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ANNUAL HR SYSTEMS SURVEY
WHITE PAPER

25TH EDITION

**Voice of the Customer:
HR Service Delivery Segment**

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INTRODUCTION AND TABLE OF CONTENTS

SECTION 1

INTRODUCTION AND TABLE OF CONTENTS

INTRODUCTION

This is a licensed report, for Dovetail Software, taken directly from the Sapiient Insights 2022–2023 HR Systems Survey White Paper, 25th Annual Edition, which is the latest installment in our ongoing effort to provide data and information directly from the practitioner’s perspective, the Voice of the Customer. None of the “Voice of the Customer” information in this report has been modified from its original version.

Since 1997, the **HR Systems Survey has been an** invaluable resource that has provided insight and guidance to practitioners around the world. Sapiient Insight’s renowned survey is the industry’s most extensive global research effort of the HR Systems market, delivering views of current and future technology spending, adoption, and achieved outcomes. The cumulative 25-year research effort represents more than 20,000 companies and 300 million employees, in more than 80 countries.

This year’s full report covers the current and future adoption plans for 54 specific HR-related applications, Voice of the Customer feedback on specific vendor solutions, and value achieved for the categories of HR applications listed below.

- Core HR
- Service Delivery
- Time Management
- Talent Management
- Analytics and Planning
- Emerging Technology

Additionally, we cover key HR operational topics critical to the success and outcomes organizations hope to achieve with HR System investments, including:

- Systems governance, planning, and strategies
- Selections, implementations, and maintenance
- Service Delivery Models and system enablement
- Expenditures, resourcing, and organizational structures
- Adaptive Change Management and system adoption
- Vendor negotiations and relationships



The Survey was conducted from May 9th through July 15th, 2022.



For more details on our full research methodology and demographics on participating organizations, please see the Research Methodology and Demographics section of this paper.

The full report contains 174 pages and 127 Figures, including charts and graphics on the latest industry data and analytical insights for consumers, HR and business leaders, end-users, and solution providers. The **Sapiient Insights HR Systems Survey 25th Annual Edition: HR Service Delivery Segment** contains 29 pages and 15 Figures. The figure numbers in this report are reflective of where they can be found in the complete White Paper and thus may appear out-of-order in this Licensed Report.

Sapiient Insights Group does not endorse any solution or vendor depicted in our research. This report consists of aggregate research data gathered from Sapiient Insights Group 2022–2023 HR Systems Survey, 25th Annual Edition, and insights from Sapiient Insights Group research organization, which is provided for informational purposes only.

INTRODUCTION AND TABLE OF CONTENTS

TABLE OF CONTENTS

SECTION 1: INTRODUCTION AND TABLE OF CONTENTS	2
INTRODUCTION AND TABLE OF CONTENTS	2
Introduction	3
Table of Contents	4
SECTION 2: VOICE OF THE CUSTOMER HR SERVICE DELIVERY	5
<u>VOICE OF THE CUSTOMER HR SERVICE DELIVERY</u>	6
HR Service Delivery Systems	7
Figure 65: HR Service Delivery Applications Definitions	7
Figure 66: Reasons for Not Implementing Self Service	7
Figure 67: HR Service Delivery Replacement Plans	8
Figure 68: Average HR Service Delivery Functionality in Use Within the Primary HR Service Delivery Solution	8
Figure 69: HR Service Delivery and Workforce Experience Model	9
Figure 70: HR Service Delivery Models Adopted	10
Figure 71: HRSD Vendor Solution Adoption, Enterprise	11
Figure 72: HRSD Vendor Solution Adoption, Mid-Market	12
Figure 73: HRSD Vendor Solution Adoption, SMB	13
Figure 74: HRSD Help Desk, Voice of Customer Vendor Satisfaction and User Experience	14
Figure 75: HRSD Self Service, Voice of Customer Vendor Satisfaction and User Experience	16
Figure 76: HRSD Engagement, Voice of Customer Vendor Satisfaction and User Experience	17
Figure 77: Top Ratings by Workforce Size	18
Figure 78: Description That Best Fits Your Current HR Systems Employee Experience	21
Figure 79: Top 3 Current Employee Experience Description Based on the Primary HR Service Delivery Vendor Selected	22

SECTION 3: RESEARCH METHODOLOGY AND DEMOGRAPHICS	24
<u>RESEARCH METHODOLOGY & DEMOGRAPHICS</u>	25
Survey & Research History	25
The Depth & Breadth of the Research	25
Voice of the Customer Methodology	26
ABOUT SAPIENT INSIGHTS	27
Legend and Licensing	28
Licensed Research Policy	29
Copyright	29



VOICE OF THE CUSTOMER HR SERVICE DELIVERY

SECTION 2

VOICE OF THE CUSTOMER HR SERVICE DELIVERY

HR Service Delivery applications grew as a category out of the need to deliver a wide range of new HR services to multiple stakeholders in an efficient, effective, and engaging manner. These applications manage the HR experience, communication, content, and data sharing that is part of an HR organization's service delivery model.

Our Voice of the Customer section of the paper is based directly on feedback, ratings, and comments from customers of these applications. For more details on our methodology for all Voice of the Customer charts and research, see [our Research and Methodology section](#) of this paper.

HR Portal

We have improved the employee and HR experience; information reaches everyone faster.

Manufacturing 10000+ EE

Employee Help Desk

Made HR more agile and responsive in providing good Service Delivery. Improved our Service Delivery metrics.

Financial Services 4300+ EE

HOW THESE SYSTEMS MAKE A DIFFERENCE!

Manager Self-Service

Makes the new hire and reporting process easy and smooth for managers.

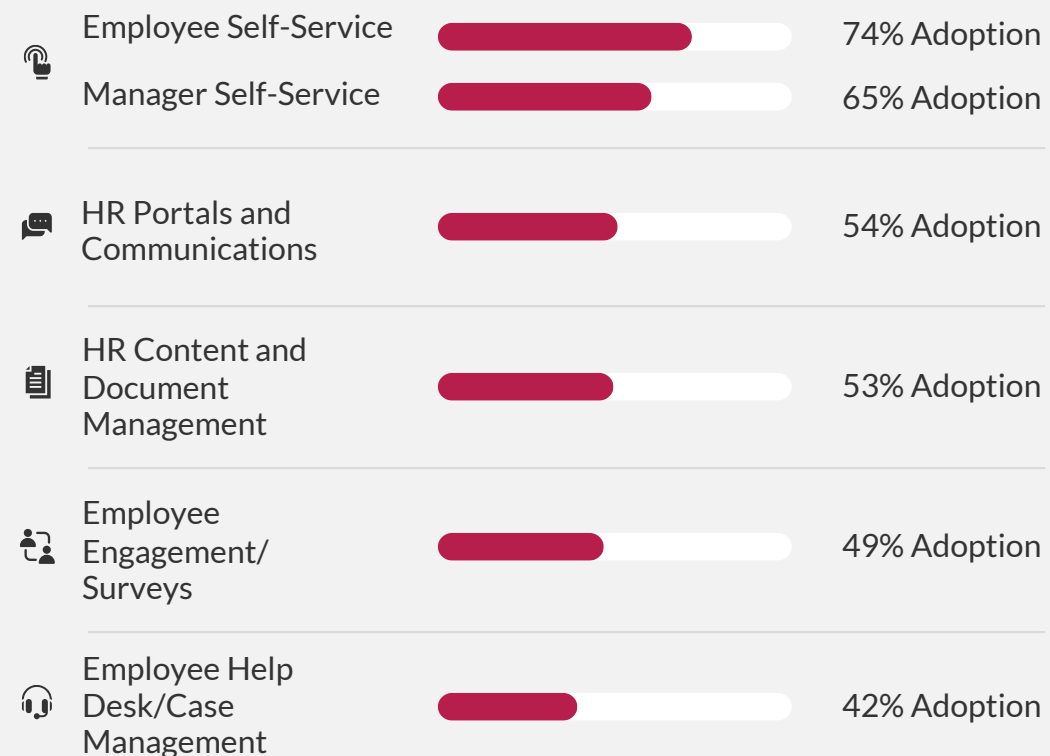
Utilities 120+ EE

Employee Self-Service

The integration for end-users is everything! Reducing keystrokes and time for employees.

High Tech 375+ EE

Applications we track in this category include:



HR Content Management

Sets the bar for other organizations - easy access to [content] for HR partners, managers, and employees. Easy to update when needed.

Financial 4000+ EE

Engagement/Surveys

Has employees more involved in their own experience at work.

Professional Services 65+ EE



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

HR SERVICE DELIVERY SYSTEMS

HR Service Delivery (HRSD) apps are an ever-evolving HR systems category that started as a simple self-service add-on to the HRMS environment – but today it encompasses a whole series of service delivery applications listed in **Figures 65**.

FIGURE 65: HR SERVICE DELIVERY APPLICATIONS DEFINITIONS

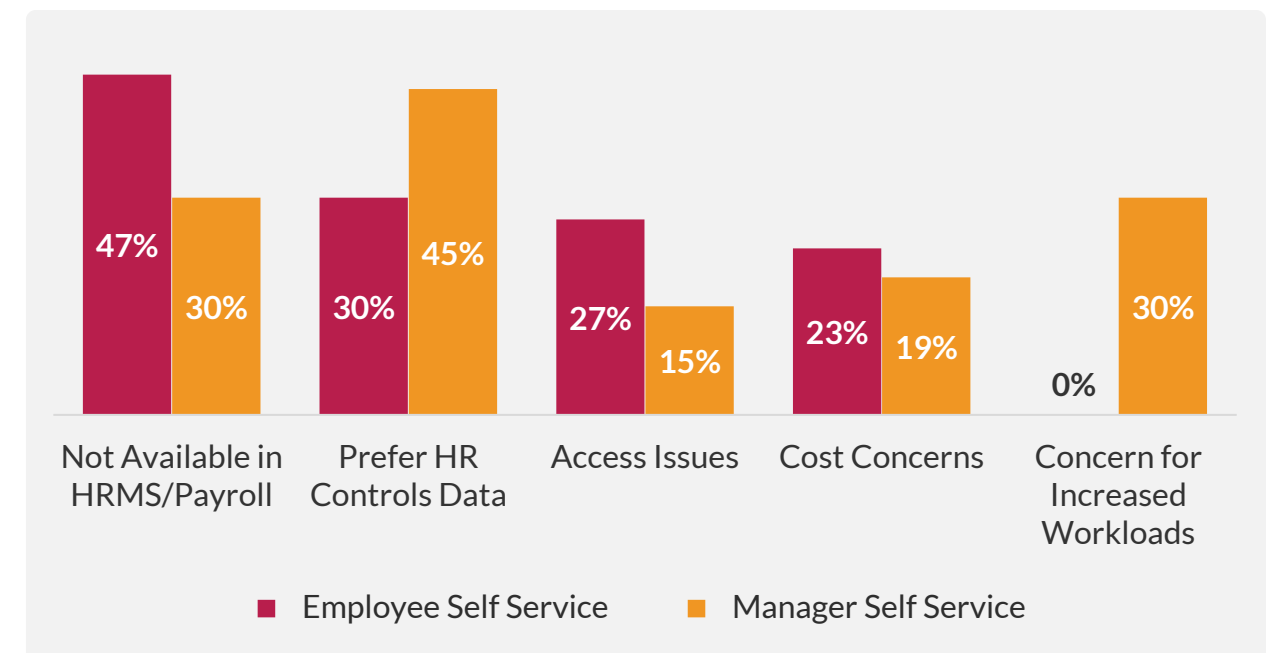
HR Portal / Communications	A single online location to access HR content, information, and communication – often called HR Hubs or HR Information Centers.
Employee Self-Service	An administrative application that allows an employee to manage their own personal information, complete HR tasks, and access relevant HR data for that employee.
Manager Self-Service	A manager administrative application that facilitates management HR activities and critical management data collection.
Content / Document Management	Document management and workflow application that supports the need to receive, track, manage, and store HR documentation.
Employee Help Desk/ Case Management	An application that supports the facilitation, tracking, and resolution of HR inquiries made by employees, usually to a call center environment.
Survey / Feedback/ Engagement Platforms	An application that facilitates two-way communication and data sharing with employees, including tools for gathering and analyzing survey, engagement, and activity data.

Although most of today’s modern HR Management Systems offer some light service delivery functionality as part of the HRMS solution – over 50% of organizations leverage non-HRMS solutions for one or more of these categories and more than 25% of HRMS buyers choose to not make any of these features available to their employees.

Although many of these applications seem administrative in nature and less strategic, that perception underestimates the value of these services. These applications dictate the experience of the employee and manager in the context of both work and HR. Organizations that view executives, managers, and employees as customers of HR, should also view service delivery applications as a key relationship management tool.

These solutions handle our most private employee information and often accessed during times of great emotional stress – new jobs, new promotions, growing families, health issues, and losing loved ones. Still over a quarter of organizations choose to not invest in any HR Service Delivery applications, including self-service solutions.

FIGURE 66: REASONS FOR NOT IMPLEMENTING SELF SERVICE



If these service delivery applications are hard to use or poorly adopted, or not even deployed for multiple reasons as seen in **Figure 66** – it’s difficult to create a data-driven HR function.



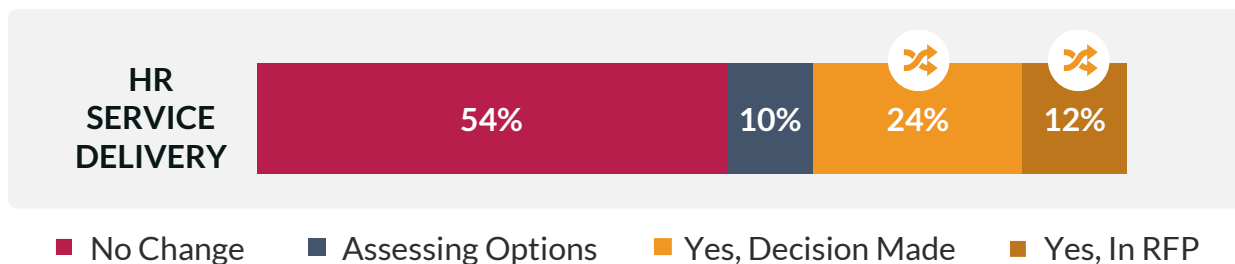
VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

Our data highlights that HR Service Delivery applications are purchased in multiple ways, depending on the organization's vision for their workforce experience. Currently, organizations blend multiple applications to create their desired HR Service Delivery experience, and usually select one of three types of applications as their primary service delivery application:

- Core HRMS - 82%
- HR Help Desk - 12%
- Collaboration/Communications - 6%

As seen in **Figure 67**, HRMS environments seem to have the most convenient solutions which is probably why 82% of respondents identified them as their primary HRSD application, but we also see a lower-than-average User Experience and Vendor Satisfaction rating with many of these applications, with multiple organizations mentioning a lack of flexibility, upcharges, and reporting issues. This is possibly why 36% of organizations are planning to replace their current HR Service Delivery solutions.

FIGURE 67: HR SERVICE DELIVERY REPLACEMENT PLANS



CORE HRMS CUSTOMER QUOTES:

It is difficult to use for any kind of analyses - pulling data out is a mess because it is not a [standard] database. It does not do well at all at reporting and analysis..

Healthcare 9000+ EE

HR HELP DESK CUSTOMER QUOTES:

Not all the plugins seem to work as they should, there are always some challenges, i.e., integration with SharePoint or Adobe Sign.

Manufacturing 10000+ EE

COLLABORATION SOLUTION CUSTOMER QUOTES:

It could be our issue, but employees either don't know it exists or can't seem to find what they need. It is difficult to administer, the content easily goes out of date, and users struggle to use it.

Retail 1100+ EE

FIGURE 68: AVERAGE HR SERVICE DELIVERY FUNCTIONALITY IN USE WITHIN THE PRIMARY HR SERVICE DELIVERY SOLUTION

PRIMARY HRSD SOLUTION	Employee Self Service	Manager Self Service	Portal/ Communication	Content Management	Employee Help Desk	Surveys/ Feedback
HRMS	69%	45%	37%	27%	23%	14%
HR HELP DESK	30%	30%	50%	25%	100%	N/A
COLLABORATION	15%	20%	60%	35%	N/A	N/A

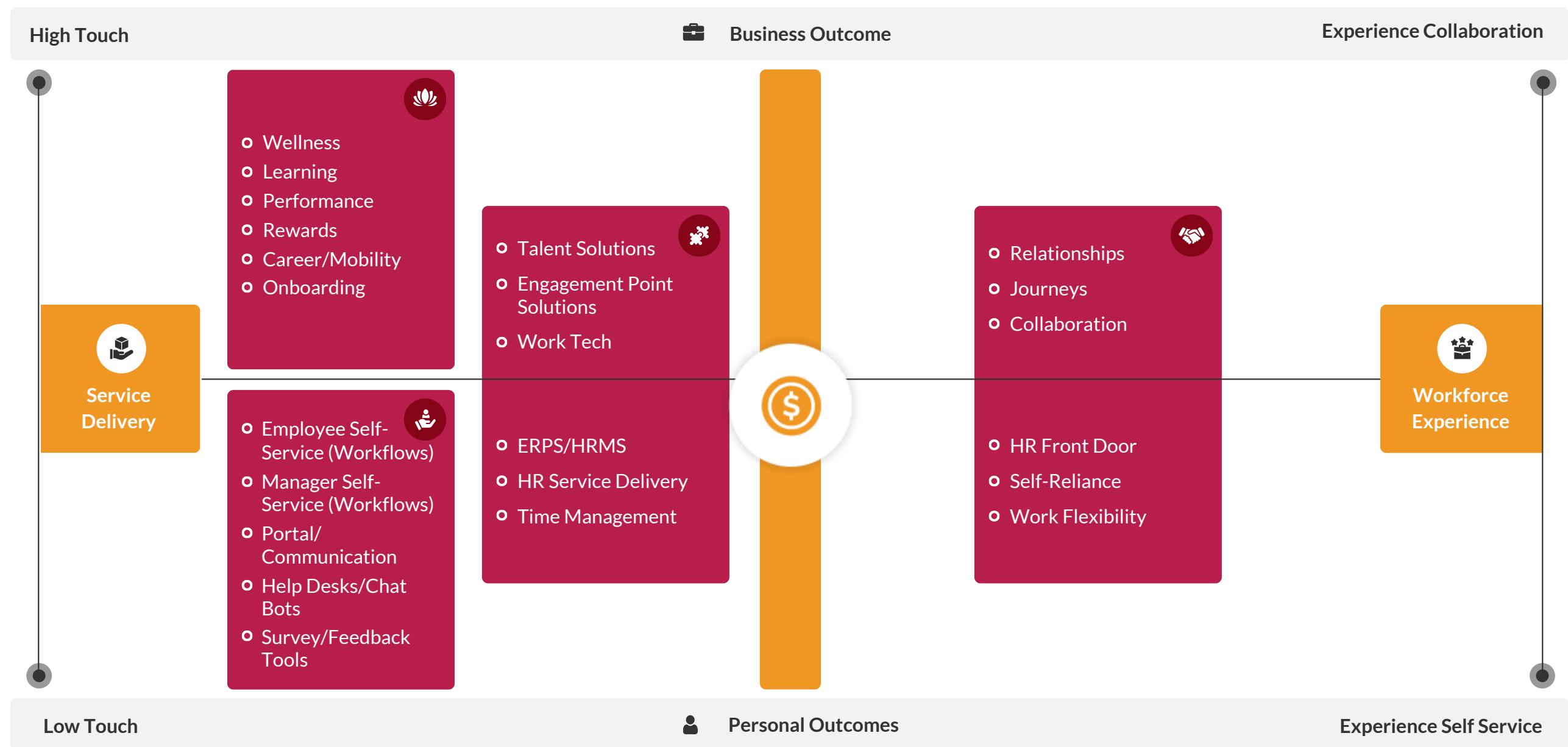


VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

An organization's HR Services Delivery model and its vision for various levels of workforce experiences are two sides of the same coin. Our data shows that HR functions are always balancing two factors in their approach to creating a Total Workforce Experience - High-Touch or Low-Touch HR Service Delivery, with a Collaborative or Self-Reliant workforce experience, against the business and personal outcomes they want that experience to achieve.

For example, implementing a low-touch service delivery model for all employees that creates a self-service experience might achieve the desired business outcome of reducing HR costs. But it could also create a personal experience of high workloads and isolation for first-time supervisors. HR technology should not be used to just deliver HR services but to also gather data and feedback on the actual experiences, ensuring an environment that achieves both the business and personal outcomes desired by an organization.

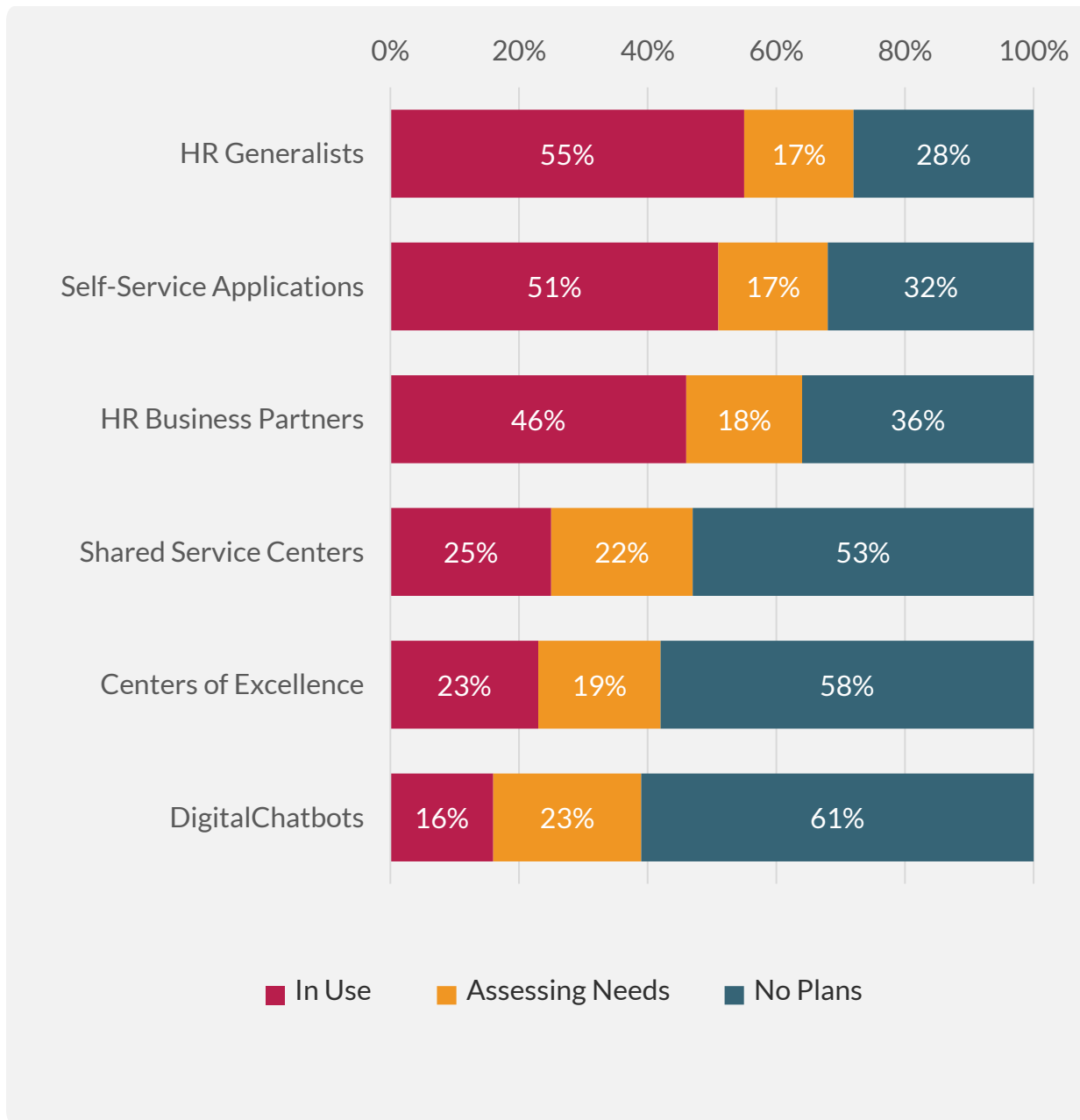
FIGURE 69: HR SERVICE DELIVERY AND WORKFORCE EXPERIENCE MODEL





VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

FIGURE 70: HR SERVICE DELIVERY MODELS ADOPTED



HR Service Delivery models tend to be viewed as topics for Enterprise organizations, but every HR function has a service delivery model whether it is clearly defined or simply an understanding of how HR should function within an organization. Service Delivery models generally describe the services to be provided, and usually include the infrastructure and management needed to provide those services. Sophisticated service delivery models are documented, with clearly defined stakeholders and service level agreements.

The most common elements of today’s HR Service Delivery models include:

- HR Generalists
- Self-Service Applications
- HR Business Partners
- HR Shared Service Centers
- Centers of Excellence
- Digital Assistants or Chatbots

Even with a slightly larger set of SMB organizations participating this year, more than 50% of respondents have already implemented some form of HR generalists and self-service solutions as seen in **Figure 70**– this aligns with the increasing investments we are seeing in self-service technology and HR content management tools. We also continue to see growing investments in Shared Service Centers and Digital Chatbots with over 20% of organizations assessing their needs in these categories – both models tightly connected to enterprise-wide technology solutions.

HR technology sits solidly in the middle of these service delivery models providing a vehicle through which the experiences can be tailored into workflows, journeys, front doors, accessible information, and feedback. It is also a great avenue for setting cultural expectations, rewarding behaviors, and engaging the workforce.



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

FIGURE 71: HRSD VENDOR SOLUTION ADOPTION, ENTERPRISE

>5000+EE	Today Adoption Level	Expected Growth	12 Month Adoption Level
Workday Help	7.47%	↑	9.04%
ServiceNow	5.50%	↗	6.29%
Microsoft Sharepoint	5.11%	↗	5.89%
Microsoft Viva/ Teams	4.52%	→	4.91%
In-House/ Intranet	3.73%	↗	4.52%
Dovetail	3.54%	↗	4.13%
Qualtrics	3.34%	↗	3.93%
DocuSign	3.14%	↗	3.93%
Oracle PeopleSoft	2.16%	→	2.36%
Salesforce.com	2.16%	→	2.16%
SAP SF Employee Central	2.16%	→	2.55%
Survey Monkey Momentive	2.16%	→	2.36%
Ceridian Dayforce	1.96%	↗	2.75%
Infor HCM	1.96%	↗	2.55%
Perceptyx	1.96%	→	1.96%
Neocase HR	1.77%	→	2.16%
Workday Peakon Employee Voice	1.77%	→	1.77%
UKG Employee Voice	1.77%	→	2.16%
Willis Towers Watson - AskHR	1.77%	→	1.96%
Atlassian Jira	1.57%	↗	2.16%
Cherwell	1.57%	↗	2.36%
SAP Solution Manager	1.57%	→	1.96%
Zendesk	1.38%	↗	1.96%
LBi Software	1.18%	↗	1.96%
Oracle HCM	1.18%	→	1.38%

The HR Service Delivery Vendor adoption chart is expressed as a percentage of the total survey responses achieved for each vendor solution and broken down by organization size (see Figures 71, 72, 73). Please note, these charts are not market-size data.

ENTERPRISE HR SERVICE DELIVERY ADOPTION - ANALYST INSIGHTS:



Enterprise organizations use a multitude of HR applications to deliver on their HR Service Delivery needs and are the most likely group to have a primary HR Service Delivery application that is not the Core HRMS application. Due to the increase in applications identified as solutions in this category by buyers – we are seeing relatively lower adoption percentages from last year, but the expectations for growth are still quite high across the application list, even with more vendors entering the space.

Workday achieved the highest level of both current and future adoption with their Workday Help application launched in 2021. We believe some of these numbers include buyers who view the entire Workday application as their primary HR Service Delivery application and may not specifically have turned on the Help module, but it was defined as the Help module in the question.

ServiceNow continues to leverage its IT relationships to increase HR adoption and is currently the second-most likely solution used by Enterprise respondents. Similarly, Microsoft is rapidly gaining adoption across its Office 365 install base, and if SharePoint and Viva’s numbers were combined, they would be #1. Other notable applications in this category include Dovetail, Qualtrics, and DocuSign all receiving high User Experience (UX) and Vendor Satisfaction (VS) ratings and expected increases in adoption.

Expected Growth Legend

- ↑ Substantial Growth
- ↗ Slight Growth
- Flat
- ↘ Slight Decline
- ↓ Substantial Decline

Expected growth calculation is based on the difference between Today and 12 Month adoption plans, in addition to data points from future replacement plans, assessment plans, and RFP inclusions.

Note: These data sets do not equal 100%, respondents often have multiple applications, and responses below 2% in Today or 12-month adoption levels have been removed.



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

FIGURE 72: HRSD VENDOR SOLUTION ADOPTION, MID-MARKET

500 - 5000 EE	Today Adoption Level	Expected Growth	12 Month Adoption Level
Workday Help	6.07%	↑	9.38%
ServiceNow	5.60%	↗	6.23%
In-House/ Intranet	5.51%	↑	7.17%
Microsoft Sharepoint	4.78%	↑	6.99%
Ceridian Dayforce	4.04%	↑	6.99%
Microsoft Viva/ Teams	4.04%	↑	5.88%
UKG HRSD	3.86%	↑	5.15%
DocuSign	3.31%	↑	6.07%
UKG Employee Voice	3.13%	↑	5.15%
Survey Monkey Momentive	2.94%	↑	4.96%
ADP Workforce Now	2.57%	↑	6.07%
Qualtrics	2.57%	↑	4.60%
Delttek	2.02%	↑	4.23%
Atlassian Jira	1.84%	↑	5.33%
Dovetail	1.84%	↑	4.60%
Generic IT Help Desk	1.84%	↑	3.86%
Zendesk	1.84%	↑	4.41%
Culture Amp	1.65%	↑	4.04%
Oracle HCM	1.65%	↑	4.41%
Freshworks Freshdesk	1.47%	↑	3.68%
Paycor	1.47%	↑	3.49%
Lattice	1.47%	→	2.94%
Remedy	1.47%	↑	3.94%
ADP HCM	1.29%	↑	3.86%
Perceptyx	1.29%	↑	3.86%
SAP SF Employee Central	1.29%	↑	3.86%
ApplaudHR	1.10%	↑	3.49%
Infor HCM	1.10%	↑	3.68%

MID-MARKET HR SERVICE DELIVERY ADOPTION - ANALYST INSIGHTS:

We continue to see the greatest opportunity for growth in this category with Mid-Market sized organizations, between 500 and 5000 Employees - 27 Vendor Solutions identified have 3% or more current or future adoption in this category.

Workday Help also holds the top current and future adoption level for our survey participants in this category, but it is closely followed by ServiceNow and In-House solutions. Microsoft is also seeing rapid growth in this category but has more competition from core HRMS solutions offered by organizations like Workday, Ceridian, or UKG.

Increased adoption levels are considerable for almost every solution in this category with ADP Workforce Now, Atlassian Jira, and Workday Help seeing the highest expected growth percentage. As we noted earlier, we are seeing a combination of core HRMS, collaboration solutions, and help desk solutions all seeing similar levels of high growth in this category.

The high percentage of organizations still leveraging In-House developed solutions in this category is an indication that current solutions are still missing major functionality and user experience expectations, or the current solutions aren't priced at a level that would make the In-House development and maintenance efforts more expensive.

Expected Growth Legend

- Substantial Growth
- Slight Growth
- Flat
- Slight Decline
- Substantial Decline

Expected growth calculation is based on the difference between Today and 12 Month adoption plans, in addition to data points from future replacement plans, assessment plans, and RFP inclusions.

Note: These data sets do not equal 100%, respondents often have multiple applications, and responses below 2% in Today or 12-month adoption levels have been removed.



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

FIGURE 73: HRSD VENDOR SOLUTION ADOPTION, SMB

<500 EE	Today Adoption Level	Expected Growth	12 Month Adoption Level
isolated	6.74%	↑	9.57%
Other, please specify	6.74%	↗	7.62%
Microsoft Sharepoint	4.79%	↑	8.51%
ADP Workforce Now	4.61%	↑	7.45%
In-House/ Intranet	4.26%	↑	6.91%
Microsoft Viva/ Teams	3.72%	↑	7.09%
Ceridian Dayforce	3.55%	↑	6.74%
Survey Monkey Momentive	3.37%	↑	6.91%
DocuSign	3.01%	↑	6.38%
BambooHR	2.66%	↑	6.56%
Paycor	2.30%	↑	5.50%
ThinkHR Mineral	2.30%	↑	5.50%
Workday	2.13%	↑	5.85%
Zendesk	2.13%	↑	4.61%
ADP HCM	1.95%	↑	5.14%
Atlassian Jira	1.95%	↑	5.50%
ADP Run	1.77%	↑	5.50%
Oracle HCM	1.77%	↑	5.32%
Paychex Flex	1.77%	↑	4.79%
Paycom	1.77%	↑	4.26%
Paylocity	1.77%	↑	3.55%
UKG HRSD	1.60%	↑	4.26%
Generic IT Help Desk	1.42%	↑	5.14%
Lattice	1.42%	↑	4.96%
LBi Software	1.42%	↑	4.61%
Limeade	1.42%	↑	4.61%
ApplaudHR	1.24%	↑	4.26%
Freshworks Freshdesk	1.24%	↑	3.90%

<500 EE	Today Adoption Level	Expected Growth	12 Month Adoption Level
Workday Peakon	1.24%	↑	3.72%
Qualtrics	1.24%	↑	4.26%
SAGE People	1.24%	↑	4.26%
Salesforce.com	1.24%	↑	3.19%
SAP SF Employee Central	1.24%	↑	3.90%
ServiceNow	1.24%	↑	4.26%
Cherwell	1.06%	↑	3.37%
Culture Amp	1.06%	↑	3.72%
Delttek	1.06%	↑	4.08%
Namely	1.06%	↑	5.14%
Dovetail	1.06%	↑	3.10%
UKG Employee Voice	1.06%	↑	3.72%
Infor HCM	0.89%	↑	4.08%
WorkHuman	0.89%	↑	3.19%

Expected Growth Legend

- ↑ Substantial Growth
- ↗ Slight Growth
- Flat
- ↘ Slight Decline
- ↓ Substantial Decline

Expected growth calculation is based on the difference between Today and 12 Month adoption plans, in addition to data points from future replacement plans, assessment plans, and RFP inclusions.

Note: These data sets do not equal 100%, respondents often have multiple applications, and responses below 2% in Today or 12-month adoption levels have been removed.





VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

SMB HR SERVICE DELIVERY SOLUTION ADOPTION - ANALYST INSIGHTS:



The SMB HR Service Delivery space is highly fractured, with over 30 different vendors selected by 3% or more of our data set for current or future use. Almost every solution is seeing increases in this category, but here Core HRMS solutions have the highest combined increases and are most likely to be used as a single solution for almost all functionality in this category.

Once again due to the large number of solutions identified in this category, the overall adoption percentages are lower than last year. Even with 30 solutions identified in this category, the Other and In-House solution categories are two of the largest selected choices, with only isolved, Microsoft, and ADP Workforce Now seeing similar large adoption numbers. Both isolved and ADP have invested in improving their employee and manager self-service solutions, along with offering both native and easy marketplace solutions for content management, employee feedback, and light portal environments. This flexibility tends to make them more viable for this category than some of the direct SMB core HRMS competitors in the market.

The highest levels of expected growth once again are split across multiple solution types with Microsoft, Workday (Core HRMS in this case), ADP Run, and Generic IT Help Desks, all-seeing almost 4% growth expectations. We often dismiss SMBs as not having the necessary complexity to require document management, case management, or employee feedback solutions but, with their smaller HR functions, they tend to achieve the greatest outcomes from streamlining their processes, automating content updates, and digitizing help and support for employees and managers.

As Figure 73 shows on the previous page, the HR Service Delivery landscape is growing more fragmented with solutions and vendors that offer a wide range of features. This year we have 51 vendor solutions selected by 2% or more of our survey population across the various size categories. Most vendors competing in this space view these capabilities as a secondary set of features to their original entry points into Enterprise or HR system environments.

Big differentiators now include:

- Cost
- Accessibility
- Ease of use and configuration
- Accessibility, including mobile capabilities
- Reporting and Intelligent features

The most common Other category (vendors that did not reach 2% or more in our data set) includes a mix of enterprise and niche players. On average, 5% of organizations use a vendor in the Other category; the most often mentioned solutions are:

- 15Five/Emplify
- Cornerstone
- Darwinbox
- Engagedly
- Engage ESM
- HiBob
- Microsoft Glint
- IBM Maximo
- Medallia
- PeopleSphere
- Quantum Workplace
- QuestionPro
- Survey Sparrow
- Zonka



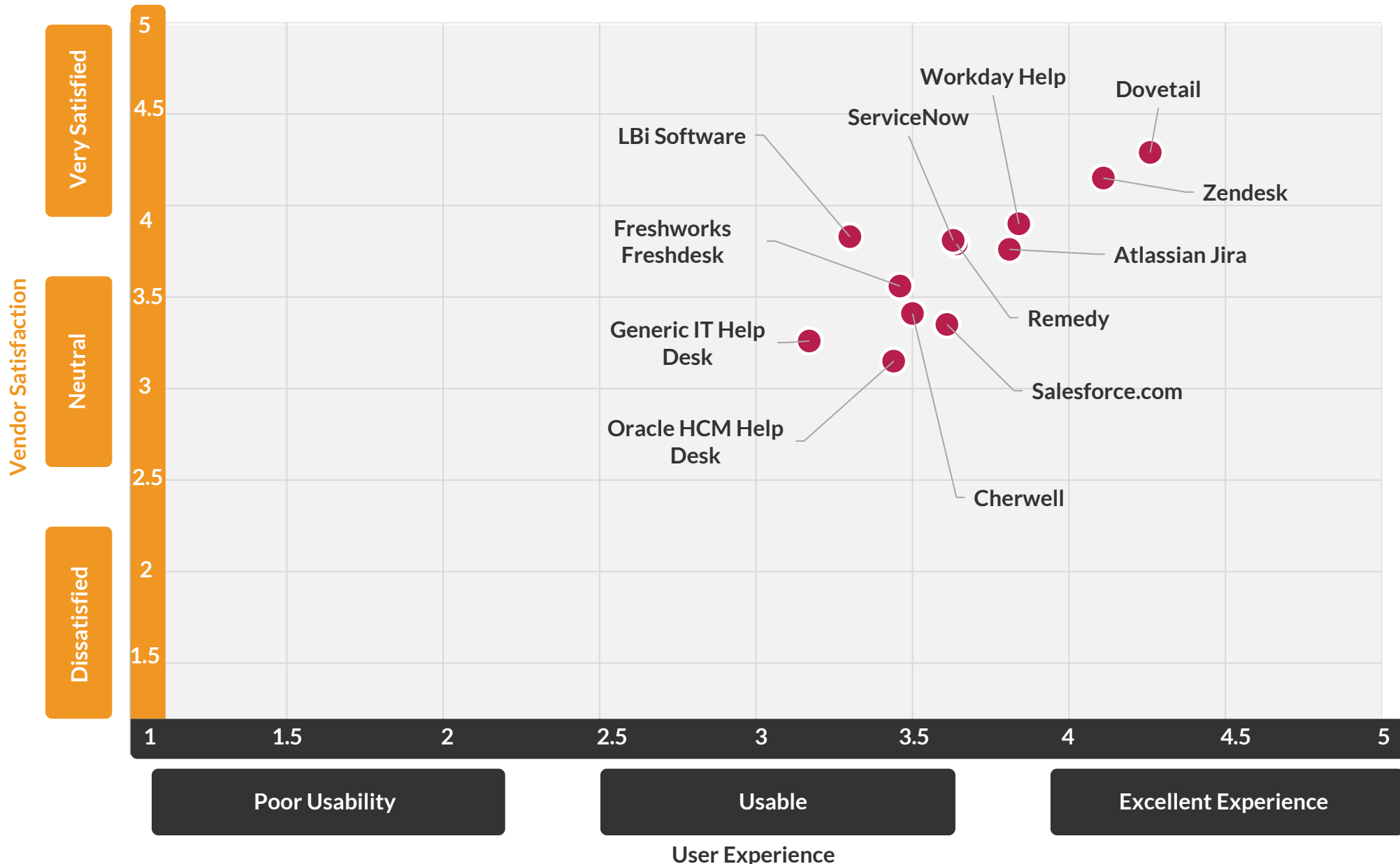
VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

Each year we ask survey respondents to rank the quality of their system User Experience and Vendor Satisfaction on a scale of 1-5, and we average those ratings for each solution. This year the overall HRSD categories' average scores sit at 3.54 (UX) and 3.52 (VS), about 5% lower than last year's HRSD averages. There were 38 vendor solutions that received the minimum validated customer ratings to make our HRSD VoC chart this year.

Due to the evolving buying patterns in this category we've decided to separate the HRSD Voice of the Customer (VoC) User Experience and Vendor Satisfaction charts into three major functionality areas: Help Desk/Case Management Solutions, Self-Service Solutions, and Engagement Solutions.

HRSD HELP DESK SOLUTIONS: Buyers who make these applications their primary service delivery tools are often looking to create economies of scale, by serving more employees with fewer HR resources using streamlined processes and supported technology. Organizations often find that beyond the cost savings, these applications add real value in both improved employee and HR engagement, along with more environmental data for employee-focused decision making.

FIGURE 74: HRSD HELP DESK, VOICE OF THE CUSTOMER VENDOR SATISFACTION AND USER EXPERIENCE



HRSD

HELP DESK

Major Factors driving Vendor Satisfaction and User Experience ratings include:

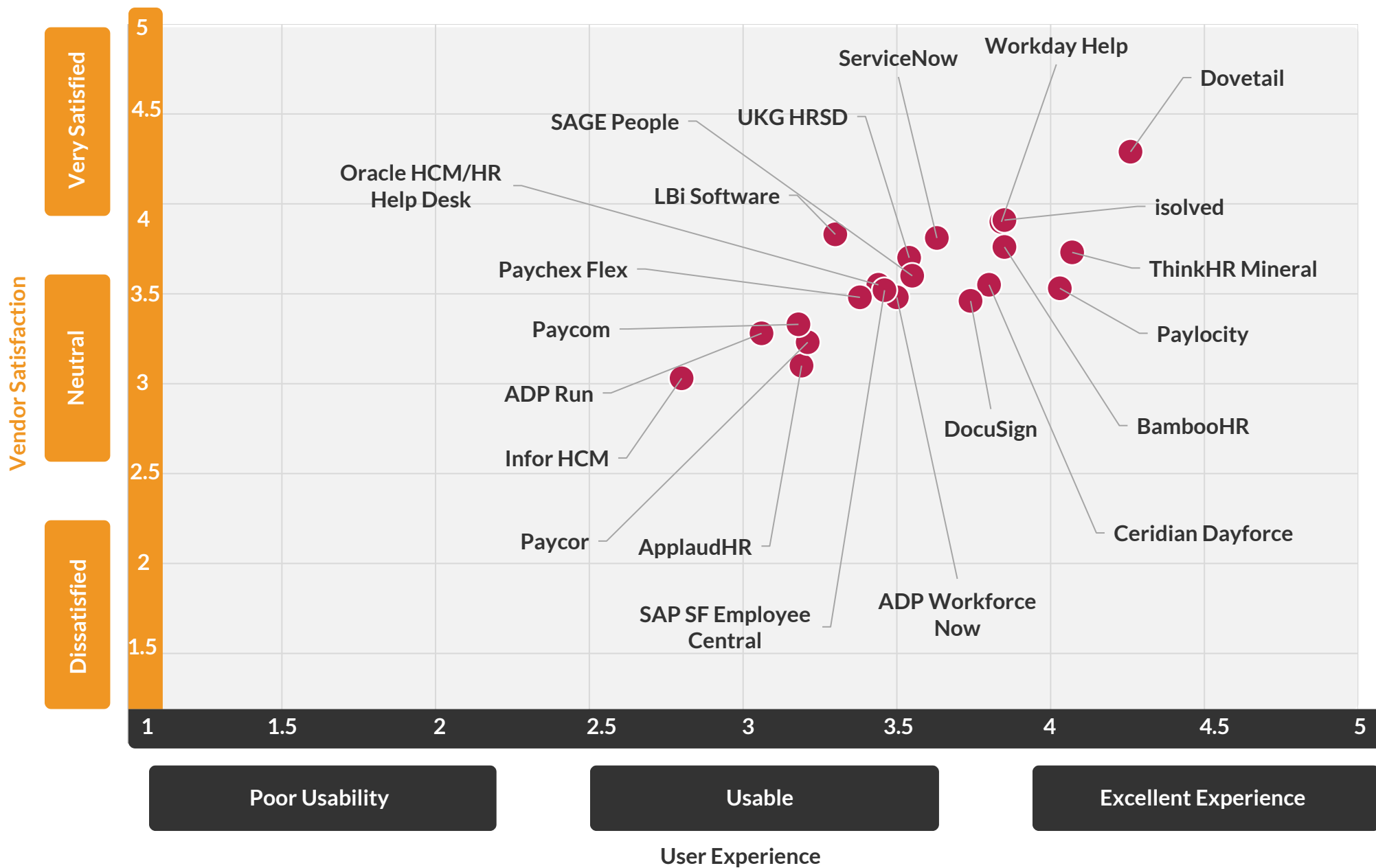
- Ease of use
- Ease of configuration
- Mobile capabilities
- Integrations



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

HRSD SELF-SERVICE SOLUTIONS: This is a wide mix of HRMS, HR Service Delivery, and Portal technologies that provide solutions that allow HR to configure and setup workflows, help employees and managers complete HR and work-related processes, and gather necessary data from employees to complete those processes, communicate necessary information and documents. This is the most common set of solutions used by today’s buyers to meet their HR Service Delivery needs and has several solutions that overlap with the HR Help Desk category. These applications tend to be more utilitarian in their features and buyers look for the most convenient and cost-effective solution to meet these needs.

FIGURE 75: HRSD SELF SERVICE, VOICE OF THE CUSTOMER VENDOR SATISFACTION AND USER EXPERIENCE



HRSD

SELF SERVICE

Major factors driving Vendor Satisfaction and User Experience ratings include:

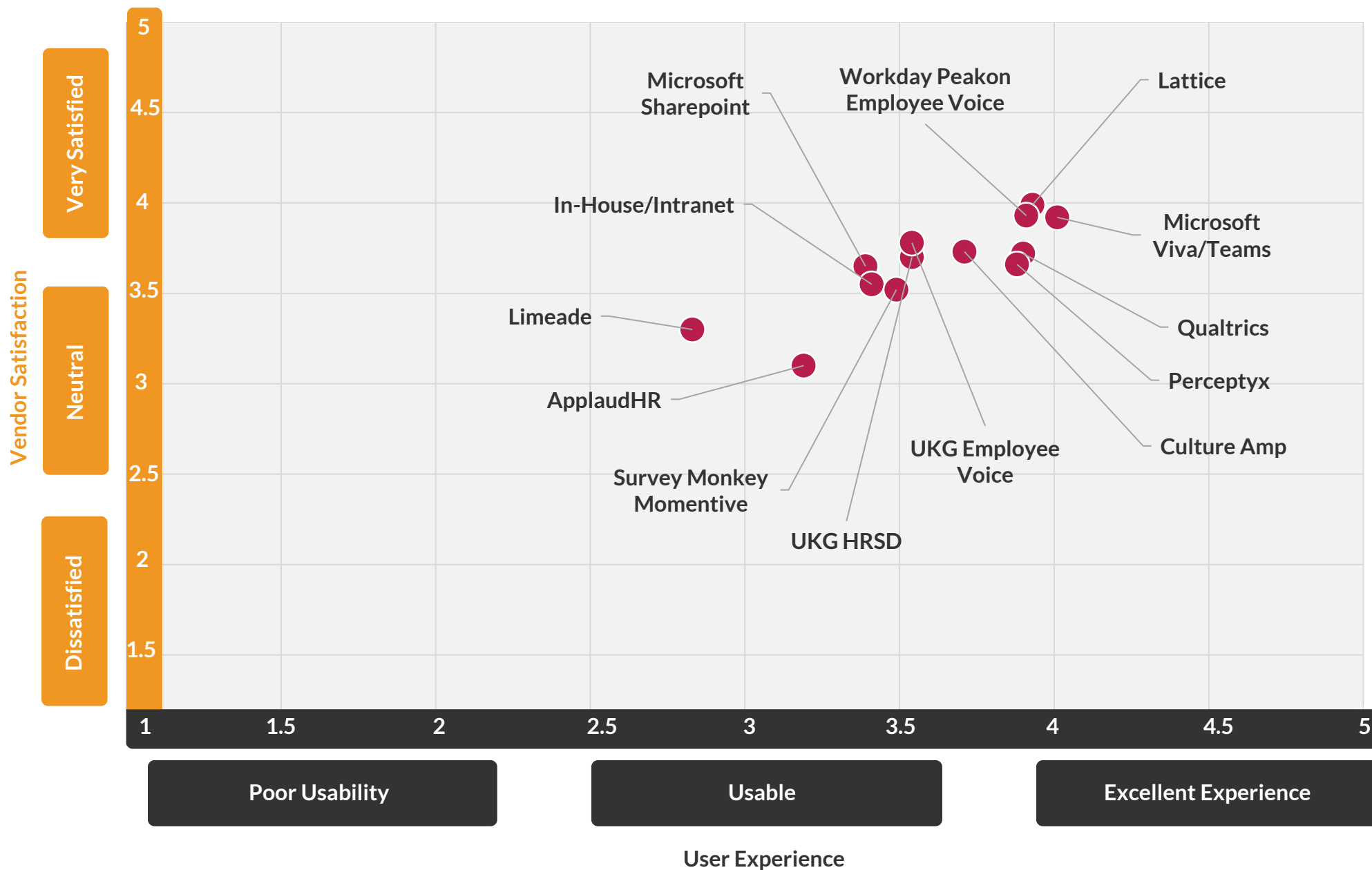
- Cost
- Convenience
- Intuitive use
- Flexible workflows



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

HRSD ENGAGEMENT SOLUTIONS: This category is an emerging set of solutions evolving in the HR Service Delivery ecosystem, with a focus on engagement, feedback, and in some cases employee performance. These applications range from traditional survey tools expanding into employee listening solutions to wellness or reward applications focusing on employee engagement. This is also the category we see traditional workforce productivity tools like Microsoft and Google entering the enterprise HR systems market, using their ability to gather constant information on work behaviors, team communications, and enterprise workflows to tailor workforce experiences and inform an organization’s understanding of employee engagement. Although these solutions are often tightly connected to other HR application categories such as Talent Management or Time Management, our survey respondents currently identify their primary ownership or buying function as part of their HR service delivery or shared-services functions.

FIGURE 76: HRSD ENGAGEMENT, VOICE OF THE CUSTOMER VENDOR SATISFACTION AND USER EXPERIENCE



HRSD

ENGAGEMENT

Major Factors driving Vendor Satisfaction and User Experience ratings include:

- Accessibility
- Cost
- Reporting
- Mobile friendly



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

Our aggregate Voice of the Customer (VoC) Vendor Satisfaction (VS) and User Experience (UX) charts are a valuable tool for obtaining a broad perspective of how the HR community is evaluating their current applications. Over the last 25 years of gathering and analyzing customer feedback, we have seen a wide range in customer ratings based on the global complexity and total workforce size managed within the application. These ranges are most evident in Payroll, HRMS, Time Management, and HR Service Delivery applications.

To provide more context to this data, we analyze the solutions that achieve the highest average rankings, from multi-sourced validated responses in three size categories. The solutions must have at least 15 or more responses in the respective size categories to qualify for this analysis.

Our Voice of the Customer Top Five ranking is hard-won and worth a bit of celebration. In **Figure 77**, we provide a snapshot of the solutions achieving the Top 5 average ratings, in **HR Service Delivery Systems** by size. We are also launching a series of Voice of the Customer badges for Vendors who achieve these notable ratings from their customers*.



*Full details of this analysis and further breakdowns of data by company size can be accessed through our research subscriptions, contact us at Research@SapientInsights.com for further information.

FIGURE 77: TOP FIVE VOC RATINGS BY WORKFORCE SIZE

ENTERPRISE, >5000 EE - HR SERVICE DELIVERY SYSTEMS		
	User Experience	Vendor Satisfaction
Top, #1	Dovetail	Dovetail
Top	Workday Help	Workday Help
Top	DocuSign	ServiceNow
Top	Qualtrics	SAP SuccessFactors EC
Top	ServiceNow	Microsoft SharePoint

MID-MARKET, 500 - 5000 EE - HR SERVICE DELIVERY SYSTEMS		
	User Experience	Vendor Satisfaction
Top, #1	Microsoft Viva	Microsoft Viva
Top	Qualtrics	Workday Help
Top	Dovetail	Dovetail
Top	Workday Help	Qualtrics
Top	Culture Amp	UKG HRSD

SMB, <500 EE - HR SERVICE DELIVERY SYSTEMS		
	User Experience	Vendor Satisfaction
Top, #1	Zendesk	Microsoft Viva
Top	Microsoft Viva	isolved
Top	Mineral	ADP Workforce Now
Top	DocuSign	Zendesk
Top	isolved	Mineral



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

As HR Service Delivery systems become more standardized and buyers become clearer on their expectations and needs, the Vendor Satisfaction and User Experience ratings will start to balance. Currently vendor ratings are widely dispersed.

The top factors given for low Vendor Satisfaction and User Experience ratings:

- Difficult to use
- Poor customer service
- Cost concerns
- Difficult configuration
- Lack of mobile tools

I feel slightly thrown to the wolves regarding how our training went with implementing this new system. For the cost, I feel we should get more help.

Healthcare 197+ EE

The top factors given for high Vendor Satisfaction ratings:

- Great customer support
- Knowledgeable implementors
- Checkpoints and adoption meetings
- Partner communities

The top factors given for high User Experience ratings include:

- Ease of use by Employees, HR, and IT
- Continued improvements and updates
- Accessibility and convenience

ENTERPRISE

HR SERVICE DELIVERY UX AND VS RATINGS – ANALYST INSIGHTS:



Although one of the smaller vendors in the HR Service Delivery category, Dovetail has achieved the highest scores in User Experience and Vendor Satisfaction in aggregate and at the enterprise level for the last two years. Over the last several years this organization invested heavily in upgrading its platform and focused customer care on helping buyers achieve specific outcomes.

DOVETAIL CUSTOMER QUOTES:

They changed how we handle cases and calls creating an improved user experience and extremely improved efficiencies that we didn't have before. They truly understand the HR function and built their product around that understanding.

Healthcare 30000+ EE

Workday Help achieved the second highest ratings in User Experience and Vendor Satisfaction ratings for enterprise-level organizations, along with the highest level of expected growth in adoption for this size category. Workday Help was made generally available in 2020 amid the initial COVID-19 crisis, along with Workday Journeys, and Workday People Analytics. The rapid uptake by existing Workday customers isn't surprising when you look at a buyer's desire to find convenient, accessible, and user-friendly applications to improve the employee experience while reducing HR workloads.

The final application to achieve top-five status in User Experience and Vendor Satisfaction for the Enterprise HR Service Delivery category is ServiceNow. This solution has seen several years of increasing adoption in this HR category, leveraging existing customer relationships with organizations already using their IT help desk, asset management, and workflow applications. Buyers looking for convenience, a focus on multi-application integrations, and standardized experiences across IT and HR shared service solutions often find this a convenient and cost-effective service delivery tool.

Additional applications achieving high ratings in this category are a diverse group of solutions, including DocuSign, Qualtrics, SAP SuccessFactors, and Microsoft SharePoint. All solutions tout streamlined user experiences with reduced HR workloads.



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

Mid-Market

HR SERVICE DELIVERY UX AND VS RATINGS - ANALYST INSIGHTS:



Although Microsoft Viva as a combined application is relatively new, launched in early 2021 as Microsoft's Engagement platform, it brings together a dispirit set of Microsoft Teams and 365 applications already in use for communications, knowledge sharing, learning, workflows, and environmental employee listening. As a free add-on for most Microsoft 365 buyers, it has quickly become a valuable tool for HR functions. Achieving the highest User Experience and Vendor Satisfaction ratings for Mid-Market organizations emphasizes the impact Microsoft can have when entering a market.

MICROSOFT VIVA CUSTOMER QUOTES:



This was a life saver during COVID and is a key communication tool today. Cloud-based, mobile-friendly, also easily syncs with SharePoint & distributed employee laptops.

Manufacturing 1800+ EE

In the Mid-Market category, we also continue to see Workday Help, Dovetail, and Qualtrics all receive high ratings in both User Experience and Vendor Satisfaction. Although usually purchased for very specific needs,, when used creatively, these applications have multiple overlapping features that many mid-market buyers find valuable extensions of their initial vendor purchase, such as workflow tools, forms, communication tools, and user analytics.

Culture Amp and UKG HRSD round out the top five list of solutions in the Mid-Market category. Culture Amp has been slowly positioning itself as a broad engagement platform, with capabilities in employee listening, performance management, and knowledge-sharing. In contrast, UKG's HRSD is a more traditional HR Service Delivery solution focused on information sharing, process automation, and file sharing.

SMB

HR SERVICE DELIVERY UX AND VS RATINGS - ANALYST INSIGHTS:



This category of solutions can be challenging for SMB buyers, who desperately need more HR automation and self-service tools to meet increasingly diverse employee needs with far fewer HR resources than larger organizations.

It isn't surprising that buyers gave top UX and VS ratings to a wide mix of solutions that range from traditional customer helpdesk solutions to standard core HRMS solutions.

ZENDESK CUSTOMER QUOTES:



Terrific tool--meets our needs and is a lot of value for the money. Awesome resource--reporting capabilities are top-notch.

Hospitality 480+ EE

Zendesk received top User Experience ratings, making the case that treating employees as well as you treat your customers isn't a bad idea - as Zendesk is a popular Customer Help Desk solution. Additionally, Microsoft Viva received top marks in Vendor Satisfaction, highlighting that SMBs value packages and support that goes beyond HR functionality.

Zendesk, Microsoft Viva, Mineral, and isolved all received Top Five ratings in UX and VS for SMB organizations. Mineral is an HR services and technology offering that focuses on compliance needs for the SMB market. They offer a mix of internal applications with partner solutions to create a tailored environment for SMB organizations focused on simplifying HR processes, work-flowing compliance processes, knowledge sharing, and content management. Although a traditional HRMS, isolved offers a broad employee and manager self-service solution and workflow tools that are invaluable to first-time HR technology buyers.



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

The HR Service Delivery category is rapidly evolving and at the center of the conversation about today's Employee Experience creating the need for solutions that achieve real outcomes and address business needs – 55% of organizations feel their primary HR Service Delivery application “meets their business needs most of the time,” and 15% feel it “always meets their needs.”



Only 15% of organizations are confident that their primary HR Service Delivery Solutions are Always meeting their Employee Experience and Business Needs

TOP HR SERVICE DELIVERY GAPS IN MEETING BUSINESS NEEDS



HR Service Delivery Applications

- Reporting Functionality 40%
- Gaps in overall functionality 40%

Another way to look at this question is to assess the current Employee Experience an organization believes is being achieved by its HR Systems and processes. As seen in **Figure 78**, in aggregate when we asked this question a little over 30% felt they achieving a culture of collaboration and teamwork, with the remaining organizations almost evenly split across various experiences from standards to setting consumer-grade expectations. On the next page in **Figure 79**, we look at this analysis by the top primary HR Service Delivery solutions identified by survey participants.

So why are organizations struggling with these solutions – over 40% of organizations stated that the top reasons were both reporting capabilities and functionality gaps, Currently these applications continue to be viewed as incomplete with room for improvements.

FIGURE 78: DESCRIPTION THAT BEST FITS YOUR CURRENT HR SYSTEMS EMPLOYEE EXPERIENCE





VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

When we look at this analysis of the current Employee Experience, HR technology buyers feel they are achieving with the primary HR Service Delivery solutions they selected – we find that many solutions seem to achieve a unique set of outcomes. Collaboration and Teamwork are number one for the bulk of vendor solutions, but the second and third most highly selected Employee Experiences are much more diverse and widely spread across the options. We did not see major patterns based on the size of employees served, or if the solution was primarily an HRMS solution or a stand-alone help desk or communications point solution.

FIGURE 79: TOP 3 CURRENT EMPLOYEE EXPERIENCE DESCRIPTION BASED ON THE PRIMARY HR SERVICE DELIVERY VENDOR SELECTED

Top Primary HR Service Delivery Solutions		Collaboration and Teamwork	Standards / Policy	Manager-Led	Self-Reliance	Diversity & Belonging	Innovation / Work Flexibility	Consumer Grade Experience
Workday / Workday Help	CORE HRMS SORTED BY AVG EE SIZE	1		2	3			
Oracle HCM				1		2	3	
SuccessFactors EC		1		3	2			
Ceridian Dayforce		1	3		2			
UKG HRSD		1	2				3	
ADP Workforce Now		1	2				3	
Paylocity		1		3	2			
Paycom		1			2			3
Paycor				3	1			2
BambooHR		2	1		3			
isolved		1	2			3		
ServiceNow	OTHER APPS	3	1				2	
Dovetail		1				2	3	
Microsoft Sharepoint/Viva		2			3		1	
In-House / Developed		1	2			3		



VOICE OF THE CUSTOMER HR SERVICE DELIVERY SYSTEMS

Competition continues to increase in this application area as point solutions expand on their platform offerings and HR Suites continue to invest in more HR Service Delivery focused functionality. We are seeing extensive work being done in almost all solution providers on Employee and Manager Self-Service experiences, including workflow tools, and employee listening solutions that may eventually bring the HR Service Delivery tools in line with HRMS environments, or create a separate category focused on employee experiences only.

A major goal for many organizations is to figure out how to increase adoption in hopes of increasing the data accuracy and frequency of the information they are gathering from employees to improve their experience and ensure engagement.

Additional emerging trends to watch in HR Service Delivery applications include:

- Voice initiation/chatbots
- Intelligent services and integration
- Collaboration and cohort creations
- Contingent and remote workflows
- Two-way communications, constant interactions
- HR communication and standards, based on ESG requirements
- Separation of front and back-end architecture (headless microservices)

Organizations of all workforce sizes, industries, and regional makeups are now leveraging HR technology as a critical business solution. As a community, we have a real opportunity to leverage these technologies to support both business outcomes and workforce experiences.

CUSTOMER QUOTES:

[Vendor] does well with pushing documents for signature, and you can post an announcement, but not overall a great tool. We mostly use it for lower priority/nice-to-have/optional-read communications to employees.

Construction 4500+ EE

CUSTOMER QUOTES:

I can call with the same question or concern 3 or more different times and get 3 or more different answers. Setting user permissions is complicated.

Professional Services 100+ EE

CUSTOMER QUOTES:

Support is sometimes lacking knowledge of our specific configuration and so unable to help us as quickly as needed. Not all solutions are available on the mobile app.

Financial Services 900+ EE

These are just a few of the 5,000 + comments we received from respondents on ways their current systems or vendors struggle to support their business outcomes. These are great topics to include in your RFP assessment process.



RESEARCH METHODOLOGY AND DEMOGRAPHICS SECTION

SECTION 3

RESEARCH METHODOLOGY & DEMOGRAPHICS

SURVEY & RESEARCH HISTORY

This report was taken from the Sapiient Insights 2022-2023 HR Systems Survey White Paper, 25th Annual Edition, which is the latest installment in a continuous annual research effort that began in 1997 by The Hunter Group. It's now published under Sapiient Insights Group.

Since its inception, the sponsoring organization has changed its name several times. However, this primary industry research continues to follow a rigorous research methodology each year and is overseen by well-known and trusted industry analysts. The Annual HR Systems Surveys and resulting published research continue to be invaluable resources that provide insights and guidance to business leaders around the world concerning their HR and finance technology decisions.

THE DEPTH & BREADTH OF THE RESEARCH

Each year, more than 2,000 organizations worldwide complete our systems surveys, providing us with valuable research data from companies of all sizes and industries. Survey participants come from multiple known industry distributors, with the majority from outside Sapiient Insights Group's client base.

This outreach approach gives us a broad and varied audience for gathering data on tech adoption and usage metrics – while safeguarding against data bias toward any particular vendor or user community. The data is, therefore, representative of the overall HR tech community and its practices.



Target survey participants are HR and IT practitioners and leaders at the center of HR Technology decisions.

Participants answer in-depth enterprise systems questions that cover multiple topic areas, including:

- Enterprise outcomes and business financials
- HR technology selection, replacement, and deployment plans
- HR technology integration and implementation practices
- HR resourcing and system budgets
- HR functional processes and social responsibility behaviors
- Customer feedback and satisfaction drivers for major HR applications

Target survey participants are HR, finance, IT, and shared services leaders and practitioners at the center of tech decisions, implementations, maintenance, and/or change management efforts. Each year, our annual reach provides a wealth of knowledge that we share within the HR and finance communities. Many executives and business leaders who focus on workforce and finance technology use these survey results to make better, more-informed business decisions.

RESEARCH METHODOLOGY & DEMOGRAPHICS

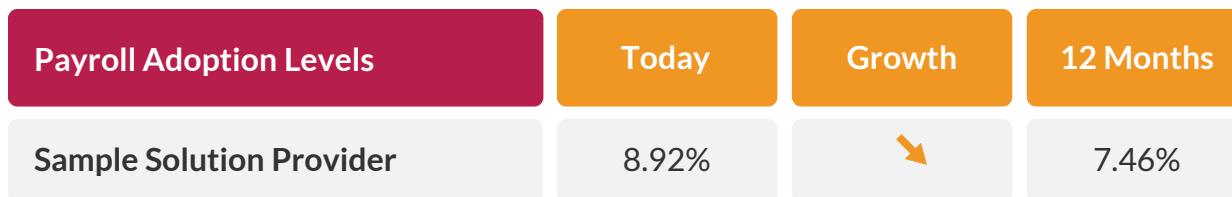
VOICE OF THE CUSTOMER METHODOLOGY

The importance of an organization’s relationship with their HR Technology solution provider is often overlooked and under-appreciated. A good solution provider relationship, built on respect, leads to better outcomes, less stress, and improvement opportunities for both parties. A solid solution provider relationship includes more than just appreciation and communication between the primary contacts; it also considers how well the solution meets the organization’s business needs and is perceived by the end users.

For 25 application categories we ask participants to identify each solution:

- In use today
- Implementing in the next 12 – 36 months
- Replacing in the next 12 – 36 months

This data creates our Vendor Adoption charts (Sample Below), which only include applications that achieve 2% or more of the overall **in-use or planned-to-be-in-use** solution responses.



Our research then gathers quantitative and qualitative data from survey participants on four key factors that impact the overall customer relationship for each of their identified solutions:

Meets Business Needs:

We ask our respondents to rate how effective their specific HR solution is at meeting their organization’s current business needs from always to sometimes.

- Organizations that respond that the system always meets their needs, are asked additional questions about the impact of that application.
- Organizations that respond that the system does not meet their needs, are asked additional questions concerning the type of gaps and specific examples of those gaps.

User Experience:

We ask our respondents to rank the quality of their solution User Experience on a scale of 1-5 (poor to excellent) for all deployed applications. We specifically ask them to focus their answers on the applications end-user experience for all stakeholders; including IT, HR, Managers, and Employees.

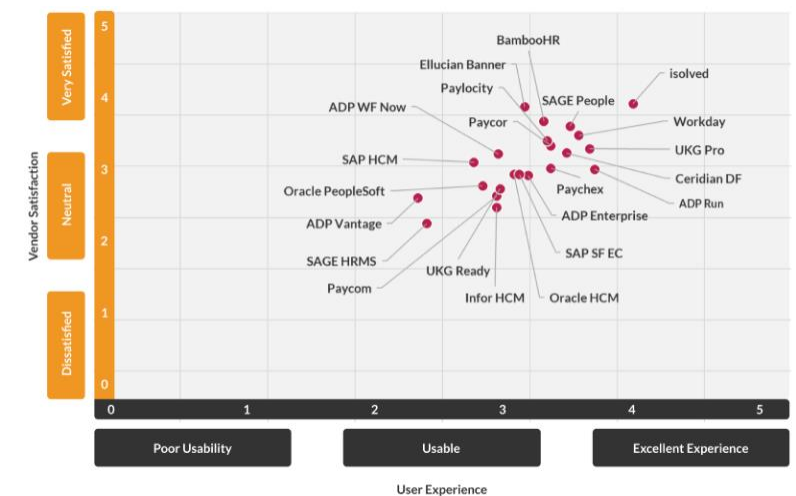
Vendor Satisfaction:

We ask our respondents to rank the quality of their Vendor Relationship on a scale of 1-5 (very dissatisfied to very satisfied) for all deployed applications. We ask them to specifically focus on their relationship factors such as service levels, vendor communications, and alignment of product roadmap to their needs.

All survey participants are then asked additional open-ended questions to provide further details on the reasons they gave a specific rating to each solution on its User Experience and Vendor Satisfaction.

Based on these questions we provide an average User Experience and Vendor Satisfaction rating for every application that receives at least 20 responses from validated buyers. This data is used to create our Voice of the Customer (VoC) Charts of these 10 HR solutions:

- Core HRMS
- Benefits
- Payroll
- Time Management
- HR Service Delivery
- Learning
- Recruiting
- Performance Management
- Compensation Management
- Analytics and Planning



Our goal with all of the data in these sections is to provide a broad overview of the Vendor Landscape for all buyers and HR Technology community members through Voice of the Customer as they assess their own current solutions and needs. More details on our Vendors who have achieved Top 5 User Experience and Vendor Satisfaction ratings for each HR Technology category and by size can be found on [our Voice of the Customer HR Systems Top 5 Performers Page](#).

ABOUT SAPIENT INSIGHTS



**RESEARCH AND
ADVISORY SERVICES.
BRINGING CONFIDENCE AND
CLARITY TO OUR CLIENTS.**



HR | Finance Systems Research and Selection



Strategy and Transformation



Communication and Change Management



Culture Building and Leadership Coaching

Sapient Insights Group is a women-owned, research and advisory firm with a strong sense of business ethics and a passion for adding value to clients, partners and the HR and Finance communities we work within.

At this stage in our collective careers, we don't make stuff up, we're not good at selling trendy, superficial solutions, and we have the confidence to challenge our audiences to focus on what drives results versus simply burning hours on popular business activities.




Everything we produce is rooted in decades of experience, primary research or proven practices. When we can't find what you need, we know the people who can! We build communities, guide you to the right results and inject some fun along the way...

We specialize in research serving these communities:

- Enabling HR, Finance, IT, and Sales/Marketing as they tackle technology transformation, modernize business practices, and invest in the change management and people development required for success.
- Informing technology vendors and investors using primary data, market landscapes, and analyst insights to guide product roadmaps, sales strategies, market pricing and vendor partnerships.
- Supporting Consultants with targeted data to shape their advice to customers and inform their consulting practice.

LEGEND






Organization Sizes:

-  SMB
<500 Employees
-  Mid-Market
500-4,999 Employees
-  Enterprise
>5,000 Employees

The HR Systems BluePrint:

-  Data Governance
-  Strategy
-  Culture

Generational Compositions:

-  Greatest Generation
1930-1945
-  Baby Boomers
1946-1964
-  Gen X
1965-1980
-  Millennial
1981-2000
-  Gen Z
2001-2010

Voice of the Customer:

-  Core HR Management Systems
-  Payroll Systems
-  Benefits and Wellness
-  HR Service Delivery Systems
-  Time Management Systems
-  Talent Management Systems
-  HR Analytics & Planning Systems

Contacts:

-  Email



















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Applications we track in 6 categories:

-  Payroll
-  HRMS
-  Benefits
-  Health and Safety
-  Wellness
-  Employee and Manager HR Self-Service
-  HR Portals and Communications
-  HR Content and Document Management
-  Employee Engagement/Surveys
- Employee Help Desk/Case Management
- Time and Attendance
- Absence Management
- Leave Management
- Labor Scheduling
- Labor Budgeting
-  Productivity /Task Management (assessing)
-  Recruiting and Acquisition
-  Onboarding and Mobility
-  Performance Management
-  Learning and Development
-  Compensation and Rewards
-  Skills Management
-  Career Planning and Succession
-  Embedded HR Tech Analytics Applications
- Generic Analytics, Vis, and Stats Tools
- Enterprise Business Intelligence Platforms
- HR Intelligence /Analytics Platforms
- Workforce and Org Planning Applications
- Data Mapping and Integration Tools
- Data Storage Applications: Warehouses and Lakes

LICENSED RESEARCH POLICY

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Sapiient Insights Group is an independent research and advisory organization that focuses on providing primary research data gathered directly from the practitioner community, a "Voice of the Customer" perspective. Our research approach is vendor-agnostic and open to all organizations for participation.

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To participate in next year's research and receive an advanced copy of the Annual HR Systems Survey Research, please join our [Research Community](#).



To request a media interview, email us at Research@SapiientInsights.com.



This licensed report contains one or more sections from the full **Sapiient Insights Group White Paper, 25th Edition**. More details on our research approach can be found in our [research methodology](#).



To learn more about additional research efforts conducted by Sapiient Insights Group, please visit [our website](#).



Our research is an annual community effort and key aggregate findings can be found [here](#).



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