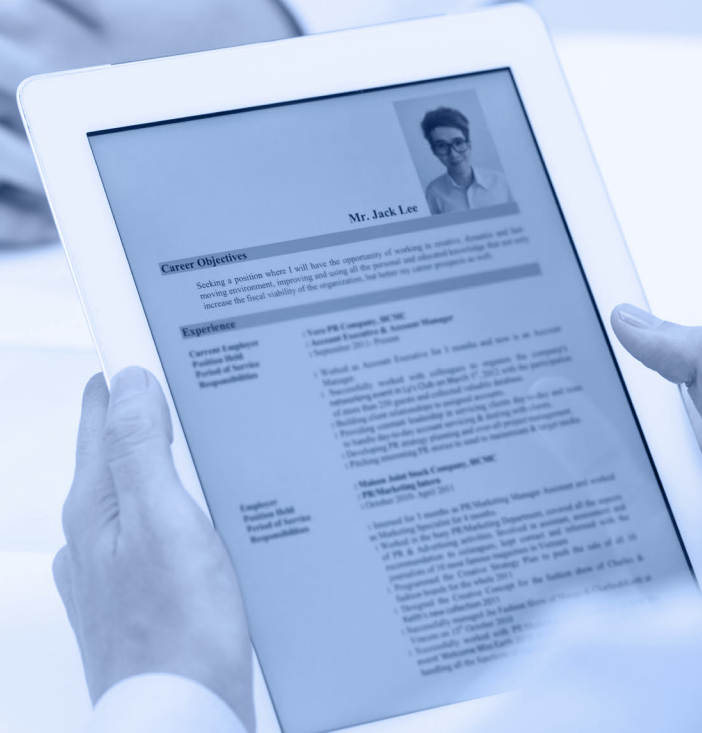


HCM Technology Platforms

Core HCM Technology Plus Talent Management for Small Market and Midmarket

A research report comparing provider strengths, challenges, and competitive differentiators.



Customized report courtesy of:



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The human capital management (HCM) market is poised for continued expansion, fueled by ongoing digital transformation initiatives, the proliferation of hybrid work models and organizations' prioritization of employee well-being and engagement. Key trends shaping the market include the increasing integration of AI-driven automation to streamline HR tasks, the emergence of personalized EX platforms and the enhancement of integrated tools and solutions to create efficiencies in delivery and allow direct access to workforce insights.

The top differentiators in the current HCM market, as observed by ISG, are as follows:

Functionality for efficient HR service delivery

Globally, the HCM market is witnessing demand for a unified HCM platform to deploy an end-to-end HCM tool that offers robust HR helpdesk features. This encompasses product functionality, case management, a knowledge base portal, and text and voice channels for addressing candidate queries. The development

of HR helpdesk features and configurable chat capabilities is gaining more traction, facilitating a more efficient delivery model for organizations.

In the past, vendors invested significantly in HCM tools and then found themselves deploying additional tools to realize their end-to-end vision, often as an afterthought. Currently, their investments are focused on enhancing and delivering comprehensive HCM platforms to distinguish themselves in the market.

Interconnected HCM solutions

Historically, HR functions such as recruitment, onboarding, performance management and learning management operated independently in silos or as distinct products. The development of interconnected solutions has resulted in functions operating as a unified ecosystem. The dynamics of efficiency and effectiveness within the workforce landscape are also evolving continuously, resulting in providers such as Oracle and Workday offering integrated solutions. These solutions offer operational scalability and enhance organizational capabilities, including

Organizations are investing in HCM to **boost agility**. Vendors mainly catering to larger, global clients commonly invest in **skills science**.



streamlined processes, improved collaboration among teams and a transformative 360-degree perspective on employee data, presenting organizations with a significant advantage for contemporary businesses.

Use of AI and automation

Organizations are increasingly relying on AI to source and assess resumes, provide tailored career advice, offer training for future roles, deliver employee feedback, automate HR tasks, make personalized decisions regarding benefits and stay updated on payroll compliance.

The extent and scalability of AI integration into the central platform are crucial factors that set organizations apart in leveraging these capabilities.

EX and listening tools

In the contemporary workforce landscape, tools designed to enhance EX play a pivotal role in enabling organizations to understand and effectively respond to employee needs. Equipped with features such as employee journey mapping, feedback mechanisms and real-time analytics, these tools enable organizations to assess and respond to

employee sentiment promptly. One of the advantages of these tools lies in their action-oriented approach, empowering organizations to address issues swiftly and supporting employees seamlessly within their professional workflows. Organizations are placing a high priority on employee satisfaction and engagement, with these tools serving as a crucial channel for expressing the voice of the employees. They contribute to fostering a productive, content and loyal workforce.

Intelligent insights

The ultimate objective is to furnish leadership with data that facilitates informed decision-making, issue highlighting and pinpointing areas for enhancement. HCM solutions with traction in the industry have the capability to deliver data-driven insights by enabling access to clean, accessible data and understanding current and future business needs to ensure the right insights are defined and evolved as the business adapts to the market.

Outlook for the HCM market

The strategic vision for HR in 2024 focuses on efficiency, engagement, AI and reskilling.

Efficiency: The current emphasis is on efficiency, as numerous market announcements highlight a shift toward cost reductions and workforce realignments. With a noticeable slowdown in productivity, organizations can tackle this challenge by fully leveraging their technology and optimizing their solutions through innovations in HCM. Utilizing the AI-enabled solutions to remove volume processes from critical HR roles and focusing on value-add services for HR teams, businesses can enhance efficiency. Using the capabilities within the HCM across the full suite of functional capabilities will result in increased efficiencies across core processes, reduced management of integrations and a smoother UX in day-to-day processes.

Engagement: In the current year, organizations will significantly emphasize enhancing engagement levels in response to low engagement scores, digital communication fatigue, overworked employees and heightened tensions in employer–employee relationships. There is a pressing need for increased productivity from various teams. HCM vendors are responding with active solutions that will

provide real-time insights into the workforce and provide tools to assess business capability to have the right skills to manage employee needs and meet business demands.

AI: Many organizations are prioritizing AI as it becomes pivotal in various applications. It is anticipated that in the coming years, nearly every HCM technology vendor will incorporate generative AI (GenAI) into their solutions to stay competitive and align with changing buyer needs. As a result, HCM providers are extending their capabilities within their suites to incorporate AI for their clients into their daily business processes, and traction is seen in specialty and high-volume areas such as benefits and volume recruiting processes.

Reskilling: Businesses are actively engaged in reskilling their workforce to address the anticipated disparity in skill sets. The prevalent approach involves retraining existing employees as a practical solution to the shortage of skilled professionals. This proves to be a cost-effective strategy and contributes significantly to employee retention. HCM solutions that bring together talent pools into more robust



and holistic solutions allow businesses to view both internal and external talent pools across the business and functions. This feature also enables analytics to identify areas for future needs and immediate development, helping build active plans to address the disparity in needed skills.

Recruiting tech summary


The recruiting tech market continues to evolve rapidly, driven by advancements in AI, ML and data analytics. Employers are increasingly turning to sophisticated platforms and tools to streamline hiring processes, enhance candidate experience and make data-driven decisions. AI-powered applicant tracking systems (ATS) have become ubiquitous, offering features such as resume parsing, automated candidate screening and predictive analytics to identify top talent more efficiently.

Moreover, diversity, equity and inclusion (DEI) have become central themes in the recruiting tech landscape, with platforms incorporating algorithms to mitigate bias in job postings, candidate selection and interview processes.

Social media recruiting continues to be a dominant force, with platforms leveraging AI algorithms to match candidates with suitable job opportunities based on their skills, experience and preferences. As the competition for the best talent persists, employers are investing in employer branding tools and personalized recruitment marketing strategies to attract and retain top candidates. Overall, the recruiting tech market in 2024 reflects a dynamic ecosystem driven by innovation, data-driven insights and a commitment to creating more inclusive and efficient hiring processes.


ISG evaluated 19 HCM technology vendors across two market segments, with source data for our evaluations consisting of provider-completed questionnaires, interactive demonstrations with ISG, and significant relevant, current information in the public domain. In the SMB market segment, two of the seven HCM solution suppliers were determined to be market Leaders. In the large market segment, six of the 12 vendors evaluated were determined to be market Leaders.



 Provider Positioning


	Core HCM Technology Plus Talent Management - Large Market	Core HCM Technology Plus Talent Management - Small and Mid Market	Best-of-Breed ATS
ADP	Leader	Not In	Not In
Avature	Not In	Not In	Product Challenger
Bamboo HR	Not In	Market Challenger	Not In
Bullhorn	Not In	Not In	Product Challenger
Cegid	Market Challenger	Not In	Not In
Darwinbox	Rising Star ★	Not In	Not In
Dayforce	Leader	Not In	Not In
Epicor	Contender	Not In	Not In
Greenhouse	Not In	Not In	Leader
HiBob	Not In	Rising Star ★	Not In



 Provider Positioning

	Core HCM Technology Plus Talent Management - Large Market	Core HCM Technology Plus Talent Management - Small and Mid Market	Best-of-Breed ATS
iCIMS	Not In	Not In	Leader
Infor	Product Challenger	Not In	Not In
isolved	Not In	Leader	Not In
Jobvite	Not In	Not In	Leader
Lever	Not In	Not In	Product Challenger
Oracle	Leader	Not In	Not In
PageUp People	Not In	Not In	Rising Star ★
Paychex	Not In	Leader	Not In
Paycor	Not In	Product Challenger	Not In
Paylocity	Not In	Product Challenger	Not In



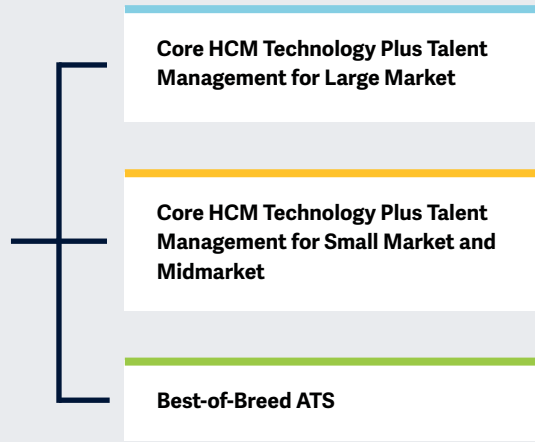
 Provider Positioning

	Core HCM Technology Plus Talent Management - Large Market	Core HCM Technology Plus Talent Management - Small and Mid Market	Best-of-Breed ATS
PeopleStrong	Product Challenger	Not In	Not In
Sage	Not In	Product Challenger	Not In
SAP SF	Leader	Not In	Not In
SmartRecruiters	Not In	Not In	Leader
UKG	Leader	Not In	Not In
Unit4	Product Challenger	Not In	Not In
Workable	Not In	Not In	Contender
Workday	Leader	Not In	Not In
Zoho Recruit	Not In	Not In	Market Challenger



Key focus areas for HCM Technology Platforms 2023.

Simplified Illustration; Source: ISG 2023



Definition

Organizations of every size, industry and geography recognize that optimizing the human side of their business usually translates into a major competitive advantage. The ISG Provider Lens™ HCM Technology – 2023 study examines how human capital management (HCM) technology solutions help organizations achieve critical and strategic goals by way of enhancing organizational agility, upskilling and reskilling workers, and delivering a superior employee experience — with the latter being the key to attracting and retaining top talent. HCM technology solutions are also associated with supporting the daily decisions and activities of people managers, ensuring efficient back-office HR and payroll operations and regulatory compliance in operating regions.

This range of outcomes, both strategic and operational in nature, can clearly help organizations improve business results and sometimes even increase their industry rankings. Moreover, managing the people side of a business is not only about effectively stewarding what is usually the largest cost component of an operating budget, but also

about driving employee productivity. Even modest upticks in productivity (for example, as measured by revenue, per employee) result in major value creation.

This 2023 ISG Provider Lens™ study includes an evaluation of three distinct sets of HCM technology solution providers, each of which is covered in a quadrant analysis: Core HCM Technology Plus Talent Management for Large Market, Core HCM Technology Plus Talent Management for Small Market and Midmarket and Best-of-breed ATS. The third group of solution providers covered in this IPL report specialize in and derive the vast majority of their customer revenue from automating and enabling different aspects of the end-to-end talent acquisition process, and each has estimated annual SaaS revenues of at least \$25 million. ISG believed the Recruiting Technology market warranted its own special call out or separate quadrant given today's well chronicled resourcing challenges. Also, the intense focus on skills relationships (e.g., to other skills and roles), now enabled with AI/machine learning, has also amplified the importance of this market segment.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: Core HCM Technology Plus Talent Management for Large Market, Core HCM Technology Plus Talent Management for Small Market and Midmarket, and Best-of-breed ATS.

This ISG Provider Lens™ study offers HR decision-makers:

- Transparency on the strengths and weaknesses of relevant software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Core HCM Technology Plus Talent Management for Small Market and Midmarket

Core HCM Technology Plus Talent Management for Small Market and Midmarket

Who Should Read This Section

This report is relevant to enterprises evaluating HCM technology platform vendors for the small market and midmarket.

In this quadrant, ISG assesses the current market positioning of HCM technology platform vendors for the small market and midmarket based on their solution offerings and market presence.

Organizations are upgrading to modern HCM technology solutions to gain a competitive edge in providing seamless employee experience, which is critical to attracting and retaining top talent.

Enterprises in the small market and midmarket are using core HR systems that serve as a system of record for employee personal data, such as work history and education. Other critical information, such as job and compensation details, is also captured and maintained for reporting and compliance purposes.

HCM technology vendors intend to assist people managers in better decision-making, achieved by robust HR and payroll operations in the backend.



HR technology professionals should read this report to better understand the digitalization of HCM solutions in response to the increase in remote work globally.



HR professionals should read this report to understand the developments in the HCM industry and explore ways to enhance the employee experience within their organizations.



Procurement professionals should read this report to gain insights into the standards set by leading providers and the digital evolution in the HCM market.

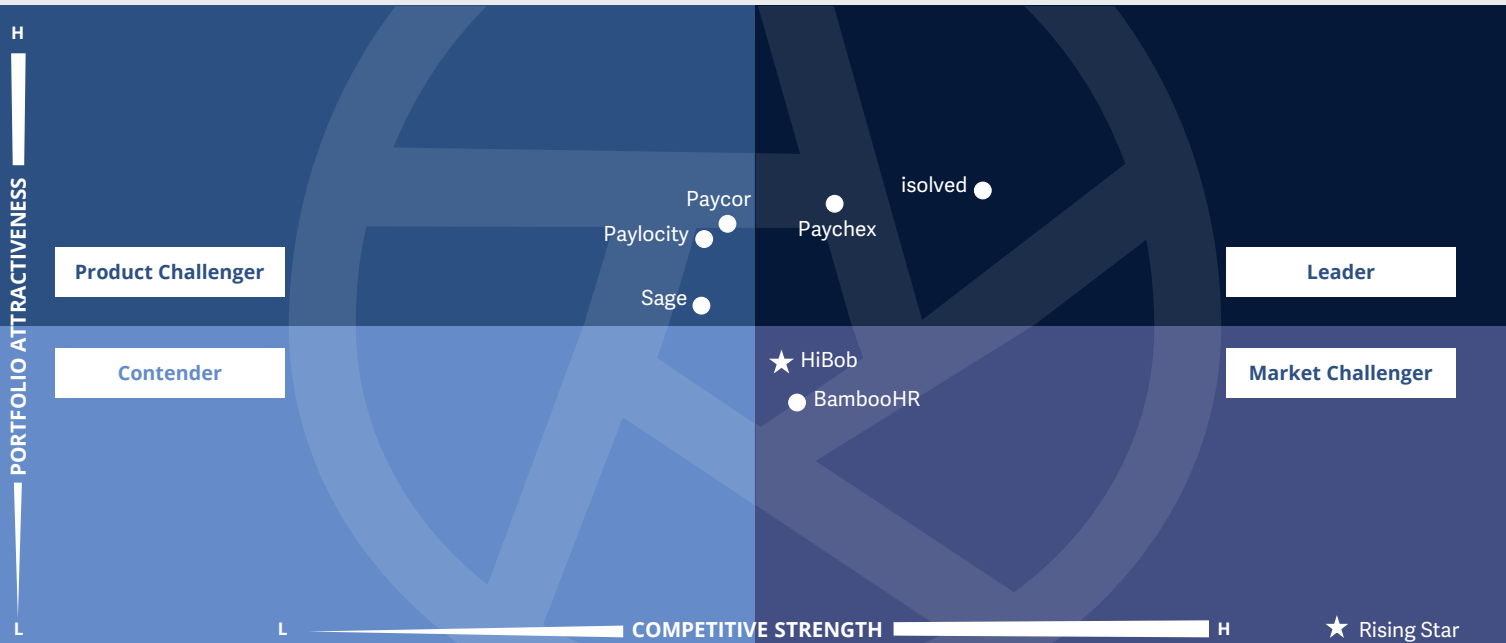


Strategy professionals should read this report to understand the broader context of HCM and payroll offerings and identify opportunities to integrate new capabilities.



HCM Technology Platforms
Core HCM Technology Plus Talent Management for Small Market and Midmarket

Global 2023



This quadrant assesses HCM platform vendors in the SMB segment for functions like learning, performance, compensation and succession. They enhance **business agility**, offer scalability and localization, and provide great UX in digital workplaces to **attract and retain top talent**.

Stacey Cadigan and Saskia Goods



Core HCM Technology Plus Talent Management for Small Market and Midmarket

Definition

This report quadrant includes SaaS solution providers that offer products for automating and enabling “core HR” functions such as employee lifecycle recordkeeping, benefits administration, payroll and workforce management. The latter often includes product support for some or all of the following: time, attendance and absence/leave management processing; employee/worker scheduling; and sometimes labor forecasting.

Core HR systems serve as a system of record for employee personal data such as previous work history and education, and track key data associated with events that occur in the life of an employee. Effective dates, job and compensation information, and the event or data change type comprise what is typically captured (facilitated by workflow automation) and maintained. This audit trail is also used for reporting and compliance purposes and forms an employee historical record.

In this IPL study, product support for payroll processing does not have to be natively built as long as this third-party-built or partnered functionality is tightly integrated with the rest of the vendor’s core HR offering. Solution providers offer (either via natively built or a tightly integrated solution) at least three talent management modules or solution components from among the following: talent acquisition or recruiting; performance management, compensation management/ total rewards; learning and development; succession planning and/or workforce planning. Finally, solution providers typically have customers operating in three or more countries or regions of the world (“global” for the purposes of this report), and the majority of the vendor’s customers have between 1,000 and 3,000 employees.

Eligibility Criteria

1. Ability to offer depth and breadth of **HR/HCM functionality and process enablement**, together with a range of strategic business outcomes related to the workforce
2. Ability to offer process and business rule **configurability**, alongside **system interoperability**
3. Ensures quality of **user experience**, including mobile device support, digital assistants, and voice activation
4. Demonstrate **globalization capabilities**, including the ability to **support languages and currencies** alongside date and data formats
5. Has an established **product roadmap** that includes prominent investment themes and **R&D process efficacy**
6. Offer a range of **reporting and analytics capabilities**, including the ability to incorporate external data from multiple sources
7. Has an established and **robust pre-built integration** and marketplace model for partner applications
8. An emphasis on common best-in-class enterprise solution vendor **attributes and performance indicators** related to **customer satisfaction and retention**



Core HCM Technology Plus Talent Management for Small Market and Midmarket

Observations

Vendors introduce product and technology advances across this market segment, knowing they may not see major adoption for some time. This is largely because SMB customers have fewer change management and training resources and fewer dedicated IT staff to ensure the integrity of back-end integrations and optimal data management. There is a strong correlation between longer deployment cycles for HCM (and other) enterprise solutions designed for smaller customers and the extent of sophisticated features offered, like those related to AI or cognitive computing.

A change is nonetheless underway in this segment, and it has propelled several acquisitions by vendors in this group, often to accelerate time-to-market or seek net-new revenue channels. One example was Paychex's acquisition of Flock. Although it does not necessarily fall into the cognitive computing or analytics enhancements categories, bringing

Flock's modern benefits enrollment experience into the Paychex fold can be viewed as designed to materially elevate EX and not just the administrator's experience. Furthermore, HiBob acquired the startup Cassiopeia and its AI-based workplace relationship analytics technology to improve team communication and collaboration. Such acquired benefits and outcomes had been considered a luxury for smaller customer organizations and vendors serving this market segment. However, this is no longer the case. Another interesting example demonstrating the dynamic of greater HCM tech sophistication, now a market trend, is isolved's acquisition of the predictive people analytics provider TrenData.

From the 45 companies assessed for this study, seven qualified for this quadrant, with two being Leaders and one a Rising Star.

isolved

isolved is a modular HCM platform designed for the small and midmarket segments. A hallmark of its go-to-market strategy that has led to impressive customer satisfaction and retention is holding dozens of "customer roadshows" annually to stay aligned with customers.

Paychex

Paychex, an HCM vendor once known more for payroll, benefits and outsourcing, has transformed itself by now offering Paychex Flex with strong capabilities across key talent management processes and support for more modern concerns such as career pathing.



HiBob's (Rising Star) mission and differentiator is to be an HCM platform for organizations willing to excel within a fluid, changing operating environment. This objective is largely achieved by simplifying HR complexity while driving productivity, collaboration, engagement and retention.



HiBob



“HiBob’s offering Bob caters to midmarket clients, including those with fluid organizational structures. It automates core HR functions, enables a tech-strong corporate culture and readily integrates essential adjacent HCM solutions.”

Stacey Cadigan and Saskia Goods

Overview

HiBob is co-headquartered in London, New York and Tel Aviv and has major offices in seven countries. It has more than 3,500 customers and 800 employees globally. In FY23, it generated more than \$100 million in revenue, with the HCM vendor’s core HCM platform being the largest segment. HiBob offers a modern, core HCM platform that seamlessly connects to payroll and compliance systems as well as communications and productivity tools. Its consumer-friendly design nurtures employee engagement, using features such as internal social networks, video employee profiles, and continuous check-ins. Other features include a People Directory and Org Chat, Onboarding, People Analytics and more.

Strengths

Interoperability and UX: HiBob’s product strategy focuses on integrations with 100 tech partners (such as learning, payroll, ATS and collaboration) and a modular platform that can support extreme configurations. Bob’s user-friendly UX is its other differentiator.

Truly global: Bob serves multinational companies by seamlessly supporting 16 languages, multiple time zones, and currencies. It also enables different site setups, offering employees a localized experience with relevant content.

Efficient payroll: HiBob’s Payroll Hub offers a clear vision of multiple payroll-related data flows and system feeds. Its dashboard gives an up-to-date view of the pay cycle progress

across regions, simplifying related workflows. It connects with most payroll systems worldwide through direct integration with official payroll partners or an easy, no-code setup wizard for third-party systems.

Unique support: HiBob supports atypical and fast-growing organizational structures spread across countries with in-house and remote teams. The platform’s modular design enables customers to scale alongside their evolving systems. While many HCM software vendors might refrain from engaging with clients with fluid organizational structures to avoid lower customer satisfaction levels (with the system), HiBob is partially designed for such operating contexts.

Caution

HiBob’s go-to-market strategy pertaining to its integrations may need revisiting over time as its pre-built integrations support only a few LMS offerings and payroll systems. The alternative could be to keep integrating third-party adjacent HCM systems per customer requests, which would need reimaging the product roadmap.





Appendix

The ISG Provider Lens™ 2023 – HCM Technology Platforms study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2023 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of HCM Technology Platforms market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies



Author

Stacey Cadigan
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As ISG's leader in HCM and Enterprise Transformation, Stacey leverages her 25+ years of experience to help clients achieve their strategic, operational, and financial objectives. Through her diverse background in strategy, operations, transitions, and technology, she has developed unique insight and the ability to ask the right questions to help organizations achieve their vision.

Stacey holds a master's degree in Business Administration from Arizona State University, with a double major in Accounting & Finance and Financial Management & Markets. Her undergraduate bachelor's degree is in Economics from the University of California, Irvine.



Author

Saskia Goods
Director - ISG, Human Capital Management

Saskia has more than 20 years' experience in HR technology leveraging her expertise to help clients achieve their technology and operational goals. Through her diverse experience, Saskia has been able to establish long-term, trusted partnerships with her clients and has worked with them across many strategic initiatives within HR and technology. Saskia has partnered with the leading providers in cloud ERP and has a specialized background in HCM, talent, recruiting and learning, helping clients transform their business, ensuring return on their investment and successful adoption of new business processes and technology.

Saskia has leveraged her experience and expertise to help organizations align their HR technology initiatives and service delivery model with their strategic vision for the HR function.

Saskia studied Economics, Geography and Social Biology at Long Road SF College in Cambridge. She is also a certified ISG Digital Expert.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

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iSG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.



DECEMBER, 2023

REPORT: HCM TECHNOLOGY PLATFORMS