an Affirmative Action solution that supports compliance. These solutions enable PeopleFluent to help companies with their total talent acquisition needs.

HIGH VOLUME



PeopleFluent has extensive experience in industries such as retail and hospitality. This provider understands the capabilities needed to hire a lot of people in a short period of time, including improving the quality and organizational fit of every hire. It does this across all locations and includes engaging video and role-based collaboration capabilities. The solution enables recruiters, hiring managers, and candidates to reduce redundancies and communicate with each other in personalized ways.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Continuous sourcing for high-volume organizations</p> <p>Productivity Platform (Mirror) for hiring, recruiting, and onboarding</p> <p>Vendor Management System for contingent workforce management</p> <p>Supports globally complex workflows</p>	<p>Internal challenges including turnover and customer churn</p> <p>Loss of awareness in the market</p>	<p>Improve partnership strategies</p> <p>Bring awareness to any product development</p> <p>Create awareness for total talent solutions- VMS and ATS</p>	<p>Next generation providers replacing enterprise customers</p> <p>Workday's growing presence in the ATS market</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Total Talent Acquisition

High-Volume Hiring

Mobile Responsive Design

BEST SUITED FOR

Enterprise: Over 2500 employees

Global Enterprise: support over 10 languages and 3+ global offices

VENDOR PROFILE:

SAP



SAP's cloud-based talent solutions help simplify talent management, so HR professionals can proactively act, easily measure, and clearly communicate talent results and business impact.

October 2017

SAP did not participate in the demo and briefing required for this report analysis.



COMPANY HISTORY

HISTORY

- **Year Founded:** 1972
- **Private or Public:** Public
- **Heritage:** ERP
- **Offices:** Offices locations all over the world
- **Revenue:** \$20+ billion
- **Growth Rate:** N/A
- **Mergers & Acquisitions:**
2011 SuccessFactors; 2011 Jobs2Web

LEADERSHIP

- **CEO:** Bill McDermott
- **Glassdoor:** 95% Approval Rating of CEO
- **The Executive Team:** 15% of the Executive team is female.

CUSTOMERS

- **Number of Customers:** N/A
- **Target Market:** Global Enterprise; Enterprise
- **Target Vertical:** All
- **G2Crowd review:** N/A

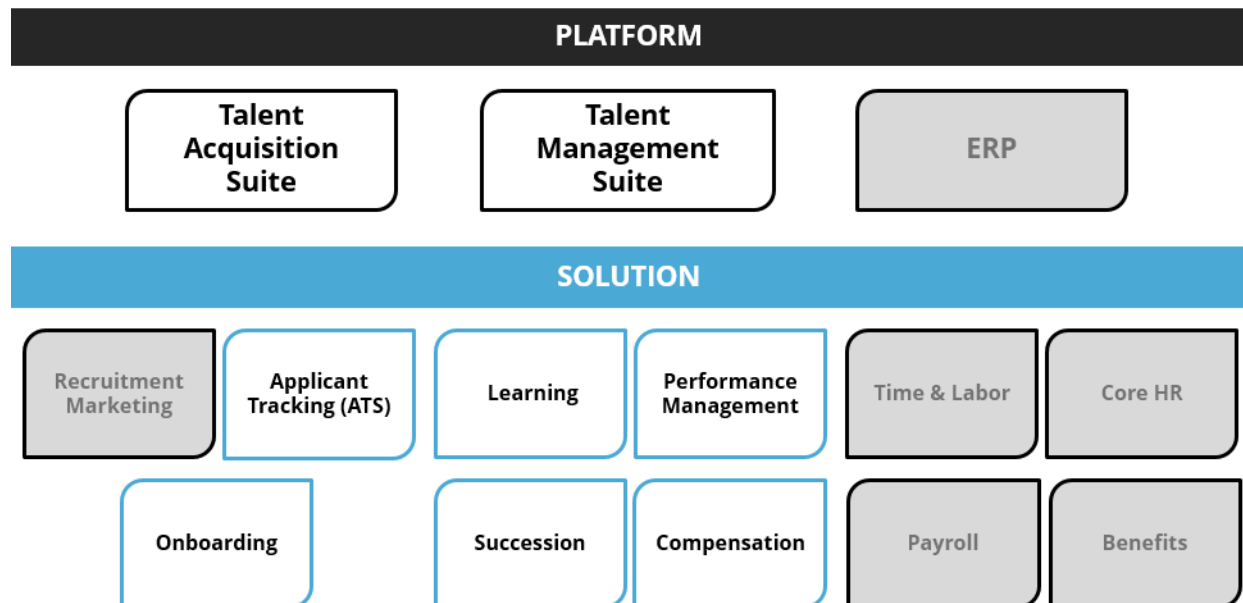
EMPLOYEES

- **Number of Employees:** 20,000+
- **% Employees in R&D:** N/A
- **% Employees in Sales/Marketing:** N/A
- **Glassdoor rating:** 4/5



PRODUCT INFORMATION

SOLUTION PROFILE



THE BOTTOM LINE

KEY CHARACTERISTICS

Strong Integration

Complete HCM

BEST SUITED FOR

Enterprise: Over 2,500 employees

Global Enterprise: Global Over 10,000

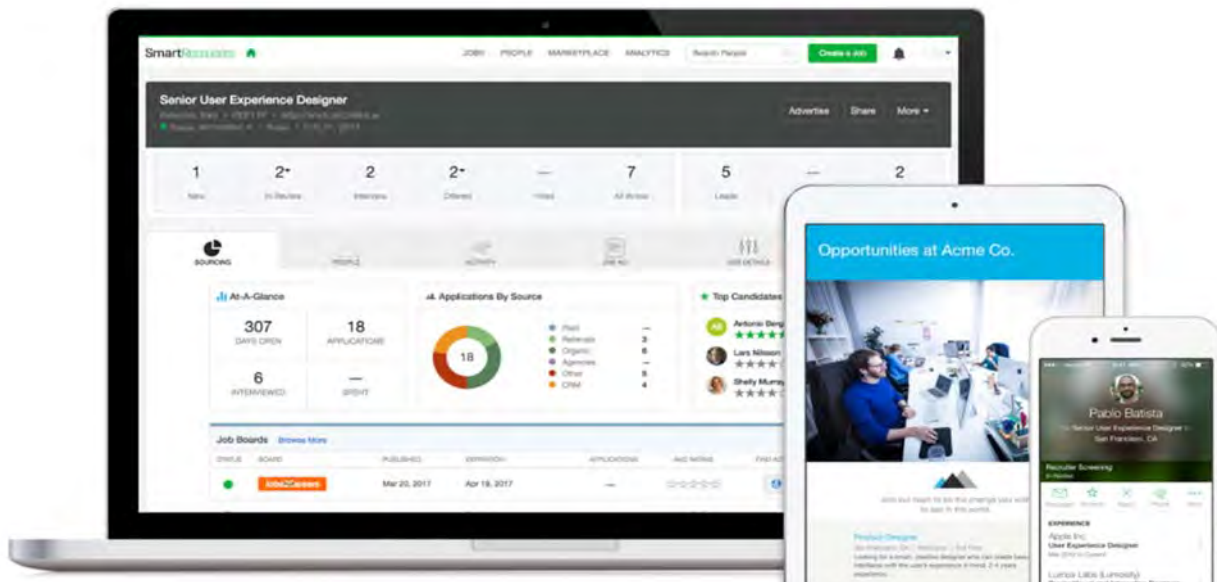
VENDOR PROFILE:

SmartRecruiters

SmartRecruiters
THE HIRING SUCCESS COMPANY™

SmartRecruiters is a next generation talent acquisition platform that is dedicated to helping companies find the talent they require and helping individuals find the job they need to be successful. Its goal is to modernize the talent acquisition function through an end-to-end solution.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 2010
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Offices:** San Francisco; Spokane; London; Paris; Krakow; Berlin
- **Revenue:** ~\$15 Million
- **Growth Rate:** 500%
- **Mergers & Acquisitions:** acquired Jobspotting GmbH (Jan 2017)

LEADERSHIP

- **CEO:** Jerome Ternynck
- **Glassdoor:** 82% Approval Rating of CEO
- **The Executive Team:** Executives have expertise both inside and outside the recruitment space. 30% of the Executive team is female.
- **Investment:** 56M in three rounds (Mayfield, Salesforce, RVP, and Insight Ventures)

CUSTOMERS

- **Number of Customers:** 900
- **Target Market:** Mid-Market, Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 4.6/5



EMPLOYEES

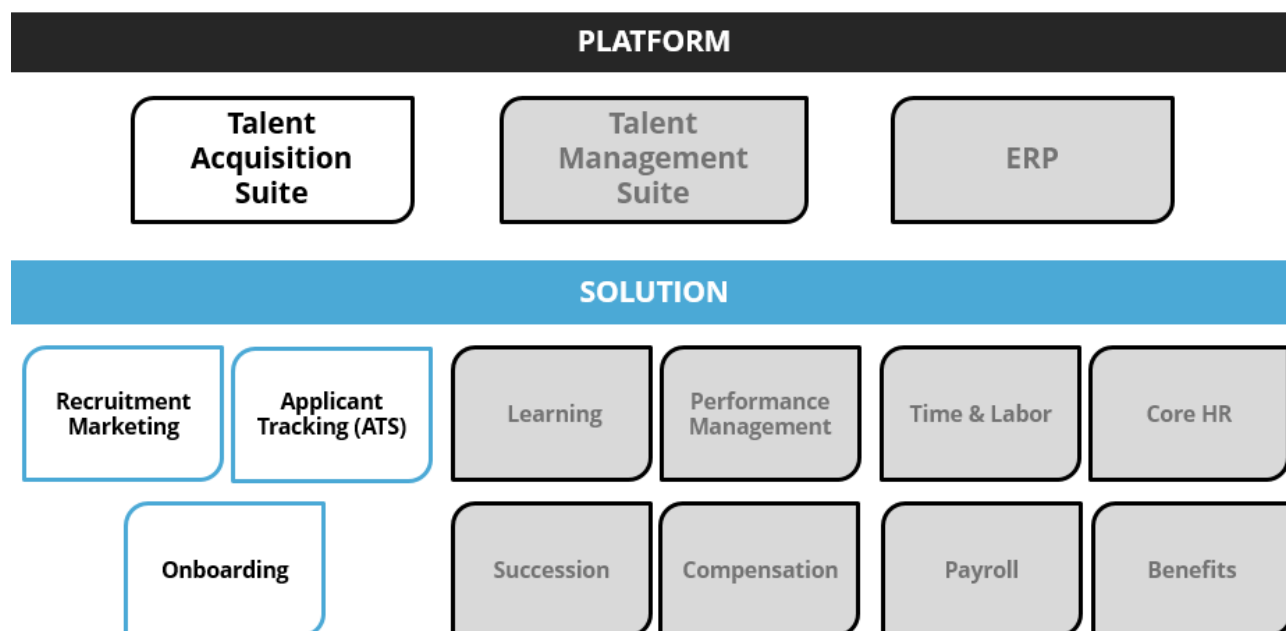
- **Number of Employees:** 100+
- **% Employees in R&D:** 40%
- **% Employees in Sales/Marketing:** 30%
- **Glassdoor rating:** 3.7/5



CUSTOMER ACQUISITIONS IN THE NEXT YEAR

Robert Bosch GmbH, adidas AG, Avery Dennison, Optimizely, Minor Hotels, Rocket Internet, Eurofins, Publicis Media, Kelly Services (UK), LVMH, Manpower Group (FR), Cineplex, Red Lion Hotels, Sodexo Australia, Merkle, and Leidos AU

PRODUCT INFORMATION



PRODUCTS	Recruitment Marketing (Connect); ATS (Recruit); Onboarding through partnerships
DELIVERY MODEL	SaaS
RELEASE SCHEDULE	Quarterly Releases
DATA CENTERS	San Francisco, CA; Krakow, Poland; Frankfurt, Germany
DEVELOPMENT TECHNOLOGY	Multiple, Java on Top of AWS
LANGUAGES	Over 35 Candidate-Facing Languages & over 15 end user languages
SERVICES	Implementation; Process Optimization; Training & Certifications; Account Management & Ongoing support
PARTNERS	380

PRODUCT INFORMATION

SECURITY AND BACKUP

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 Certification	No
Ability to include a way 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
Integration toolsets for Security Administrators	Yes

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	No
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	Yes
Multiple Location Requisitions	Yes

INSIGHTS AND ANALYSIS

ANALYST INSIGHTS

SmartRecruiters provides innovation and demonstrated deep domain expertise to talent acquisition. It continues to rethink processes and enhance its technology with a more modern experience. SmartRecruiters doesn't follow the rules of traditional ATS providers and isn't concerned by its Bay Area competitors. It follows what its customers want and focuses on developing solutions for a more modern talent acquisition function. It is a company that is not afraid to take risks, but it still maintains a strong commitment to customer success and product development. Over the past year, SmartRecruiters has increased its global footprint by deploying new languages both for candidates and on the back end that require no training or cost. It has strengthened interview management through a mobile hub that includes messaging, reminders, and critical information. It has also enhanced its education center through additional learning paths and tutorials. Through its marketplace, an exceptional user experience and powerful analytics, recruiters have the tools they need to find better talent and improve efficiency.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Average
- Hiring Manager Experience: Exceptional
- Mobile Experience: Exceptional

ROADMAP

Forthcoming features:

- Full global localization of the platform for global/local brands
- New "Smart CRM" to drive sourcing and attraction on top of the core ATS platform
- Deep notification, SLA & tasking engine on desktop & mobile to engage hiring managers and ensure a positive candidate experience
- Native AI functionality for matching & discovery of both internal and external profiles
- Updates to the already robust integrated vendor marketplace
- Continued investment in key updates to ensure global compliance for all customers, specifically GDPR, Russia, and China support

INSIGHTS AND ANALYSIS

KEY DIFFERENTIATORS

COMPLETE SOLUTION



SmartRecruiters is more than an Applicant Tracking System. It offers a complete talent acquisition platform that can support recruiters, hiring managers, and candidates through 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. Companies can buy a third-party provider right in the SmartRecruiters platform and submit reviews and comments.

COMMUNICATION



Feedback and communication is a key differentiator of the platform. Recruiters and hiring teams do not have to leave the platform to send an email or gather feedback. Collaboration and notes functionality are embedded throughout the platform. Recruiters can easily reach out to candidates at any stage of the process through email and campaigns during the recruitment marketing phase and through follow-up, interview scheduling, and job offer.

ANALYTICS



SmartRecruiters offers powerful analytics and dashboards to meet the needs of the modern recruiter. Hiring Plan Analytics shows hiring teams how many positions they have filled over a given time period, how long it took to fill those positions, and how long until a candidate starts. Sourcing Analytics gives insight into spend and quality of hire. Pipeline Analytics provides information on candidate engagement, conversion rates, and source of influence.

INSIGHTS AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Powerful analytics embedded in the platform</p> <p>Strong marketplace with 100s of providers</p> <p>Bi-directional integration with LinkedIn</p> <p>Implementation training and support services</p>	<p>Lack of an onboarding solution</p> <p>Market perception that the ATS is for the SMB market</p>	<p>Continue to expand in the global enterprise market</p> <p>Additional development in CRM and marketplace</p>	<p>Providers with onboarding solutions added to deals</p> <p>Traditional providers with a reputation for supporting global enterprise</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Comprehensive Solution

Robust Marketplace

BEST SUITED FOR

Enterprise: Over 2500 employees

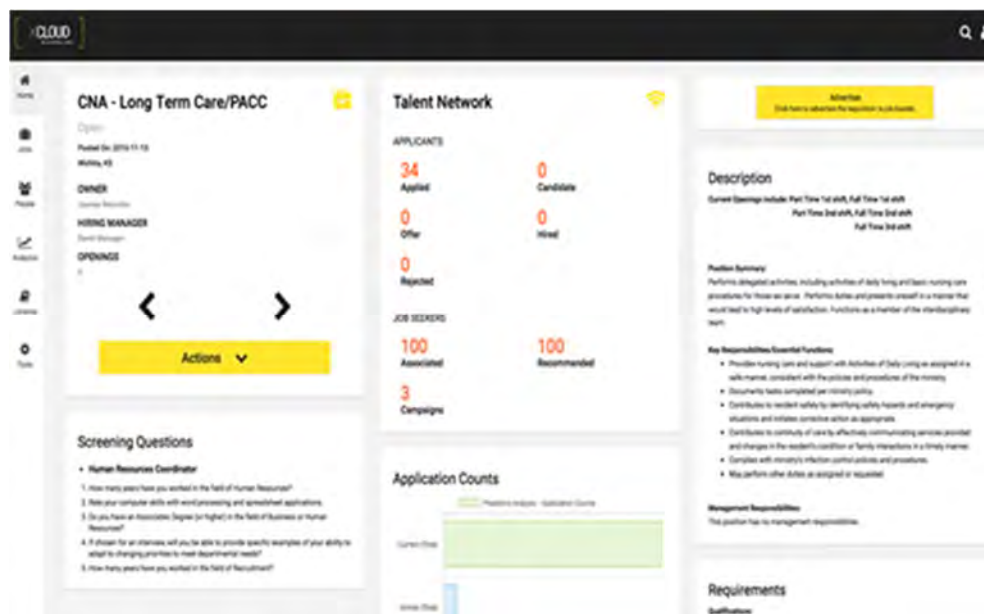
Mid-market: 1,000 employees-2500 employees

VENDOR PROFILE: Symphony Talent

[SYMPHONY TALENT]

Symphony Talent provides a next generation talent acquisition solution that combines employer branding, recruitment marketing, candidate management, and employee engagement to deliver relevant experiences for candidates, employers, and employees. Its Talent Acquisition solutions provide comprehensive capabilities and can fill in the gaps of their current technology set.

October 2017



COMPANY HISTORY

HISTORY

- **Year Founded:** 2009
- **Private or Public:** Private
- **Heritage:** Talent Acquisition
- **Headquarters:** New York, NY
- **Revenue:** N/A
- **Growth Rate:** 15%
- **Mergers & Acquisitions:** Hodes Group, QueSocial, SkillCheck, Findly, HRLogix

LEADERSHIP

- **CEO:** Roopesh Nair
- **Glassdoor:** 98% approval rating of the CEO
- **The Executive Team:** 30% of the Executive team is female

CUSTOMERS

- **Number of Customers:** ~1000
- **Target Market:** Enterprise
- **Target Vertical:** All
- **G2Crowd review:** N/A

EMPLOYEES

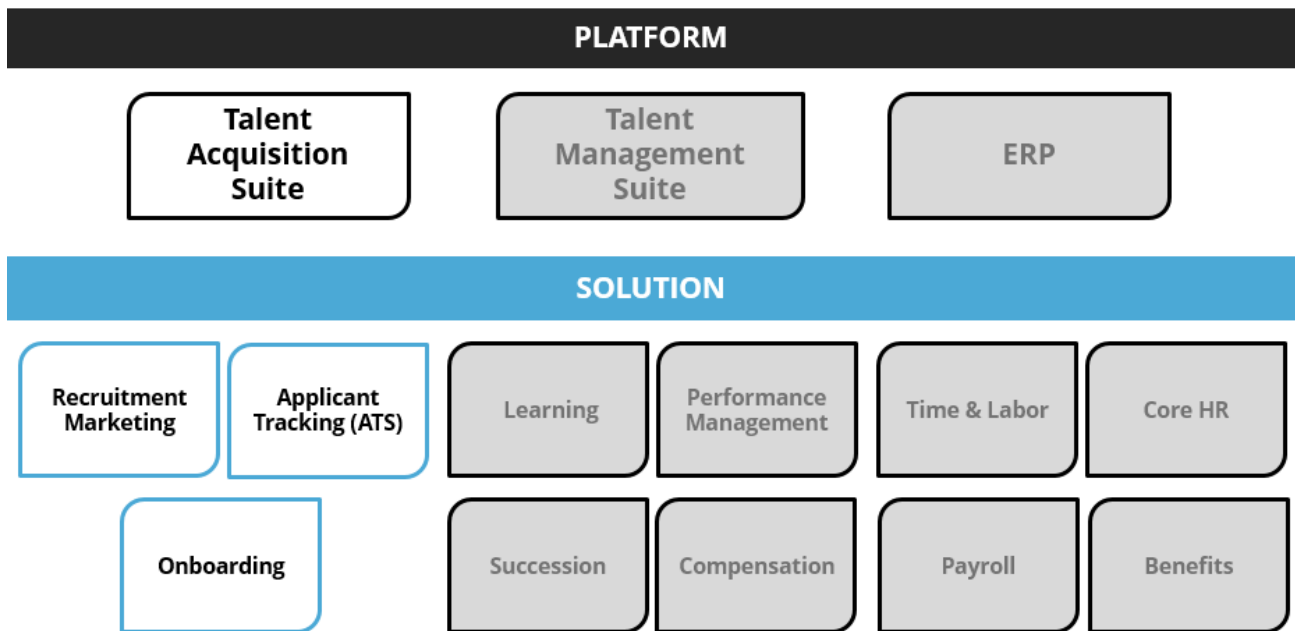
- **Number of Employees:** 350
- **% Employees in R&D:** 32%
- **% Employees in Sales/Marketing:** 9%
- **Glassdoor rating:** 3.9/5



CUSTOMER ACQUISITIONS IN THE PAST YEAR

FCA US LLC, Thermo Fisher Scientific (non-US), Marriott International, JPS Health Network, La Quinta Inns & Suites, Sonepar and UCLA Health

PRODUCT INFORMATION



PRODUCTS	Experience Cloud; Media Cloud; Hodes Creative and Brand Agency
DELIVERY MODEL	SaaS Based Global Infrastructure
RELEASE SCHEDULE	Monthly
DATA CENTERS	Global Cloud Infrastructure
DEVELOPMENT TECHNOLOGY	Java/Javascript/Angular
LANGUAGES	English for recruiter; English and some European languages for candidate
SERVICES	Dedicated Account Representative; Content Curation; Campaign Support; Candidate Experience Services; Creative and Branding Services
PARTNERS	50+

PRODUCT INFORMATION

SECURITY AND BACKUP

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 Certification	Yes
Ability to include a way 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	No
Integrated toolsets for Security Administrators	Yes

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	Yes
CRM	Yes
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	Yes
Multiple Requisitions	Yes

INSIGHT AND ANALYSIS

ANALYST INSIGHTS

Symphony Talent tells a story through their software. It is a story of the candidate experience and the recruiter's journey. It does this through an exceptional user experience and through a comprehensive solution that starts with recruitment marketing and extends to onboarding. The product differentiates itself because of its simplicity and ease of use. While other ATS solutions are prioritizing the candidate experience, Symphony has invested in the recruiter's experience. It feels more like a consumer product than a corporate talent acquisition solution. Symphony Talent's Experience Cloud combines data-driven insights with consumer marketing techniques. It offers companies a unified and streamlined experience for both candidates and employers. Symphony Talent's Media Cloud (M-Cloud) is a goals-based recruitment media optimization platform that guides recruitment media buying through artificial intelligence by automatically calibrating media spend to focus on those sites that provide the best fit and highest-quality candidates.

USER EXPERIENCE APTITUDE REVIEW

- Candidate Experience: Exceptional
- Recruiter Experience: Exceptional
- Hiring Manager Experience: Exceptional
- Mobile Experience: Exceptional

ROADMAP

Forthcoming features:

X-Cloud

- Persona based automated engagement
- Text/chat based capture and apply
- Candidate communication and Employee advocacy for Q4
- Automated conversational profile building M-Cloud
- Deeper integrations with major media partners resulting in powerful new automatic job ad formats.

M-Cloud

- Deeper integrations with major media partners resulting in powerful new automatic job ad formats.

INSIGHT AND ANALYSIS

KEY DIFFERENTIATORS

CREATIVE AND BRAND AGENCY



Hodes is Symphony Talent's brand agency and has a deep domain experience in activating employer brands. Hodes provides creative and engaging solutions for research campaigns, internal communication, bespoke websites, and social media.

EMPLOYEE ADVOCACY



Symphony Talent's QUEsocial will activate companies' most trusted and powerful voices: employees. By delivering sharable content to employee fingertips for one-touch sharing to their social networks, companies can extend their employer brand reach into new pools of talent, while also actively engaging employees.

OMNI CHANNEL ANALYTICS



Symphony Talent offers Omni Channel Analytics across paid, earned, and shared media accounts. This ties together all activities across all channels to provide talent acquisition leaders with better insights to make the right decision.

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Exceptional experience</p> <p>Simple and engaging solution</p> <p>Creative and brand agency</p> <p>CRM solution integrated with ATS</p>	<p>Lack of awareness in the market</p> <p>Need for more visibility for end-to-end talent acquisition technology and services</p>	<p>Create more visibility around solutions and go-to market strategy</p> <p>Provide awareness for both technology and creative services</p> <p>Continue to move up market</p>	<p>Next generation ATS providers that have more visibility with 2nd and 3rd generation buyers</p> <p>Global enterprise providers</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

Mobile Apply

Candidate Personalization

Data-Driven AI

BEST SUITED FOR

Enterprise: Over 2500 employees

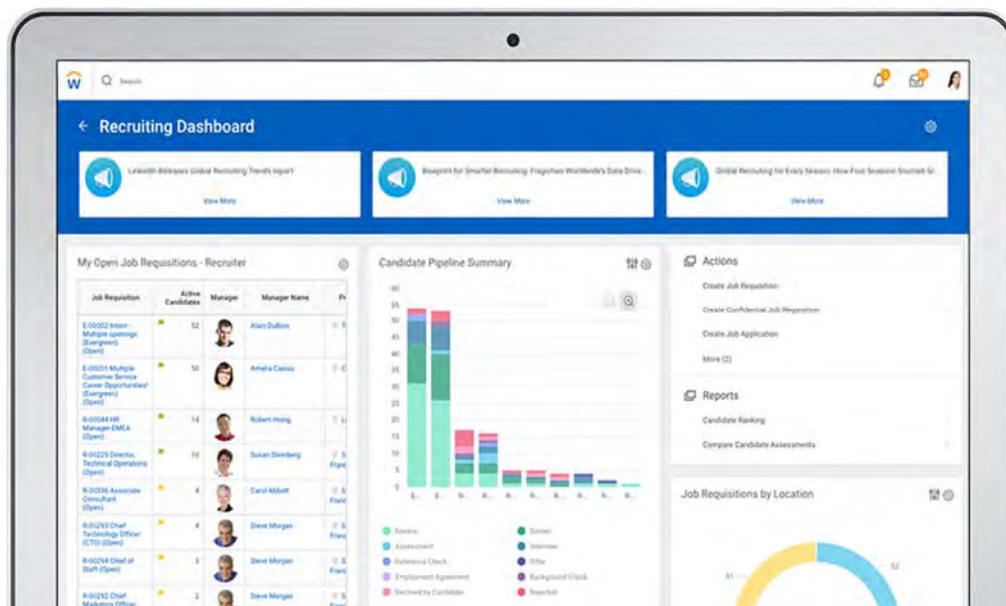
VENDOR PROFILE:

Workday



Workday provides an intuitive mobile interface that gives hiring managers and recruiters the freedom to collaborate and communicate from anywhere. With social sourcing, recruiting analytics, and visibility into the entire talent pipeline, Workday Recruiting offers a new experience designed for the entire hiring team.

October 2017



COMPANY HISTORY

HISTORY

Year Founded: 2005

Private or Public: Public

Heritage: Cloud Financial Management and HCM applications

Offices: For a list of global offices, visit:

http://www.workday.com/company/about_workday/office_locations.php

Revenue: N/A

Growth Rate: N/A

Mergers & Acquisitions: Cape Clear (2008), Identified (2014), GridCraft (2015), MediaCore (2015)

CUSTOMERS

- **Target Market:** Enterprise, Global Enterprise
- **Target Vertical:** All
- **G2Crowd review:** 4.1/5



LEADERSHIP

CEO: Aneel Bhusri

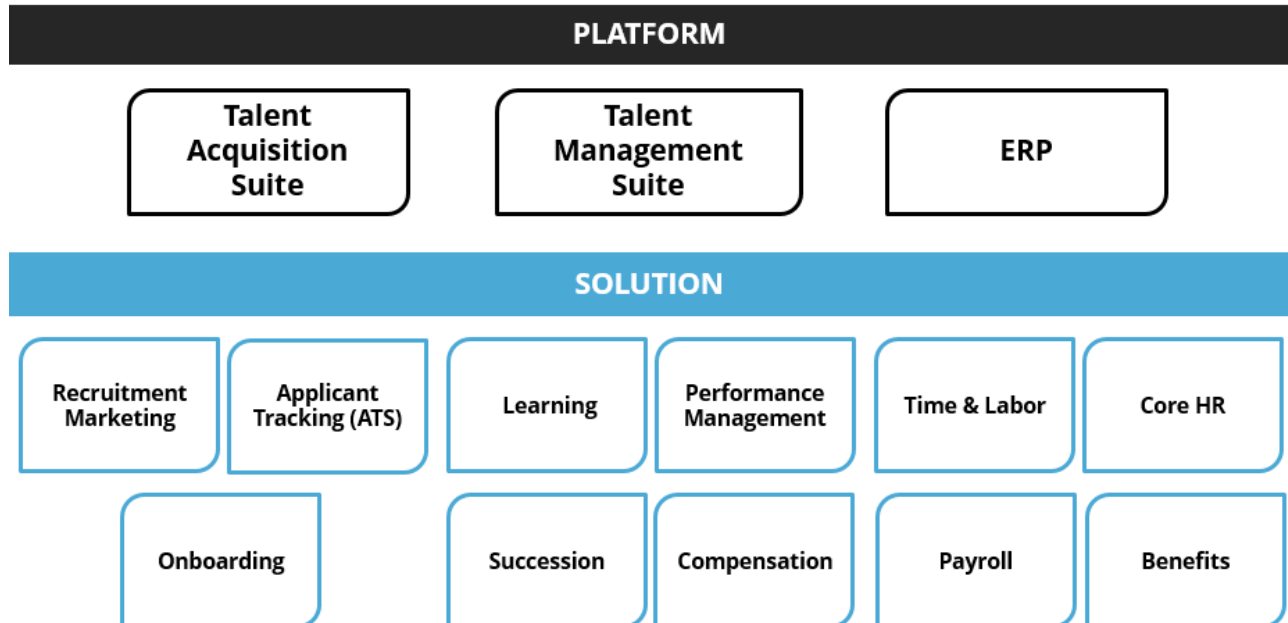
Glassdoor: 90% approval rating of CEO

EMPLOYEES

- **Number of Employees:** 6,000+
- **% Employees in R&D:** N/A
- **% Employees in Sales/Marketing:** N/A
- **Glassdoor rating:** 3.6/5



PRODUCT INFORMATION



KEY DIFFERENTIATORS

END-TO-END SOLUTION



Workday offers a complete solution for the entire talent lifecycle including strategic workforce planning, through screening and selection, onboarding, learning and succession planning. All of these capabilities are in one solution with no integration.

MOBILE FIRST DESIGN



Workday Recruiting is designed and built with the mobile experience in mind – delivering a consumer grade experience for candidates, managers, and recruiters.

HIRING TEAM COLLABORATION



Workday Recruiting was built for the entire hiring team, making it easy for all hiring team members to provide feedback and collaborate on candidates and reducing cycle times in the recruiting process.

PRODUCT INFORMATION

SECURITY AND BACKUP

Comply with DOE, Federal, State, and Local Regulations	Yes
Provide access to all modules with a single login	Yes (only 1 app)
Ability for Administrator to restrict data access by role, IP, ID and report	Yes
SOC 2 Type II Certification	Yes
Ability to include a way 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	No
Support for web service API integrations that meet standard web logic	Yes
Integrate with third party video interview providers	Yes
Integration toolsets for Security Administrators	Yes

ADVANCED CAPABILITIES

Interview Scheduling	Yes
Event Management	No
CRM	Basic elements
Internal Mobility	Yes
Employee Referral	Yes
Apply as a Guest	Yes
Multiple Location Requisitions	Yes

INSIGHT AND ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Professional services</p> <p>Greater collaboration and feedback for hiring teams</p> <p>Powerful analytics</p> <p>Total talent management platform</p> <p>Workforce planning capabilities</p> <p>Onboarding</p>	<p>Perception that Workday is not focused on talent acquisition</p> <p>Lack of complete recruitment marketing solution</p>	<p>Continue to develop more partnerships</p> <p>Enhance recruitment marketing capabilities</p>	<p>Next generation providers that move upmarket</p> <p>Traditional providers that reinvent themselves</p>

THE BOTTOM LINE

KEY CHARACTERISTICS

End-to-End Solution

Powerful Analytics

BEST SUITED FOR

Enterprise: 2500 employees and above

Mid-Market: 500-2499 employees

Appendix:

Talent Acquisition

Ecosystem

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. 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.

CATEGORIES

- **Sourcing:** The solutions that help companies find talent.
- **Employer Branding:** Tools and solutions that help organizations define their employer brand and translate that brand to the candidate journey.
- **Online Reference Checking:** Tools that automate the reference call stage of recruitment marketing.
- **Background Screening:** Tools to check drug use, employment verification, education verification, and criminal checks.
- **Pre-Hire Assessments:** Tools that provide a science for finding the right fit.



SOURCING

JOB BOARDS

- CareerBuilder (www.careerbuilder.com)
- Indeed (www.indeed.com)
- LinkUp (www.linkup.com)
- Monster (www.monster.com)
- The Muse (www.themuse.com)
- The Ladders (www.theladders.com)
- US Jobs (www.usjobs.com)
- Vet jobs (www.vetjobs.com)
- WayUp (www.wayup.com)

JOB ADVERTISING

- Apploi (www.apploi.io)
- Appcast (www.appcast.com)
- Reflik (www.reflik.com)
- Safer Places (www.saferplaces.com)

JOB MATCHING

- TalentHub (www.talenthub.com)
- Vettd (www.vettd.com)
- JobView (www.jobview.com)
- Restless Bandit (www.restlessbandit.com)

JOB DISTRIBUTION

- AppCast (www.appcast.io)
- CareerArc (www.careerarc.com)
- eQuest (www.equest.com)
- WayUp (www.wayup.com)
- ZipRecruiter (www.ziprecruiter.com)

EMPLOYEE REFERRALS

- LinkedIn Referrals (www.linkedin.com)
- RolePoint (www.rolepoint.com)
- ZALP (www.zalp.com)

TALENT PIPELINE

- entelo (www.entelo.com)
- Jibe (www.jibe.com)
- LinkedIn (www.linkedin.com)

SEARCH

- Daxtra (www.daxtra.com)
- Soveren (www.soveren.com)
- Crowded (www.crowded.com)

Sourcing is one of the most fragmented areas of talent acquisition. Companies invest in a variety of solutions providers and categories to help attract and find the best talent.

BRANDING, MARKETING AND RPO

RECRUITMENT MARKETING

- ClinchHR (www.clinch.com)
- Beamery (www.beamery.com)
- Ascendify (www.ascendify.com)
- Phenom People
(www.phenompeople.com)
- Smashfly (www.smashfly.com)
- TalentBrew (www.tmp.com)
- Talemetry (www.talemetry.com)

EMPLOYER BRANDING

- BrandAmper (www.brandamper.com)
- Glassdoor (www.glassdoor.com)
- Universum (www.universum.com)
- The Muse (www.themuse.com)

RECRUITMENT PROCESS OUTSOURCING (RPO)

Recruitment Process Outsourcing is one area of talent acquisition that has transformed significantly over the past few years. Service providers that were once just focused on sourcing and screening have now invested in areas such as analytics and employer branding. Technology has now become ingrained in many of these deals. Below is a list of some of the major partners.

- Alexander Mann Solutions (www.alexandermannsolutions.com)
- AMN Healthcare
- Aon Hewitt (www.aon.com)
- Cielo (www.cielo.com)
- FutureStep (www.futurestep.com)
- Randstad SourceRight (www.randstadsourceright.com)
- Seven Step RPO (www.sevensteprpo.com)
- Talent2 (www.talent2.com)

SCREENING AND ASSESSMENTS

SCREENING

- Accusource (www.accusource.com)
- Back Track
- 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)
- NMS Drug Screening
- Onfido (www.onfido.com)
- Sterling Background Screening
- TalentWise (www.talentwise.com)
- Tax Credit Screen Services

ASSESSMENTS

- Assess Systems
(www.assesssystems.com)
- CPP
- ExactHire (www.exacthire.com)
- General Dynamics
(www.generaldynamics.com)
- HackerRank (www.hackerrank.com)
- HireVue (www.hirevue.com)
- Hogan Assessments
(www.hoganassessments.com)
- Impact Achievement Group
- Optimize Hire Assessment
- Pearson (www.pearson.com)
- PeopleMatter (www.peoplematter.com)
- PI Worldwide (www.piworldwide.com)
- Plan Source (www.plansource.com)
- Profiles International
(www.profilesinternational)
- QuestionMark
- Select International
- Shaker (www.shaker.com)
- Traitify (www.traitify.com)
- Wonderlic (www.wonderlic.com)
- Talent Sonar (www.talentsonar.com)

ONLINE REF CHECKS

- SkillSurvey (www.skillsurvey.com)
- Checkster (www.checkster.com)

The Top 4 Areas of Investment in Talent Acquisition Technology Ecosystem for 2016 Include: Assessments, Background Screening, Employee Referrals and Recruitment Marketing.

DIGITAL INTERVIEWING AND ONBOARDING

INTERVIEWING

- HireVue (www.hirevue.com)
- JobOn (www.jobon.com)
- Montage (www.montage.com)
- Take the Interview (www.taketheinterview.com)
- WePow (www.wepow.com)

ONBOARDING

- Click Boarding (www.clickboarding.com)
- DocuSign (www.docusign.com)
- Equifax (www.equifax.com)
- HROnboard (www.hronboard.com)

A Few Notes about Integration

Integration with the ecosystem is a major consideration when investing in a talent acquisition system. Companies must think about if the provider has open APIs, how the data flows between the two systems, and how seamless the experience is for the candidate. Below are a few questions to consider when evaluating integrations:

- Does this provider have open APIs with my third-party providers?
- Will you ensure data consistency between the two systems?
- Where will the data reside?
- How much will integration between the two providers cost? Will that cost escalate?
- What information needs to get moved between the two systems?
- Who is available to troubleshoot if something goes wrong?

APTITUDE RESEARCH PARTNERS

Aptitude Research Partners is an independent research-based analyst and advisory firm guiding businesses to success within the increasingly complex Human Capital Management Technology Landscape.

Founded by leading authorities and lifelong students of HCM (human capital management,) **Mollie Lombardi** and **Madeline Laurano**, Aptitude Research Partners harnesses over 20 years of combined experience to foster a new conversation about the role of technology in HCM.

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