TALENT MANAGEMENT

TECHNOLOGY VALUE MATRIX 2017

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THE BOTTOM LINE

Year-over-year change in vendors' placement within the Talent Management Technology Value Matrix is light. The biggest exception is Saba Software, which has catapulted into the Leader quadrant on the heels of the company's decision to acquire Halogen Software to offer mile-deep end-to-end specialization at the intersection of performance management and learning. It's a wise competitive move, and Nucleus believes 2018 will touch off a fire sale for vendors that fail to develop sound strategies to survive and thrive in the new normal—where everything they do today is also available from full-suite providers of technology for all of human capital management (HCM).

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A FIRE SALE IS ABOUT TO IGNITE

A fire sale to acquire vendors of end-to-end technology suites solely for talent management is about to ignite. It will take a few years to play out, but 2018 is when all the markings will become undeniable. Among vendors of technology solely for talent management, a bought or be bought mentality is brewing. Also-rans and me-too vendors will be gobbled up or forced to radically change their business models.

Why? With technology for talent management, the return on investment (ROI) is there, but the value is not as straightforward as that of payroll, time and attendance, or other central functionality for HCM (Nucleus Research *r97 – Value in HCM ripples from the epicenter outward*, May 2017). Meanwhile, to buoy their departments' strategic relevance to the organization, HR managers have figured out they need end-to-end HCM suites and the holistic data these systems produce, to make sense

of the analytics that talent management itself produces (Nucleus Research *q194 – Nucleus Top Ten Predictions for 2017*, October 2016).

TALENT MANAGEMENT VALUE MATRIX October 2017 — NUCLEUS RESEARCH

The Value Matrix is an assessment of the state of the market and indicates the functionality and usability of a solution. An arrow indicates future movement of a solution relative to others. Solutions without an arrow are projected to keep pace with the increase in functionality and usability expected in the overall market.

FULL-SUITE HCM PLAYERS BRINGING THEIR A-GAME

As noted in previous Talent Management Technology Value Matrices, when capable technology for talent management is available in a one-vendor suite that features functionality for all of HCM, employers are usually better off staying put (Nucleus Research *p153 – Talent Management Technology Value Matrix 2015*, September 2015). The logic in seeking an end-to-end suite solely for talent management from a separate vendor makes vanishingly little sense when the capabilities already there are competitive and progressive.

Ceridian is an example of the high caliber of full-suite player recently entering the full fray of talent management. The vendor's relatively new offerings for talent management are compelling (Nucleus Research *r124 – Ceridian advances to graduate*

studies in HCM, June 2017). Providing similarly capable functionality for talent management, full-suite vendors that have been at the talent management game for longer are Ultimate Software, SumTotal Systems, Oracle and SAP, the latter three all appearing in the Leader quadrant of this report.

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TIMING IS EVERYTHING

So, the idea that an employer ready for talent management ought to obtain the functionality in the form of a full-breadth standalone suite is facing growing pressure. The corollary is that vendors fitting this category of provider may have reached their peak in terms of perceived market value. Furthermore, they may recognize that their ability to sell to the highest bidder is now, not later. Since the last report published, rumors have gained steam that Cornerstone OnDemand—among the vendors closest to the upper right-hand corner of the Leader quadrant in this year's Value Matrix—is for sale. Nucleus believes such a move would reveal a great deal of shrewdness on the part of Cornerstone and come perhaps not a moment too soon for the vendor. In the meantime, Cornerstone's new suite-naming nomenclature plays into mile-deep end-to-end specialization, an idea that these pages later explain.

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MICROSOFT AND TALENT MANAGEMENT SITTING IN A TREE

On the subject of vendors buying vendors, last year Nucleus noted that the next big M&A event in HCM might come from an unusual suspect, one not normally associated with technology for HR, payroll or talent management (Nucleus Research *q156 – HCM technology vendors Microsoft could acquire*, August 2016). Increasingly, talent management looks to be where this event will eventually occur, and Microsoft—having recently begun to develop Dynamics 365–native functionality for workforce management (WFM)—looks to be the most likely of the unusual suspects.

Potential targets for Microsoft abound, all in the Leader quadrant of this year's report. Cornerstone is one. PeopleFluent is another. In February of this year, SilkRoad and Microsoft announced a deepening of their years-long partnership to

use Azure infrastructure to support SilkRoad Talent Center, talent management service, employee engagement applications, and personalized onboarding integrated with Dynamics 365. A high level of usability and deep integration with the prevalent Office 365 suite make SilkRoad's solutions attractive and the vendor a ready potential target for acquisition by Microsoft (Nucleus Research *r58 – Talent management vendors vie for position*, March 2017). Even SAP SuccessFactors is a possibility—though more of an intriguing than likely potentiality (Nucleus Research *q230 – Microsoft and SuccessFactors would make a great couple*, December 2016)

The logic of the best-of-breed point solution has reemerged, but this time the point is broader.

BEST-OF-BREED POINT SOLUTIONS CUTTING LIKE A KNIFE

Without selling, how will others survive and thrive? They're joining forces to resurrect an enduring tactic, Nucleus's analysis finds. The logic of the best-of-breed point solution has reemerged, but this time the point is broader. It's the idea that various counter-balancing areas of talent management naturally intersect and call for straddling mile-deep specialization. Point solutions of the past sank in like needles, but the new point solutions will cut like a knife—in a good way, of course.

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To position themselves for this shift as the market for standalone full-suite talent management commences its long fade away, vendors are taking stock of their strongest suits and building businesses around those—or buying other vendors to achieve the mile-deep end-to-end specialization they want. In Nucleus's estimation, it's a viable way for these vendors to retain relevance and grow in stature as the landscape for technology in talent management enters this latest evolution. Following are two examples:

- Learning + Performance Management. Since this new climate began to take shape, Saba Software's acquisition of Halogen Software provides the best example of one player buying another in order to achieve the cross-functional specialization desired (Nucleus Research *r58 – Talent management vendors vie for position*, March 2017). The idea is to marry two areas of talent management that go hand-in-hand, in this case learning and performance management. Among the best vendors of technology for learning, Saba had functionality for performance management before acquiring Halogen, but the latter's

capabilities reach deeper, and the acquisition significantly broadens Saba's customer base for performance management specifically. Furthermore, with each vendor's ability to facilitate the trigger-based approach for both learning and performance management, Nucleus considers the combination a major leap forward, placing the vendor in the Leader quadrant this year (Nucleus Research *q57 – Trigger based learning takes hold*, March 2016).

- Onboarding. SilkRoad has made the smart decision to position itself as the go-to solution for high-end, strategic onboarding by broadening the understanding and concept of onboarding's applicability beyond the realm of talent acquisition. Onboarding is where the vendor happens to excel most (Nucleus Research *r115 – SilkRoad Onboarding – General Electric*, June 2017), and the move repositions SilkRoad's most noteworthy functionality as a mile-deep end-to-end specialization in straddling a broad cross-section of the workforce lifecycle. This also leaves SilkRoad poised to bring in its innovations in performance management (SilkRoad Activate) as opportunities arise.

The following pages provide more details and a profile for every vendor appearing in this year's Talent Management Technology Value Matrix, which evaluates each provider based on the functionality found in its solutions and the usability of them (Nucleus Research *r59 – Understanding the Value Matrix*, April 2017).

LEADERS

Leaders in the Value Matrix include Ceridian, Cornerstone OnDemand, Oracle Talent Management Cloud, PeopleFluent, Saba Software, SAP SuccessFactors, SilkRoad, SumTotal Systems, and Talentsoft.

CERIDIAN

This is Ceridian's second year in the report, and with Dayforce the vendor again holds strong mid-pack in the Leader quadrant. Ceridian has executed faithfully on an aggressive product roadmap. The vendor has amassed new functionality in a logical progression for HCM with talent management coming for the most part last—but not least (Nucleus Research *r97 – Value in HCM ripples from the epicenter outward*, May 2017). Moreover, for talent management Ceridian began with recruiting. This also makes sense, as Nucleus's analysis shows talent acquisition delivers the most value after workforce management (WFM) (Nucleus Research *r153 – Where talent is most important*, August 2017). WFM is Dayforce's origins, and after rounding out the epicenter of HCM and recruiting, Ceridian added the rest of talent acquisition (i.e., onboarding) and, then, performance—which is where the bulk of remaining gains in productivity originate within talent management.

As of Q4 of 2017, the vendor has added the following:

- Compensation management. New functionality for compensation planning benefits from Dayforce's tightly knit WFM technology and—just like everything else in the solution—exists in a single application spanning the entire suite. Functionality is robust. Among the capabilities available, users can define compensation budgets for base and variable pay, allocate compensation pools to teams, conduct scenario-modeling for managers, and give employees Total Rewards Statements.

- Learning. Ceridian has added a learning management system (LMS) to the suite. This LMS, too, rests on the single application, the central characteristic of the Dayforce architecture. For the LMS, Docebo has become Ceridian's preferred third-party content provider. Even so, Dayforce is compatible with whatever provider users may have in place for an LMS.

- Analytics. Drawing on machine learning algorithms applied to the single set of data found in the application, Dayforce now also offers predictive analytics that will eventually be available throughout the application and for no additional SaaS subscription fee. This is of additional importance to talent management, and the focus first is on helping employers identify employee flight risk. Using the data in an employee's TeamRelate profile, while understanding flight risk and the factors behind it, managers can potentially have better discussions with their team members to identify the triggers of high turnover and address them.

Nucleus's analysis finds that many vendors whose breadth of functionality for talent management is mature and broad, begin to infuse the solution with predictive analytics, and most that do so address employee turnover as an opening salvo in this realm. In the Dayforce solution, interactive dashboards heavy on visuals present employee information benefiting from the wealth of information available in the single dataset of Dayforce (Nucleus Research *q153 – The evolution of embedded analytics*, August 2016).

Elsewhere, Ceridian recently announced the launch of the Dayforce Software Partner Program. The idea is to make open Dayforce APIs to third-party developers intent on creating applications designed to complement and work in concert with the suite. Nucleus believes this is yet another sign of the maturation of Dayforce's suite; most vendors that have developed functionality for all but the most obscure aspects of HCM typically open their APIs to outside developers (Nucleus Research *q172 – HCM Technology Value Matrix 2016*, September 2016).

Two years ago, Nucleus surveyed Dayforce users' inclination to deploy functionality for talent management as it became available in Dayforce (Nucleus Research *p224 – Anatomy of a decision – Ceridian Dayforce HCM*, December 2015). Adoption rates appear to be in line with those projections. Meanwhile, Nucleus's analysis of customers' use of Dayforce continues to find their experiences to be strong and positive. Many point to the comprehensiveness of the human resource information system (HRIS) and Dayforce's abilities in reporting. With these latest advancements applied to Dayforce, the vendor has matriculated to graduate studies in HCM, as Nucleus observed in mid-2017 (Nucleus Research *r124 – Ceridian advances to graduate studies in HCM*, June 2017). As iterative additions to functionality accrue, Nucleus expects Ceridian's ascent within the Leader quadrant to continue.

CORNERSTONE ONDEMAND

Cornerstone OnDemand is a single application, cloud-based and SaaS-delivered, for all of talent management. For companies employing fewer than 250 there is Cornerstone Growth Edition. Cornerstone OnDemand is for organizations employing 250 or more. This year, the vendor's product roadmap reflects a logical progression of evolution in the solution (Nucleus Research *r140 – Cornerstone OnDemand expands its domain*, July 2017):

- New suites. Notably, Cornerstone implemented a new naming convention and nomenclature for its suites, arranging its capabilities in packages tailored for its current and future customers' differing needs: Cornerstone HR, Cornerstone Performance, Cornerstone Learning, and Cornerstone Recruiting.

- Learning. The biggest news in new functionality from Cornerstone is, arguably, the vendor's overhaul of its mechanism to deliver learning-related content. Fully integrated capabilities in machine learning and predictive analytics undergird the effort, which serves content as the Netflix model might, if applied to learning. The system's machine learning continually analyzes employees' professional profiles and learning activity so that it may deliver content that is as relevant as possible to any given employee at any given time. Nucleus believes the result promotes employees' ever greater participation in on-the-job and job-related learning.

Following are additional highlights pertinent to this report:

- People analytics. In June of this year the vendor further bolstered its analytics-related offerings to help users measure employee engagement and performance. This is the latest milestone in Cornerstone's smart long game to incorporate technology from Evolv into the entire application. The new

capabilities here are not unlike those that the vendor's full-suite competitors in HCM have added to their arsenals (Nucleus Research *r160 – HCM Technology Value Matrix 2017*, August 2017).

- Implementations. Also in June, the vendor launched a new program designed to simplify and tailor implementations of its software in the interest of expediting them. Cornerstone Realize is not unlike similar efforts other vendors in this market space have undertaken over the past couple of years. One example is WorkForce Software's Xcelerate (Nucleus Research *q128 – WorkForce Software Vision 2016 update*, July 2016). Another is JDA Stratus (Nucleus Research *q80 – JDA expands its sphere in WFM with Stratus*, May 2016).

As for the newly packaged suites, Cornerstone HR presumably comprises inner workings of what used to be Cornerstone Link. The latter was the name of the much-needed human resource management system (HRMS) that Cornerstone developed and deployed last year. Nucleus believes viable HRMS-related functionality is necessary for any vendor of technology solely for talent management to compete with large, increasingly present players whose solutions encompass all of HCM (Nucleus Research *p87 – Cornerstone OnDemand Needs a Strategy for the Epicenter of HCM*, May 2015).

As for analytics, they thread throughout all the new suites and are unavailable as a standalone option. This is a smart move by Cornerstone. The vendor has put much work into integrating Evolv-originating capabilities into everything that the end-to-end application does. By making analytics inextricable, Cornerstone protects the asset from any pressure that might surface, from holders of publicly-traded Cornerstone's stock, to sell Evolv should returns on their portfolios wane.

Nucleus's analysis finds that most users of Cornerstone laud the vendor for the breadth and depth of its functionality. Some report dissatisfaction with the level of usability for administrators. Others note that the UI seems dated to them, though Nucleus's analysis finds that the vendor has made great strides in this regard. Users point to learning, performance management, and capabilities in customization as particularly noteworthy high points. On the balance, Nucleus believes Cornerstone continues to innovate wisely and at an admirable pace on an exceptionally solid solution for talent management, more than justifying its placement among the leading Leaders in this year's report.

ORACLE TALENT MANAGEMENT CLOUD

This year Oracle Talent Management Cloud remains in the Leader quadrant. Cloud-based and SaaS-delivered, functionality spans sourcing, recruiting, employee

development, performance management, learning, and retention predictors and indicators. Oracle maintains that it has replicated, on its own data model, nearly all the functionality originally found in the several-years-ago acquired Taleo. With its recently announced launch of the Oracle Recruiting Cloud, that now includes talent acquisition. Nucleus has long argued that Oracle HCM Cloud, parent to Oracle Talent Management Cloud, must consolidate and simplify its data model, so the development is welcome. In the meantime, the vendor has no near-term plans to retire Taleo, and will be repositioning it as the cloud recruiting solution for its standalone recruiting and on-premise HR customers.

Based on the presentations Oracle shares, the vendor's pace of innovation is aggressive. This year, improvements to functionality have been incremental and iterative. For instance, employees may now leave feedback at any coworker's profile. Learning has grown crowd-sourced and collaborative. Administrators may now create rules to automatically enroll workers exhibiting various shared criteria in learning communities. For mobile, a chatbot understands questions, and the application integrates with a smartphone's voice recognition functionality.

Elsewhere, Decision Sciences—what Oracle calls its machine learning capabilities—infers actions by any one jobseeker, for example, based on the aggregate actions of others like him or her. Additional new functionality includes mobile learning, an expanded calculation rating for rating employee performance, improvements to site configurability in sourcing, and enhanced integration of interview scheduling.

The volume of changes has been large, too many to list comprehensively in this profile. Nucleus's analysis of users' experience finds them liking the functionality, but struggling with integration. Given the strides Oracle has made in simplifying its data model for all of HCM, Nucleus suspects that frustrations with integration may be on the wane.

PEOPLEFLUENT

PeopleFluent is based in the cloud and delivered via SaaS. The vendor's suite offers functionality for talent acquisition, onboarding, performance management, professional development, workforce analytics, learning management and content, succession planning, organizational planning, compensation planning, and workforce compliance. PeopleFluent targets the large enterprise market: Users employ on average approximately 29,000 in staff. The solution will accommodate users with employee populations as low as 2,000, but PeopleFluent's roster of customers includes many employing more than 50,000 in staff.

PeopleFluent's technology accommodates needs around talent management for a contingent workforce, too. As noted last year, one of the solution's strengths is its ability to help users comply with regulations related to the Office of Federal Contract Compliance Programs (OFCCP).

An emerging trend from the vendor this year is the rise in deployment of its Talent Productivity Platform, which provides contextual learning, communication, social collaboration and video as part of the talent management process, and can also unify the UI for other HCM vendors whose capabilities integrate with PeopleFluent's and provide a single dashboard for employees across all HR processes and systems. Incidentally, much like other UIs, PeopleFluent's pushes tasks to individuals using the system according to his or her role and day-to-day goings-on.

Functionality for talent acquisition from PeopleFluent is designed for high-volume hiring scenarios. In deals involving just recruiting, unsurprisingly, the vendor encounters a range of existing and upstart point solutions. Many deals PeopleFluent enters involve prospects that wish eventually to deploy functionality across the full breadth of talent management. In these instances, the vendor finds itself most often facing off against Oracle, Workday, and SAP SuccessFactors. Nucleus's analysis of customers' experience finds them repeatedly pointing to the solution's ease of use. Users also give high marks for the LMS's ability to facilitate compliance.

SABA SOFTWARE

Long a trailblazer in technology for learning, Saba Software moves well into the Leaders quadrant on the heels of acquiring Halogen Software this year (Nucleus Research *r58 – Talent management vendors vie for position*, March 2017). Combining functionality across recruiting, onboarding, learning and development, succession and leadership planning, and compensation planning, the development brings formidable competition to SAP SuccessFactors, Cornerstone OnDemand, and Oracle Talent Management Cloud.

Prior to acquiring Halogen, Saba was already offering cloud-based, SaaS-delivered functionality for learning management, career and succession planning, performance management, organizational management, compensation, recruiting, and analytics largely focused on enterprise customers. Focused on mid-market customers, Halogen entered the acquisition with much deeper and richer performance capabilities and a large user base deployed on these. There is overlapping capability, yes, but combined the two vendors complement each other in learning, performance management, social UI, and employee engagement and are able to address customer needs in both the enterprise and the mid-market.

Following are additional developments that have surfaced since last year's report published:

- Informal learning. In mid-2017 Saba announced the launch of Saba Discovery, a learning record store (LRS), along with richer support for micro-learning and gamification in Saba Cloud and other tools designed to help organizations track and leverage employees' informal learning. The functionality lets users infuse on-the-spot and employee-led learning, which takes place outside the conventional confines of on-the-job training, into official learning efforts.

- Mobile coaching. Operating in concert with the TalentSpace suite, the new mobile experience and mobile application for coaching is a vehicle for real-time delivery of feedback, recognition, coaching tips, and development ideas. From a mobile device, users can schedule one-on-one meetings and share agenda topics for these. This is another example of trigger-based performance management (Nucleus Research *p199 – The coming mass extinction in HCM*, November 2015).

- Updates to TalentSpace. In early Q3 of 2017 Halogen announced updates to its suite for talent management. A reworked homepage dashboard showcases employee goals, open tasks, development plans, learning assignments, and recent feedback received. TalentSpace is accessible via mobile devices, where employees can update these activities and receive feedback. Preconfigured, templated forms and best-practice workflows help users to tailor programs for performance management. Data part-and-parcel to these activities is readily available in the form of reports. TalentSpace also gives users the ability to create and administer real-time surveys. This brings part of Saba Pulse 360 functionality into a new add-on product called Halogen Pulse.

Nucleus's analysis of users' experience finds instances of extreme satisfaction with customer service. Learning from Saba gets very positive feedback. Many users commend the regular cadence of SaaS-delivered updates suite-wide, as well as the quality of these. Customers also point to a high level of configurability. In all, Nucleus believes the vendor's newfound breadth, coming from the acquisition, couples with a generally positive user experience to more than justify Saba's movement into the Leader quadrant this year.

SAP SUCCESSFACTORS

This year SAP SuccessFactors remains among the vendors with the most usability and functionality in talent management. SAP SuccessFactors itself is a cloud-residing, SaaS-delivered solution especially strong in learning and performance

management. Several developments relevant to this report were covered in the 2017 HCM Value Matrix, published recently, and much of the following will be familiar to readers of that report (Nucleus Research *r160 – HCM Technology Value Matrix 2017*, August 2017):

▪ Collaboration. SAP Jam is the social media overlay for SAP SuccessFactors, the element found in SAP SuccessFactors that facilitates employee collaboration. SAP Jam now enables users to create customized home pages for pertinent groups of colleagues. As well, IT can allow departments it chooses to manage their own collaboration, thus saving IT personnel time from having to manually add or remove information or users.

▪ Talent acquisition. In November 2016, SAP SuccessFactors announced that it had added a career site builder enabling employers to create website designs for management and recruitment. The goal is to allow employers to use the cloud to create mobile and consumer-friendly career websites to ease the hiring process. The new career site builder capabilities provide best-practice site components such as dynamic layouts and preformatted elements and live site updates for an adaptive candidate experience, enabling recruiters to make real-time changes based on candidate needs, feedback and site interactions. The potential for reductions in cost and duration of management and implementation is apparent, and more usable system enables customers to improve candidate experience.

▪ Mentoring. Also in November of 2016, SAP SuccessFactors announced the availability of intelligent mentoring as part of the SAP SuccessFactors Succession & Development module. The new functionality can automatically and intelligently match mentors with mentees and also provides real-time feedback surveys and reporting. The latter enables HR to track progress and development with reports and metrics found in easily accessible dashboards.

▪ Trigger-based performance management. In October of 2016, the vendor announced updates for its continuous performance management as part of SAP SuccessFactors Performance & Goals. From peers, employees and managers can now request feedback on employees' achievements at any time. The new "achievements" tab in the goal section of performance forms captures achievements, making it easier for managers to better track these metrics.

▪ Mobile functionality. In June 2017, the vendor announced a new design for the SAP SuccessFactors Mobile app for iOS—designed in partnership with Apple. Available on the mobile app are time sheets, time-off requests and approvals, search, organization chats, performance management and reviews, learning,

and recruiting (e.g., candidate assessment and job offer and requisition approvals). The UX is unified across iPhone and iPad. Improvements to help the application for Android OS achieve parity with the one for iOS are ongoing. Enhanced Learning is the first of these improvements to reach this goal.

▪ Learning. SAP SuccessFactors continues to hone to its already formidable capabilities in learning. A single learning management system (LMS) undergirds internal and external activity in the vendor's learning marketplace and integrates with SAP Hybris. The latter enables users to manage their websites and engage in marketing and promotions. The vendor describes the UX as Amazon-like with a mind for search engine optimization. Related to learning, new functionality for Apprentice Management enables users to manage apprenticeships and educational programs. The functionality helps organizations engage with generally younger talent such as interns and recent college graduates.

In analyzing users' experience, Nucleus has encountered mixed feedback on the caliber of customer support for SAP SuccessFactors. Additionally, some users report that the system is slow to process data. That said, functionality from SAP SuccessFactors for talent management is among the very best available in the industry, Nucleus finds. The vendor's position in the Leaders quadrant this year, well ahead of most others there, reflects this.

SILKROAD

This year SilkRoad remains in the Leader quadrant as the vendor builds on the developments that, as noted last year, have fueled its movement. For one, beginning about 18 months ago, SilkRoad altered its strategy considerably—and smartly. Since, the vendor has assiduously deployed functionality and made business decisions that make it a straightforward, intuitive partner for Microsoft. For example, functionality compatible with Office 365 applications continues to build (Nucleus Research *r58 – Talent management vendors vie for position*, March 2017). Meanwhile, SilkRoad's capabilities in self-coined "appification" let users design and generate micro applications that meet their needs. This appification is essentially platform-as-a-service (PaaS), but what's different is that the vendor uses it, too.

More recently, SilkRoad has built significantly on strides it made last year in deploying functionality that reflects the trigger-based approach to performance management (Nucleus Research *p199 – The coming mass extinction in HCM*, November 2015). In May of this year, specifically, the vendor unveiled SilkRoad Activate. The idea behind it is to enable employers to create individualized, personalized career paths and engagement for individual employees. Nucleus sees

the related terminology and concept of Talent Activation as a notable attempt to shift industry conversations away from the tired notion of employee engagement, and toward an acknowledgement of the outcomes organizations want to see from a more positively engaged workforce.

Integration with Office 365 and with appification is standard with SilkRoad Activate, which comprises recruiting, onboarding, Agile Performance, and learning. Features include analytics applications such as recruiting and onboarding dashboards, business applications and tools for organizations to create their own applications (i.e., appification), and experiences tailored for employees, managers and HR staff.

Nucleus's analysis of user experiences with SilkRoad reveals some criticism of the UI, with users reporting that it is at times clunky. However, they also report high levels of satisfaction with, especially, customer service and pricing—which many note, is exceptionally affordable. Marquee, well-known companies report notable ROI with the vendor's best-known and possibly best product, SilkRoad Onboarding, with one user's ROI placing it just shy of winning a 2017 ROI Award from Nucleus (Nucleus Research *r115 – SilkRoad Onboarding – General Electric*, June 2017).

SUMTOTAL SYSTEMS

Three years ago, Skillsoft acquired SumTotal Systems. The two have mutually elected to operate as separate business units even as they merge functionality. Over the past year, they have succeeded in combining talent management and WFM with learning technology and content—specifically, bringing WFM, talent management, learning, and recruiting onto one platform (Nucleus Research *r160 – HCM Technology Value Matrix 2017*, August 2017). Earlier this year, the vendor did away with nomenclature around the elixHR platform, bundling all of its functionality into the Core Platform to provide in-memory data-crunching that supports predictive and prescriptive analytics. Expanded reporting and analytics, as well as career and individual development capabilities, are also part of the Core Platform.

Following are recent developments relevant to this report:

- Recruiting. Two years ago, Nucleus noted that SumTotal was relying on a partnership with iCIMS for talent acquisition (Nucleus Research *p153 – Technology Value Matrix 2015 – Talent Management*, September 2015). The vendor later made the first steps to extricate itself from this necessity by launching native functionality for onboarding (Nucleus Research *r160 – HCM Technology Value Matrix 2017*, August 2017). As of this report's publishing, SumTotal has launched native functionality for the pre-hire elements of talent acquisition. Sophisticated capabilities expected in a modern solution for talent

acquisition are a part of the new functionality and they have the cumulative effect of relieving SumTotal of the necessity for a cloud-to-cloud integration with iCIMS. At the same time, in keeping with customary industry practices, SumTotal remains committed to supporting integrations with iCIMS and other third-party ATSs.

- Talent Expansion Suite. This suite saw a major revamping this fall to include innovations in gamification, reporting and analytics, and social platform integration. The vendor has instituted a "bring your own social" policy whereby customers may easily integrate a third-party social media solution—Yammer, for example. For learning, the system now accommodates the aggregation of content from third parties and massive open online courses (MOOCs). This is significant in that it indicates Skillsoft, though it offers far-reaching, high-quality learning-related content of its own, does not wish to impede users' ability to get content from wherever they want. Further supporting this notion, another significant new enhancement is support for the Experience API (xAPI), which enables customer tracking, reporting, and analytics for learning experiences that occur outside of the LMS.

Early this year Skillsoft launched Percipio, a new cloud-based content delivery and learning platform. A personalized homepage enables employees to track their goals, access learning content, and follow paths of learning tailored to their career and other goals. Skillsoft has not yet baked machine learning into the solution. For now, curated channels accommodate an employee's learning needs after he or she completes a Percipio-based self-assessment. Percipio provides recommendations on content that match a learner's interests based on this self-assessment. Skillsoft plans eventually to incorporate machine learning into Percipio to refine content recommendations and assist users in discovering content best suited for them.

An advanced search engine for learning content eases the experience for users. Whereas most competitors' search engines employ an inferior metadata-based approach, Skillsoft's brings in elastic search to crawl potential matches' entire text to produce results better tailored to the query.

The Percipio learning ecosystem will eventually be seamlessly integrated into the SumTotal platform to provide the two entities' combined customer base with a single learning and development experience. The first deployment of this integration is slated for summer of 2018.

The most current version of SumTotal is available to any user whether the customer receives the solution via SaaS, has a privately hosted instance, or has the system installed on the premises. This flexibility is advantageous for a distributed enterprise

whose business units, countries or subsidiaries by some necessity have different deployments, but all need to work off the same instance of the software. With the latest release of the software, SumTotal made available deployment tools to automate the installation process for on-premises customers, via a single installer. Additionally, the vendor will soon release updates to allow customers with perpetual licenses to deploy the solution to Amazon Web Services (AWS) and Microsoft Azure. Of new sales, approximately 85 percent are in a multitenant cloud, the vendor says.

As Nucleus has noted, the solution is among only a few that offer the full breadth of HCM, from WFM through talent management, including learning. Some customers note challenges in the details of working the system. However, Nucleus's analysis of users' experience finds solid ROI in Skillsoft learning, including for large enterprises (Nucleus Research *r125 – Skillsoft ROI case study – General Motors*, September 2017).

TALENTSOFT

Talentsoft is a cloud-based, SaaS-delivered solution for recruitment, career planning, compensation management, competencies and performance management, and e-learning. The vendor competes mainly in Europe. Ahead of last year's report, the vendor acquired e-learning provider e-doceo. Since, Talentsoft has entirely assimilated e-doceo's functionality into its product naming nomenclature and gained greater ability to compete in an end-to-end sense with its biggest rivals, Oracle, SAP SuccessFactors, Cornerstone OnDemand and, increasingly, Workday.

A new customer of note is the French National Mail Service, whose implementation recently began. Talentsoft recently beat SAP SuccessFactors to win the business of Toyota Material Handling, headquartered in Sweden and with operations in more than 20 European countries. The vendor claims, surprisingly, that it has not faced Lumesse in a deal in a very long time.

Since last year's report, Talentsoft has revamped its UI. Also new is traceability, functionality designed to help users produce an auditable trail of activity should a regulatory agency train its eye on any given customer.

Implementations of Talentsoft tend to be quicker than those of its competitors. Part of this is attributable to the launch early this year of Talent Hub, the vendor's new, customizable solution for HR data management. A hybrid approach to core HR allows customers to integrate Talentsoft with whatever HRMS (including payroll systems) they already have— or use Talentsoft's, if they want. Automated data checks are provided to help maintain the quality and reliability of an HR database. The UI is contextualized and features robust ESS. Local libraries and data-mapping

facilitate centrality of information-storing. APIs feature standard connectors to simplify integration.

Nucleus sees Talentsoft as the emerging primary Europe-based vendor of technology solely for talent management—its full breadth. Given the pros and cons to this from a competitive standpoint, detailed in last year's and this year's reports, Nucleus will watch intently as the vendor charts a course for the years ahead with its product roadmap and overall approach to the market for its solutions.

E X P E R T S

Experts in the Value Matrix include Cegid, Epicor HCM, Haufe-Umantis, IBM Watson Talent, and Lumesse.

CEGID

Cegid entered this Value Matrix last year under its talent management suite's previous name. A cloud-based, SaaS-delivered solution for talent management, Cegid is the new name for Technomedia, a solution that remains in the Expert quadrant. As mentioned in last year's report, through the acquisition Cegid has been able to expand into more than 75 countries in sectors such as financial, manufacturing, government, health, education and distribution. In 2016, private equity firms Silver Lake and AltaOne Capital became majority stock owners and took Cegid again under private ownership.

Talent management from Cegid rests on a single line of code, which Nucleus believes to be a benefit here and elsewhere in HCM. Modular applications in talent acquisition and onboarding, performance management, career and succession planning, compensation management, learning and development, and core HR are available standalone or as part of an integrated suite (Nucleus Research *p161 – A year-to-date update on Technomedia*, September 2015).

Recently, Cegid announced acquisitions designed to augment in talent management suite in areas related to talent acquisition:

- CVManager. This CVManager Group–originating solution is an ATS designed to handle needs of the healthcare, education and retail markets.

- RITA. An online tool created by Illico Hodes to source job candidates and post jobs, RITA enables users to post their job openings to hundreds of job boards in short order. Reach is international and affords recruiters access to several hundred million online profiles of potential candidates.

Nucleus's historical analysis of users' experience with Cegid finds them extolling the solution's reporting capabilities and the vendor's customer service. Customers point to the solution's ability to accommodate complex global organizations. Some users express dissatisfaction with some inflexibility in the solution's ability to be customized. Nucleus notes, however, that customization beyond configuration is not necessarily the forte of any cloud-based solution.

EPICOR HCM

This is Epicor HCM's second year in the Talent Management Technology Value Matrix, where it remains in the Expert quadrant. The solution is designed for users of 100 to approximately 5,000 employees. In late Q3 of last year, multinational private equity firm KKR & Co. L.P. completed its acquisition of Epicor. The vendor offers functionality across a broad cross-section of HCM, with capability concentrated in WFM (Nucleus Research *r66 – WFM Technology Value Matrix 2017*, April 2017). As of last year, Epicor integrated Epicor HCM with its flagship Epicor ERP solution, meaning manufacturers using the vendor's solutions may now integrate functionality such as employee leave and actual time worked. This is a part of the vendor's industry-specific strategy.

For talent management, the vendor offers recruitment, onboarding, performance management, training, and employee development. The application is available as single-instance hosted, via SaaS, or on-premises. Target industries include manufacturing, distribution, retail, and services.

Since last year's report published, Epicor HCM has deployed new functionality related to usability, government compliance, and mobile candidate capabilities. The main highlight is the rollout of a new UI. Nucleus's analysis of users' experience suggests the new UI is welcome. Also of note, enhanced analytics are on the horizon in the form of a recently released analytics offering as seen in other Epicor solutions (Nucleus Research *r159 – ERP Technology Value Matrix 2017*, August 2017).

User feedback runs the gamut. Some of it is stellar, whereas Nucleus's analysis encountered some users who were looking at their options. A good deal of the feedback had to do with the outgoing UI and a lack of predictive analytics, much of which the vendor addressed in the significant update to Epicor HCM launched in August 2017. Much of the rest of users' concerns are receiving attention as innovations in the near-term roadmap. In the meantime, users who are repeat customers challenge their peers to find a system with better end-to-end capability in HCM. Customers point to the quality and ease of reporting as another strong suit.

HAUFE-UMANTIS

Cloud-based and SaaS-delivered, Haufe-Umantis provides an ATS, performance management and goal setting, compensation planning, career development, learning, and succession planning. Depending on the target market, the vendor competes with Workday, Oracle, SAP SuccessFactors, Cornerstone OnDemand, Lumesse, and Talentsoft. Following are developments relevant to this report:

- In April of this year, Haufe announced that it was modifying the release cycle for applications. The new schedule meant that all users will now receive minor updates every two weeks and a major update twice a year. Minor updates will include things such as regular bug fixes, while major updates, coming at intervals of several months, will be for larger changes, including those that possibly requiring administrative action.

- In December of 2016, the vendor announced that it would increase focus on end users. Specifically, to respond to users' requirements, Haufe has embarked on a long-term effort to analyze their behavior and level of satisfaction. One of the first products to undergo this analysis has been the Hiring Manager.

Last year, Nucleus noted that functionality designed to support trigger-based performance management was expected to be deployed in 2017. Since, word of any development on this front has yet to surface. In analyzing users' experience with Haufe's solution, Nucleus finds that the solution is adept at helping them foster engagement between managers and their staff. The solution, users report, helps them to identify influencers able to emerge as leaders within their organizations.

IBM WATSON TALENT

In 2012, IBM acquired Kenexa, the origins of IBM's functionality for talent management. For a while, IBM retained Kenexa's brand name as a moniker for the functionality. Comprising sourcing and recruiting, compensation and rewards, employee engagement, learning, employee assessments, onboarding, and performance management, the solution later became IBM Smarter Workforce (Nucleus Research *m104 – IBM Purchases Kenexa to support a Smarter Workforce*, August 2012). Today, talent management functionality from the company is known as IBM Watson Talent, which combines Kenexa-stemming functionality with capabilities found in IBM Watson.

Fundamentally, IBM Watson is artificial intelligence (AI) (Nucleus Research *p143 – Understanding Watson Analytics*, August 2015). Notwithstanding Nucleus's reservations regarding the reality versus hype of AI today, the natural language processing (NLP) and analytics found in Watson and other vendors' solutions do

augment functionality for talent management in ways that are transforming HR's relationship with this area of HCM. To the extent that machine learning informs IBM Watson Talent, this is where the most interesting potential upside resides. Nucleus's analysis finds that if AI delivers any ROI yet, it's in machine learning (Nucleus Research *r144 – The ROI of machine learning*, July 2017).

Announcements of new functionality and developments have been sparse since the publishing of last year's report, which noted the advent of Watson Talent (Nucleus Research *q209 – Talent Management Technology Value Matrix 2016*, November 2016). In Q4 of 2016, the vendor launched MobileFirst for iOS Apps to help users combine mobile applications from their enterprise with machine learning.

Nucleus has analyzed users' experience. Some point to a high level of configurability, but that the solution struggles to integrate with other applications in the IBM suite. Functionality for recruiting gets high marks. For now, IBM Watson Talent remains in the Expert quadrant. As an apparent way forward for the product becomes more readily apparent, this may change.

LUMESSE

Cloud-based and SaaS-delivered, Europe-based Lumesse last year introduced Empower, which is well on the way to comprising the full breadth of functionality for talent management. Empower is the vendor's new solution, SaaS-delivered and fully in the cloud. There remains a full suite for talent management in a privately hosted environment, too. This is ETWeb. When customers see Empower offered under the auspices of ETWeb, however, the latter is simply branding nomenclature.

Modules in Empower that are now live are Perform, Grow (i.e., succession planning, career pathing, and development planning), Reward (i.e., employee recognition and compensation planning), Learn, and Core HR. Next up to be live is Recruit. Then, Onboard will launch and, finally, Ideate—a way to foster innovation by facilitating collaboration. Lumesse says the largest contingent of users is showing interest first in Grow. Next in popularity is Learn.

Learning Gateway is a learning management system (LMS) that also encompasses coaching. Onboarding is available through a cloud-to-cloud integration linking TalentLink and SilkRoad. Lumesse recently announced that it's one of the seven systems in existence given a partnership for a LinkedIn integration, and the only one with a working integration that's commercially available.

For talent acquisition, there is also TalentObjects built for the Salesforce 1 Mobile Platform. For mid-sized to large companies, for talent acquisition there is

TalentLink. i-Grasp is for enterprise users. In talent acquisition, Lumesse excels in functionality for large, complex global organizations with multiple brands.

This year the vendor has also upgraded features for performance management in ETWeb, allowing managers to track goals and collaborate outside of traditionally scheduled reviews. The new functionality here reflects trends Nucleus has identified whereby the modern UI facilitates managers' and their employees' ability to circumvent the conventional performance review (Nucleus Research *p199 – The coming mass extinction in HCM*, November 2015). The vendor's solution can accommodate trigger-based learning, too.

iCIMS is a competitor in talent acquisition specifically. Workday surfaces most often in North American deals. When learning is involved, Cornerstone OnDemand does, too. In Europe, Lumesse most often encounters SAP SuccessFactors, as well as a long tail of local solutions.

Almost uniformly, customers point to the user-friendliness of the vendor's UI. Nucleus's analysis of their experience also finds some observing that the solution appears to struggle a bit in reconciling multiple lines of code behind that UI. Lumesse again sits in the Expert quadrant. Nucleus would like to see a simplification of the product portfolio.

CORE PROVIDERS

Core Providers in the Value Matrix include BambooHR, Deltek Talent Management, and PageUp People.

BAMBOOHR

This is BambooHR's second appearance in this report, again as a Core Provider. A viable choice for SMBs, the vendor offers an ATS plus elements of HCM outside talent management. As noted last time, BambooHR's ATS integrates with a broad array of HR software providers' solutions. In BambooHR, role-based information defines functions. Integration with the rest of the solution is unimpeded.

Regarding the rest of the system, of note since last time is that BambooHR has developed and deployed native functionality for payroll. Nucleus's analysis of user feedback finds that some have encountered difficulty integrating BambooHR with third-party payroll applications—not an uncommon scenario among vendors industrywide (Nucleus Research *r65 – Compliance costs one third less with full WFM*, April 2017). So, Nucleus believes the latest is a smart move (Nucleus Research *r162 – The logic of a prefix in HCM*, September 2017). Talent acquisition delivers the most

value where talent acquisition intersects with central functionality for HCM. Nowhere is this intersection more potent than at payroll, the most essential functionality for employing people (Nucleus Research *r153 – Where talent is most important*, August 2017).

Further evidence of the attention BambooHR gives to the epicenter of HCM can be seen in the caliber of the vendor's capabilities for compliance, as noted last year (Nucleus Research *q209 – Talent Management Technology Value Matrix 2016*, November 2016). Users report accuracy in benefits administration, for example. They also report satisfaction with the mobile application. In last year's report Nucleus noted that BambooHR had the potential to move into the Expert quadrant as the vendor introduced new functionality. The addition of payroll is a step in the right direction, and Nucleus awaits to see new capabilities in talent management specifically, from the vendor.

DELTEK TALENT MANAGEMENT

Deltek Talent Management is the result of Deltek's acquisition of HRsmart, in 2015. Spanning a broad cross-section of hosted talent management modules—recruiting, onboarding, performance management, career development, succession planning, learning, and compensation planning—the solution complements Deltek's enterprise software for government contractors, professional service firms and other project-based businesses globally. Nucleus's analysis finds that across this broad spectrum Deltek users benefit from project-centric design and functionality, see increases in visibility and mobility, and reduce their management costs (Nucleus Research *r166 – The value of the Deltek cloud*, September 2017). Cross-functionality across ERP and HCM results in notable productivity gains for HR staff (Nucleus Research *p190 – Guidebook – Deltek*, November 2015).

In December of 2016, shortly following the publishing of last year's report, Deltek announced that it would be acquired by Roper Technologies. Not all acquisitions are kind to the targeted organization, but Nucleus believes this one is good for Deltek; the acquiring organization has a track-record of being hands-off in the day-to-day dealings of businesses in its portfolio (Nucleus Research *r2 – Deltek project ERP takes center stage at Insight*, January 2017).

Just ahead of last year's Talent Management Technology Value Matrix, Deltek launched a new release of the talent management suite. More details are available in that report (Nucleus Research *q209 – Talent Management Technology Value Matrix 2016*, November 2016). Nucleus's analysis of user experiences finds some customers wishing that more content in the system were editable; they attribute that lack of functionality in this regard to the system's unified nature. Even so, many customers

think the system is well-suited to the industries Deltek targets, and users extoll the vendor's customer service.

PAGEUP PEOPLE

PageUp People is a unified cloud-based solution for recruiting, onboarding, learning, performance management, and succession planning. The application is good at facilitating contingent and contract labor. As do many solutions for candidate relationship management, the mobile recruiting application follows the principles of customer relationship management (CRM). An analytics dashboard informs the activity of recruiters and managers.

Following are product roadmap developments pertinent to this report:

- In August of this year, PageUp launched the Everyday Learning App to track the network effect of shareable learning content (e.g., online videos and blogs). This is important, of course, to measure the success of such content, which tends to be crowd-sourced.

- Last year, just ahead of the 2016 report's publishing, PageUp launched the Everyday Performance App, a mobile solution for managers and employees to share their goals and achievements in real time with coworkers, and receive their feedback. It's another example in the marketplace of what Nucleus calls trigger-based performance management (Nucleus Research *q57 – Trigger based learning takes hold*, March 2016).

A potentially $10 million IPO on the Australian Securities Exchange, first announced in Australian press in September 2016, appears yet to have occurred. Nucleus's analysis of users' experience finds most in some way saying the UI is clean and straightforward. Functionality for talent acquisition is strong, according to their feedback—including integration with onboarding. Advanced configuration can be a challenge for administrators.

FACILITATORS

Facilitators in the Value Matrix include Greenhouse Software, HireVue, iCIMS, and SmartRecruiters.

GREENHOUSE SOFTWARE

A cloud-based, SaaS-delivered solution for talent acquisition, Greenhouse Software is best suited for growing to medium-sized companies. Last year, Nucleus found almost solely positive feedback for the vendor's customer support and the

Greenhouse Interview Kit (Nucleus Research *q209 – Talent Management Technology Value Matrix 2016*, November 2016).

Since the publishing of last year's report, the vendor has announced the launch of new functionality in two new areas—both in September 2017, and both falling in line with larger trends Nucleus has observed in this market:

- Candidate relationship management (CRM). The objective is to give a user greater control over managing talent pools with, for example, discrete workflows. The system will automatically present the user with jobseekers best-suited to a new open position.

- Predictive analytics. Focused on talent acquisition, machine learning capabilities within the system help users to accurately project the timeframe for any given prospective new hire to go through a process from being sourced to starting his or her first day of work, as an employee.

Nucleus's analysis of user feedback found some clamoring for CRM from the vendor, so it appears that the launch came at a good time. Others find mobile usability fair for candidates, but difficult for administrators. Aside from this, users' experience is generally positive. They laud the utility of scorecards and interview kits found in the system, the intuitiveness of the UI, and the way the vendor provides an end-to-end solution for pre-hire talent acquisition.

HIREVUE

Cloud-based and SaaS-delivered, HireVue Team Acceleration consists of HireVue Build Suite to focus on talent acquisition and HireVue Coach Suite to help with high-touch interaction between managers and their staff post-onboarding. HireVue Velocity is available for organizations with needs in high-volume hiring. AI analyzes video interviews to determine the level of engagement, motivation, and empathy a job candidate might display, if hired. These capabilities, along with predictive analytics, help customers to hire for, build, and coach teams. Meanwhile, Team Acceleration provides data on candidates to interpret resumes ahead of the interview, relieving hiring managers of a time-intensive activity that detracts from their ability to focus—through HireVue video, on candidates' talents.

New developments in product from the vendor this year are sparse. Nucleus's analysis of user feedback finds some customers noting a lack of ability to synchronize resumes with an ATS. Some also note a need for more robust analytics reporting and better integration with other solutions. Additionally, interviewees occasionally encounter issues, users report. Most point to an exceptional ease of

use, however, contributing to HireVue's position along the vertical axis again, this year. As with other vendors in this report that offer functionality only for talent acquisition, the lack of breadth otherwise limits HireVue from placing farther to the right, along the horizontal axis.

ICIMS

iCIMS' cloud-based and SaaS-delivered solution provides functionality for recruiting and onboarding through a branded career portal. Additionally, UNIFi, a PaaS framework, helps users integrate with vendors in iCIMS' large partner ecosystem. A streaming API integration became live in April 2017 to support especially high-volume data transfer. This makes sense. Nucleus's analysis of user cases finds iCIMS's solution is particularly suitable for high-volume hiring organizations.

In June 2017, iCIMS announced that it had become a featured integration in ADP's Marketplace (Nucleus Research *q172 – HCM Technology Value Matrix 2016*, September 2016). Also of note this year, iCIMS launched a design lab in-house to update and modernize its UI and innovate the UX. Seeing an uptick in business in the United Kingdom, in August of this year the vendor opened an office there. Earlier this year, the vendor announced the launch of a data center in the European Union (EU). Additionally, in late Q2 2017, iCIMS, a foundational ATS partner of Google's, announced a partnership with the search technology provider to help candidates find jobs. Google now detects and surfaces publicly posted jobs from the iCIMS customer base as soon as the job becomes available.

Nucleus's analysis of user feedback finds that customer support at iCIMS can fall short of expectations or exceed them, depending on the user, so consistency may be an issue in this area. Additionally, some users report it is difficult to run reports combining data from different sets—though others point to the ease with which they can create, execute on, and automate reports. Among the positives, users say configuration tools for administrators exhibit much flexibility. Customers give the vendor high marks for listening to them, readily apparent in new features released with most SaaS updates. A few users lamented the solution's lack of suitability for global scenarios, though this is hardly unique to iCIMS. Usability is above average. As with other vendors in this report that offer functionality mostly or solely for talent acquisition, the breadth of applicability to the broad spectrum of talent management lands iCIMS in the Facilitator quadrant.

SMARTRECRUITERS

SmartRecruiters is a cloud-based and SaaS-delivered talent acquisition technology that includes recruiting software, solutions for recruitment marketing, a platform for

collaborative hiring, and dashboards that help users manage their hiring campaigns. These hiring campaigns include a compliance module and enterprise analytics.

This summer, SmartRecruiters launched its Summer Release with new functionality such as mass upload of candidates, saved searches, and Google jobs search. Users now have the ability to manage budgets and permissions better by controlling access to the SmartRecruiters Marketplace. Administrators can get reports that help make compliance efforts easier to manage and to determine who's doing what in the SmartRecruiters platform. Additionally, four languages have been added, which brings the total to 30 that SmartRecruiters supports.

Earlier this year, the Spring Release included the following new functionality: New backend languages ease recruiters' work in their native languages as they configure SmartRecruiters to their local needs. Multi-contract support for LinkedIn Recruiter decreases the amount of administrative work for those with complex commercial relationships with LinkedIn. An internal job widget helps users to brand their internal application experience with these widgets, which display on corporate intranet pages or career portals.

Nucleus's analysis of users' experience indicates that they find the centralization of functionality, whether that be to send emails to job candidates or a job requisition to multiple job boards, to be a positive. Some have encountered difficulty in attempting to integrate SmartRecruiters with other vendors' solutions. Others point to the usefulness of the internal system for rating job candidates. As with other solutions in this report that span only talent acquisition, SmartRecruiters remains in the Facilitator quadrant.