IDC MarketScape: Worldwide and U.S. Modern Talent Acquisition Suites for Medium-Sized Enterprise 2019 Vendor Assessment
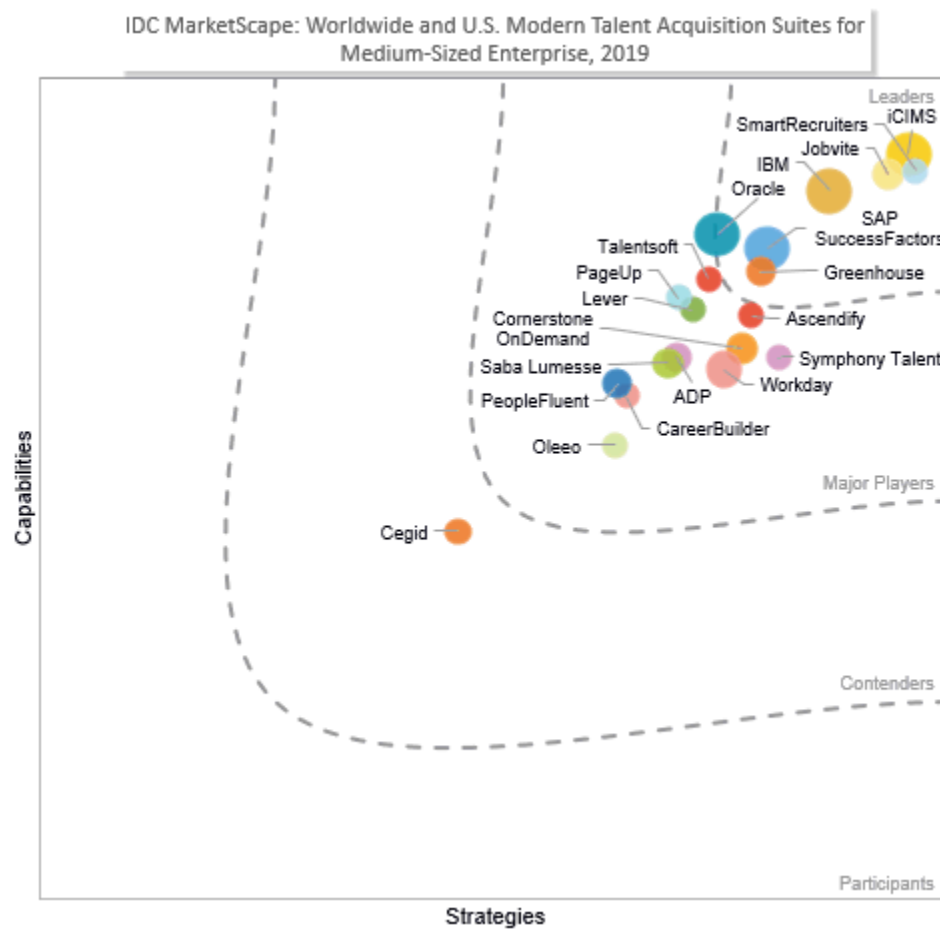
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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide and U.S. Modern Talent Acquisition Suites for Medium-Sized Enterprise Vendor Assessment

Source: IDC, 2019

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IDC OPINION

The world is changing. Global paradigms shift as entire industries undergo expansive digital transformation; new services economies emerge, fragment, and grow; enterprises and start-ups do their best to adapt; and human capital management (HCM) broadens in scope to support fast-changing business needs. Among the companies at the leading edge of innovation (and success), there is one constant: their ability to attract, hire, and engage top talent.

For today's talent acquisition leaders, this is a double-edged sword. On the one hand, business leaders have bought into the notions that candidate experience is a fundamental success driver, that there is an urgent need to evolve talent acquisition beyond reactionary recruiting, and that the recruiting function itself drives tangible business impact (for better and for worse). On the other hand, talent acquisition (and human resources [HR] as a whole) has suffered from years of fatalistic "good enough" performance expectations — and is limited by long-standing operational, technological, and aptitudinal limitations. But as labor markets continue to tighten, recruiting gets more and more difficult — and the business case for upgraded capabilities is stronger than ever.

Talent acquisition has rapidly evolved in recent years, and so has its technology requirements. As the concept of a talent acquisition suite evolved from marketing message pushed by key vendors into a reality for any viable solution in the market, the core recruiting system — the applicant tracking system (ATS) — has evolved to meet demand for broader capabilities and deeper functionality. Competitive solutions in this category have expanded their recruiting suites to offer far more than applicant tracking — including candidate relationship management (CRM), new hire onboarding, job marketing and advertising, and advanced analytics.

In a survey of 441 talent acquisition technology buyers, IDC found that an average of 63.1% of medium-sized enterprise organizations had changed ATS, CRM, or new hire onboarding solutions in the past 18 months and an additional 46.8% were planning to change in the next 18 months (see Figure 2). That's a lot of change — and a lot of competition. Solution providers in this space with broader product portfolios and deeper functionality are growing quickly — and moving further upmarket — whereas recruiting systems delivered as part of an integrated HCM suite are leveraging the extended talent management applications to enhance stakeholder value and reduce total cost of ownership. Regardless of how these vendors come to market, it's safe to say the category has evolved far beyond the ATS; the modern talent acquisition suite is here to stay.

Of course, there is no silver bullet — and technology can only do so much. Some vendors have plenty of vision for what modern recruiting should look like but are still building out client success functions. Others that are part of a larger, more established HCM vendor are undergoing their own transformation as decades-old customers move to the cloud. To better understand how this category is evolving beyond ATS, what differentiates one system from another, and how they're competing, this IDC study represents a vendor assessment of modern talent acquisition suites through the IDC MarketScape model.

FIGURE 2

Changes in Recruiting Systems for Medium-Sized Enterprise

Q.   For each of the following talent acquisition system, what are your plans to change solution providers?

Yes — past 18 months
Yes — next 18 months
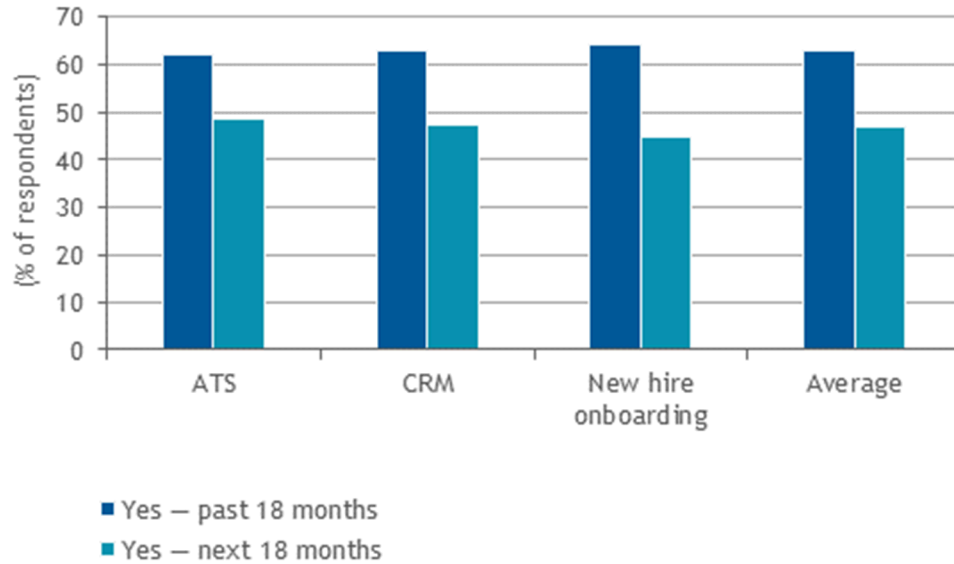
n = 148

Source: IDC's *Talent Acquisition Buyer Survey,* December 2018

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The criteria for inclusion of vendors in this IDC MarketScape analysis are as follows:

- Vendors must offer a native talent acquisition system – including core capabilities found in a standard ATS (requisition management, job advertising and distribution, career site, online applications, resume parsing, etc.) as well as advanced capabilities found in a premier talent acquisition system (including any modules for candidate sourcing, prospecting, and pipelining; new hire onboarding, CRM, and robust reporting and analytics).
- Vendor offerings may be standalone solutions – or part of a larger HCM suite – but must be native, not white-labeled.
- Vendors must manage a minimum of 10,000 job requisitions annually.
- Vendors must generate a minimum of $10 million annually from their recruiting solution set alone.
- Vendors must have at least 50 clients using their recruiting solutions with 1,000+ employees.

ADVICE FOR TECHNOLOGY BUYERS

Today's talent solutions providers have their work cut out for them as talent acquisition grows more complex by the day and modern recruiting technology continues to play a critical role in enabling success at scale. While the same holds true for HR in general, talent acquisition tends to push the envelope a bit further by constantly trying new tools and tactics to gain a competitive edge. And recruiting continues to be incredibly competitive.

Buyers considering talent acquisition suites are laser focused on several operational capabilities: strengthening their employer brand, improving their candidate experience, optimizing recruiting processes across disparate business units and geographies, and providing better insight to the business on near- and long-term performance. We're in the midst of a major replacement cycle, and these buyers and the businesses they serve aren't just looking for software. They see technology as the catalyst for much-needed changes in talent acquisition process and strategy — and are willing to pay top dollar for deeper functionality in critical capability areas that they can only find among standalone solutions.

In a world where the pace of innovation is moving at the speed of thought, many talent acquisition functions are long overdue for technology upgrades. According to a recent survey of talent acquisition technology buyers at companies with 1,000–4,999 employees, 47.3% anticipate increasing their technology spend in the next 12 months. For these specific buyers, a few distinct priorities outweigh others, as shown in Figure 3.

FIGURE 3

Top Talent Acquisition Investment Priorities for Medium-Sized Enterprise in the Next 12 Months

Q.   Which areas will you be most likely to invest in the next 12 months?
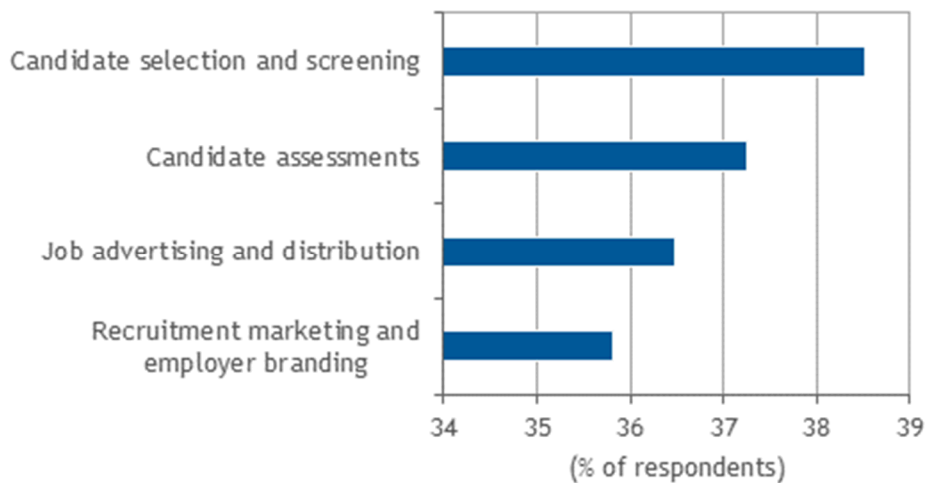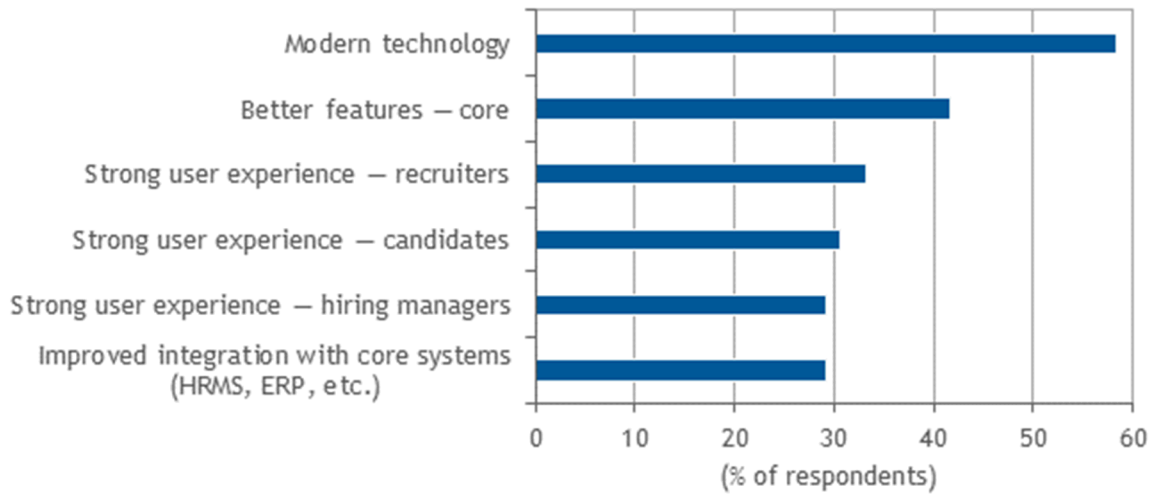

n = 148

Source: IDC's *Talent Acquisition Buyer Survey,* December 2018

For medium-sized enterprise organizations, the highest priority investments include new hire onboarding, candidate experience, and diversity recruiting. Achieving meaningful results in each area requires substantive and lasting change management in the people, processes, and systems that make up a company's existing recruiting operations. On the systems front, these change initiatives require enhancements to user experience (UX), integrations with core HCM systems, and improvements to the core ATS. These requirements are reflected in Figure 4, which includes the most important factors in medium-sized enterprise buyers' decisions to change solutions.

FIGURE 4

Drivers of Changes for Talent Acquisition Suite Vendors in Medium-Sized Enterprise

Q.   *For each of the following talent acquisition system, what is your overall level of satisfaction with the solution you currently use.*

n = 148

Source: IDC's *Talent Acquisition Buyer Survey,* December 2018

To address these specific needs while also upgrading to a more modern system, some organizations will look to their HCM suite provider to deliver a scalable solution that integrates with other systems like learning and performance. At the same time, a growing number of talent acquisition leaders are making a strong business case for standalone specialized, dedicated solutions.

This IDC MarketScape seeks to inform both buyers, as their problem is universal: the traditional ATS wasn't designed to support end-to-end talent acquisition. They need something more than applicant tracking and requisition management. HCM suite vendors have caught on and are making significant investments in recruiting capabilities, while standalone vendors remain a step ahead in a few key areas like CRM and collaborative hiring. Both types of vendors are building systems that marry innovation with utility to deliver tangible value to hiring organizations in medium-sized enterprises – but some are doing so more successfully than others.

With this in mind, it is important to point out that there is no one-size-fits-all talent acquisition system. Some of the products included in this document are primarily designed for small and midsize businesses (SMBs) offering hard-coded best practices in candidate sourcing, recruiting workflows, and the interview process. Others are designed for enterprise hiring organizations anxious to bring their recruiting systems into the 21st century and balance consumer-grade UX with extensive configurability and custom reporting. Still others are designed for the recruiting organization of the future and are powered by artificial intelligence (AI) and cognitive capabilities.

Whatever system best fits your needs, be mindful of the elementary truth that too many have learned the hard way: technology alone will never solve some of the fundamental problems inherent in many recruiting organizations. Optimizing your career site and application process for mobile users won't solve for poor candidate experience. A CRM system won't magically turn your candidate database into rich pools of highly engaged candidates. Robust analytics capabilities won't transform talent acquisition into a data-driven business function.

Modern talent acquisition capabilities like CRM, continuous sourcing, programmatic advertisement, and new hire onboarding are cornerstones of modern talent acquisition. But as a whole, the recruiting industry needs upskilling (and reskilling), stronger business acumen, and significant culture change. And this, more than anything, is driving the most change among talent acquisition suite vendors: Every solution has the core functionality we've come to expect from an ATS, but each solution has a unique take on what "good" looks like in talent acquisition.

When evaluating recruiting suites (standalone or otherwise), look beyond the feature list. Compare client success offerings, consider what kind of technical support is needed during implementation *and beyond,* and never take a vendor's word for it when the vendor says its offerings integrate with everyone — vet this yourself. Get to the heart of a vendor's design principles and take the philosophies guiding product strategy into account. In a SaaS world, finding alignment between your vendor's culture and your own is increasingly important.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Vendors were evaluated on 52 different criteria (detailed in the Appendix) spanning current product offering, global support capabilities, breadth of services, and future road map. Some are more visionary, some have proven track records in supporting global talent acquisition operations, and others show immense promise but are still growing. Regardless, all are worthy of consideration — to get a sense of how this category continues to evolve and innovate to support the modern recruiting organization, if nothing else.

ADP

ADP is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

ADP, with more than 740,000 clients and services offered in over 140 countries and territories, is one of the world's largest providers of human capital management technology and business outsourcing

services. Leveraging nearly 70 years of experience, ADP offers a wide range of human capital management solutions designed to help companies of all sizes find, manage, grow, and keep talent.

Since entering the talent market in 2006, ADP has grown both organically and via acquisition. In early 2017, ADP acquired The Marcus Buckingham Company to deliver employee engagement tools and coaching that help activate talent within clients' organizations. In addition, with its acquisition of WorkMarket last year, ADP is meeting the needs of employers looking to leverage a broader talent network. This is in addition to ADP's full suite of talent solutions that address recruiting, performance, learning, compensation, succession, and engagement for all of its clients. ADP also offers Recruitment Process Outsourcing (RPO), Screening and Selection Services (SASS), and AIRS Recruitment Training and Outplacement services.

ADP also offers a variety of solutions for organizations of different sizes and levels of complexity. This analysis considers ADP Talent, a solution suite focused on larger and more complex organizations (typically firms with 1,000+ employees). ADP Talent is most frequently sold and integrated as part of a talent suite with ADP Vantage and enterprise HCM platforms or in conjunction with other ADP National Accounts offerings. Many large companies that do not use ADP for HCM have deployed ADP's solutions either as a suite or as a point solution.

In the past year, ADP has continued to focus on delivering a consumer-grade user experience across the talent suite, rolling out significant updates to its recruitment, learning management, performance management, and compensation management solutions:

- The ADP DataCloud provides clients with reporting and analytics leveraging the vendor's almost 30 million employee records to deliver benchmarking capabilities; ADP recently released two key features to help clients with its diversity and inclusion initiatives as well as key metrics embedded within the Recruiting Management platform.
- ADP Recruiting Management introduced Visual Search, a patented feature that enables blind search through surfacing skills that then inform a ranking of resumes based on the chosen combinations to reduce bias in hiring practices.
- The ADP DataCloud powers the Pay Equity Explorer, which identifies potential pay gaps for groups of employees in specific EEOC Protected Classes (gender, race/ethnicity, etc.).
- Through the ADP Marketplace, ADP clients can access hundreds of pre-integrated solutions, giving clients the choice and flexibility to integrate solutions that meet their unique needs. In addition, ADP Marketplace provides developers open access to its API library through a secure cloud platform.

In the next 12 months, ADP will enhance the talent experience even further with continued usability improvements, features to support evolving talent practices, and integrations to accelerate its journey in delivering increased employee performance through ADP Talent Management and help leaders better understand their people and teams.

ADP is publicly traded on Nasdaq: ADP.

Strengths

With a recent UX overhaul across ADP Talent's suite of products and continued investment in core capabilities of its talent acquisition solution in particular and client success in general, ADP continues to serve the ever-growing needs of midmarket hiring organizations. Whereas some vendors are busy out-innovating each other, ADP is leveraging its extended capabilities in RPO as well as expansive

data sets on labor supply and demand to support clients managing more fundamental recruiting challenges.

ADP Talent's highly configurable applicant tracking system can support complex hiring operations, and the ADP Marketplace provides talent acquisition managers with hundreds of solutions to bolster those capabilities that matter most to them — from background checks to candidate assessments and more. But most notable of ADP's offerings in this category isn't their software or services alone, but the insights powered by the ADP Research Institute and its mission to keep clients in touch with emerging best practices.

Challenges

ADP is a household name, well known and highly regarded for its long history of HR and payroll services, but it is less known for its software offerings. This poses challenges as the company competes for business in the incredibly crowded talent acquisition technology market, but its vision of the future of work — and the systems required to support it — is rapidly evolving following the acquisition of WorkMarket and The Marcus Buckingham Company. ADP's transformation from a services company to a technology company is well underway, and ADP has a unique opportunity to tell a different story when furthering awareness of its software offerings.

Ascendify

Ascendify is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Ascendify is an end-to-end talent acquisition platform designed for the enterprise. Ascendify has a few key initiatives that shape its product: transform the candidate experience, improve internal collaboration, and deliver better hiring outcomes through an intelligence layer. The system integrates modern strategies like recruitment marketing and candidate relationship management with core functionality like applicant tracking, talent matching, interview scheduling, competency assessments, and onboarding into a single platform.

Ascendify's candidate experience is powered by a mobile-responsive, platform-agnostic user interface (UI) and allows candidates to easily join talent communities or apply for jobs using their social profile from their mobile device. By delivering a user-friendly candidate experience, Ascendify is designed to improve applicant conversion while reducing candidate drop-off.

The platform is designed to allow the entire recruiting team (sourcers, recruiters, and hiring managers) to easily collaborate and improve internal efficiencies. Ascendify's approach to competency-based hiring, which helps companies improve their quality of hire utilizing a configurable capability framework, is most noteworthy.

Ascendify is powered by parsing and matching technologies that surface candidates who exemplify proficiency in vital competencies (whether role or organization specific). Sourcers can hunt for specific competencies rather than generic skills, community managers can nurture pipelines of candidates with budding skills, and recruiters and hiring managers can evaluate candidates in the system side by side to make better hiring decisions.

In addition, the platform leverages competency data to improve the onboarding experience by recognizing the new employees' skill gaps and intelligently surfacing learning assets, leadership programs, and mentorships to fill those gaps quickly.

Strengths

Ascendify has always targeted enterprise-grade hiring organizations with a differentiated offering and has a good track record of supporting the complexity and scale this segment requires. A few notable strengths based on the IDC MarketScape evaluation are:

- Ascendify's applicant tracking system is solid, especially its comprehensive candidate and requisition management and collaborative hiring capabilities. A key area of strength is the UX for candidates and for hiring managers.
- Ascendify's native onboarding module goes a step beyond task and form management to ensure new hires hit the ground running.
- What sets Ascendify's solution apart is that it's built with an ever-evolving competency framework at the core, enabling hiring organizations to break out of requisition-centric operating models and build candidate pipelines that meet talent needs, both today and tomorrow.
- Ascendify offers robust recruitment marketing capabilities, which are fully integrated with its applicant tracking system.

Challenges

Rolling out a more modern talent acquisition suite in a global enterprise environment is difficult enough without the added challenge of forcing recruiters and hiring managers to adopt an entirely different (albeit potentially more effective) model. Ascendify can be used as an out-of-the-box talent acquisition platform, without the use of its competency-based hiring framework — but the framework itself is one of the strongest differentiators of the product and many hiring organizations lack the bandwidth for the change management required to fully realize the power of Ascendify's offering. With this in mind, there are a few things to consider when evaluating Ascendify:

- Those that have taken the plunge are happy with Ascendify's software but identified challenges related to client success and technical support. Considering the depth and breadth of Ascendify's suite of products, this is one area where the company should be investing heavily.
- While external assets like career sites and job postings as well as applications can be supported in any language, the software itself is only offered in English at this time. Language localization is on the company's road map.
- Ascendify primarily sells to midmarket and enterprise organizations, where reporting capabilities are critical. It has recently expanded its offering in this area, but it's an area where the company should be ahead of the curve, considering its target client base.

CareerBuilder

CareerBuilder is positioned as Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

CareerBuilder is a global, end-to-end talent solutions company focused on helping employers of all shapes and sizes find and hire the talent they need. Combining advertising, software, and services, CareerBuilder stands as one of the largest solution providers for recruiting capabilities around the world.

The company has worked with hundreds of thousands of employers — after nearly 25 years in business — and has spent the past several years evolving beyond its job advertisement offerings into a human capital SaaS organization. CareerBuilder has significantly expanded its product suite, through both acquisitions and technology built from the ground up, and today, it provides solutions to address the full candidate life cycle, including:

- Talent and labor market analytics
- Job advertising and promotion
- Candidate sourcing and referral technology
- Applicant tracking and management
- Background checks/verifications
- Managed services to augment talent acquisition teams
- Benefits administration

CareerBuilder's applicant tracking system has advanced search capabilities to view current and past candidates; allows employers to create multiple, customized workflows; includes a mobile-first career site and an interview scheduler tool; and houses all email communications between recruiters and candidates within the system. CareerBuilder's ATS is also integrated with the company's extended product portfolio, including CareerBuilder Talent Discovery, Talent Network, and Employment Screening.

The full acquisition of Textkernel, which leverages machine intelligence for matching jobs and people, has accelerated CareerBuilder's road map of using of AI technology to create job descriptions and candidate resumes.

CareerBuilder recently launched a new talent discovery platform, which consolidates all candidate data sources in one place, includes an intake tool that leverages real-time data around talent supply and demand, and provides a tool for creating and managing email campaigns to target best-fit candidates.

Embedded in CareerBuilder's offerings is data and reporting, which taps into the company's vast repository of real-time and historical data sets to help employers design strategies. For example, during intake meetings, employers can see in real time the number of available candidates in CareerBuilder's database that match the job criteria. Detailed labor market information, candidate data, and recruitment performance data are visualized and presented in automated or customized reports.

Strengths

CareerBuilder works with companies of all sizes across industries, with different product offerings to meet the varying needs of each segment. CareerBuilder solutions are focused on removing complexity; increasing speed and efficiency; and providing an easy, intuitive user experience, and the company offers full-service or "light" versions of different products. Some particular strengths identified in this evaluation are:

- CareerBuilder can claim to meet robust job marketing and advertising capabilities. The company has more data at its disposal on candidate attraction and engagement than any other vendor in this evaluation and is diligently putting that data to work for its clients.
- Customers were especially satisfied with CareerBuilder's recruiter UX, which prioritizes productivity and standardized workflows above all. Customizable dashboards and reduced clicks make it easy for recruiters to focus on the work that needs to be done.

- CareerBuilder has recently brought on new leadership that is heavily invested in fully leveraging the company's extended portfolio of products from end to end. With recent innovations in candidate experience and job marketing, the company is reinvigorating its offerings and reimagining how they come to market.

Challenges

CareerBuilder's greatest asset is also potentially its greatest challenge: The company is a well-established brand in the world of recruiting but is better known for its job boards and resume databases than for its extended suite of software applications.

As the company continues its evolution as a Hello To Hire solution provider, there's work to be done in a few areas:

- For many in the target markets they serve, the ability to self-administrate with little-to-no IT support is critical. Based on customer satisfaction, CareerBuilder has some work to do as it relates to administrator UX: reporting, configurability, and integration capabilities are available but burdensome for admins without more dedicated support.
- CareerBuilder has a lot to offer from applicant tracking to sourcing to background screening. But bringing all of these solutions together as part of a cohesive, solution-centric model is difficult without addressing more fundamental challenges in customer satisfaction. CareerBuilder has been investing in client success as a strategic priority in 2019 and beyond in response, but the results have yet to manifest.
- CareerBuilder has an ambitious innovation road map that includes productization of analytics and machine learning (ML), but its clients are more interested in improvements to core offerings in applicant tracking and new hire onboarding. Specifically, customers want to see improvements to candidate UX and deeper integrations across the portfolio more than applications of artificial intelligence.

Cegid

Cegid is positioned as a Contender in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

The Cegid Group improves the performance of organizations by providing cloud solutions for talent and human resources management as well as finance and business management solutions for the retail industry globally.

Cegid is heavily invested in delivering solutions at the edge of current technology and user trends, including mobility, cloud services and digitalization, Big Data, artificial intelligence, and collaborative platforms.

Serving over 120,000 clients in 75 countries, Cegid employs 2,400 people globally.

The Cegid Talent division of the Cegid Group offers natively unified, cloud-based talent management solutions to enterprise and midsize organizations globally. Its comprehensive talent management suite is designed to complement client's existing HR systems while bringing deep functionality to critical aspects of talent acquisition and onboarding, performance and competency management, learning and development, career management and succession planning, compensation management, and talent profile management and analytics.

Cegid's Talent Acquisition (TA) module is offered as a standalone solution or as part of Cegid Talent Management suite. The Cegid TA module comprises sourcing, some CRM, applicant tracking, and onboarding components. In 2017, Cegid acquired RITA Sourcer, a sourcing platform that allows a client to manage all sourcing activities in one place to drive higher candidate quality and sourcing return on investment (ROI), as well as to shorten the time to fill job postings with real-time analytics. In 2018, Cegid integrated RITA Sourcer into Cegid Talent Management.

Cegid Talent Acquisition differentiates itself through its:

- Configurable, flexible, and scalable solution
- CRM capabilities through a modern user interface
- Enhanced Recruiter Dashboard with integrated KPIs
- Integrated e-sourcing capabilities with ecommerce and cost tracking (through RITA Sourcer)
- Integrated video interviews and questionnaires to accelerate the recruiting process
- Workflows and e-signatures for fast job requisition approval, candidate approval, and job offer approval

Strengths

Cegid further penetrated the talent space with the acquisition of Technomedia nearly four years ago and has been busy leveraging this solution provider's suite of applications – including recruiting. Cegid's applicant tracking capabilities are solid and can support the essential components of talent acquisition and onboarding on a scalable system with an updated interface. The system itself is fairly configurable, reporting is straightforward, and Talent Scout is a great sourcing feature for filling more difficult positions. Some other strengths to call out are:

- Although Cegid's recruiting application is used successfully in industries outside of retail, the product is especially well suited for teams managing hiring operations in the retail space. The company is well attuned to the trends, challenges, and realities of the retail world and has been recognized for the results its retail clients have had using Cegid's recruiting solution.
- For talent retention, Cegid offers a differentiated, complete internal mobility functionality that goes beyond a private careers page to map career paths and the related competencies employees need to be developing.
- Total cost of ownership for Cegid's applicant tracking and new hire onboarding is very competitive, and the value is further enhanced when utilized with Cegid's full enterprise applications.

Challenges

Innovation cycles are never-ending in talent acquisition today and it's increasingly difficult for vendors offering a broader suite of enterprise applications to keep up. That said, the core recruiting capabilities are strong but Cegid faces a few challenges competing in this corner of enterprise technology – even in the retail industry:

- Recruiting operations are often as complicated as they are expansive in retail, and competition in this market is fierce. Implementing a modern talent acquisition suite can be disruptive, and client success is heavily dependent on a vendor's investments in tech support. Whereas highly successful vendors in this space have dedicated technical account managers, however, Cegid has only recently begun increasing its investments in this area.

- Cegid's offering lacks depth in some key areas like CRM and job marketing. Compared with those vendors selling extended enterprise suites, Cegid's recruiting application isn't as configurable or easy to integrate with. Cegid is focused on enhancing its offering in order to ensure it can continue to support modern recruiting operations, but advanced hiring organizations may require more robust capabilities than Cegid currently offers.

Cornerstone OnDemand

Cornerstone OnDemand is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Cornerstone was founded in 1999 and launched its initial public offering in March 2011. While the company's roots are in learning and competency management, Cornerstone has since built out other talent management components organically and now offers all functions.

The company currently supports more than 40 million total active users across all talent management areas. Historically, the Cornerstone portfolio was targeted at large enterprises, but the company offers specific content, pricing, and services to the midmarket and a separate product line for true small businesses.

The company further extends its reach through an extended enterprise product aimed at training and enabling customer and partner networks as well as productized integrations with vendors like salesforce.com. Cornerstone also offers pro bono software and services to nonprofits through its foundation (e.g., disasterready.org, a free elearning portal targeted at relief workers).

In 2018, Cornerstone continued to improve profitability, posting a third consecutive year of non-GAAP net income and its second quarter of GAAP profitability in 4Q18.

Cornerstone supports global customers with users in 192 countries, offices in 21 countries, products in 43 languages, and one-third of its revenue coming from international operations.

Since the previous version of this research, areas of major product investment included Cornerstone Learning (new learning experience platform and subscription content offerings), Cornerstone Recruiting (new candidate experience features and applicant profiles), Cornerstone Performance (enhanced development plans that utilize machine learning and new employee engagement and data benchmarking offerings), and Cornerstone HR (streamlined HR admin).

Strengths

Cornerstone OnDemand has worked with some of the most forward-thinking HR organizations in the world over the years, supporting them with a differentiated software solution for talent management. Over the years, the company has invested hundreds of millions of dollars in its product and its business to ensure its clients are successful and they're at the forefront of innovation. The company's success is deeply rooted in its ability to attract, hire, and retain top talent and is applying what it has learned toward developing a more robust recruiting and onboarding solution. Of the more notable differentiators, a few strengths stand out:

- Talent acquisition is an area of strategic importance for Cornerstone, and it has had major gains in both core and advanced capabilities over the past several years. The company's highly scalable system can support simple and complex recruiting operations, high-volume and professional hiring, and even some recruitment marketing.

- Cornerstone's recruiting solutions boast very strong UX for both administrators and candidates. Most admins will find that they can manage integrations and configuration with ease, and those requiring more tailored solutions can work with Cornerstone's dedicated talent acquisition consulting team. Candidates can preview career paths a job would offer at a prospective firm, and admins can manage the transition to new hire from the same portal they manage applications.
- Cornerstone has built a strong solution for hiring but has a much broader talent vision that puts talent mobility at the core of retention. Because of this, the company offers one of the most advanced talent mobility solutions currently available on the market — and solid new hire onboarding as well.

Challenges

Cornerstone is not alone in its efforts to further mature its recruiting offerings. Many enterprise HCM vendors are also investing in this area to keep up with the rapidly expanding scope of modern talent acquisition. Cornerstone has made significant strides in recent years, but there are a few areas where it must continue to invest in order to be better positioned in the market:

- Cornerstone has built its business by offering a talent management suite to organizations where learning and development is a critical capability. While the company has been at the forefront of innovation in this area over the years, learning and recruiting technology trends rarely overlap — and recruiting has been evolving rapidly of late in both scope and complexity. Today's most popular talent acquisition suites offer more advanced capabilities in new areas like CRM and core areas like job marketing and advertising, but Cornerstone is working diligently to close these gaps in 2019.
- Cornerstone's current offering for talent acquisition and onboarding can support hiring operations of differing sizes and industries, but those organizations that have advanced or frequently changing needs often lack dedicated IT resources internally to help them manage ongoing configuration and integration needs. Cornerstone has recently expanded the scope of its client success strategy to enhance tech support and customer service offerings, and both are areas where its clients would like to see improvement.

  Cornerstone is currently supporting many multinational organizations and services them from offices around the globe. This comes with some unique challenges for a vendor with a reputation for selling effective talent solutions as its clients have high expectations. Having a global presence is not the same thing as having localized resources, and a vendor must have the latter to deliver the same experience to hiring teams in India and in Indiana simultaneously.

Greenhouse

Greenhouse is positioned as a Leader in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Greenhouse is a fast-growing talent acquisition suite provider, with nearly 3,000 customers using the company's suite of recruiting, CRM, events, onboarding, and Inclusion solutions to design and automate all aspects of their hiring operations. More than a traditional ATS, Greenhouse focuses on supporting more competitive recruiting practices with unique product offerings designed to help companies execute a structured hiring process such as structured candidate scorecards, interview prep kits, and candidate experience surveys.

Greenhouse helps companies of all sizes stay ahead in the dynamic field of recruiting and hiring by creating order from chaotic, ad hoc hiring practices. Its scorecard-oriented hiring methodology

provides fast-growing and culture-centric organizations the structure many hiring teams lack — like qualitative feedback on critical competencies, user-based task management, and sophisticated auto-scheduling.

Greenhouse recently completed a Series D funding round in July 2018, led by Riverwood Capital, to fuel continued R&D product innovation and support its growing roster of clients through new customer support centers in Denver and Ireland. In the past three years, Greenhouse has evolved its platform to scale for larger organizations, focusing on more enterprise-grade capabilities like open APIs, flexible access to recruiting data, and customizable permissions controls. The company also has a large ecosystem of integrated partners in sourcing, background check, HRIS, assessment, and payroll categories.

The Greenhouse UX is designed to keep talent acquisition teams a step ahead — both in process and in strategy. Embedded analytics intelligently guide teams to take the right next step to keep a role on track through features like alerts, dashboard data, pipeline reporting, and machine learning-based predictive analytics, which help talent acquisition and finance teams see around corners and make adjustments to hit goals. And Greenhouse's data-driven solution continuously addresses unconscious bias in the hiring process by operationalizing behavior change.

Best practice is baked into every feature of the product itself, which is why Greenhouse continues to invest in client success. The company recently launched a consultant certification program to bring in-depth best practice and implementation support to a wider customer base. In addition, Greenhouse has launched a technical professional services team to help customers create tailored integrations between Greenhouse Recruiting, Greenhouse Onboarding, and its HRIS as well as to answer strategic recruiting process questions.

Strengths

Greenhouse has a definite idea of what recruiting processes need to look like and has spent the past several years turning those ideas into a highly competitive solution. Its talent acquisition platform is an action-oriented system that makes it easy for busy hiring teams to continuously attract high-quality candidates and deliver consistently good hires. Core to its product design is the candidate scorecard, which recruiters and hiring managers develop together when opening a new requisition. This approach supports more collaborative hiring culture and produces quantitative data that recruiters can use to source more effectively. Other noteworthy strengths include:

- Greenhouse has rapidly expanded its solution offering with the introduction of new capabilities, new modules, and new services. A substantial portion of its client base is made of fast-growing companies, and Greenhouse has continued to grow alongside them by proving it can support hiring operations big and global as well as small and regional. Balancing product innovation with client success has been key — and its clients rated Greenhouse highly on both fronts.
- Key areas of innovation for Greenhouse include the release of its CRM module, which has been well received by clients, the fast-growing ecosystem of integration partners, and the introduction of Inclusion, which actively and systematically mitigates unconscious bias in the recruiting and hiring process. Greenhouse shows no signs of slowing, and clients are confident in the company's future plans for the platform.
- Greenhouse has made significant improvements to its reporting and analytics capabilities over the past two years to enable more effective decision making at every point in the talent acquisition life cycle. These gains have greatly contributed to an enhanced UX for admins and hiring managers — and candidates.

Challenges

As with many of the vendors included in this evaluation, Greenhouse has its eyes on the enterprise. With an extensive amount of recruiting best practices hard-coded into the product, however, the company has had to learn that its offering is not the solution suited for everyone. While the candidate scorecard has proven to be a valuable tool for fast-growing organizations struggling to find quality candidates and scale their company culture, more established (and complex) hiring organizations may find this approach to be highly disruptive. As Greenhouse continues to solidify its hold in midmarket and beyond, it will face a few challenges in particular:

- Customer success remains a strategic priority for Greenhouse, and it will need to be for the foreseeable future. Its clients are buying far more than an applicant tracking system — they're buying into a new way to source, select, and onboard talent. Change management has always presented challenges to vendors with innovative talent acquisition solutions, and Greenhouse's clients expect a high-quality experience before, during, and after implementation.

- One area of client experience that is increasingly important for Greenhouse's customers upmarket is the ability to self-administrate the system. Greenhouse has a solid API strategy and has proven it can scale to support larger hiring operations, but its competitors offer system admins more extensive configuration capabilities — and its clients are especially keen to see enhancements in this area.

- As Greenhouse continues to grow its client base beyond North America, it will need to expand multi-language support — both in the application itself and in its services offerings. Localization is one area that has proven to be a critical success factor for enterprise buyers, and thus far, Greenhouse's talent acquisition suite is only offered in English.

IBM

IBM is positioned as a Leader in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

IBM is a cognitive solutions and cloud platform company. IBM's talent management solutions help companies hire, engage, and grow the right set of people to achieve business objectives. The portfolio leverages data, science, and cognitive computing to augment and accelerate human judgement. By bringing together the power of behavioral science, cognitive technologies, and expert consulting, IBM is helping HR managers create a forward-thinking, modern workforce and culture of growth.

IBM Kenexa's talent acquisition suite delivers an integrated set of capabilities to source, attract, hire, and onboard the talent needed by organizations to grow their business. IBM Kenexa has been established in the talent acquisition market for over 15 years, with its large applicant tracking and assessment business that drives a better quality of hire for companies around the globe.

Over the past five years, IBM has expanded its suite to include modern capabilities such as candidate relationship management, recruitment marketing, and candidate analytics to complement the core applicant tracking and assessment capabilities. Flexible configurations and modular product delivery support large, diverse organizations as well as smaller, growing organizations. Powerful automation removes much of the manual work many recruiting teams need to do today.

IBM's focus is on simple user experiences, data-driven decision making, and using cognitive computing to transform the way talent acquisition is done. The newly designed user experiences make it simple for recruiters, hiring managers, and job seekers to perform their jobs fast, on any device. With

the upcoming general release of Watson Talent capabilities (currently in early adopter release), IBM provides a unique suite that utilizes cognitive computing to drive data-driven decisions resulting in higher quality of external or internal hires, faster.

Strengths

IBM Kenexa's talent acquisition suite delivers both foundational capabilities needed to manage a modern recruiting operation and advanced functionality to optimize recruiting processes, reduce cycle time, and improve decision making. While up-and-coming competitors are busy trying to expand enterprise-grade capabilities in scalability, global compliance, security, and configurability, IBM has maintained a competitive edge upmarket.

A few key strengths securing its position as a Leader are:

- Powered by IBM's Watson Apps and Kenexa's extensive library of candidate assessments, the platform is designed to support hiring organizations managing complex recruiting operations by introducing intelligent automation and embedding analytics into key workflows. The company continues to innovate in this segment of the market.

- One of IBM Kenexa's most unique differentiators is the extensive services and consulting capabilities offered by the Talent and Engagement Solutions team. Talent acquisition is changing — both in scope and in function — and it's changing rapidly. Organizations vulnerable to digital disruption or those that simply want to fully optimize their talent acquisition strategy can find a true partner in IBM — and get a highly effective recruiting platform too.

- IBM's customer base is extremely diverse and highly demanding, which makes it all the more impressive that the company was rated so highly in the area of client satisfaction for the quality of its offerings and their delivery. That's not to say it's perfect (clients want to see enhancements to candidate and hiring manager UX), but it does indicate that IBM Kenexa's talent acquisition suite remains a highly viable solution.

Challenges

In the past, IBM Kenexa has made the same mistake as many enterprise technology vendors: It has been too focused on addressing customers' highly specific system needs, regardless of industry best practice. For those among IBM's extensive recruiting customer base with overly configured systems, keeping up with today's endless innovation cycles can be difficult — and creates friction in the vendor-client relationship. With this in mind, there are a few challenges that IBM faces to maintain its position in the market:

- Candidate and hiring manager UX are areas where IBM needs to offer more tailored experiences for its clients. With automation and analytics at the core of IBM Kenexa's product strategy, it would behoove IBM to prioritize some of the more foundational elements of UX over innovation. Interview scheduling is one such area.

- IBM's customers rated their satisfaction level high, but administrator functionality was considered middle of the road. Some customers cited the need to invest further to get the support they required in post-implementation. And while clients are confident IBM's product road map will keep them at the forefront of innovation, they are less optimistic about IBM's plans to continue improving the core.

iCIMS

iCIMS is positioned as a Leader in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

iCIMS is a provider of talent acquisition software solutions that are solely dedicated to managing the entire recruitment cycle – attracting, engaging, hiring, and onboarding great talent – within a single platform. The company delivers a talent acquisition suite and a platform-as-a-service framework called UNIFi that includes a marketplace of more than 230 integrated third-party software solution partners.

iCIMS supports more than 4,000 employers – from small and medium-sized businesses to large global companies – that hire 4 million people per year on its single, centralized platform with multiple career portals in any language.

The solution can be utilized in its entirety or by module to support scale and places a heavy emphasis on ease of use. iCIMS currently offers its CRM solution (Connect) and its recently acquired candidate engagement solution (TextRecruit) on a standalone basis, and it plans to sell its job offer management solution (Offer) as a standalone solution in the future.

In addition to its native offerings, iCIMS has close partnerships with several prominent HR payroll and HRIS providers, including ADP and Ultimate Software, which enable employers to integrate iCIMS software into their preferred HR platform in minutes without implementation support. In 2018, the company introduced its new managed integration offering, Prime Connector, for employers to activate third-party point solutions on their platform in a few clicks without technical support.

Strengths

iCIMS has long championed the talent acquisition function, doubling down on the need for a dedicated suite of applications purpose built to support hiring organizations at a time when many software vendors were pushing for much broader talent management suites. The company's rapid growth since doubling down on this product strategy is evidence of both the viability of the talent acquisition suite in general and the quality of iCIMS' offering in particular. Among its many strengths, a few stand out:

- iCIMS' suite of talent acquisition applications is among the biggest – and continues to grow. The acquisition of TextRecruit brings iCIMS extended candidate engagement capabilities via SMS and chat, including its chatbot Ari. The company is extending this offering to support global companies' communications by integrating TextRecruit with Facebook Messenger, WhatsApp, and WeChat. In addition, iCIMS plans to launch a new recruitment marketing solution and embed programmatic recruitment advertising to help employers find the best candidates and improve the ROI of their ad spend.

- Among iCIMS' most differentiated offerings is the Connector products – managed integrations for third-party applications. In addition to continuing to provide turnkey integrations with third-party recruiting providers, iCIMS will also launch Prime Connector in three more categories, beginning with candidate assessments.

- iCIMS' customers have given the company high marks for years, but as iCIMS continues to move upmarket its clients' needs and expectations have expanded. Last year, the company further invested in its client success organization, including a designated customer success representative for all enterprise accounts. In addition, it rolled out Premium Success, where customers receive faster disaster recovery, 24 x 7 support, and a designated technical support resource. Whereas many of its competitors' clients remain frustrated with generic technical

support offerings, iCIMS is deeply invested in providing a differentiated experience without compromising product innovation.

Challenges

After spending the better part of the previous decade focused on selling to SMB and the midmarket, iCIMS has been increasingly selling to bigger and more complex hiring organizations. Bringing a solution to the enterprise requires operational maturity – both in technology infrastructure and in customer support – and pits iCIMS against a new cadre of competitors. Some specific challenges to tackle are:

- iCIMS has prioritized configurability, scalability, and integration capabilities of its platform above specific feature parities in more recent areas of talent acquisition innovation. Whereas many of its competitors are offering candidate matching capabilities and smart scheduling for candidate interviews, iCIMS has poured many of its R&D resources into building a more easily extensible platform. As the platform matures, the pendulum will need to swing back to focus on adding features that today may be outliers but are quickly becoming core capabilities for prominent solutions. The addition of TextRecruit to the portfolio offers many opportunities on this front.
- iCIMS has successfully sold to HR and talent acquisition buyers for years. As the company moves upmarket, however, it must account for the needs and expectations of another key stakeholder: the IT leaders. They are the gatekeepers of enterprise technology ecosystems and are less impressed by the depth of iCIMS' talent acquisition functionality and more impressed about uptime, security, and ease of integrations. iCIMS' ability to engage this persona with meaningful information on its system architecture and operational infrastructure will be essential in pushing its solution into the enterprise.

Jobvite

Jobvite is positioned as a Leader in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

The Jobvite Platform, anchored by its core products Jobvite Hire, Jobvite Engage, and Jobvite Onboard, is built to support a candidate-centric recruiting model that helps companies engage talent at the right time, in the right way – from first look to first day. Jobvite's talent acquisition suite is complemented by strategic services that help customers compete for talent from sourcing to onboarding. Focused exclusively on recruiting software since 2006 and headquartered in Silicon Valley, Jobvite serves thousands of customers, including Ingram Micro, Schneider Electric, Premise Health, Zappos.com, and Blizzard Entertainment.

Jobvite Hire is an ATS designed to support a positive candidate experience and engage hiring managers by fostering collaboration during the hiring process. Key capabilities include a mobile hiring team app, a mobile-optimized apply process, and highly configurable workflows and access management. Additional capabilities can provide an enhanced candidate experience via premium career site design, on-demand video interviewing, and text-based conversational recruiting.

Jobvite Engage is a CRM solution that works seamlessly with Jobvite Hire and includes capabilities for sourcing, managing passive candidate talent pools, and executing multichannel nurture campaigns that engage passive candidates.

Jobvite Onboard powers new hire onboarding and includes support for multiple new hire portals that are intuitive and mobile optimized, configurable task management capabilities for all stakeholders, and strong compliance support with over 140 government forms.

All Jobvite products leverage a centralized reporting and analytics engine that provides both operational and predictive insights. In addition to out-of-the-box reports provided, users can create custom reports with a simple drag-and-drop interface and can apply custom groupings and formatting. Jobvite offers strong AI capabilities that support multiple use cases including candidate ranking, chatbot screening and job recommendations.

Jobvite has built a robust partner ecosystem in its Marketplace and the platform leverages an integration framework to integrate with any external system, as such offering a comprehensive set of integration solutions ranging from prebuilt, turnkey solutions to fully custom integrations.

Jobvite's Strategic Services are unique in the market and designed to align people, process, and technology to transform talent acquisition teams. Working with its clients, Jobvite helps identify and solve pain points in the current process and formulates an ideal future state for optimizing the platform, resulting in greater ROI and increased adoption.

In early 2019, Jobvite announced a $200 million majority investment from K1 Investment Management to significantly accelerate its growth and product development. Jobvite has gotten a head start on this with the acquisitions of Talemetry (a recruitment marketing platform), Canvas (a text-based conversational recruiting application), and RolePoint (an employee referral and internal mobility solution).

Strengths

Jobvite has focused exclusively on the talent acquisition space for over a decade. The company has spent this time pushing the market forward in meaningful innovation by championing social recruiting early on and embracing the critical importance of the candidate experience. It has balanced these innovations with enhancements to the platform that enable the extensibility and configuration that hiring organizations in the midmarket and enterprise require. With the recent investment from a major growth equity firm, Jobvite is pushing aggressively upmarket and building out its already robust offering even further. A few key highlights are:

- Among all its competitors in the talent acquisition suite space, only a handful have invested as heavily in strategic services as Jobvite has. The company was early to market with high-quality offerings led by seasoned professionals with deep expertise in modern talent acquisition practices and has leveraged these capabilities for supporting client success and driving new client initiatives. Considering how quickly recruiting is changing lately — and how slowly hiring operations typically adapt — Jobvite's ability to address both is a clear differentiator.

- Among all of the participants in this evaluation, few have such strong utilization of their CRM solution as Jobvite. The company learned early on that successful transformation in talent acquisition requires far more than the procurement and implementation of new technologies; by building adoption frameworks around specific recruiting use cases, it offers a highly successful model to an industry in dire need of change management support.

- With $200 million in growth equity investment and three acquisitions kicking off 2019, Jobvite's prospects are bright. Talemetry extends Jobvite's recruitment marketing capabilities considerably, RolePoint bulks up increasingly important talent mobility functionality, and Canvas brings a slew of communications capabilities to support continuous candidate

engagement. As Jobvite integrates three recently acquired companies' solutions into its product portfolio, it moves the goalposts out significantly further for what capabilities make up a modern talent acquisition suite.

Challenges

Jobvite has the product and the capital to bring a differentiated offering to enterprise hiring organizations, but it is not alone in the push upmarket. On the contrary, it's an increasingly crowded space, and Jobvite shares a number of the same challenges as other solution providers with their eyes on the enterprise – as well as a few unique to Jobvite. The areas that are most noteworthy include:

- Building out global operations while simultaneously expanding client success and improving technical support is costly – and Jobvite has to do it all in order to support its increasingly global client base. The company is already well on its way, having made immense progress in the past 18 months, but the work isn't done yet. Based on customer feedback, some high-priority areas include product localization on the front end and back end as well as enhanced global support.

- Whereas its customers rated Jobvite highly for UX across the hiring manager, candidate, and administrator personas, they were somewhat less satisfied with recruiter UX. Workarounds are needed when recruiters can't get a system to do what they want if they have unique requirements, and this can impact productivity as well as limit reporting capabilities. As Jobvite takes on more large accounts, where adoption by recruiters is a critical success factor, this is one area that needs special attention.

- Jobvite has done a good job of helping its customers navigate innovation cycles to date, but considering the rapid pace of change in the market today (i.e., continued growth in CRM adoption, the proliferation of AI capabilities), the need for guidance and change management support is higher than ever before. Jobvite has recently increased the scope of its strategic services offerings to include full-process audits, and the company will need to ensure that this function is resourced effectively to drive meaningful results to customers of all sizes – not just in enterprise.

Lever

Lever is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Lever delivers recruiting software to support companies through some of today's most pressing hiring challenges. Lever is built to give talent managers the reach of a marketing leader, the forecasting ability of a sales leader, and the analytical ability of a finance leader. Customers such as Netflix, Shopify, and KPMG Australia selected Lever based on both its software and its approach to drive hiring outcomes.

The Lever Talent Acquisition Suite consists of Lever Hire, Lever Nurture, and Lever Talent Intelligence:

- Lever Hire is the core recruiting and hiring platform.
- Lever Nurture offers modern sourcing automation and candidate relationship management capabilities.
- Lever Talent Intelligence is the reporting and analytics module.

Using Lever Nurture, customers can easily source with just one click. After pulling a candidate profile directly into the CRM, Lever can automatically launch a marketing nurture campaign to the candidate and unify an entire relationship between the candidate and an organization in one place.

At Lever, where product and design are core parts of the business, the implementation process is part of the user experience, and customers routinely have implementations under 90 days. Many of Lever's customer success representatives are former talent and recruiting practitioners who have lived the life and speak the language of their customers. Lever has built out best practice processes in 15 areas that span head count planning, career sites, sourcing, referrals, scheduling, and offers.

For metrics-based organizations, Lever offers access to data at both the recruiter and executive levels to tackle top-of-funnel hiring concerns such as volume and velocity of hires, fierce competition for talent, and greater diversity in pipeline.

Lever has integrations across the ecosystem including with the key partners across the HR technology stack, including email and employee communications, candidate sourcing and referrals, job boards, assessments, background checks, analytics, HRIS, and onboarding. In addition, Lever supports global compliance including, most recently, GDPR.

Lever has 225 employees with a 50:50 gender ratio, 53% women in leadership roles and 40% female board. Lever is committed to sharing best practices and results on how organizations can be more forward-thinking in D&I both because it's at the core of its own culture as an employer and because it's a key differentiator in how Lever's solution helps companies compete for talent.

Lever was founded in 2012, has raised $73 million in venture funding to date (including a $40 million Series C round in July 2017 led by Adams Street Partners), and has recently opened a second office in Toronto to further support growth and expansion across North America and internationally.

Strengths

Lever entered a crowded market at a time when a company's ability to consistently attract and hire the best candidates was at the top of every executive's list of strategic priorities. Focusing on providing a solution that supports practices where diversity and inclusion were fundamental rather than special initiatives, the company's offering quickly became a standout solution. Today, the solution and the company have both matured to meet the needs of hiring organizations big and small while staying true to their original vision for modern talent acquisition. Across Lever's capabilities and strategies, there are a couple of things worth noting:

- Lever's suite of applications boasts one of the most highly rated recruiter UXs available on the market today. By delivering the tools and technologies today's recruiters need to be both efficient and effective in their attempts to source high-quality candidates and keep them engaged through the hiring process, Lever continues to help clients manage the needs of a key stakeholder in modern talent acquisition — a stakeholder many of its competitors struggle to satisfy.

- Lever's recent investments in client success have built on already strong customer relationships, which go a long way in both retaining existing accounts and adding new accounts. As Lever remains at the forefront of innovation in talent acquisition, it must ensure its clients are able to keep up with the pace of change — and support them in driving adoption of new capabilities. A more robust customer success function is essential.

Challenges

After entering the market with a bang, Lever has continued to win over talent acquisition managers in organizations that are growing quickly – and where culture fit is critical for new hires. Today, its business is made up of small and midsize companies, and the company is building out operational capabilities as it pushes upmarket. It isn't the only company moving in this direction, however, and Lever is a step behind in some respects. With its history of focusing on the client, scaling the business successfully requires the company to manage the priorities of clients big and small – and there are a few challenges it needs to address to that end:

- While Lever clients often choose this vendor because of its reputation of working closely with hiring organizations to change the way they recruit, there remain some notable disconnects between the client success function and technical support where a lack of recruiting expertise can undermine efforts to address clients' more nuanced challenges. Executing meaningful and lasting change in recruiting requires a deeper understanding of the challenges that recruiting operations encounter – beyond technical issues with the applicant tracking system.

- Lever has been positioning itself as an enterprise solution for some time, but its vision of how modern talent acquisition should operate and the role that technology plays can intimidate talent acquisition managers who are looking for straightforward solutions to address more traditional needs. Lever is partnering with clients in SMB and midmarket to evolve their recruiting functions successfully but will need to balance cutting-edge innovation with enhancements to the core solution if it wants to win in enterprise.

Oleeo

Oleeo (formerly WCN Solutions) is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Oleeo's platform helps companies discover unlimited sourcing potential to attract, engage, and hire amazing, diverse teams that change the world for the better. The company's mission is to help recruiters do that faster and more efficiently than ever before.

Hundreds of employers use Oleeo solutions and expertise to improve their business performance. Over the past 24 years, Oleeo has developed a distinct expertise and dedicated solution offerings for diversity, veteran, and high-volume hiring, which include early career and campus recruiting. Many enterprise organizations use Oleeo to support the specific needs of these recruiting initiatives in many industries including financial and professional services, retail, healthcare, and U.K. government and police. The platform is currently used in over 146 countries, with Oleeo providing both customer and candidate support globally.

Built on a talent intelligence engine, the Oleeo platform automates every step of the talent acquisition process. From attracting and engaging precisely the right talent to selecting and hiring the diverse teams that will make the biggest impact, Oleeo's products deliver the speed, efficiency, and edge that recruiting teams need to drive results. Infusing the power of intelligent automation into its flexible platform, Oleeo's customer success teams help thousands of talent acquisition professionals lead with creativity and solve their biggest challenges.

Oleeo's platform is made up of six products: ATS, Event Management, CRM, Interview Management, Talent Mobility, and Program Management. In 2018, Oleeo launched "instant" versions of its Event and Interview products, enabling customers to be up and running in less than 48 hours.

Oleeo also delivers prescriptive talent recommendations built from 24 years of experience. The company automatically maps qualified candidates against the talent DNA of top performers and offers precise recommendations that help recruiters fast-track the right talent and accelerate the time to hire.

Oleeo recently announced the addition of new algorithms into its prescriptive talent recommendations to equip customers with the ability to balance quality candidate selection and compliance with EEOC standards. The new algorithms, which are built into Oleeo's ATS, Event Management, and CRM products, are optimized to ensure no adverse selection in compliance with established EEOC selection rates. Built on 120 data points derived from candidates' resumes and profiles, the recommendations foster diversity and accelerate candidate selection. The customized algorithms are designed to handle high-volume automation and deliver high-quality candidate recommendations especially critical to recruiting success in large-scale hiring events.

Strengths

Oleeo continues to dominate campus and early career recruiting with an impressive suite of solutions built on a sophisticated machine learning and automation engine. As the company continues to grow its client base beyond its traditional corner of the market, it has expanded its offerings to support broader recruiting use cases and address bigger challenges facing today's talent acquisition managers. A few notable strengths:

- Oleeo's suite of applications is surprisingly robust and offers a number of capabilities in applicant tracking and candidate relationship management. Beyond specific features, however, the system is highly configurable, making it as powerful as it is flexible.

- Oleeo is a different kind of software vendor. It has solid technology and is growing its client success organization to meet increased client needs, but it's also recruiting experts itself — with many in the company having served as talent acquisition practitioners in the past. Drawing on their experience as recruiting experts, Oleeo's team works closely with clients to build solutions to problems big and small.

- Oleeo's platform is built to support data-centric recruiting operations, and this has been especially impactful for clients using the solution to solve for specific hiring needs like campus and diversity recruiting initiatives. While the company has delivered some innovative capabilities including candidate matching and embedded analytics, its clients have given it their high marks for continuing to invest in the core system.

Challenges

Oleeo has been punching above its weight for some time now, working with a number of major enterprise organizations to support some of the most under-resourced recruiting operations. And while its clients enjoy working with the Oleeo team, there are some gaps between what's offered and what's delivered. Specific challenges include:

- Oleeo's talent acquisition suite packs a serious punch, but getting things up and running in an enterprise environment requires immense effort on behalf of both the client and the vendor. Implementations can run off the rails without rigorous planning and effective project management, and a number of clients had concerns regarding Oleeo's ability to manage both. Client confidence in Oleeo's viability is high despite these challenges, but execution will always outweigh aspiration.

- The talent acquisition technology space is highly competitive, with innovation cycles running rampant in recent years. Oleeo has done a commendable job keeping up with the latest and greatest, but its customers are more focused on improving the core operating processes than

they are on continuous transformation. From the client's perspective, some specific areas Oleeo should prioritize include enhancing UX for the recruiter, candidate, and hiring manager; easier integrations; and scalability of the solution.

Oracle

Oracle is positioned as a Leader in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Oracle HCM Cloud includes a full set of cloud-based talent management offerings such as recruiting and onboarding, learning, performance and goal management, succession and development planning, talent reviews, and compensation planning. IDC estimates Oracle HCM Cloud has 6,000+ customers. Oracle offers a midsize Talent Cloud (fka Taleo Business Edition) for SMB customers with <1,000 employees (not covered by this analysis). Oracle HCM Cloud leverages underlying technology from Oracle. In addition, Oracle acquired Taleo in April 2012.

Meanwhile, Oracle has delivered a broad set of core HR and talent management solutions in the cloud using its Cloud Platform. Oracle brought these teams together and now has a unified Talent Cloud with unification at every layer (data, process, UX, and analytics). Talent Cloud also incorporates Oracle's strong offerings for mobile and tablets (Oracle HCM Cloud Mobile), social collaboration (Oracle Social Network), and business intelligence (Oracle Business Intelligence) as well as integration tools. Oracle offers these products through its expanded, dedicated global field teams, and it collaborates with its network of partners providing integrated solutions (via Oracle Cloud Marketplace) as well as systems integration and consulting services.

Oracle built out a new video and social-focused learning platform that went into general availability in 2015 and now supports traditional learning also. Investments have also been made in a next-generation UX, modern career planning, candidate portals, continuous goal management, and matrix compensation, placing social collaboration front and center.

Oracle is publicly traded on Nasdaq: ORCL.

Strengths

When Oracle acquired Taleo in 2012, the company immediately became the largest provider of talent acquisition software in the world. Today, Taleo (now known as Oracle Talent Acquisition Cloud) remains a highly viable solution for global enterprises. The platform is highly configurable and highly scalable, and it offers the kind of reliable extensibility that these complex recruiting operations require. Though Oracle has faced increased competition from both HCM suite vendors and recruiting solutions in recent years, it has yielded little ground with its primary buyer audience by focusing on core capabilities over edge applications. Other notable strengths include:

- When it comes to the core applicant tracking system, few vendors offer as much depth and breadth as Oracle. Having proven time and time again that it has what it takes to support large and complex recruiting operations, the company maintains substantial global market share. Rather than getting caught up in the endless innovation cycles that have captured much of the R&D budgets of other vendors, Oracle has invested in supporting the flexibility and extensibility it takes to manage talent acquisition functions in the enterprise.
- Having served the extended recruiting organization for decades, Oracle knows what these users need. It maintains an excellent UX for recruiters and administrators as well as offers

prebuilt configurations for most major third-party applications — which contribute to its high customer satisfaction in regard to reporting and ease of use.

Challenges

Being a player in a highly competitive market comes with some multifaceted challenges. The core is king in global enterprise, and Oracle has wisely prioritized these capabilities over cutting-edge innovations in recent years, but it's worth noting that many of its clients had already turned to the broader market to support more advanced needs — candidate relationship and recruitment marketing, for example. The company had yielded some ground in both thought leadership and market share in recent years, and there are some specific challenges that Oracle must address:

- Last year, Oracle announced Oracle Recruit Cloud — its wholly reimagined cloud-based application, part of the Oracle HCM Cloud — and its intention to move its HCM clients over to this new solution in the coming years. While its HR clients are keen to have their recruiting functions on a fully integrated suite, some of Oracle's oldest talent acquisition clients are wary of what the future holds for their Taleo instances. This may leave a significant portion of Oracle's install base vulnerable to offers from solutions that are aggressively pushing upmarket, though Oracle remains committed to supporting these clients for the foreseeable future.

- From the client perspective, Oracle's talent acquisition suite offers many of the capabilities that clients historically needed to support recruiting operations. But digital transformation of key industries like healthcare, manufacturing, and transportation has been heavily disruptive for talent acquisition managers struggling to keep up with the pace of change. As hiring becomes more collaborative and more data driven, clients are looking to Oracle to enhance UX for candidates and hiring managers — and deliver more embedded analytics across the suite.

PageUp

PageUp People is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

PageUp is a global talent management platform provider that is passionate about helping organizations automate their people processes and strategically align their human resources across borders, business units, cultures, and languages to execute on corporate strategy.

PageUp's SaaS solution unifies recruiting and onboarding, learning and development, performance management, compensation, and career planning and succession planning with Advanced Workforce Analytics running across all modules, assisting employers to overcome talent management challenges that are inherent in operating across both developed and emerging markets.

The company was originally founded in 1997 in Australia but has since expanded globally to support both local and multinational organizations, including several Fortune 500 employers. The PageUp solution is being accessed in over 190 countries, with clients across diverse and multiple industries including banking, mining, retail, hospitality, manufacturing, education, health, and governmental and nonprofit organizations. PageUp serves its global client base through offices in New York; London; Singapore; Hong Kong; Manila, the Philippines; and Melbourne and Sydney, Australia.

PageUp's philosophy has always been to develop the company's products internally rather than acquire third-party products. As such, the company prides itself in the fact that its cloud-based software has been developed in-house via a completely organic code base, promoting uninterrupted

information flow between modules across its entire unified talent management system. In addition, PageUp supports an expanded ecosystem, integrating its solutions with widely used third-party providers of operational talent processes such as online assessments, video interviewing, and HRIS.

PageUp offers a four-tier service model to its clients. Each client is assigned a client portfolio management team – comprising a client portfolio manager, an account executive, technical account management, and a global client support team – to provide an end-to-end service across both strategic and operational levels.

PageUp is led by founder and CEO Karen Cariss, author, winner of EY's 2008 Young Australian Entrepreneur of the Year award, and one of EY's top 50 Influential Australian Women Entrepreneurs in 2015.

PageUp is privately held.

Strengths

PageUp People has spent the past 20 years supporting complex, multinational organizations manage talent with a strong recruiting solution at the core. Today, its suite of talent acquisition offerings has matured to meet the varying needs of an incredibly diverse client base ranging from retail, banking, and finance in APAC to higher education in the United States. PageUp's system is robust and delivered in a user-friendly interface, making it easier for hiring organizations to get the most out of the solution. Beyond the core strengths associated with offering a fully integrated talent management suite, highlights of PageUp's recruiting solution include:

- No matter how many features a solution offers, usability continues to be a key factor in moving the needle. PageUp's clients rated the company highly for both recruiter and administrator UX – two of the most critical user personas in modern recruiting – while UX for candidates and hiring managers were also very strong. Clients specifically noted PageUp's recently revamped interface further improving ease of use, and administrators were especially impressed with PageUp's reporting capabilities as well as easy configuration of the platform.
- PageUp's recruiting solution is priced well for the markets the company serves, and its clients gave PageUp high marks for the value of the solution relative to cost. This can be tied back directly to ease of use for all personas, as achieving greater recruiting productivity and more consistent hiring outcomes requires collaboration across all parties.

Challenges

As PageUp People continues to grow its business in North America and extend its reach into APAC, it is competing with vendors upmarket and downmarket. Selling a full suite of talent management applications pits the company against some of the world's biggest software companies; selling a talent acquisition system pits it against a number of highly viable solution providers with more brand awareness in key markets. To win, PageUp will need to focus its go-to-market strategy to prioritize the needs of specific industries and geographies – as it has done in higher education and other sectors to date. Other challenges include:

- As far as product is concerned, PageUp has quite a lot to offer, but clients are keen to see more progress in candidate relationship management capabilities as well as enhancements to the core applicant tracking system. PageUp's current offerings are solid, but talent acquisition is moving at a breakneck pace these days and technology plays a critical role in supporting modern, agile recruiting practices.

- One of the fundamental capabilities that hiring organizations require in both midmarket and enterprise is platform extensibility, as the talent acquisition suite increasingly serves as the core of the entire recruiting operation. While PageUp offers quite a bit of configurability, it had ceded some ground to competitors in both the HCM suite and recruiting as it relates to establishing an ecosystem of partners and with prebuilt integrations, though it is actively expanding its ecosystem.
- PageUp's ease of use is a serious boon to its customers, especially considering they gave lukewarm ratings for the vendor's client success and technical support offerings. Client retention is a challenge for all solution providers in this corner of enterprise technology today, but especially so for talent acquisition — and ensuring clients are successful beyond implementation is an important differentiator.

PeopleFluent

PeopleFluent is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

PeopleFluent is a provider of integrated recruiting, performance, succession, learning, and compensation solutions designed for large enterprise employers and used by the world's global brands.

Serving over 25 million users in more than 200 countries and territories, PeopleFluent customers trust that the solutions can be configured to meet their unique and specific talent and learning processes.

PeopleFluent continues to see growth across the product lines as well as in key industry verticals. This is validation of PeopleFluent's strategic focus for growth: to deliver innovative talent acquisition and talent management solutions, designed from the ground up to address the unique needs of large enterprise employers, all supported by a world-class team of customer care professionals with deep domain expertise.

PeopleFluent will continue to focus on the markets where the company's solutions are better suited, as well as remain committed to addressing the unique business challenges clients are trying to resolve. PeopleFluent's longevity in the space, combined with a proven track record for innovation, empowers the company to play a strong consultative role within the industry.

PeopleFluent was acquired by the integrated elearning services and technologies provider, Learning Technologies Group (LTG) PLC from Bedford Funding in June 2018. LTG is listed on the London Stock Exchange Alternative Investment Market and is headquartered in London.

Strengths

PeopleFluent has been serving the enterprise with talent management solutions spanning recruiting, learning, performance, and compensation for years with a differentiated approach to long-standing HR challenges. Its vision for an HR function that does more than just support the business and plays an active role in driving strategic outcomes is heavily influential in the way the company has designed its product suite — including its talent acquisition solution. A few standout strengths are:

- With a fully integrated vendor management solution that complements the core recruiting system, PeopleFluent has been able to support the more dynamic hiring requirements of its clients. The ability to track and optimize total talent acquisition efforts in a single reporting environment is invaluable in many of the industries that PeopleFluent serves.

- PeopleFluent was ahead of the market regarding employee experience, having developed its entire platform to support more collaborative work environments through the use of social, mobile, and video technologies. Its new hire onboarding solution is a great example of the power of these capabilities leveraged together, and clients are highly satisfied with the results.

- PeopleFluent's clients also gave the company high marks for its hiring manager and recruiter UXs, which are both essential stakeholders in modern talent acquisition. From a productivity hub for recruiters to streamlined decision making for hiring managers, PeopleFluent offers an excellent experience for both in a mobile-optimized interface.

Challenges

Despite supporting many of the biggest companies in the world with its extended suite of talent acquisition, learning, and human capital management solutions, PeopleFluent has been ceding ground in mindshare for HR heads over the past few years. The company recently became a part of LTG's much bigger portfolio of services and technologies and is aggressively repositioning itself in the market – notably, spinning out its VMS (previously part of its recruiting solution) as a standalone solution among other things. Competition in talent acquisition and HCM at large is only heating up, and there are a few things PeopleFluent will need to address in order to pull ahead of the pack:

- Specific to PeopleFluent's talent acquisition offerings, clients noted gaps related to candidate relationship management – an increasingly critical component of modern talent acquisition operations. To be fair, the rapid proliferation of CRM is a perfect representation of just how quickly things are changing in talent acquisition: two years ago, this application was just emerging in the space. Today, even PeopleFluent's competitors in talent management are offering CRM functionality as part of their recruiting solutions.

- Though the recruiting solution has most of the features and functionality clients are looking for today, they are less optimistic about PeopleFluent's product road map for both enhancing the core solution and adding new features around AI. Further capabilities relative to PeopleFluent's core platform (scalability, configurability, and integrations) were all areas that clients believe also need improvement.

- Supporting the enterprise requires more than scalable technology. With the rapid rate of change talent acquisition – and HR at large – is undergoing in recent years, clients are increasingly looking to their software providers to play a more active role in supporting them after a system has been implemented. And PeopleFluent's customers are especially keen to see enhancements to client success and technical support offerings. Lacking more ongoing support, it's difficult to derive the kind of value from PeopleFluent's talent suite that competitors' clients are touting.

Saba Lumesse

Lumesse, now a Saba company, is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

For Lumesse, talent acquisition is much more than just recruitment: It is about delivering a positive experience for candidates, recruiters, and hiring managers. Modern organizations need teams that can engage like marketers, source like headhunters, and interpret information like data scientists. Lumesse helps its clients build these engaging journeys for their users across any activity, on any device, and at any time using its talent acquisition platform.

With Lumesse's talent acquisition suite, clients can build relevant, tailored, and measurable interactions that are simple, modern, and engaging. Lumesse helps convert candidates, makes

recruiters more productive, and guides and informs hiring managers with tools that understand their journeys and motivations. The suite emphasizes team collaboration and insight-based decision making and is optimized to be worked on any device, at any time. Key capabilities of Lumesse's talent acquisition suite include:

- Lumesse Recruit is the engine of the talent acquisition process, helping recruiters automate the recruitment workflow, coordinate communications and interviews, and measure performance in real time using a reliable applicant tracking system.

- Lumesse Engage helps improve candidate experiences and allows organizations to get closer to candidates through beautifully designed career sites; intuitive, mobile-optimized applications; and simple but targeted content management tools.

- Lumesse Source enhances clients' direct sourcing strategies with semantic-based search to comb through volumes of application and passive candidate data with minimal effort.

- Lumesse Video offers organizations the opportunity to review candidates in volume and at speed while benefitting from the soft, intangible, and contextualized feedback of a formal face-to-face interview process.

- Lumesse Distribute helps recruiters extend the reach and enhance the quality of their job posts by providing insight and access into an extended network of job boards and social media channels. It allows recruiters and hiring managers to quickly and simply assess which networks are most effective for their role against a range of variables and then automates the distribution of adverts to these multiple channels, using predefined integrations.

- Lumesse Onboard integrates employees, from day one, through contemporary and reliable onboarding solutions, specifically designed to suit its customers and their new hires' needs.

- Lumesse Insight offers recruitment analytics that give hiring teams the information they need, in a format they can understand. Clients can utilize real-time dashboards, tailored reports, and interactive filtering to assess performance across all levels and stages of the acquisition journey.

Lumesse has years of experience working with clients to build recruitment strategies that have global scale and local relevance. It offers high levels of security and data compliance, multi-language access, and local experts to support you in 20 countries across 3 continents.

Strengths

Lumesse has successfully supported regional and multicountry hiring organizations in Europe and APAC for some time. Its solution offers extensive functionality including modern features like candidate matching and embedded analytics as well as foundational capabilities including extensive configurability — all on a fully integrated platform. With the bulk of its business in Europe, the company has extensive experience delivering high-quality, localized experiences for its clients and has been at the forefront of the impact of expansive GDPR rules on talent acquisition operations. A few other strengths to note:

- Lumesse's applicant tracking solution offers critical recruiting functionality as well as enterprise-grade capabilities in a highly configurable interface. Its clients are using Lumesse's extended suite of recruiting applications to support high-quality experience for hiring managers and candidates alike.

- Among the vendors participating in this evaluation, Lumesse has a highly robust new hire onboarding modules. Lumesse Onboard, which is fully integrated with Lumesse Recruit, can be tailored to support new hire onboarding programs of almost any sort.

- Talent acquisition operations today are highly data centric, and Lumesse's clients gave the company very high marks for its reporting capabilities. The Lumesse Insight solution brings value-added information to users regardless of analytical acumen with metrics that matter to key personas: recruiters, hiring managers, administrators, and analysts.

Challenges

Lumesse offers one of the more robust talent acquisition suites in the market today, but this evaluation went beyond features and functionality to determine which vendors were successfully supporting clients today without ceding ground in key areas of innovation. Lumesse exhibits modern technology and has a well-funded R&D team, but there were some gaps related to client satisfaction that held it back in this assessment. Specifically, there are a few areas where Lumesse will need to dedicate time and energy to improving itself:

- Competition is fierce among talent acquisition suite providers, and client satisfaction is one of the biggest drivers of retention. Low marks in client success, customer service, and technical support were juxtaposed by high marks for quality of software offerings and represent a disconnect between what Lumesse can build and how it supports clients after implementation. Rather than pushing further out into the edge of recruiting innovation, it would behoove Lumesse to invest in more value-add capabilities in tech support and client success.

- Although Lumesse's talent acquisition suite is priced appropriately relative to its key competitors, clients gave the company lower marks for cost relative to value. Some cited the need for better support post-implementation, and others noted a feeling of being upsold whenever their problems extended beyond the scope of Lumesse's standard technical support offerings. Meanwhile, others are offering complementary strategic services as part of aggressive client success initiatives. To maintain its existing market share — and to successfully grow its presence in North America — Lumesse should gain a competitive edge by prioritizing client experience at the core of its business strategy moving forward.

SAP SuccessFactors

SAP SuccessFactors is positioned as a Leader in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

SAP SuccessFactors is a provider of a cloud-based HCM software suite that includes a comprehensive, intelligent, and connected solution for successfully engaging and guiding candidates, recruiters, and managers through hiring experiences. The company's core talent acquisition capabilities include global job distribution, recruiting marketing, candidate relationship management, applicant tracking, onboarding, cross-boarding, offboarding, and analytics. The solution also provides embedded social capabilities and is integrated with SAP SuccessFactors' talent management and core HR solutions, including Employee Central, Succession and Development, Learning, Performance and Goals, and People Analytics.

Following major enhancements to the candidate experience, SAP SuccessFactors continues to invest in all areas of talent acquisition, with enhancements that automate talent acquisition processes to improve recruiter efficiency, enhance both the internal and external candidate experience to drive engagement, and provide contextual insights to help guide key decisions. Further, and in support of SAP's strategy to enable the Intelligent Enterprise, the company has introduced updates in user experience, analytics, extensibility, and support for key business initiatives, such as total workforce management and diversity and inclusion, by leveraging machine learning and artificial intelligence.

SAP SuccessFactors has expanded postsales customer enablement and support teams. The company continues to add training courses, which are included with a cloud subscription via the SAP Learning Hub. SAP SuccessFactors has broad, deep relationships with key industry, technology, and consulting partners through SAP's PartnerEdge Program. Based on SAP's extensible, connected cloud platform, and working with its partners, SAP SuccessFactors delivers comprehensive solutions to address today's talent management challenges.

Recent developments include:

- **Embedded candidate relationship management.** This includes dynamic and automated talent pools, landing pages, data capture and progressive profiling forms, email marketing, one-to-one SMS and email correspondence, and analytics.

- **Business rules.** Configurable business rules allow customers to automate various processes such as internal/external job distribution, requisition management, workflow routing, offer details, and offer validation. Additional API development opportunities can also be supported to extend rules for specific customer needs.

- **Job Analyzer.** This functionality helps managers and recruiters proactively identify and eliminate gender-biased language from job descriptions, so they can reach the most qualified candidates for every position. Job Analyzer also provides salary recommendations in job requisites by leveraging machine learning functionality that analyzes public and proprietary salary data to present average salary based on location as well as recommended salary based on difficulty to fill.

- **Career Site Builder.** This solution provides an intuitive, point-and-click, and drag-and-drop experience for recruiting teams to easily build and maintain responsive career sites (internal and external), landing pages, and email templates.

- **SAP SuccessFactors App Center.** This is an online repository available to explore and purchase over 150 integrated partner solutions, including more than 60 for talent acquisition.

- **Broader support for key business initiatives.** This includes support for total workforce management (with deeper SAP Fieldglass integration), diversity and inclusion, and health and well-being initiatives.

SAP is publicly traded on the NYSE: SAP.

Strengths

Nearly a decade after being acquired, SAP SuccessFactors has leveraged the benefits of its parent company's global reach and resources to continue pushing its enterprise clients forward into more modern talent practices. The company continue to build value-add innovations while enhancing the core platform's extensibility and has expanded its talent acquisition offering considerably to compete with vendors pushing into enterprise. Relative to its key competitors both in HCM and in talent acquisition specifically, a few strengths stand out:

- SAP SuccessFactors was ahead of the market regarding data-driven recruiting functions with its RMK offering, which brought the most powerful capabilities of Jobs2Web (acquired by SuccessFactors in 2011) together with newer capabilities like smart job postings and SEO. Today, the solution continues to grow to utilize SuccessFactors' recently released CRM capabilities to focus recruiters on activities that improve experiences for both external and internal candidates, enrich candidate pipelines, and ultimately, improve hiring outcomes.

- SAP SuccessFactors is designed to support talent acquisition operations of varying degrees of complexity in a single region or around the world. The system is highly configurable and earned high ratings from customers for administrator UX and for recruiter UX as well.

- Although SAP SuccessFactors offers extensive capabilities to support end-to-end talent acquisition operations, one of SAP SuccessFactors' greatest differentiators is the power of its extended suite of capabilities. Clients rated SuccessFactors' new hire onboarding solution best in class and called out SAP SuccessFactors vibrant ecosystem of third-party solutions as well as dedicated point solutions within the SAP family like Fieldglass in meeting unique, extended operational needs.

Challenges

When it comes to delivering reliable talent acquisition technology that can scale while supporting complex operating environments, SAP SuccessFactors continues to deliver. But as the SaaS world continues to mature, the relationship between vendors and clients is evolving as well. Today's recruiting operations are evolving at breakneck pace as the scope of these strategies is expanding to account for heavily competitive hiring climates the world over. For vendors like SAP, this requires deeper investment in how clients are supported after implementation and beyond technical issues. A few challenges specific to SAP SuccessFactors' talent acquisition offerings are:

- SAP SuccessFactors' talent acquisition suite is priced appropriately to the markets that it serves, but clients perceived a low value relative to cost. Concerns weren't specific to product gaps but rather to support around adopting new capabilities and managing continuous change associated with rampant innovation cycles. SAP has declared 2019 the Year of the Customer, signaling that it is dedicated to closing gaps in its client success and technical support strategies going forward – as it must.

- While SAP SuccessFactors is rated highly for administrator and recruiter UX, an area for improvement is the hiring manager UX. As recruiting success these days is increasingly dependent on collaboration between recruiters and hiring managers, the systems used to manage the talent acquisition process play an important role in supporting this relationship. Delivering value-add insights, streamlining decision making, and capturing manager feedback – all of these are features that many in the space are already offering. To maintain its position, it's a persona SAP SuccessFactors will need to prioritize.

SmartRecruiters

SmartRecruiters is positioned as a Leader in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Used by organizations to attract, select, and hire the best candidate for each job, the SmartRecruiters' Talent Acquisition Suite offers end-to-end functionality to connect people to jobs at scale. The platform is built on a modern cloud enterprise platform that meets compliance requirements globally, with an open ecosystem of 550+ third-party recruitment technology partners, including prebuilt connectors into the world's most common HRIS providers, such as Workday and SAP SuccessFactors.

The platform is flexible, supporting companies with 10 employees all the way to 400,000 employees across industries such as technology, retail, and manufacturing. Companies like Abercrombie & Fitch, Bosch, LinkedIn, and Visa use SmartRecruiters to achieve hiring success and make talent acquisition their competitive advantage.

The products are intuitive, as businesses can distribute jobs through multiple channels within the system, discover candidates through built-in artificial intelligence, manage talent communities with CRM, assess and track applicants with collaboration tools, and report on sourcing spend, hiring plan, and more – all on a single platform. Centralizing recruiting needs to one system delivers seamless UX, superior data quality, and better hiring results.

Founded in 2010, SmartRecruiters invested four years in R&D before going to market, and it has since deployed its talent acquisition suite to 4,000+ customers in over 100 countries around the globe, deepening its North American and EMEA market presence with 96% customer renewal rate. Headquartered in San Francisco, SmartRecruiters has seven offices globally, including Berlin; Krakow, Poland; London; Paris; Spokane, the United States; and Sydney, Australia while offering 24 x 7 technical support worldwide.

With SmartRecruiters, any stakeholder involved in the hiring journey (candidates, recruiters, hiring managers, interviewers, and executives) is engaged via desktop or mobile devices for a productive and delightful experience – anytime, anywhere – turning talent acquisition into a competitive advantage.

Strengths

SmartRecruiters has long been on the front lines of recruiting innovation, pushing the boundaries on the role software plays in supporting the rapidly expanding scope of talent acquisition. Today, its suite of recruiting applications offers extensive functionality and prioritizes several key capabilities: ease of use, embedded intelligence, and a scalable platform that meets compliance requirements globally. Among its notable strengths, some are:

- While the talent acquisition suite has expanded far beyond the ATS, this system remains a critical core component of today's viable solutions – and SmartRecruiters' out-of-the-box system remains a forerunner. The system integrates easily with other third-party applications, their reporting and analytics are strong, and the platform can support small businesses and large enterprises. Years of deep investments in continuously improving the core product while expanding its other applications has yielded industry-leading customer satisfaction in both the depth and the quality of the offering.

- Whereas any software vendor worth its salt would claim its solution is easy to use, SmartRecruiters is undoubtedly ahead of the competition when it comes to UX. SmartRecruiters is lauded by customers in all aspects of UX: candidate, hiring manager, recruiter, and administrator. The system is mobile responsive, of course, but SmartRecruiters has introduced many mobile-specific capabilities – like parsing a resume from a picture on a smart device, a dedicated mobile application for hiring managers, and more.

- Whereas many of the software vendors in the recruiting market are heavily productizing and marketing AI capabilities, SmartRecruiters is taking a different route: it's leveraging cutting-edge technologies like machine learning and deep learning, process automation, and natural language processing to enhance the core platform. The result is a high-powered and highly viable product road map that focuses on increasing value for the clients.

Challenges

Competition in this market is fierce – and shows no signs of slowing – and though SmartRecruiters delivers the functionality and scalability to serve companies of all sizes across many industries, winning on all fronts is a constant battle. Clients in large enterprise have different needs and

expectations from those in SMB — features that take off among retail industry clients may not stick in healthcare. While SmartRecruiters has strong momentum, there are a few challenges to address:

- Though clients have relatively few complaints about SmartRecruiters' Talent Acquisition Suite, the problems they cited could quickly become problematic. For example, SmartRecruiters offers clients a very straightforward interface for configuring recruiting and hiring workflows, but clients want more regarding the system's overall configurability. The platform packs a lot of punch, but talent acquisition processes vary widely. SmartRecruiters' ability to accommodate specific needs is a critical success factor as it competes both upmarket and downmarket.

- SmartRecruiters doesn't currently offer a native new hire onboarding module and has been noncommittal regarding it plans on this front. Though it partners with several other onboarding solution providers, clients that are accustomed to SmartRecruiters' UX find most of these solutions lacking. For SmartRecruiters, this creates friction with stakeholders (recruiters, candidates/new hires, and administrators) that will need to be resolved sooner than later.

Symphony Talent

Symphony Talent is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Symphony Talent has established a unique position in the talent acquisition solutions market by combining creative and technology to create, activate, and maintain employer brands and deliver seamless, personalized experiences for candidates, employees, and recruiters.

Symphony Talent creates candidate experiences that are reflective of the consumer experience, leveraging machine learning and automation to transform recruiters' efforts from reactive to predictive. Symphony Talent's Talent Marketing platform provides a unified candidate experience across all paid and earned media channels, career website, candidate relationship management, and the actual hiring process. With Symphony Talent's integrated data model along with a highly responsive user interface, the platform provides a single access point for recruiters and talent managers across the entire talent marketing life cycle — from awareness to advocacy.

Symphony Talent's integration capabilities with the industry's enterprise applicant tracking systems, as well as a key partnership with Google Cloud Talent Solution, continue to fuel the organization's growth trajectory while continuing to help forward-thinking talent acquisition managers navigate digital transformations and drive measurable results.

With 11 connected global offices and over 300 multinational employees to support its global client base, Symphony Talent services enterprise, large, and midsize employers — especially in healthcare, retail, hospitality, finance, and manufacturing verticals.

Clients such as Amazon, UCLA Health, Dick's Sporting Goods, Mars, Hilton Grand Vacations, Unilever, Baylor Scott & White, Michaels, Four Seasons Hotels and Resorts, Nestlé, UnitedHealth Group, Sky, and Epsilon rely on Symphony Talent to power their employer branding and recruitment marketing efforts.

Strengths

From Hodes' recruitment marketing and branding services to M-Cloud's data-driven media optimization capabilities, Symphony Talent's extended suite of talent acquisition solutions is one of the most robust in the market. Its CRM solution was early to market and has been well complemented by a highly configurable ATS. As they continue to evolve their unified go to market under the Symphony

Talent, the company is doubling down on its recruitment marketing capabilities as its primary offering — and offering some highly differentiated solutions. Specific strengths include:

- From robust career site management capabilities to intelligent to automated drip campaigns to event management, Symphony Talent's native recruiting CRM solution is highly robust and deeply integrated with its ATS as well as its job marketing and advertising solution, M-Cloud.
- Symphony Talent is going all in on digital transformation of talent acquisition with an ambitious product road map to incorporate and productize many AI capabilities — and is delivering new capabilities fast. Its ability to take client or industry feedback and turn ideas into product is unparalleled in this space. The industries it serves — most notably, healthcare, retail, and hospitality — have been heavily disrupted by rapid growth and transformation in recent years, and Symphony Talent is dedicated to keeping itself on top of things.

Challenges

In this extremely competitive (and increasingly crowded) corner of HR technology, good technology and modern UX are only two components of a successful model. Symphony Talent offers both, but faces other, more nuanced challenges. The lack of brand awareness is one, but it's making gains in this area.

Other more pressing challenges include:

- Symphony Talent has extensive capabilities for recruiting marketing in both software and creative services. And though it offers a solid ATS, the majority of its clients aren't using this module extensively — preferring to deploy Symphony Talent as an engagement layer on top of their legacy systems of record. This can create some innate challenges for client success as Symphony Talent doesn't control what it doesn't own. Integration and configuration issues that arise from third-party systems that are poorly deployed or insufficiently supported can be a major pain point. On those rare occasions when problems arise, Symphony Talent may find itself at the mercy of other vendors that aren't as dedicated to enabling modern recruiting practices.
- Symphony Talent's recruitment marketing capabilities are excellent, and talent acquisition managers are keen to get as much out of these solutions as they can. Many of the company's clients lack dedicated IT resources and need to be more self-sufficient. For example, though Symphony Talent offers some powerful analytics capabilities to drive data-driven decision making across the system, its clients are still looking for more extensive reporting capabilities — and stronger administrator UX in general.

Talentsoft

Talentsoft is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Talentsoft serves over 2,000 clients and 9 million users in 130 countries and in 27 languages. It has local teams in 15 countries worldwide, most notably in Europe. Recently, the company secured $50 million in funding from Francisco Partners, which joined existing investors Goldman Sachs Merchant Banking and Highland Capital Partners Europe as its main investors.

Talentsoft offers a highly customizable collaborative digital platform, My Talentsoft, that fosters interactions and transforms employees' work experience by integrating competencies management with career paths and training courses.

Talentsoft applications adapt to European and international best practices and regulations to guarantee fast deployments, whatever the organization's complexity or global footprint. Organizations of all sizes, from small businesses to multinationals, in both the private and public sectors, use Talentsoft to develop their talent.

Talentsoft's product differentiators include:

- An intuitive user interface based on dedicated HR apps with a single-page approach and zero navigation
- Full compliance with data privacy regulations
- Full support for complex and decentralized multinational organizations
- Fast module deployment enabling quick wins
- An open platform with an innovative employee-centric marketplace
- Prepackaged analytics dashboards with no implementation time and a freemium business model

Strengths

Talentsoft continues to grow its business beyond Western and Central Europe with its differentiated approach to talent acquisition and retention. The company's talent acquisition suite is built to support centralized and decentralized recruiting functions across multiple regions and business units — and is well complemented by its broader talent management suite. Other notable strengths include:

- Many of Talentsoft's customers are coming off of outdated and homegrown solutions; so ease of use is critical for recruiting stakeholders. The company's recruiting applications were built to be flexible, specifically focusing on the recruiter and administrator UXs as key capabilities. Both UXs are highly rated by customers, but candidate UX earned even higher ratings.
- Talentsoft offers quite a lot relative to its solution's cost. Not only is the software priced to sell, it also comes with high-quality customer success and technical support offerings bundled into the licensing fees. That's not to say Talentsoft is giving its recruiting solution away, but rather it is committed to clients maximizing their return on investment — and offers all recruiting clients dedicated ROI analysis to ensure the solution is being utilized to its full potential.

Challenges

Talentsoft may not have as much brand recognition as some of its competitors, but this hasn't stopped the company from experiencing significant growth over the past several years. As Talentsoft continues to expand its market share beyond Western Europe, however, some challenges stand out:

- Though Talentsoft offers a strong applicant tracking system at the core and impressive new hire onboarding, more advanced recruitment marketing capabilities are still evolving. Components like job marketing and advertising as well as CRM are increasingly critical for buyers in midmarket and enterprise — and Talentsoft will need to continue investing in both.
- Talentsoft offers a high-quality talent acquisition solution, but its broader go to market hinges on the power of recruiting strategies integrated with performance management and learning and development. It's a common theme among many more established vendors in North America, which is a strategic market for Talentsoft. To compete, it will need to further articulate a more differentiated value proposition.

Workday

Workday is positioned as a Major Player in this 2019 IDC MarketScape evaluation on worldwide and U.S. modern talent acquisition suites for medium-sized enterprise.

Workday is a provider of enterprise cloud applications for finance and human resources. Founded in 2005, Workday delivers financial management, human capital management, and analytics applications designed for the world's largest companies, educational institutions, and government agencies. Organizations ranging from medium-sized businesses to Fortune 50 enterprises have selected Workday.

Workday Recruiting is an end-to-end talent acquisition application built to help you find, share, engage, and select the best internal and external candidates empowering your organization to meet the hiring objectives of today and plan for the workforce of the future.

Together with Workday HCM, Workday Recruiting delivers a single system to manage the entire talent life cycle. Beginning with strategic workforce planning, through sourcing and selecting candidates, Workday delivers a seamless recruit to hire experience to candidates from outreach to onboarding and beyond.

With over 1650 recruiting customers today, Workday Recruiting was designed to support the entire hiring team by facilitating collaboration with hiring managers and driving efficiency for the recruiters delivering a central workspace to execute on recruiting activities transforming the recruiter experience.

Workday delivers robust reporting capabilities, empowering organizations to make better hiring decisions, deliver actionable dashboards, and enable drilling into hiring metrics and taking action directly from reports. In addition to insights, Workday also delivers benchmarking for recruiting, enabling you to know how you compare with your peers of a similar size, industry, and more.

Strengths

Building a suite of talent acquisition applications from the ground up has proven to be an immense undertaking for Workday. In the years since the company released its initial offering, it has learned the hard way how difficult it is to meet the needs of the many stakeholders within an increasingly demanding recruiting organization. The work is never done in this corner of HR applications, but Workday continues to work closely with its clients to close key gaps and enhance core capabilities – and has built up substantial momentum along the way. Some notable strengths are:

- Workday has always prioritized client success as a strategic capability and is just as dedicated to supporting its recruiting customers as any other. As part of the company's latest release, the product and client teams spent hours working directly with its biggest and most challenging customers to identify critical product enhancements and gaps in functionality – and the results are self-evident: Customers of Workday rated the company very highly in the area of client success overall and ongoing support.
- Workday's talent acquisition offerings are still maturing, and the product team is moving quickly to ship new capabilities and deeper functionality. The company's previous two releases were its most ambitious yet with the introduction of candidate self-scheduling, native candidate sourcing and matching, extensive diversity reporting and analytics, and a deep integration with Slack.
- A core tenet of Workday's overarching product strategy is the power of data. The company's client base spans far beyond its recruiting users to include executives in finance, operations,

and human resources — and these stakeholders care about far more than specific features offered within recruiting. The power of a fully integrated suite of native enterprise applications bears out in the reporting and analytics capabilities Workday offers and an area where customers rated the company highly.

Challenges

Workday's foray into talent acquisition is a cautionary tale of the challenges that come with selling to a mercurial and oftentimes querulous recruiting user. While Workday's offerings in other segments have been well received even when initial releases lacked the depth of offerings, its recruiting solution has taken quite a beating in public forums for gaps big and small. The team has done a commendable job of taking feedback (constructive and otherwise) in stride and is working diligently to enhance and improve the recruiting solution, but a few challenges remain:

- Workday has done a commendable job closing critical gaps in the core applicant tracking solution, but its competitors have been at this for much longer — and are a step ahead in some key areas like candidate relationship management and job marketing and advertising. Though Workday is developing some native capabilities in this area, it should look to the broader ecosystem of point solutions to augment current offerings in the near term.

- Reporting at the highest level of the Workday environment is strong, but recruiting customers are anxious to get more advanced capabilities specific to their needs. The introduction of diversity metrics is a step in the right direction; enhancements to custom report building will further address needs in this area.

- Workday's recruiting solutions are priced competitively, but customers gave mediocre marks for relative value of the solution. With client success such an important differentiator, it's crucial that Workday develops more outcome-oriented support initiatives — and get more meaningful success stories out to the market.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

For this IDC MarketScape, the weights for capabilities and strategies was shifted in favor of capabilities today (60%) and strategy for tomorrow (40%). Although some players have been in this

space for over a decade, the talent acquisition suite is itself still a budding category. As such, the evaluation was more heavily focused on what vendors are currently offering – both in product and in service. Those with more robust capabilities (offering all core functionality identified as standalone, supporting clients in change management and strategy optimization, etc.) rated more highly than those that are still early in their journey. As the category matures, the weights may change.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC defines talent acquisition as those functions that serve to attract, source, engage, and assess candidates as well as to select, hire, and onboard new hires. The scope of talent acquisition has rapidly expanded in recent years, and the function itself has evolved accordingly – as has its technology requirements. As a result, the core recruiting system, the applicant tracking system (ATS), has evolved to meet demand for broader capabilities and deeper functionality.

Competitive solutions in this category offer far more than applicant tracking to include modules for new hire onboarding, candidate relationship management, and even internal mobility. This IDC study represents a vendor assessment of the modern talent acquisition suites offered for medium-sized enterprises (defined as 1,000–4,999 employees) through the IDC MarketScape model.

Strategies and Capabilities Criteria

IDC evaluated a broad set of criteria in both strategies and capabilities as part of this IDC MarketScape – 52 to be exact. Evaluation spanned solution offering, breadth and depth of services, global capabilities, and client success.

Tables 1 and 2 outline the specific factors IDC consider to be best in class in this category.

TABLE 1

Key Strategy Measures for Success: Worldwide and U.S. Modern Talent Acquisition Suites for Medium-Sized Enterprise Market

Strategies Criteria	Definition	Weight (%)
Functionality or offering strategy	▪ For the best-of-breed talent acquisition systems market, excellence is marked by plans to offer a full suite of modern talent acquisition capabilities through organic development, through a marketplace, through partnership, or through acquisition. ▪ AI road map includes utility offerings incorporating ML, RPA, and NLP either currently available or planned for release in the next 12 months. Examples include smart scheduling; automated workflows from apply to screen, interview to assess, offer to pre-boarding, candidate relationship management, event management, and so forth; programmatic advertising; and candidate matching algorithms (candidate facing or recruiter facing). ▪ Integration and API road map includes open APIs, developer toolkits, deep integrations with strategic partners, and dedicated app marketplaces. ▪ Modern core road map includes features and functionality essential to supporting the future of talent acquisition including internal talent mobility, collaborative hiring, dedicated UX for key stakeholders (hiring managers, admins, coordinators, sourcers, etc.), embedded analytics, and custom reporting.	19.0
Growth	▪ Buyers in different vertical industries and of various client sizes are interested in investment in talent acquisition solutions that service their unique needs. Excellence is demonstrated by plans to serve new markets such as hourly and evergreen hiring, healthcare and retail industries, or SMB. ▪ Growing and maintaining market share ▪ Talent acquisition is moving to a global scale. Excellence is determined by existing presence and plans for global reach to serve both North America–based multinationals and foreign-headquartered firms.	17.0
Financial/funding	▪ Strategic plans for growth over the next three to five years include entering new markets and serving new client bases. Score is based on viability and specificity of plans.	8.0
R&D pace/productivity	▪ Modern talent acquisition systems support a different kind of recruiting strategy, and marketing strategies are rooted in the role vendors play in supporting needed change and driving tangible value. ▪ Strategic plan for attaining or retaining functional superiority over competition exists. What is the release schedule for the next 12–18 months? ▪ R&D is essential to maintaining position of leadership in this dynamic market. Leaders will invest more per R&D head count than all others.	18.0

TABLE 1

Key Strategy Measures for Success: Worldwide and U.S. Modern Talent Acquisition Suites for Medium-Sized Enterprise Market

Strategies Criteria	Definition	Weight (%)
Delivery	▪ Customer is confident that current road map will meet future needs. ▪ Customer is confident in vendor's AI road map. ▪ Customer is confident in vendor's ecosystem strategy. ▪ Customer is confident in vendor's road map for future foundational offerings. ▪ Proven by case studies across all ranges (SMB, midmarket, enterprise, global enterprise). ▪ Customers are satisfied with the level of resources vendor offers to support operations at the local and global levels.	26.0
Innovation	▪ Vendor is prepared to support customer through transformation initiatives across multiple use cases. ▪ Customer is confident that the vendor is prepared to provide support through transformation initiatives across multiple use cases.	6.0
Other	The solutions are geared toward well-defined target markets. The message is concise and appropriate for each of the target markets — aspiration is balanced by execution as vendor consistently delivers on brand promise.	6.0
Total		100.0

Source: IDC, 2019

TABLE 2

Key Capability Measures for Success: Worldwide and U.S. Modern Talent Acquisition Suites for Medium-Sized Enterprise Market

Capabilities Criteria	Definition	Weight (%)
Functionality or offering	▪ Candidate relationship management has become a core component of modern talent acquisition. As such, leading vendors in this category must deliver CRM functionality to some degree.	43.0
	▪ Core recruiting module must support essential functions and processes, but best-in-class solutions offer advanced functionality to support modern operations.	
	▪ Job marketing and advertising are core to modern talent acquisition strategy, and leading vendors in this category offer advanced capabilities to support competitive practices.	
	▪ New hire onboarding is an essential component of effective talent acquisition. Leading vendors in this category will support modern onboarding practices with dedicated functionality in this area.	
	▪ Modern talent acquisition requires data-driven decision making and operations. Leaders in this category offer robust reporting options within the platform and make it easy to export data to other BI systems.	
	▪ Analytics are an essential component to modern talent acquisition operations. Leaders in this category deliver advanced capabilities including live analytics, customizable dashboards, and embedded analytics in key workflows.	
	▪ Candidate experience is the foundation of an effective recruiting strategy — and that extends to the technology employees use to engage with candidates. Leaders in this category account for candidate expectations as it relates to usability and access to relevant information.	
	▪ With the rapid pace of innovation in this space, the interface through which new capabilities are delivered is as important as the capabilities themselves. Likewise, personalized dashboards and notifications improve recruiters' ability to make the most of the systems they're using to manage key processes. Leaders in this category deliver best-in-class UX to their core user persona.	
	▪ Hiring managers have always been important stakeholders in the recruiting process, but rarely had the ability to access essential information or to easily provide feedback to recruiters. Today, leaders in this category offer dedicated portals for hiring managers to do what they need to do to keep things moving along.	
	▪ Today's talent acquisition systems have more users than ever — each with their own specific permissions and access to sensitive information. Similarly, there are more stakeholders asking for access to reporting data (more applications requiring integrations to the core platform), and administrators rarely have the support from IT they would like. Leaders in this category take special care to ensure these power users have the resources and functionality they need to keep things running smoothly.	
	▪ The vendor landscape in talent acquisition (and HR tech in general) is both expansive and fragmented, and recruiters use more tools than any other cohort in HR. Leaders in this category offer requisite capabilities for integrating disparate tech stacks — both upmarket systems and downmarket applications.	
	▪ Talent acquisition is increasingly complex, and a vendor's ability to support the specific processes and operational best practices of its clients is a critical success factor. But there is such a thing as overcomplexity. Leaders in this category balance configurability with scalability through their own proven best practices.	
	▪ One of the strongest indicators of vendor viability in modern talent acquisition is the vendor's ability to scale with its customers. While scalability is more important for some customer bases than others, leaders in this category can meet the needs of their biggest clients as well as their smallest.	
	▪ Many organizations source for talent across a multitude of languages. Breadth of language support is just one aspect. How solutions enable the creation and posting of hiring opportunities, including both system and user-translated content, soliciting applications from diverse language speakers can dramatically simplify administration, end-user interactions, and candidate processing.	

TABLE 2

Key Capability Measures for Success: Worldwide and U.S. Modern Talent Acquisition Suites for Medium-Sized Enterprise Market

Capabilities Criteria	Definition	Weight (%)
Portfolio benefits	Excellence in this category is shown by having the right partners and a strong system that engages partners at the right time. Excellence is also shown by having a strong partner ecosystem.	2.0
Range of services	Vendor is attuned to modern best practices in talent acquisition strategy and operations and supports change management through the delivery of both modern features and functionality as well as best practice consulting and professional services.	2.0
Total cost of ownership of product/offering to IT buyer/user	How are solutions priced — in terms of volume of hiring, modules added, and size of candidate database, as well as relative competitiveness with the market.	2.0
Customer satisfaction	▪ Core offering meets the needs and purpose of clients and clients' stakeholders. ▪ CRM offering meets the needs and purpose of clients and clients' stakeholders. ▪ New hire onboarding offering meets the needs and purpose of clients and clients' stakeholders. ▪ Reporting capabilities meet the needs and purpose of clients and clients' stakeholders. ▪ Analytics capabilities meet the needs and purposes of clients and clients' stakeholders. ▪ Client success organization appropriately and consistently supports clients from implementation and beyond. ▪ Candidate UX meets the needs and expectations of clients. ▪ Recruiter UX meets the needs and expectations of clients. ▪ Hiring manager UX meets the needs and expectations of clients. ▪ Admin UX meets the needs and expectations of clients. ▪ Customers perceive a positive cost-to-value ratio relevant to their total investment with vendor, including demonstrable and tangible ROI. ▪ Vendor's integration capabilities for upmarket systems and downmarket applications meet the needs of clients and clients' stakeholders. ▪ System configuration capabilities (including tech support and self-service) meet the needs of clients and clients' stakeholders. ▪ Scalability of solution (up or down) meets the needs of clients and clients' stakeholders. ▪ Customer service and support meet the needs of clients and clients' stakeholders.	39.0
Customer service delivery	▪ No vendor should be innovating in a vacuum. Leaders in this category listen closely to their most strategically minded clients to keep a pulse on what matters most to their extended user base. ▪ Global customer support operations directly reflect global customer footprint to ensure appropriate, localized, and timely service delivery.	6.0
Customer service offering	▪ As talent acquisition evolves beyond a cost center and into a business performance success factor, a vendor's ability to support (and illustrate) maximum ROI is closely tied to client success. ▪ The buyer is given flexibility in delivery to meet its operational needs with options for implementing the system with whichever modules it requires.	6.0
Total		100.0

Source: IDC, 2019

Related Research

- *IDC Market Glance: The Emerging Employee Experience, 1Q19* (IDC #US44940119, March 2019)
- *IDC PlanScape: Digital Transformation for a Strategically Aligned Workforce* (IDC #US44505518, December 2018)
- *Market Analysis Perspective: Worldwide Talent Acquisition, 2018 - Talent Acquisition Leads the Digital Transformation in Human Capital Management* (IDC #US44322718, September 2018)
- *Worldwide Talent Acquisition Technologies and Services Forecast, 2018-2022* (IDC #US43522918, August 2018)

Synopsis

This IDC study seeks to inform buyers how talent acquisition suites are evolving beyond ATS – how solutions that are part of HCM and talent management suites differ from solutions using a best-of-breed approach. In a world where the pace of innovation is moving at the speed of thought, many talent acquisition functions are long overdue for technology upgrades. According to IDC's 2018 *Talent Acquisition Buyer Survey,* 63% of medium-sized enterprise organizations changed ATS vendors in the past 18 months and an additional 47% were planning to change in the next 18 months. Some organizations will continue to look to their HCM suite provider to deliver a solution that integrates with other systems like learning and performance, but a growing number of talent acquisition leaders are making a strong business case for standalone solutions. This research is intended to inform both buyers and their colleagues in IT and HR.

"Talent acquisition continues to evolve in form, function, and scope at a breakneck pace," says Kyle Lagunas, research director for IDC's Emerging Trends in Talent Acquisition and Staffing program. "As organizations prepare to embark on digital transformation journeys, acquiring talent has become a critical success factor – and having the right system in place to enable more modern practices is essential. Each talent acquisition suite provider is working with clients to adapt to today's highly competitive hiring environments, offering more advanced capabilities than the ATS vendors have in the past."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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