joshbersin

josh bersin academy

Untangling The HR Tech Market 2021

HR Technology Evolved: For The World of COVID-19

Global Industry Analyst
2021 Edition
Twitter @Josh_Bersin

Untangling The HR Technology Market

How The World Has Changed

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Four Phases of The Pandemic

React	Respond	Return	Transform
HR, IT, Facilities come together Response task force assigned Set up emergency team around the world Daily standup meetings Regular all-hands and CEO communications Essential vs. Non-Essential workers Real-time data on infection and travel Real-time feedback and surveys Reporting of problems, infections, issues Remote work policy Stipend for home office equipment Support India and remote offices Empower HRBP to act and coordinate Cut or realign budgets Share business downturn and changes CEO Chief Empathy Officer Support leaders to help remote workers Provide support to furloughed people Return and remind of values and mission Show positive future and optimism Put big projects aside	Remote work training and tools 1:1s, communications, team connection Programs for mental health and resiliency Increase access to counseling Cost offset for childcare Wellness, safety tips, education on virus Exercise, fun, kids programs Online learning on every topic Home school help and programs Daily communications on status and policies Coaching and counseling on stress Furlough or job policies Mandatory leave, vacation policy updates Update to performance process New workforce plan, new hiring plans Swap workers, support dislocated people Change bonus accruals, exec pay Regular pulse surveys and feedback Remote interview, onboarding Train managers on new role and issues Apply for government support in location	Move and change roles, train for new roles Create new protocols for safety and health Define who “comes back” and who doesn’t Create distancing guidelines in office Buy masks and other safety equipment Stay current on local regulations and changes Identify “fear of return” and address issue Formalize infection reporting process Decide new process for pay and performance Reset expectations around productivity Create new flexible work policy Decide what locations to close Put people into working teams Create program around stress and PTSD Invest in pay and benefits for economics Align with ongoing government policies Support local community programs Train employees on productivity at home Roll out new wellbeing program Roll out new leadership support program	Reinvent business model Rethink customer experience and demand Move and change roles, train for new roles Redefine customer engagement model Create new business plans and goals Redefine org structure for new world Set in place ongoing measurements Identify new HR tech platforms Realign careers and jobs for new business Invest in citizenship and diversity Deal with Black injustice issues Redefine brand and marketing message Create scenario for new wave of virus Partner with infection, safety vendors Rethink hiring plan Strengthen internal mobility programs Roll out new work at home strategy Roll out new facilities strategy Roll out new customer interaction strategy Give leadership a rest and new energy Redefine company mission Realign financial goals

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The Big Reset in HR: New Operating Model

Responsive (Efficient)	Resilient (Adaptive)
Operating Model: *central control, distributed execution*	*Operating Model:* *distributed control, centralized coordination*
• Integrated HR tech strategy • Strength in People Analytics • Self-directed learning, new career models • Integrated experience for recruitment • Strong focus on business priorities	• HR professionals work close to client needs • Teams are cross-functional by design • Agile “pools” of people who work on projects • HR professionals know each other well • Skills and capabilities valued and well known
Strategic, data-driven, experience-oriented, diverse, inclusive, passionate.	*Cross-trained, highly collaborative, distributed, coordinated, agile.*
Success: efficiency and employee satisfaction	**Success: speed and quality of response**

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The Shift In HR Technology

Pre-Pandemic

- Best features and functionality
- Vendor stability and growth
- Ease of use, ease of implementation
- Scalability and fit with organization
- Customer support and vendor trust

The Right Product

Now - Adaptable

- System fit and **flexibility**
- Vendor size and **reliability**
- Ease of use, **flow of work integration**
- Scalability, **configurability,** fit
- Customer support and vendor trust

The Right Platform

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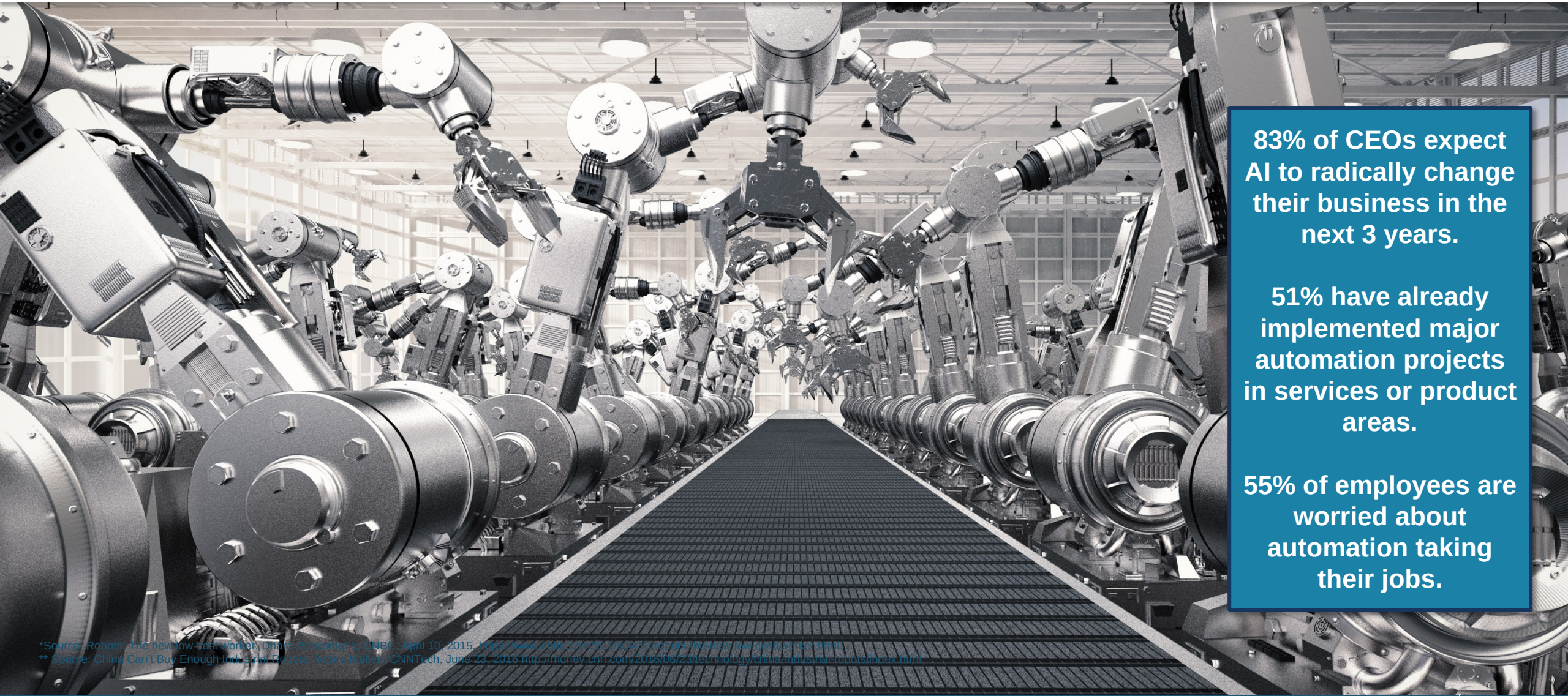
The Future of Work is Here

AI, Robotics, Sensors Have Arrived



83% of CEOs expect AI to radically change their business in the next 3 years.

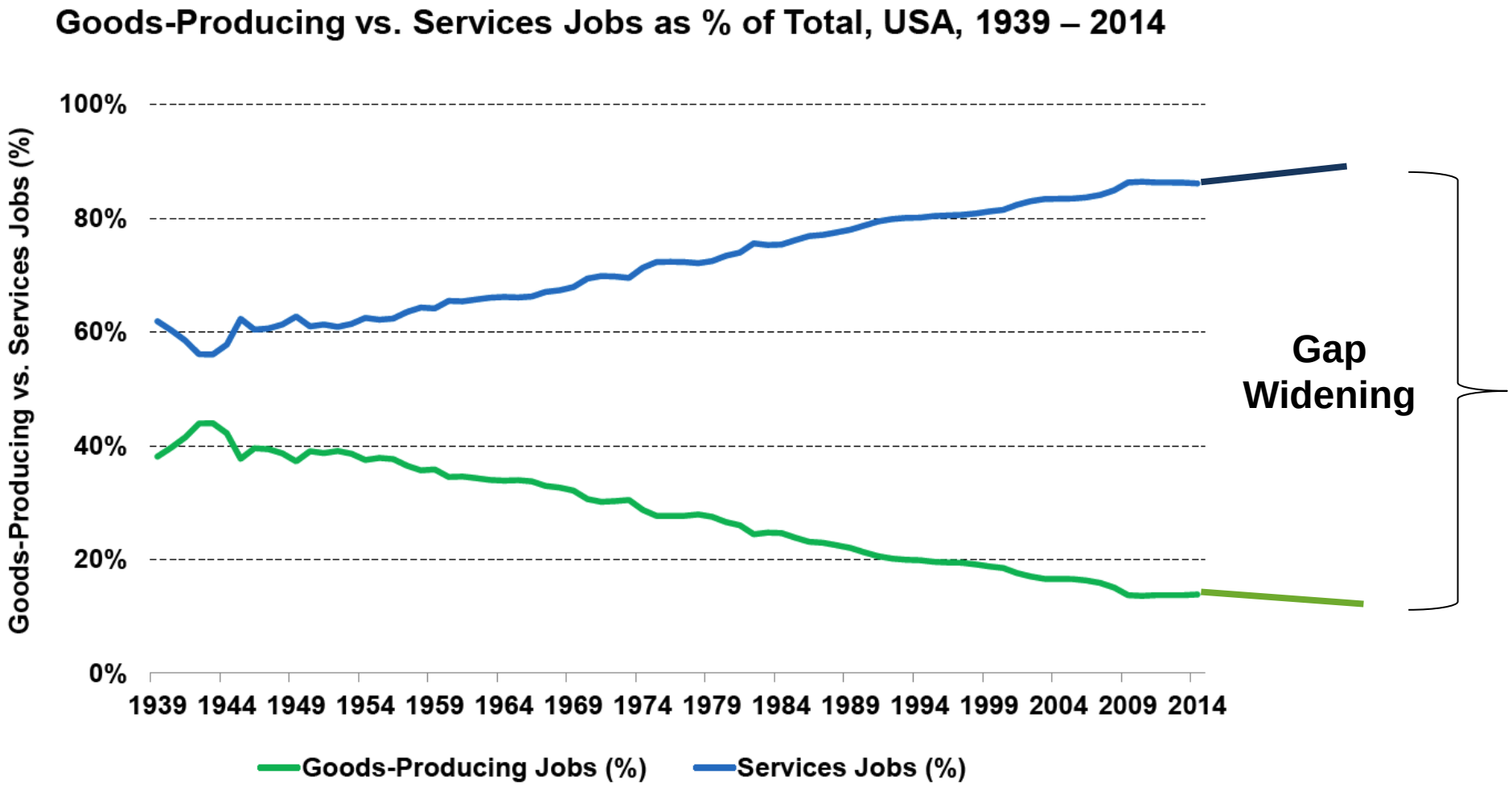
51% have already implemented major automation projects in services or product areas.

55% of employees are worried about automation taking their jobs.

*Source: Robots: The new low-cost workers, Dinah Ramsinghe, CNBC, April 10, 2015, https://www.cnbc.com/2015/04/10/robots-the-new-low-cost-workers.html

** Source: China Can't Buy Enough Industrial Robots, Jethro Mullen, CNNTech, June 23, 2016 http://money.cnn.com/2016/06/23/technology/china-industrial-robots/index.html

Shift to Service and IP-based Economy



Source: U.S. Bureau of Labor Statistics

"Fully Grown" by Dietrich Vollrath

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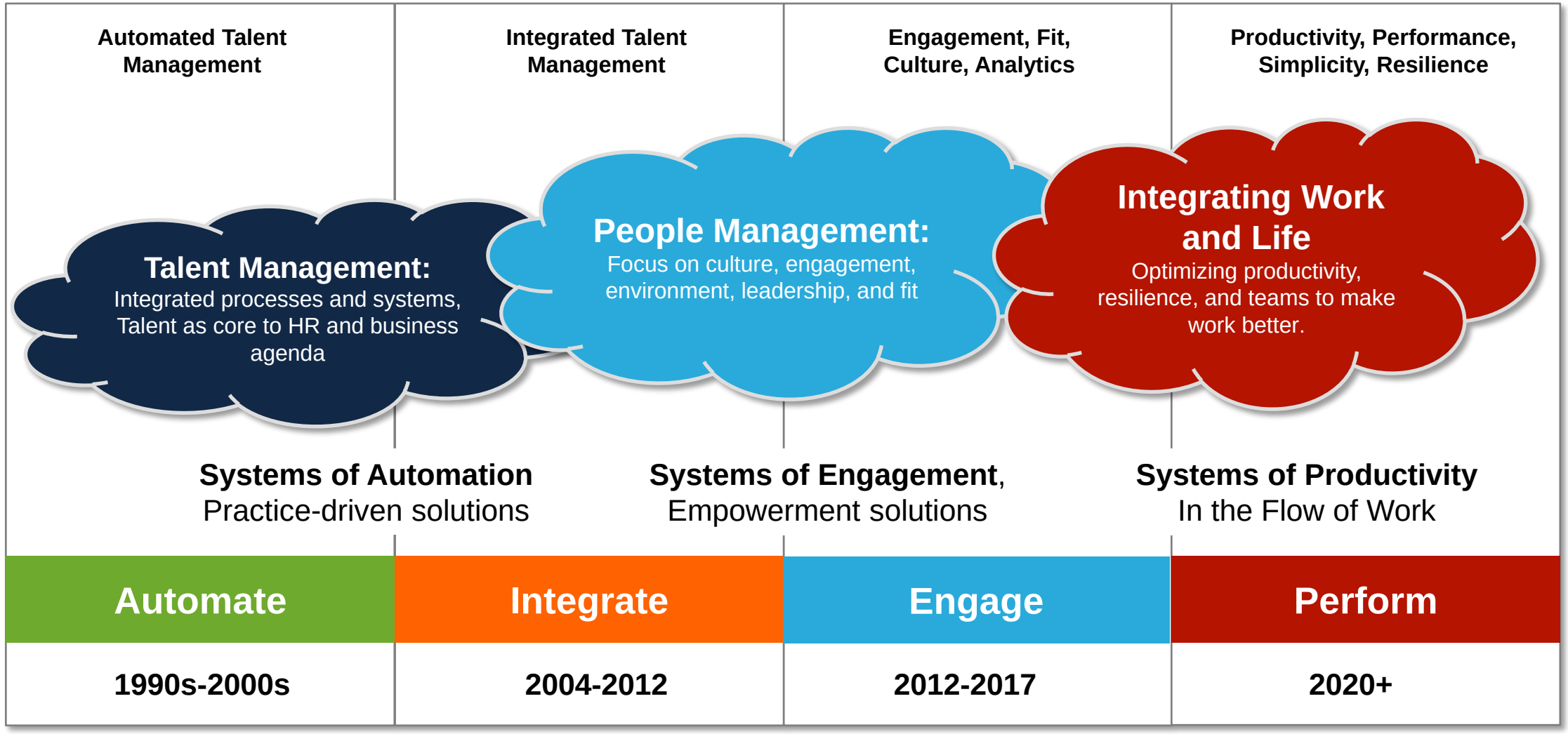
The New HR Tech: *Integrating Work and Life*



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The Big Shift: *Integrating Work and Life*

HR Tech

HRMS
Payroll
Recruiting
Compliance
Benefits

Goals
Recognition
Learning
Opportunities
Pay

Engagement
Surveys
Feedback
Development
Career

Work Tech

Wellbeing
Family
Career
Lifestyle
Health

Email
Video
Chat
Documents
Processes

Goals
Recognition
Learning
Opportunities
Pay

Finance | Family | Photos | Events | Fitness

Neighbors | House | Feelings | Transitions

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The Transition From HR Tech to Work Tech

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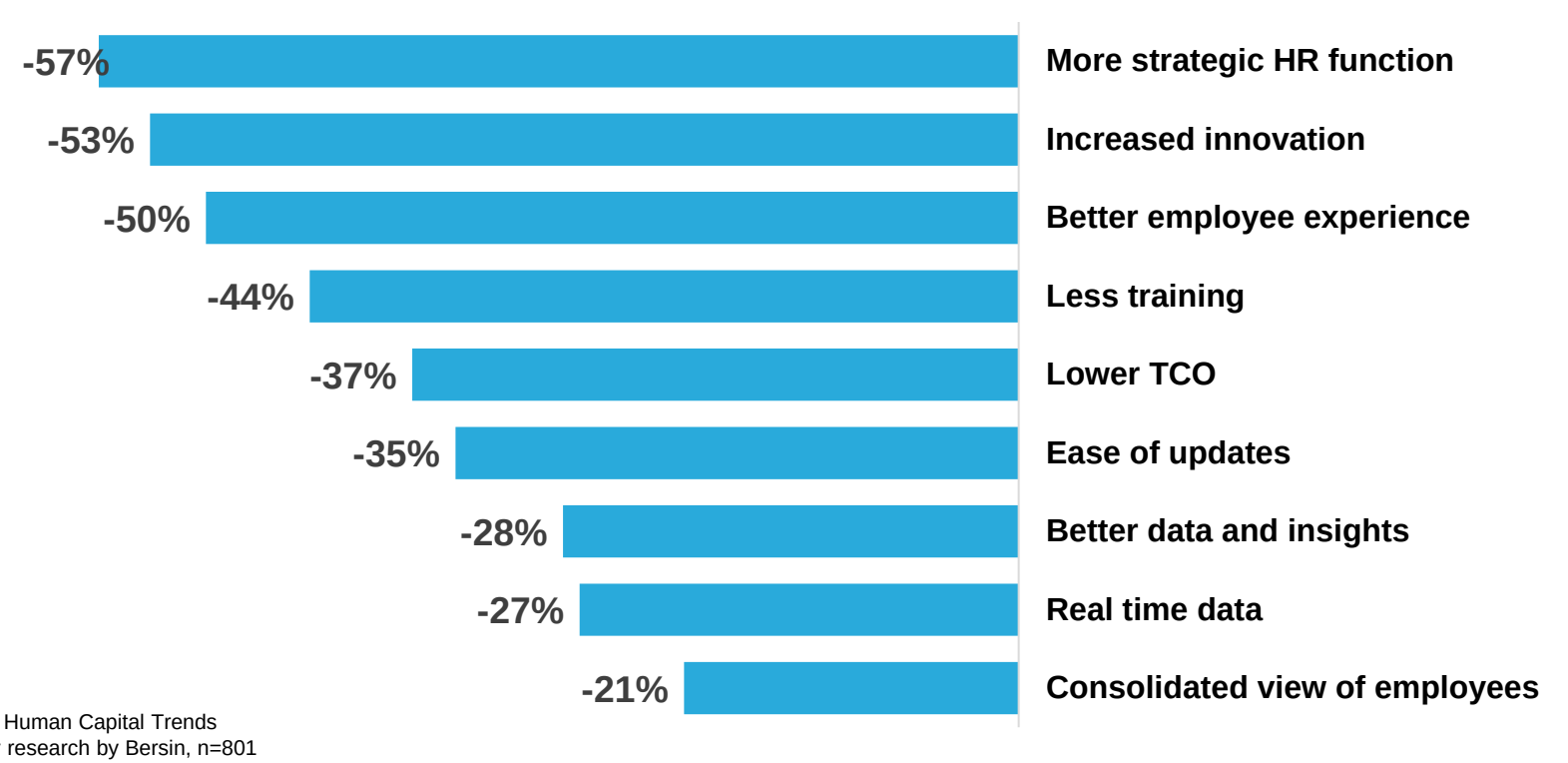
Success Is Harder To Achieve Than We Thought

32% of HR Tech Projects are significantly over budget

53% of projects miss deadline for implementation

42% rated not fully successful or failed after two years

Dashed Expectations From Cloud HCM



Difference between expected value and actual value achieved.

Source: 2019 Deloitte Human Capital Trends and 8/2019 proprietary research by Bersin, n=801

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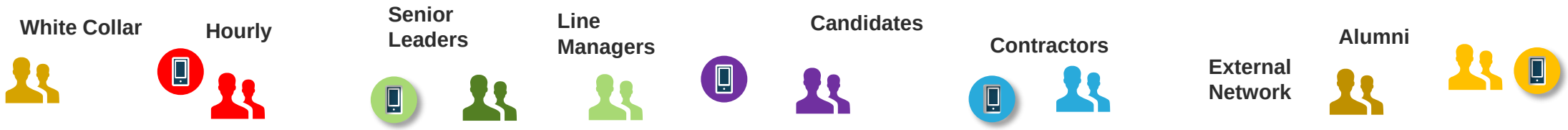
HR Technology Architecture: 2021 and Beyond



Work Tech: Systems of Productivity

Microsoft | Workplace | slack | salesforce | Google

Employee Workflows: Chat | Survey | Communicate | Route Cases | Resolve

Self Service | Case and Expertise Management | Document, Knowledge Management | Transition Programs | Employee Communications | External Services

Sourcing Recruitment Assessment	Learning Career Coaching	Performance Goals Succession	Engagement Feedback Recognition	Wellbeing Rewards Benefits	HRMS Payroll/Time Communications	ONA Analytics/AI Workforce Mgt

Senior Geographic Business Partners

Junior Geo Bus Partners

Talent Specialists (OD, sourcing, recruiting, learning, organized in networks of excellence)

Wellbeing, safety, culture, engagement, recognition

HR Ops, AI and Bots, Intelligence

Analytics, Monitoring, Predictive, WF Planning

Comp, Ben, Rewards

HR Tech, App development

HR Prof Development

Research, Market Best Practices,

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1

Core HCM Systems Now Stretched Thin

Disruption | Growth | Expansion

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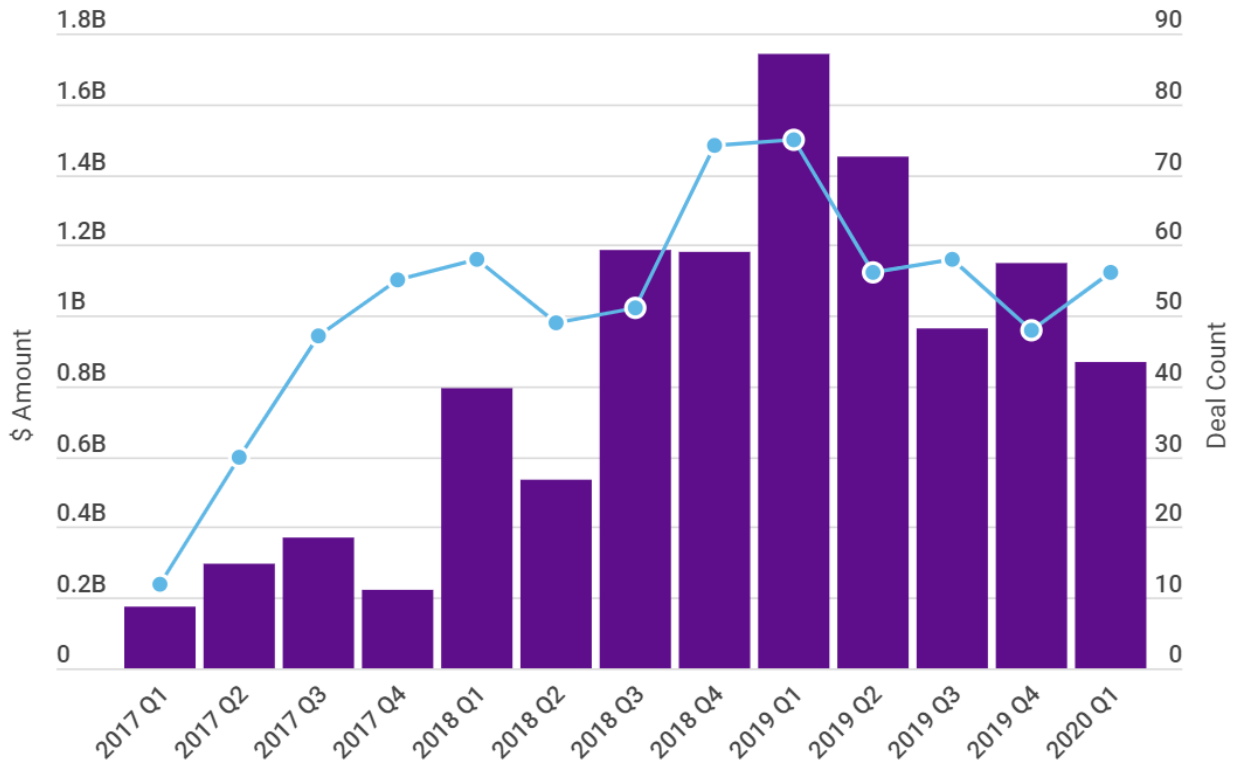
Continued Massive Investment in HR Tech

$16.0 Billion in Investment in HR Tech Since 2009 (3,218 companies)



2019: $4.8 b invested

2020: Over $1b year to date

Lyra ($75M) Maven ($45M) Headspace ($93M) Healthjoy ($30M) ModernHealth ($31M)	**Wellbeing**
Personio ($75M) Justworks ($50M).	**Payroll**
Catalant ($35M) InterviewBit ($20M) Phenom ($30M) Mya ($30M)	**Recruiting**
Udemy ($50M) WorkBoard ($30M) Strivr ($30M).	**Learning, PM, VR**

Source: #HRWins

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Every Major Company Is Now Building HR Technology

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HCM Vendors Trying To Keep Up

…Becoming Spread Thinner and Thinner

- Global payroll
- COVID-19 response and reporting
- GDPR compliance
- Reinventing performance management
- New learning platforms
- Feedback and pulse surveys
- AI-based recruitment
- Wellness, fitness apps
- Diversity and inclusion products
- Team management tools
- Career management
- Employee experience
- Integration with Slack, Workplace, G-Suite

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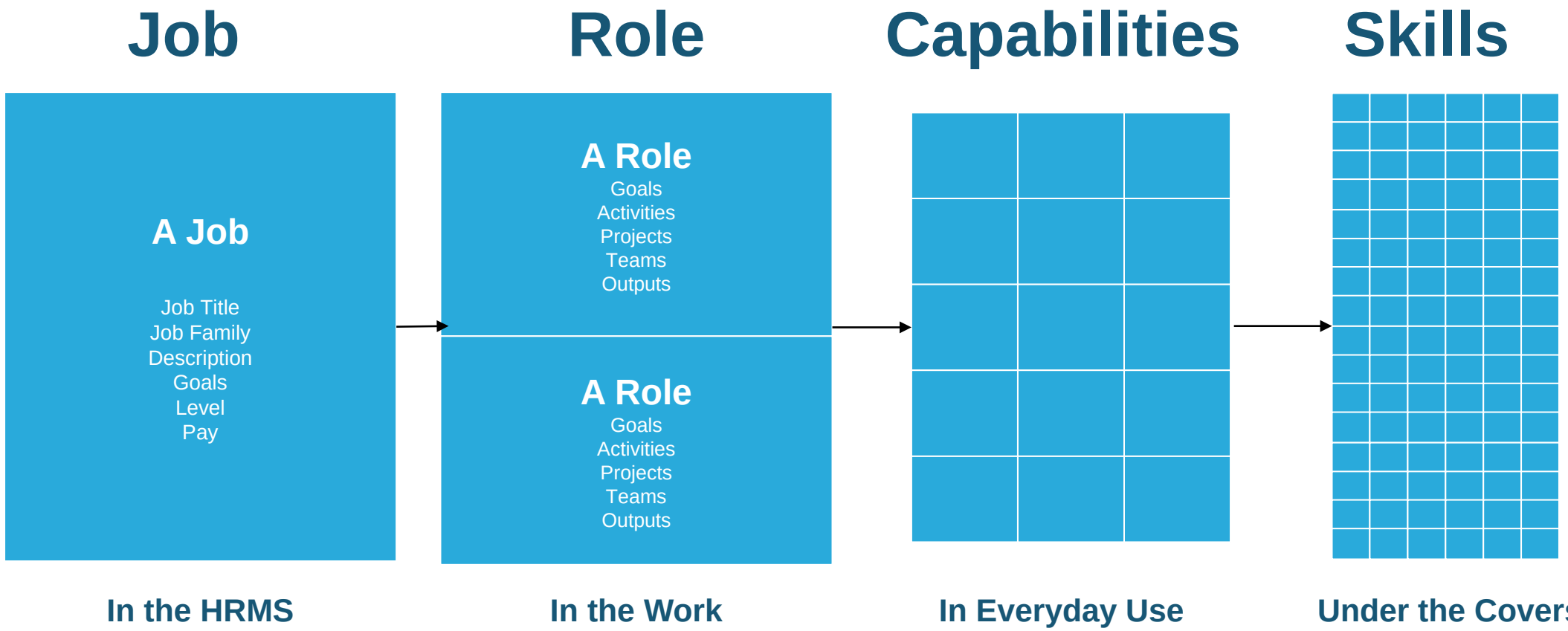
Understanding Jobs, Roles, Skills, and Capabilities



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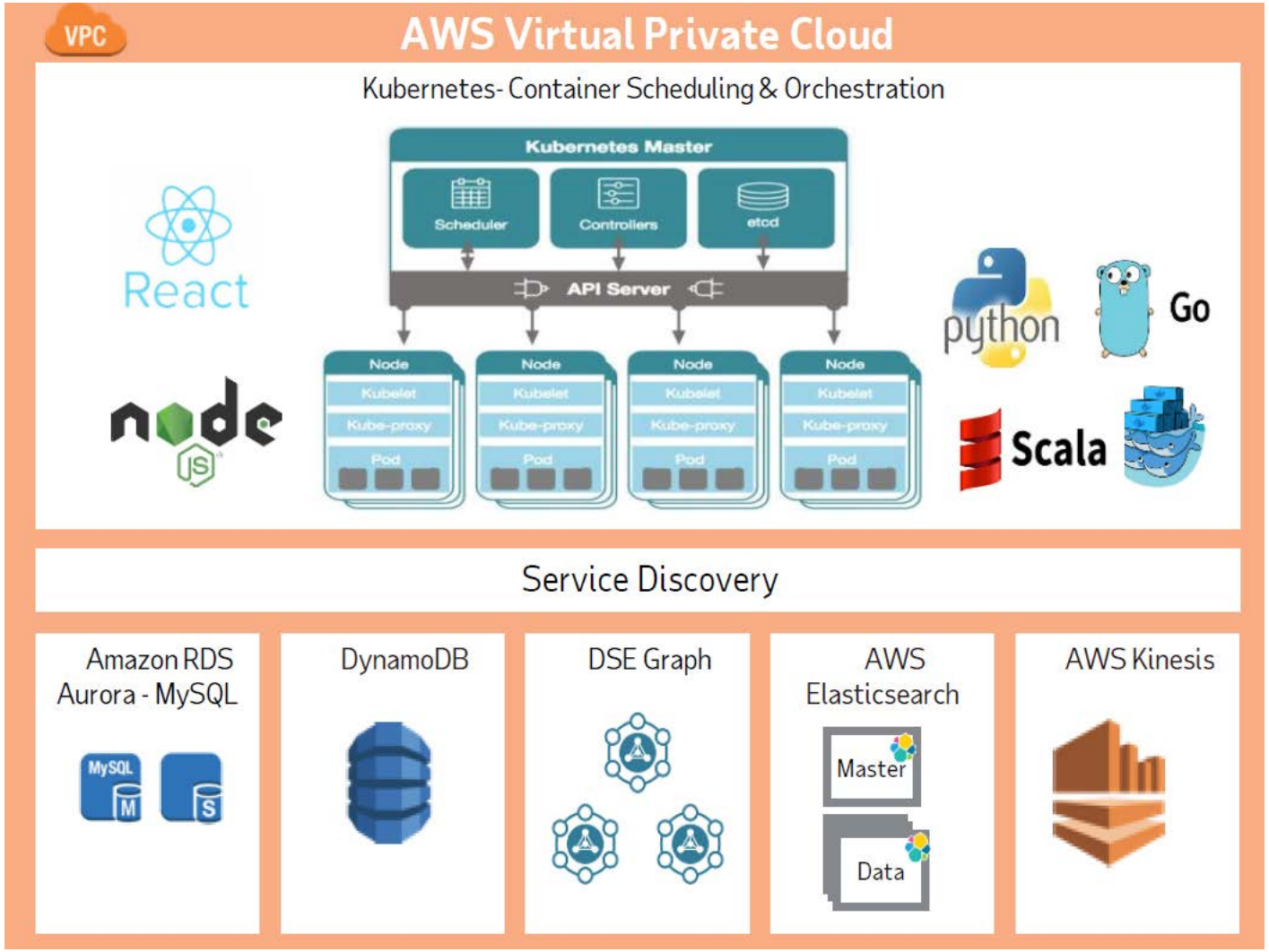
New Platforms

Why ADP's Next-Gen HCM Is A Disruptive Force In HR Technology

BY JOSHBERSIN · PUBLISHED SEPTEMBER 18, 2019 · UPDATED SEPTEMBER 24, 2019

A year ago I wrote a controversial article about ADP's new core HCM system, code-named Lifion. Well here it is a year later, and it looks like ADP has done it. The company's next-generation HCM and payroll system is now available, and could become one of the more disruptive systems on the market. While the system is still young, it sets a technical direction for Workday, SAP, Oracle, and others.

How The HR Software Market Has Changed



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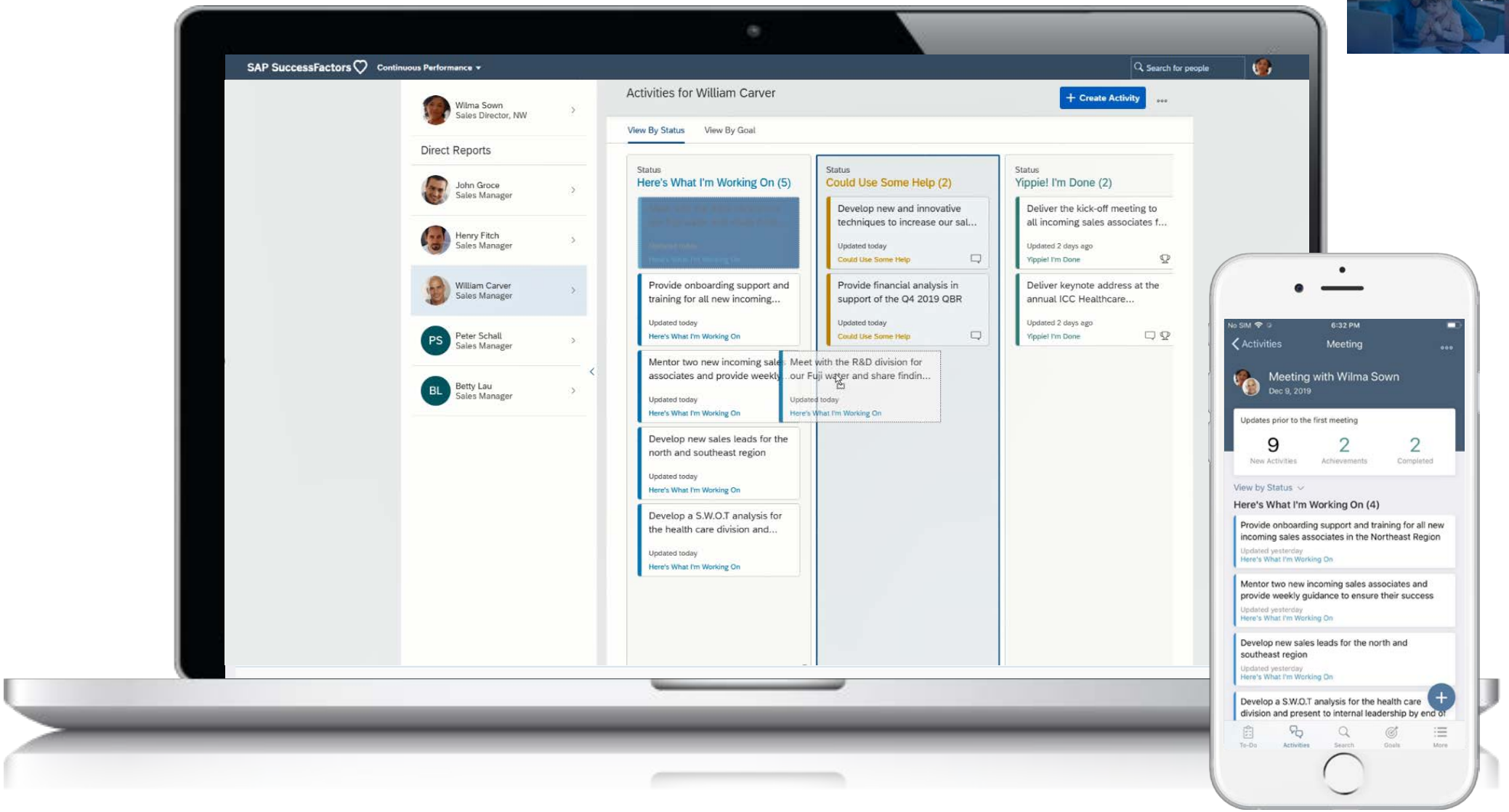
successfactors™
An SAP Company



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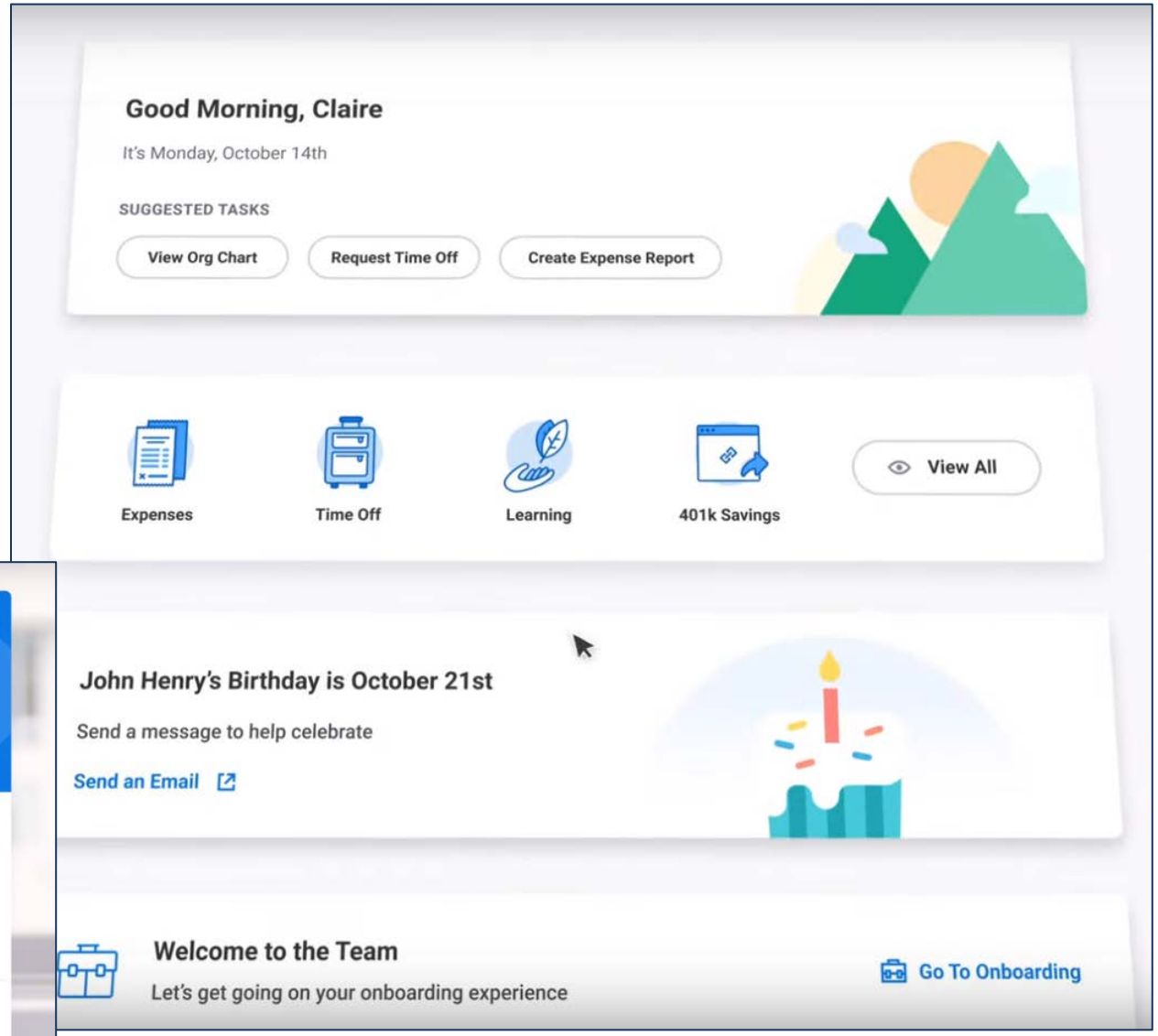
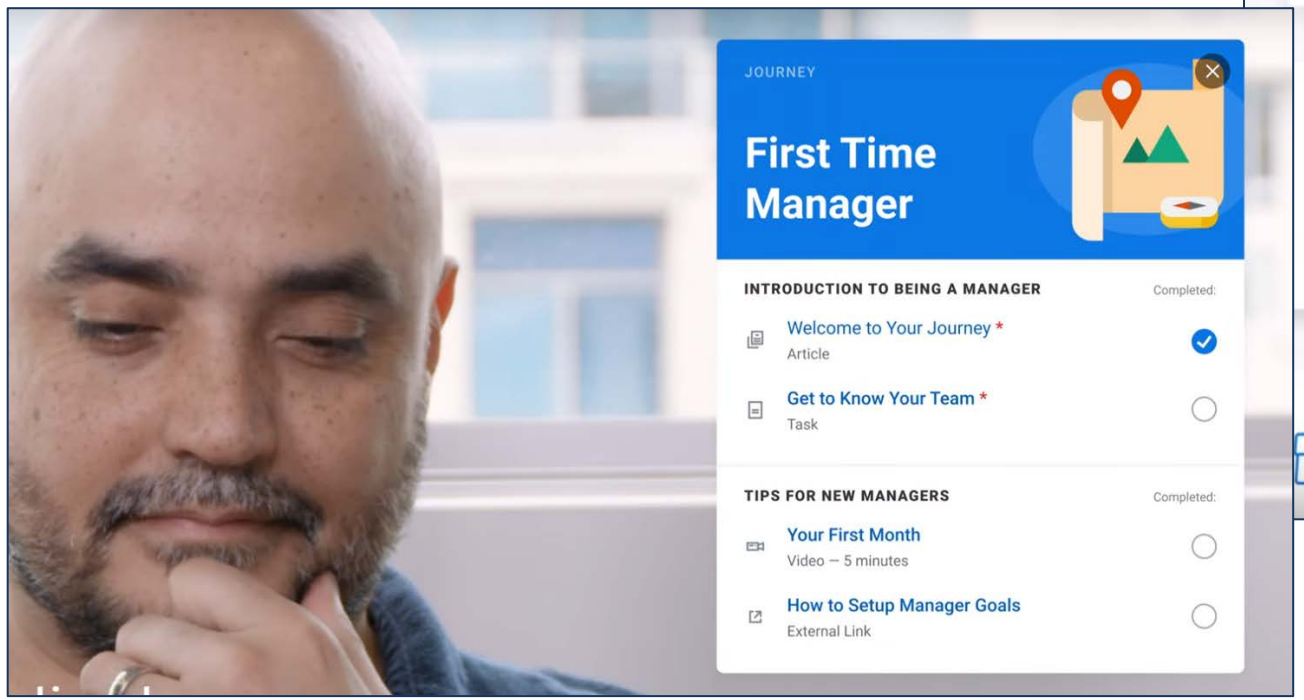
workday®





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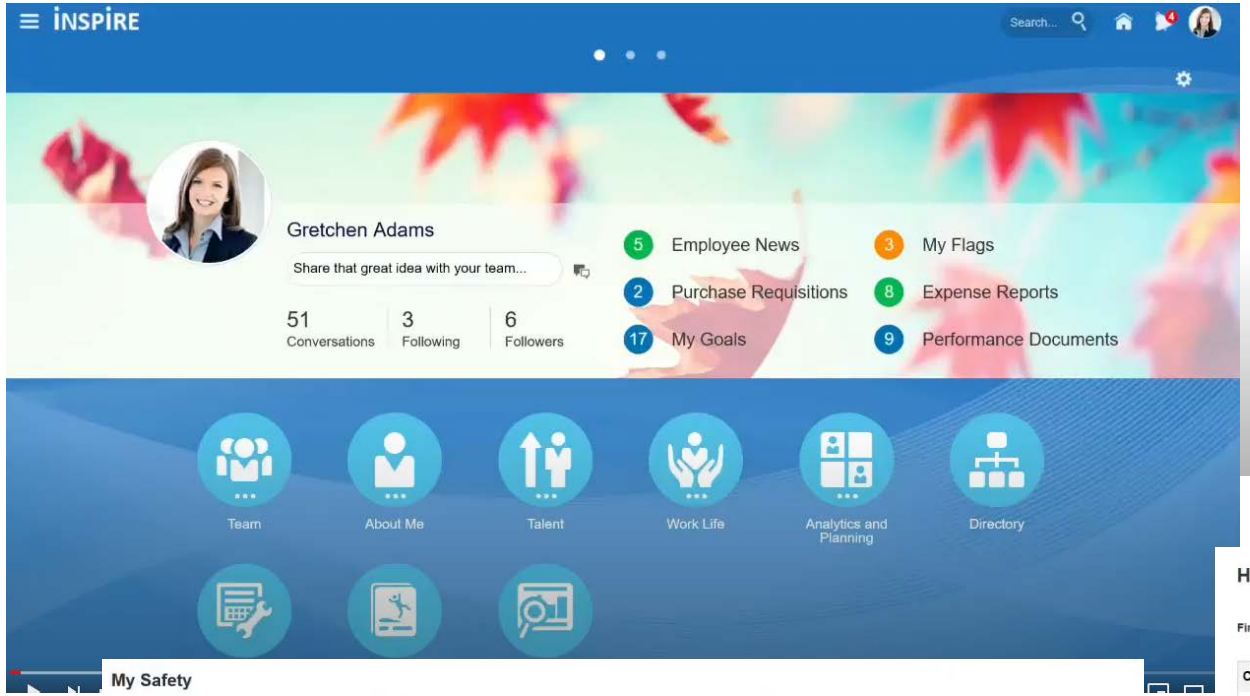
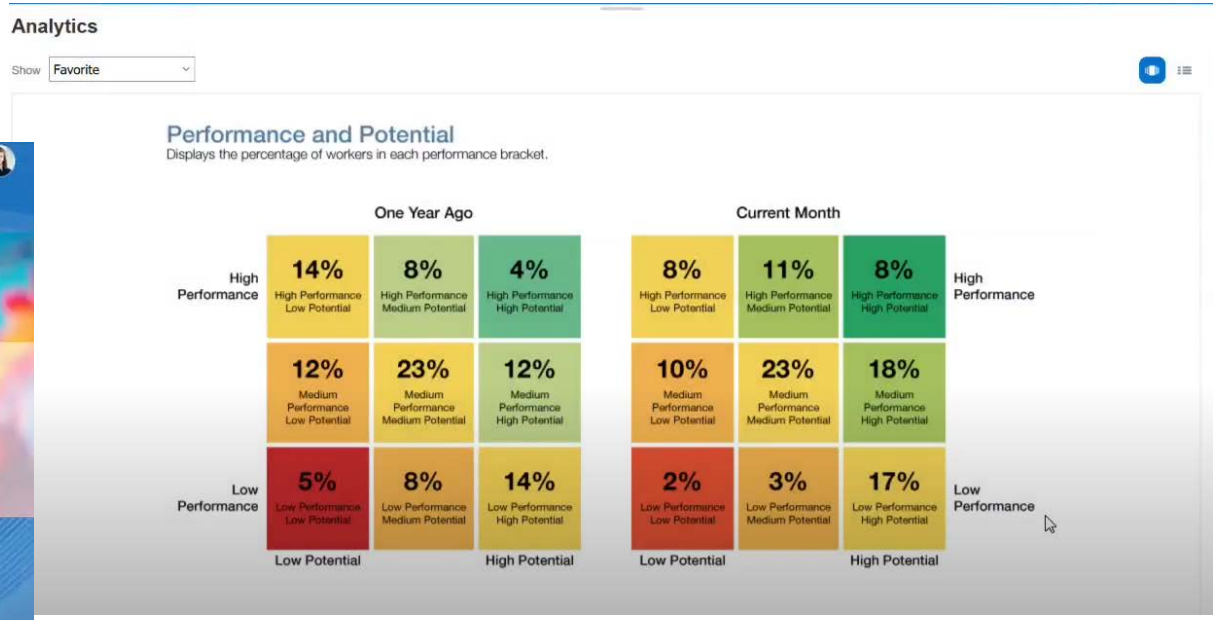
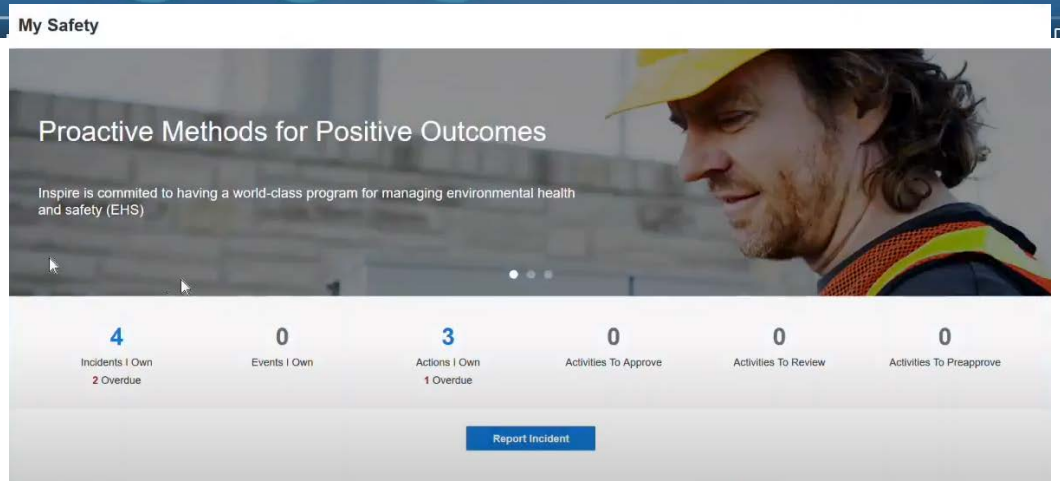
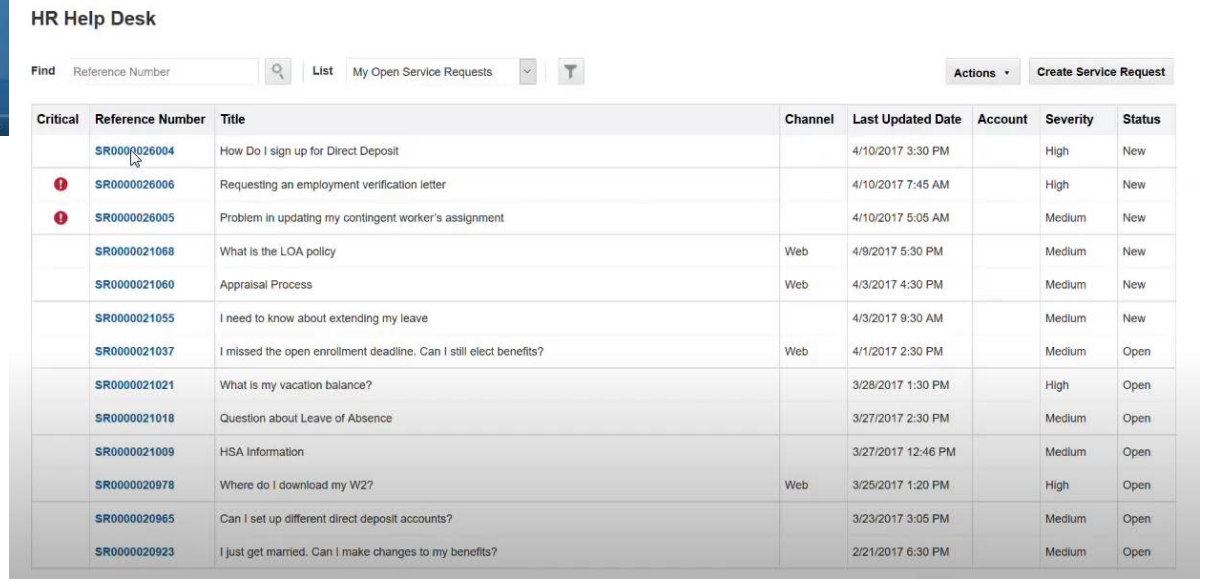
Oracle HCM









Critical	Reference Number	Title	Channel	Last Updated Date	Account	Severity	Status
	SR0000026004	How Do I sign up for Direct Deposit		4/10/2017 3:30 PM		High	New
!	SR0000026006	Requesting an employment verification letter		4/10/2017 7:45 AM		High	New
!	SR0000026005	Problem in updating my contingent worker's assignment		4/10/2017 5:05 AM		Medium	New
	SR0000021068	What is the LOA policy	Web	4/9/2017 5:30 PM		Medium	New
	SR0000021060	Appraisal Process	Web	4/3/2017 4:30 PM		Medium	New
	SR0000021055	I need to know about extending my leave		4/3/2017 9:30 AM		Medium	New
	SR0000021037	I missed the open enrollment deadline. Can I still elect benefits?	Web	4/1/2017 2:30 PM		Medium	Open
	SR0000021021	What is my vacation balance?		3/28/2017 1:30 PM		High	Open
	SR0000021018	Question about Leave of Absence		3/27/2017 2:30 PM		Medium	Open
	SR0000021009	HSA Information		3/27/2017 12:46 PM		Medium	Open
	SR0000020978	Where do I download my W2?	Web	3/25/2017 1:20 PM		High	Open
	SR0000020965	Can I set up different direct deposit accounts?		3/23/2017 3:05 PM		Medium	Open
	SR0000020923	I just get married. Can I make changes to my benefits?		2/21/2017 6:30 PM		Medium	Open

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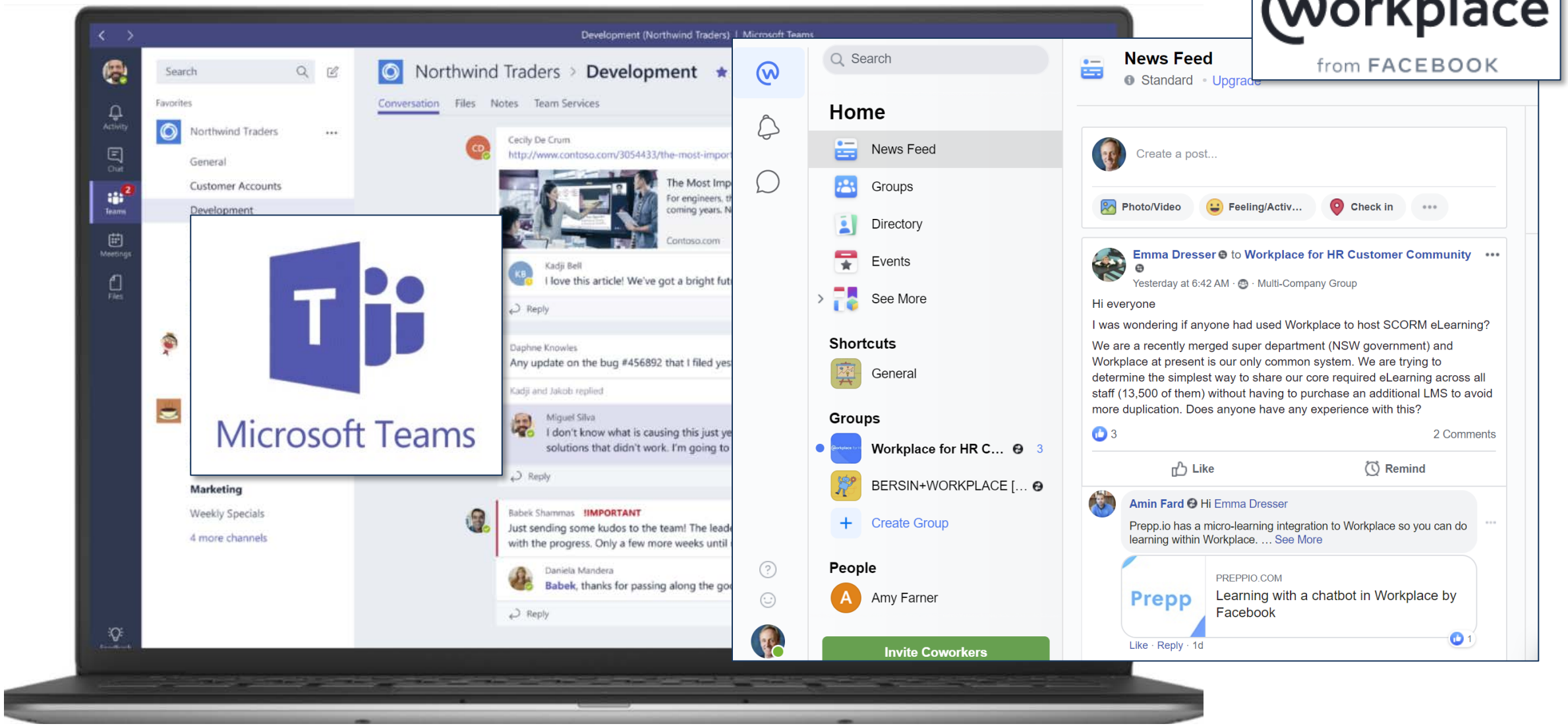
Microsoft, Facebook, Google



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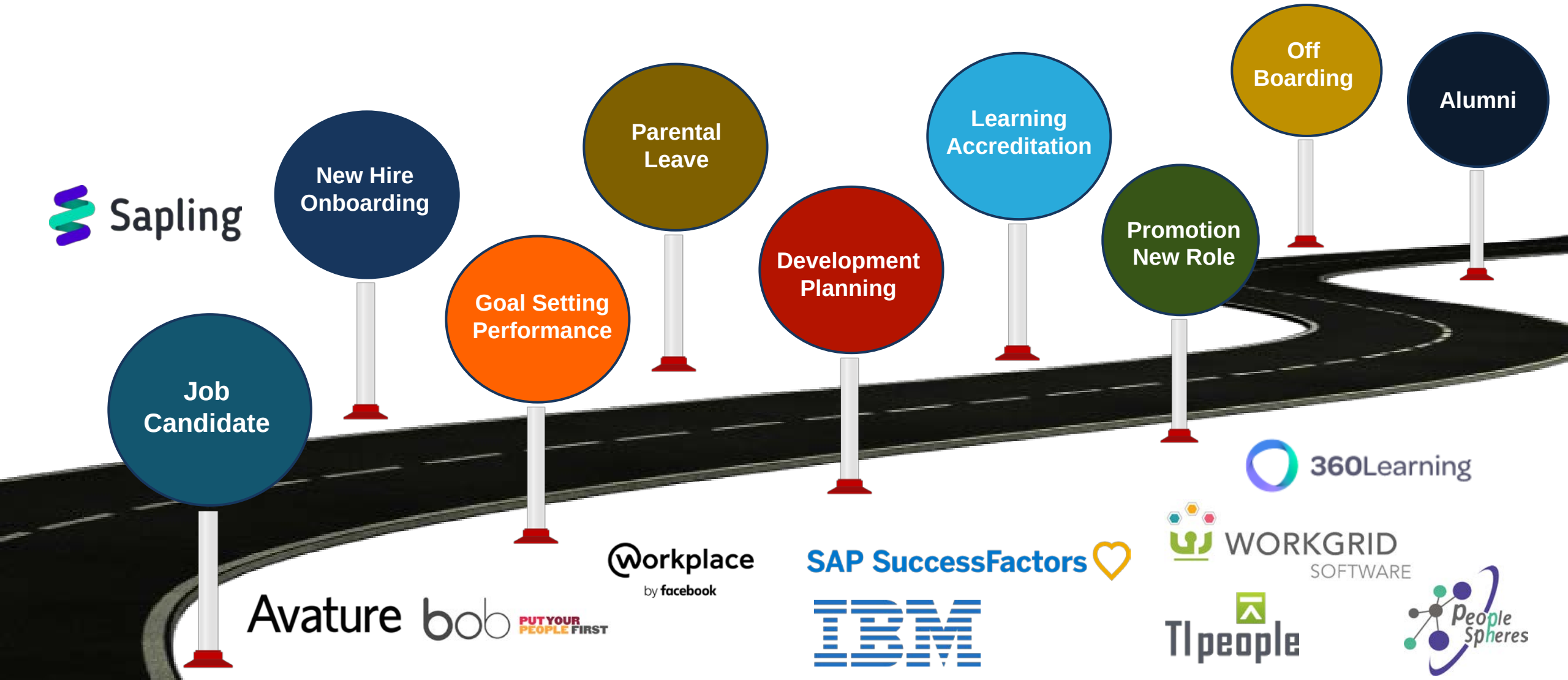
The Workflow Workhorse

servicenow



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Talent Management Evolved:

2

A *Brutally* Competitive Market

Employee Focused, HR Administered

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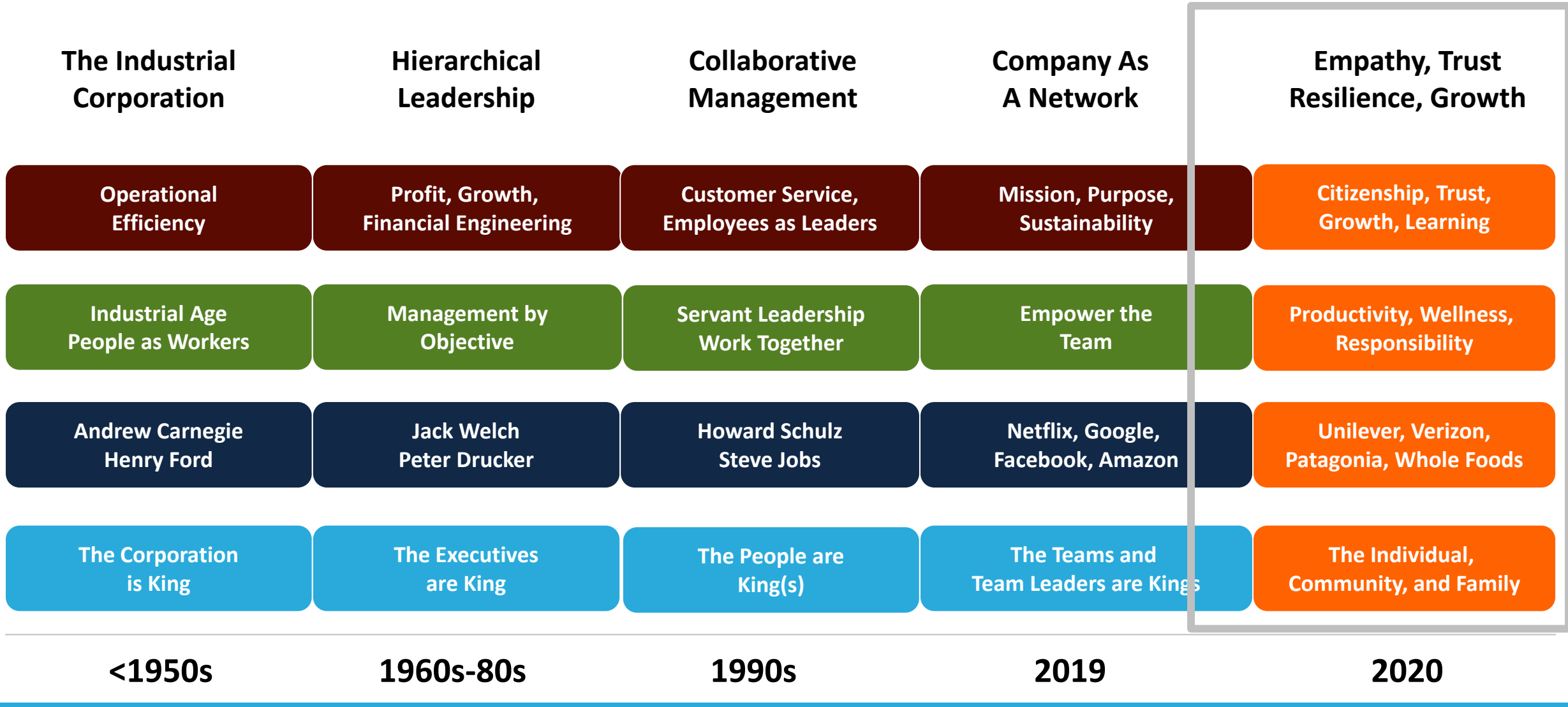
Management Philosophy Has Changed



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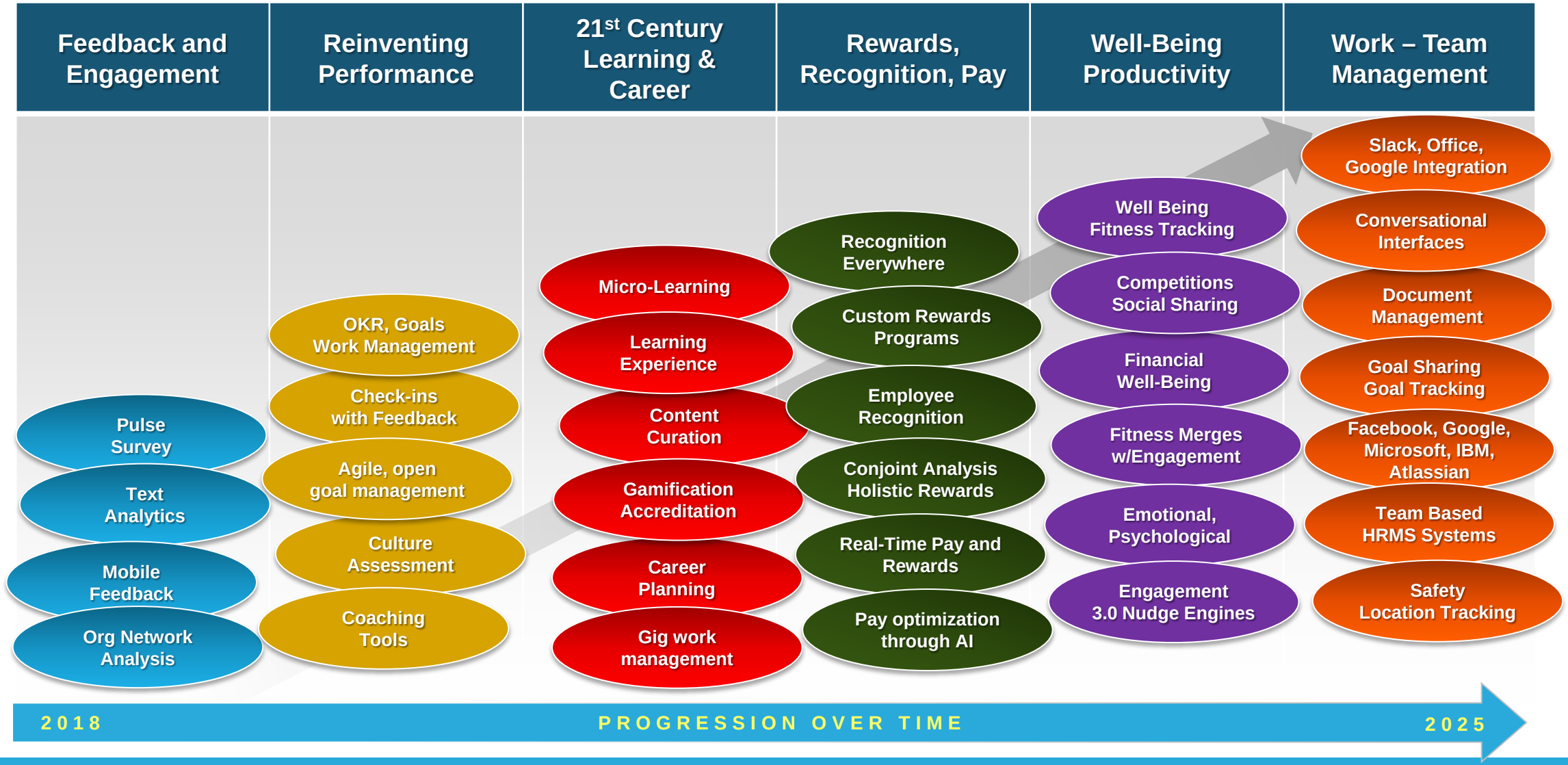
2021 And Beyond: A New Set Of Talent Apps



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Talent Management Is Brutally Competitive

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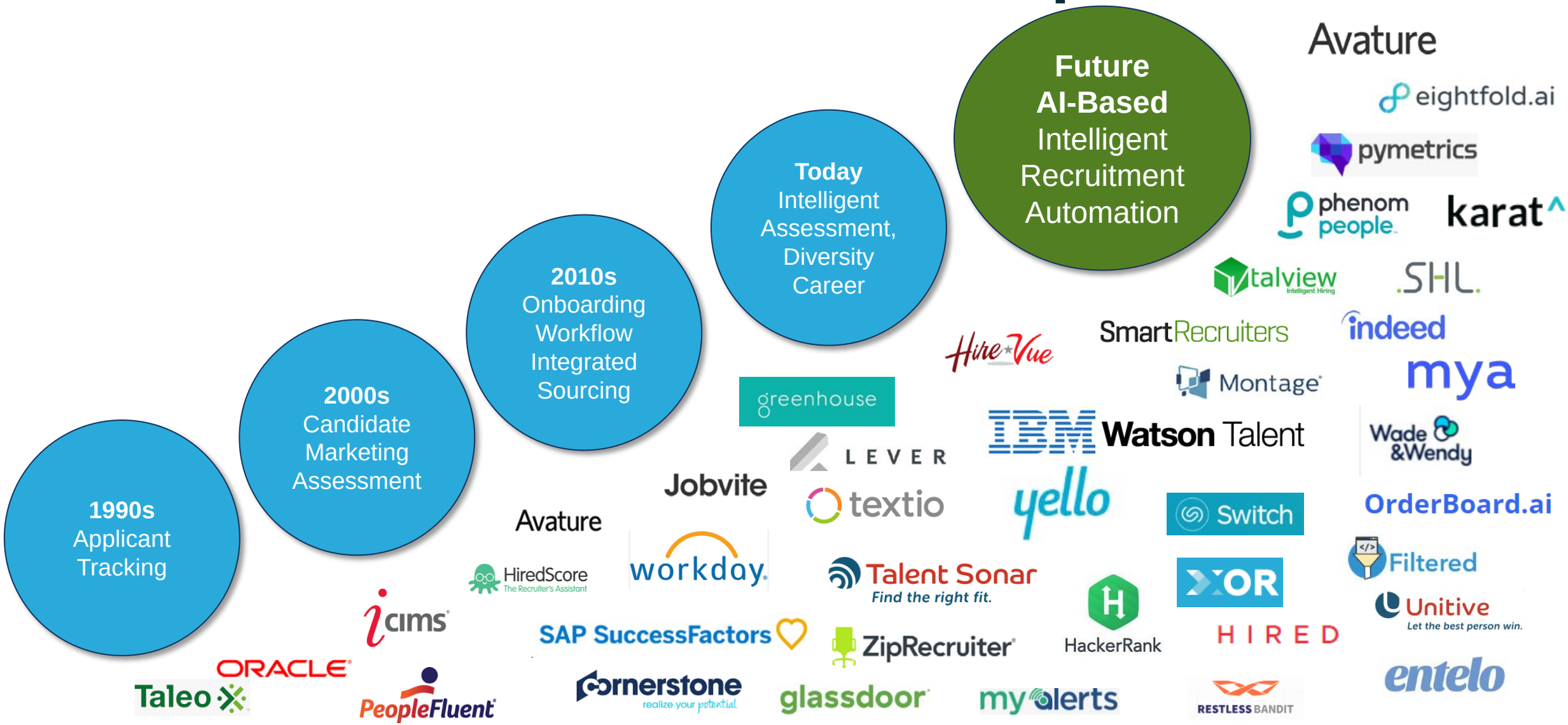
Continued Growth in Talent Acquisition



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AI Is Now A Standard Feature

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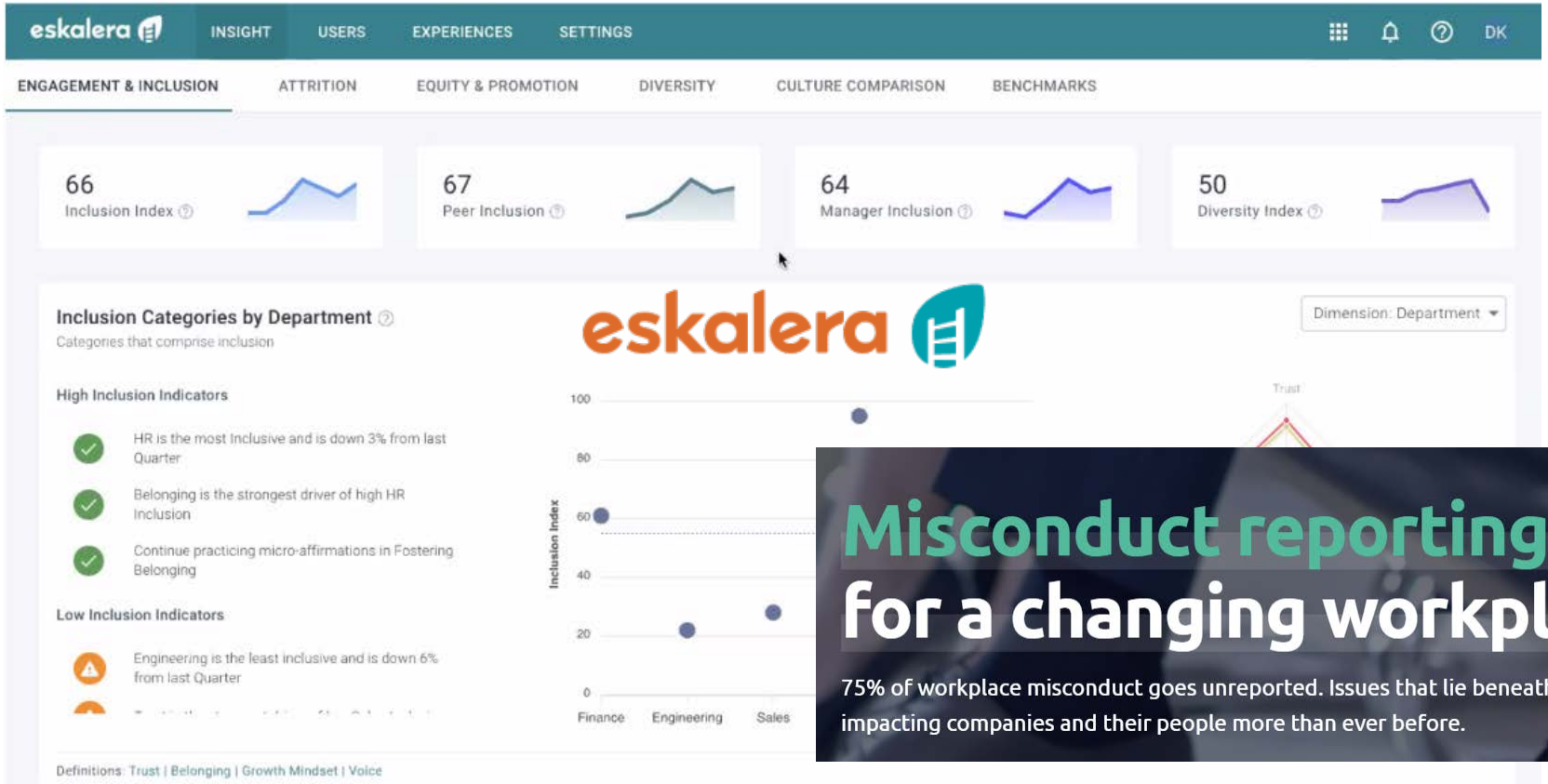
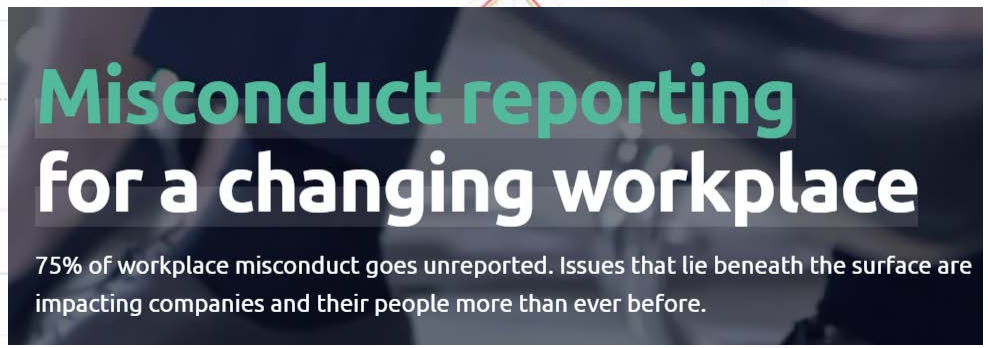
New Tools To Drive Fairness, Diversity, Inclusion



eskalera



LinkedIn

SAP SuccessFactors

vault.

JOPWELL

FAIRY GODBOSS

entelo

textio

greenhouse

Crescendo

allie

THEMOMPROJECT

BLENDOOR
MERIT-BASED MATCHING

Gender Decoder for Job Ads

WorkplaceDiversity.com
The Source For Diversity Talent

interviewing.io

inhersight

Landit

Equal Reality

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3

Employee Voice Platforms
From Insights to Action

Survey | Voice | Action

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Employee Experience – Before Cornavirus

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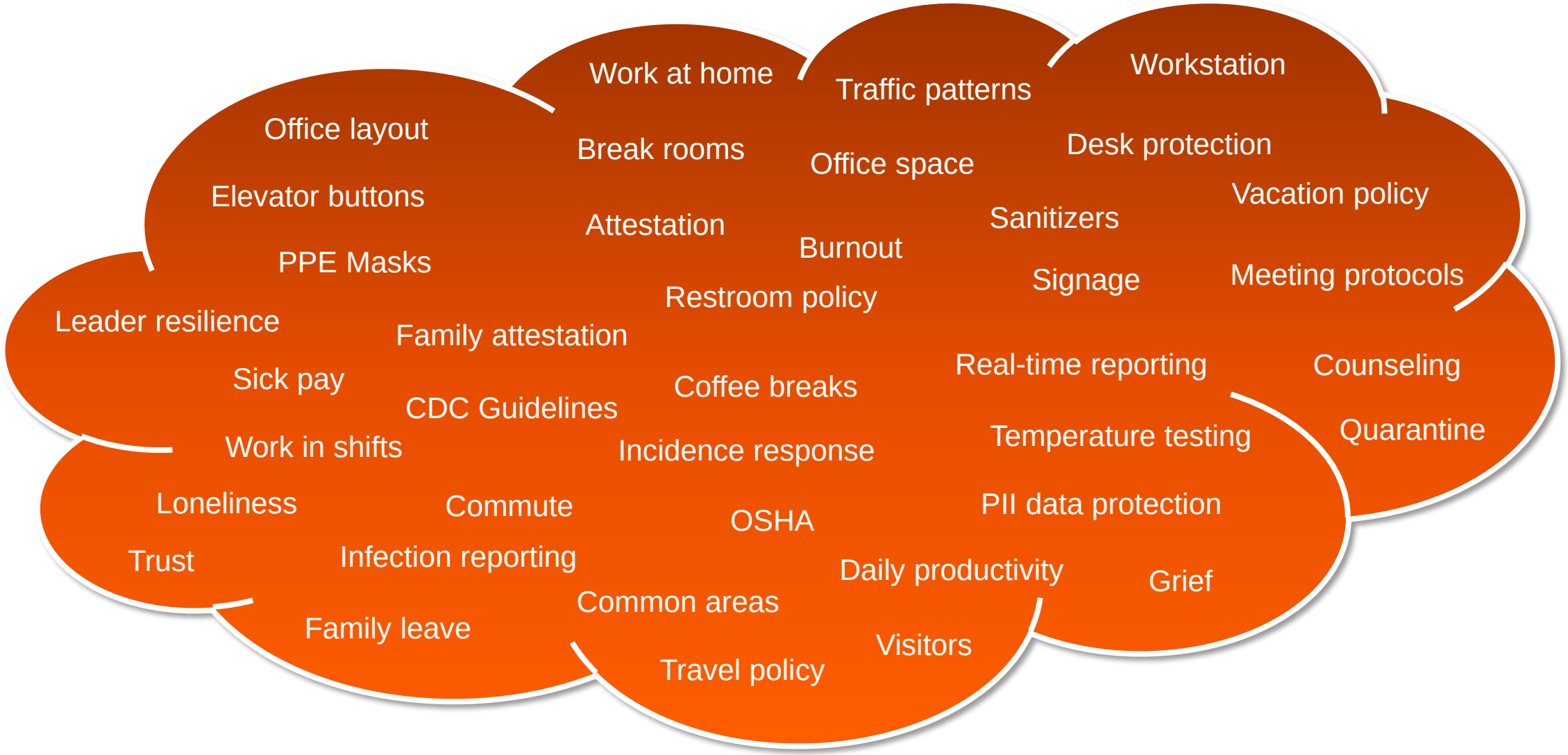
Employee Experience – After Coronavirus



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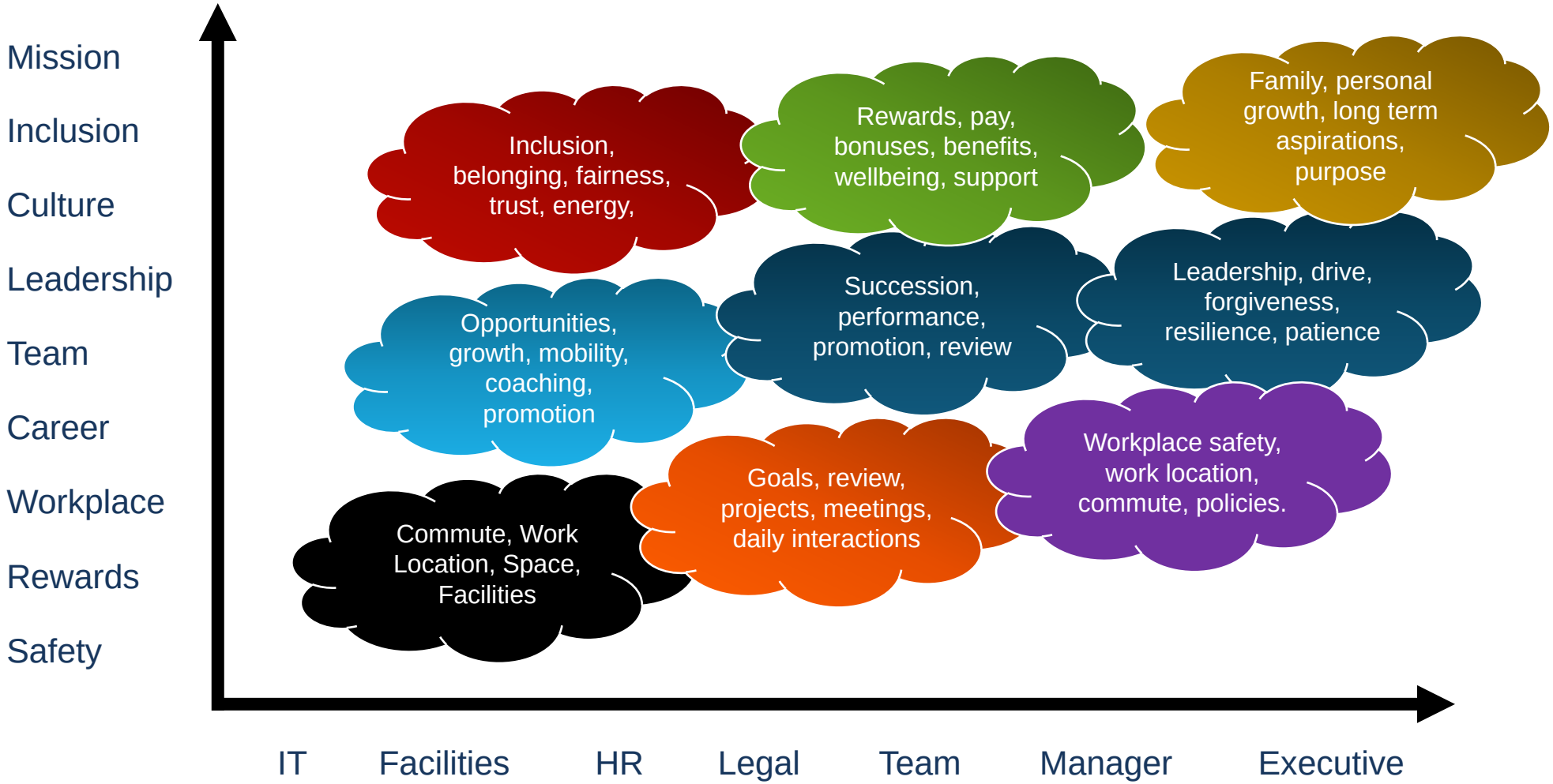
Wide Range of Employee Experience Issues



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Employee Engagement Market (EX) Evolves

EX 1.0	EX 2.0	EX 3.0	EX 4.0
Annual engagement survey	Pulse surveys with mobile access	Intelligent dashboards and action plans	Continuous Response *action platforms*
Once per year. Focus on management. Benchmarked annually. Rigid questions asked year after year. **Focus on benchmarking**.	Agile surveys as needed. Pulse on regular basis. Feedback on mobile or apps. AI-based action plans. Immediate feedback. **Focus on feedback.**	Many sources of data. Dashboards recommend action, deliver nudges, suggestions, and learning or action plans for individuals **Focus on behavior change.**	Tied into internal systems with alerts, feedback, cases and integration with CX systems. Now called EX, not Engagement **Focus on action.**
Survey technology.	***Mobile, easy to use.***	***Useful data & learning.***	***Instrumented actions and alerts***

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Employee Listening: Upping The Game

GLINT
Perceptyx
waggl
SurveyMonkey
questback
StandOut. Powered by ADP
QUANTUM WORKPLACE
cultureIQ
Confirmit
humu
workday
Cornerstone realize your potential
TINYpulse
GALLUP
MEDALLIA
qualtrics XM
Culture Amp
Willis Towers Watson
Peakon
PERCEPTION BY ULTIMATE SOFTWARE
BRIDGE BY INSTRUCTURE

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An Employee Listening Strategy

Customer Experience

Employment Brand

Annual Survey

Pulse Surveys

Crowdsourcing
Open Feedback

Email
ONA

Integrated
Reporting & Analytics
Sentiment Analysis
Network Analysis

Attestation
Infection

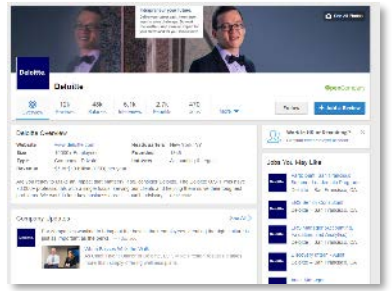
Exit
Interviews

Location
Travel, Badges

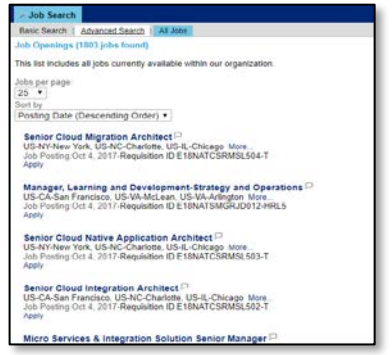
Performance
Appraisals

Performance
Check-ins

Incident
Reporting



Candidate Experience



Case Management

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Market Slowly Starting To Converge

Performance Management	Team Management OKRs	Engagement, Analytics	Recognition, Rewards
successfactors An SAP Company	15Five	Culture Amp	O.C.TANNER
betterworks	WorkBoard	GLINT	globoforce work human
Lattice	impraise	Perceptyx	Achievers
QUANTUM WORKPLACE	Geese	qualtrics XM	kazoo
Reflektive	officevibe	Willis Towers Watson	ANYPERK FOND
kazoo	JUST 3 THINGS	Peakon	RewardGateway the employee engagement people
Small Improvements	Motivii WEEKDONE	waggl SurveyMonkey	
TINYpulse		GALLUP MEDALLIA humu	

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Where These Vendors Are All Going

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4

New Generation of Learning Platforms

LXP | Skills | Real Capabilities

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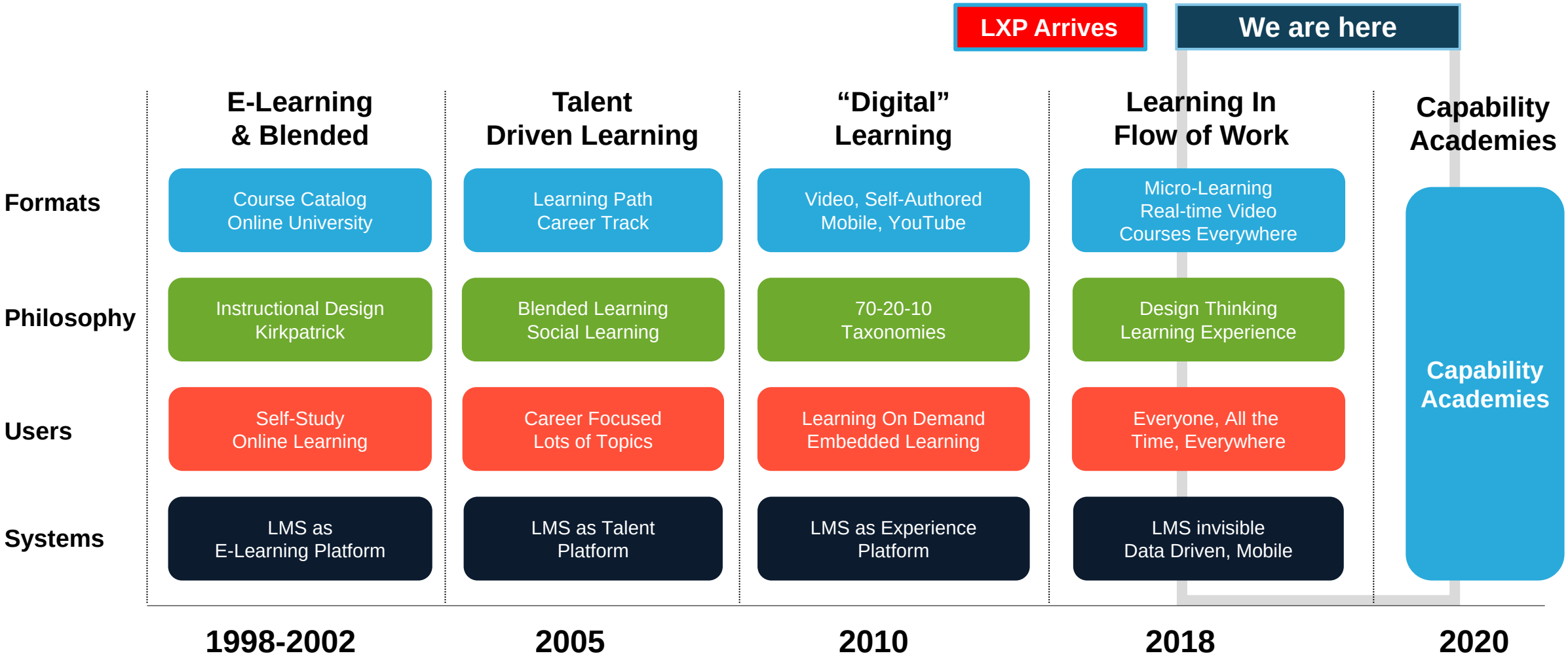
How Corporate Learning Has Evolved



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The Corporate Learning Market Has Exploded

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Explosive Growth In MicroLearning

Micro-Learning	Macro-Learning
I need help now.	*I want to learn something new.*
• 2 minutes or less • Topic or problem based • Search by asking a question • Video or text • Indexed and searchable • Content rated for quality and utility	• Several hours or days • Definitions, concepts, principles, and practice • Exercises graded by others • People to talk with, learn from • Coaching and support needed
Is the content useful and accurate?	*Is the author authoritative and educational?*
Videos, articles, code samples, tools	*Courses, classes, MOOCs, programs*

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What Are PowerSkills? The Skills of Success.

Optimism	Curiosity	Tenacity	Flexibility	Integrity
Learning	Generosity	Joy	Teamwork	Comm-unication
Drive	Ethics	Empathy	Followership	Time Management
Happiness	Patience	Kindness	Forgiveness	Awe

Source: IBM, Greater Good Science Center, Pymetrics, Josh Bersin

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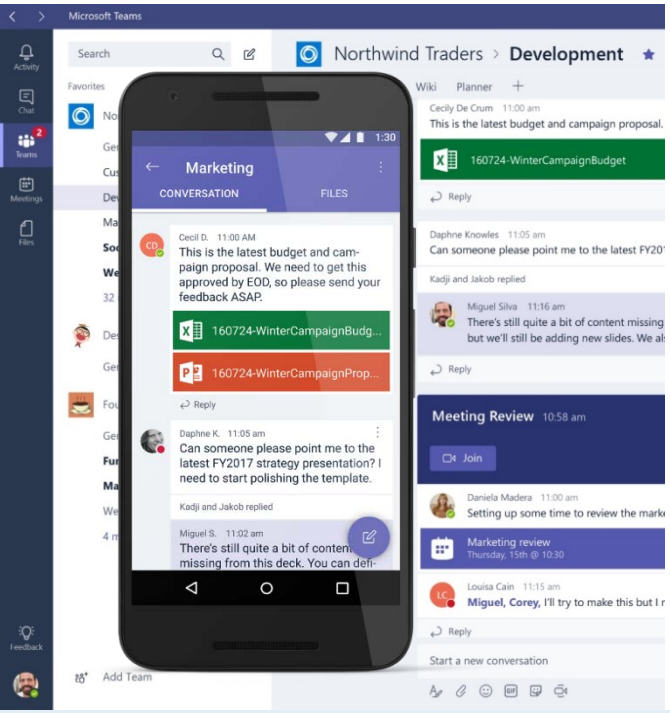
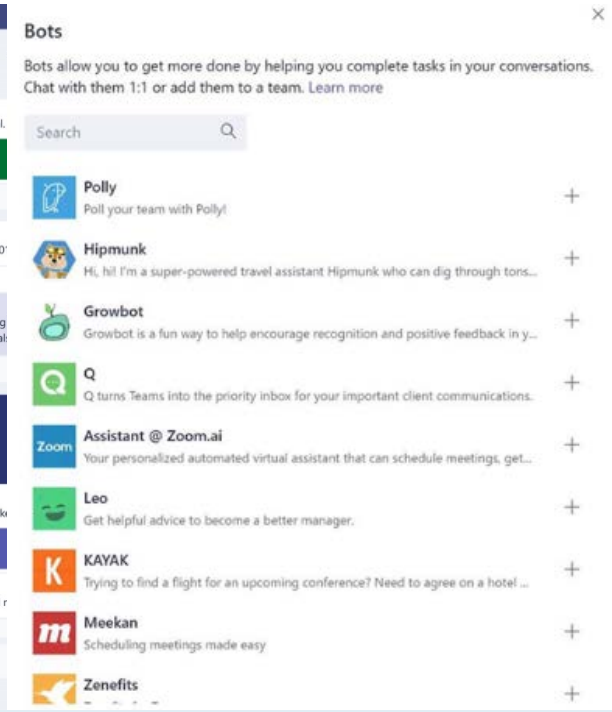
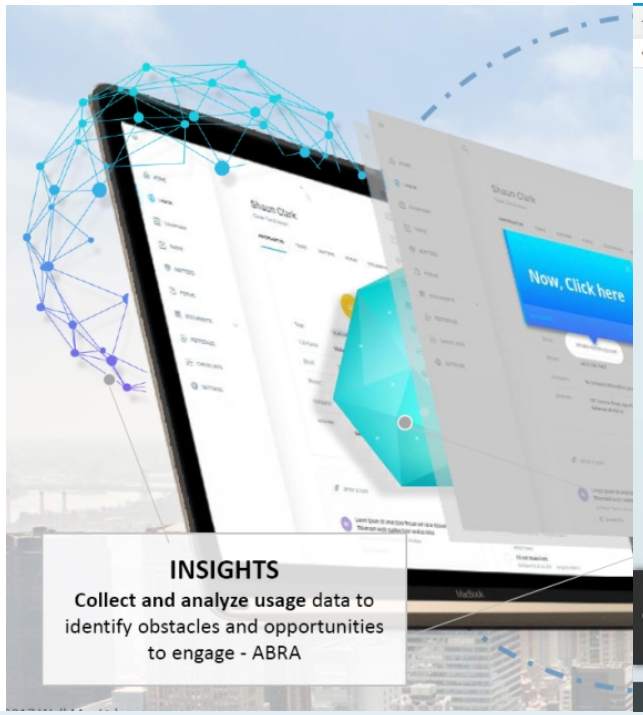
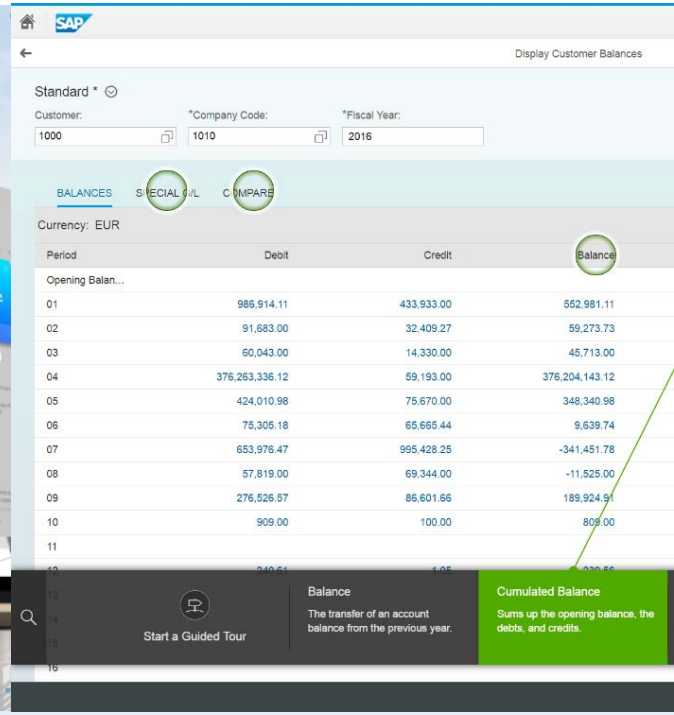
Learning Will Appear Everywhere









Microsoft Teams

LEARNING

GLINT

inkling

walkme

filtered

salesforce

TRAILHEAD

volley

IBM Watson

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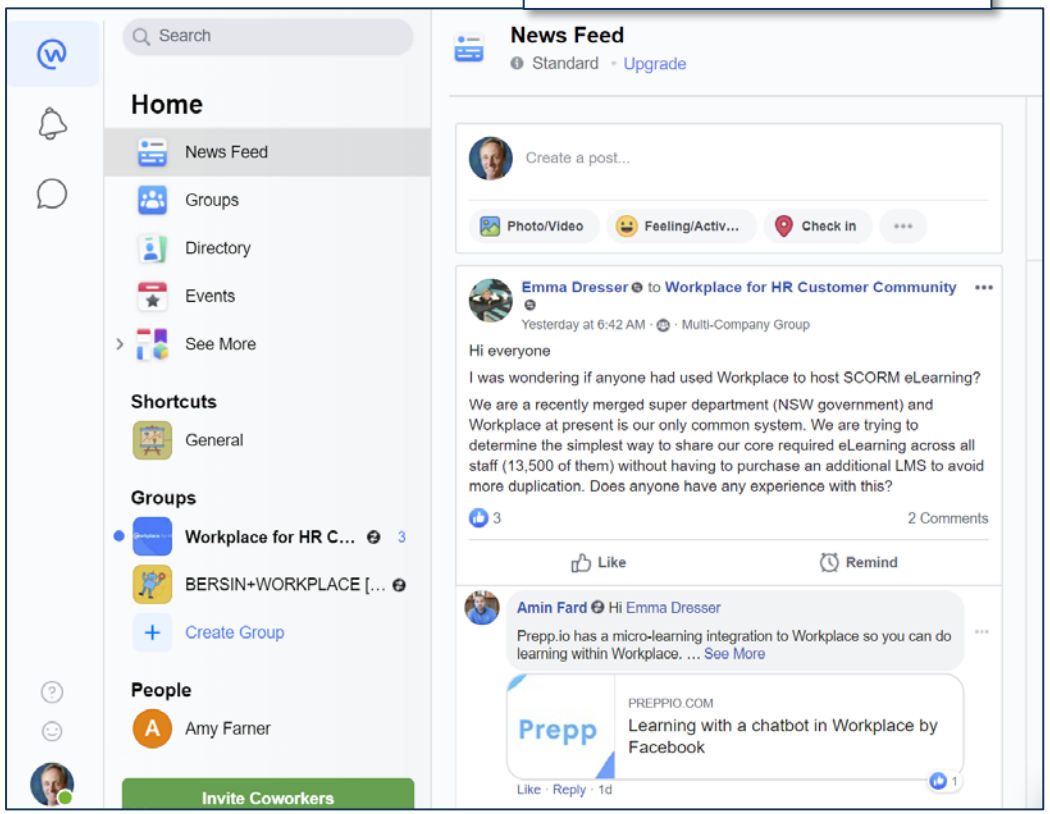
Learning In The Flow Of Work



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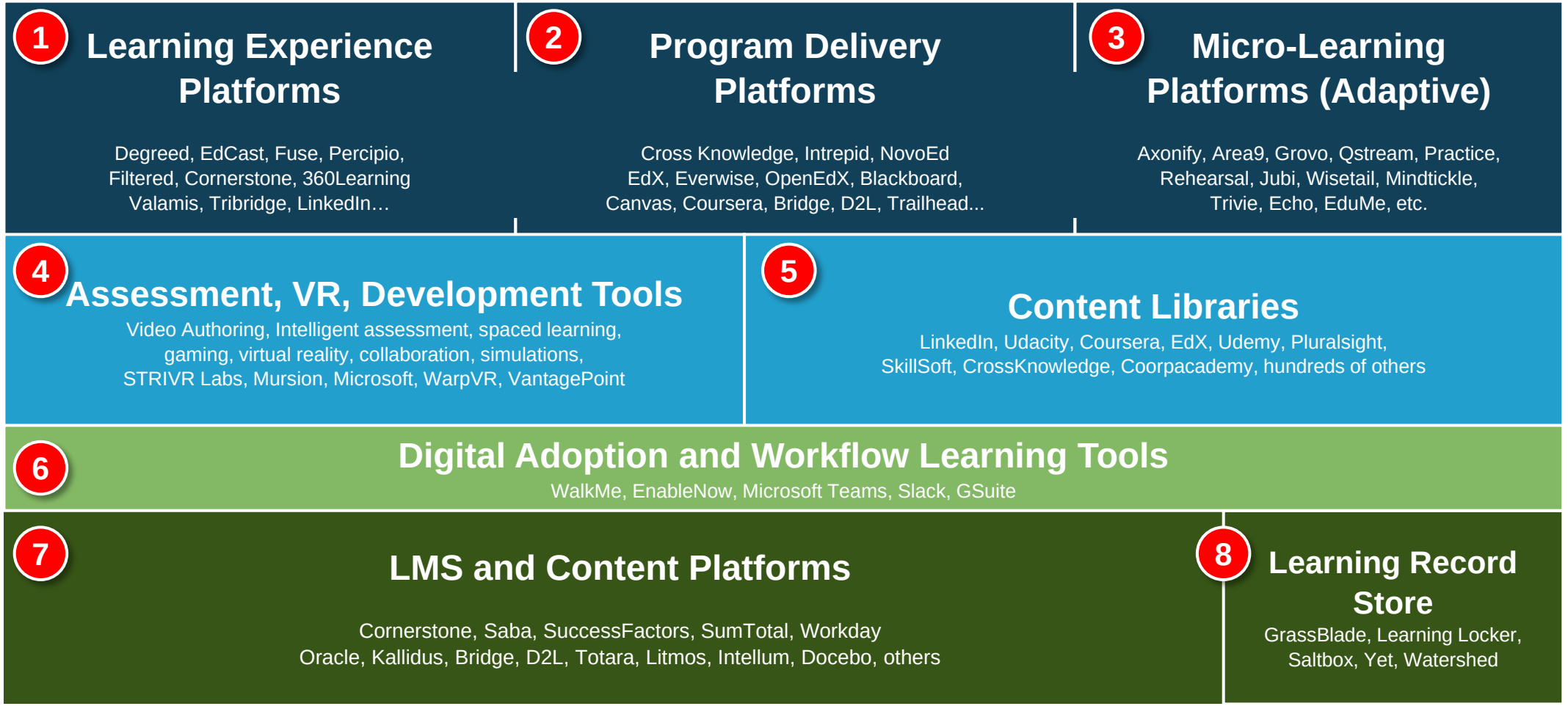
How The Learning Tech Market Looks



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VR Market Is Exploding

STRIVR

96%

reduction in training from
8 hours to 15 minutes

Walmart

10%

increase in customer
satisfaction in 6 months

Fidelity

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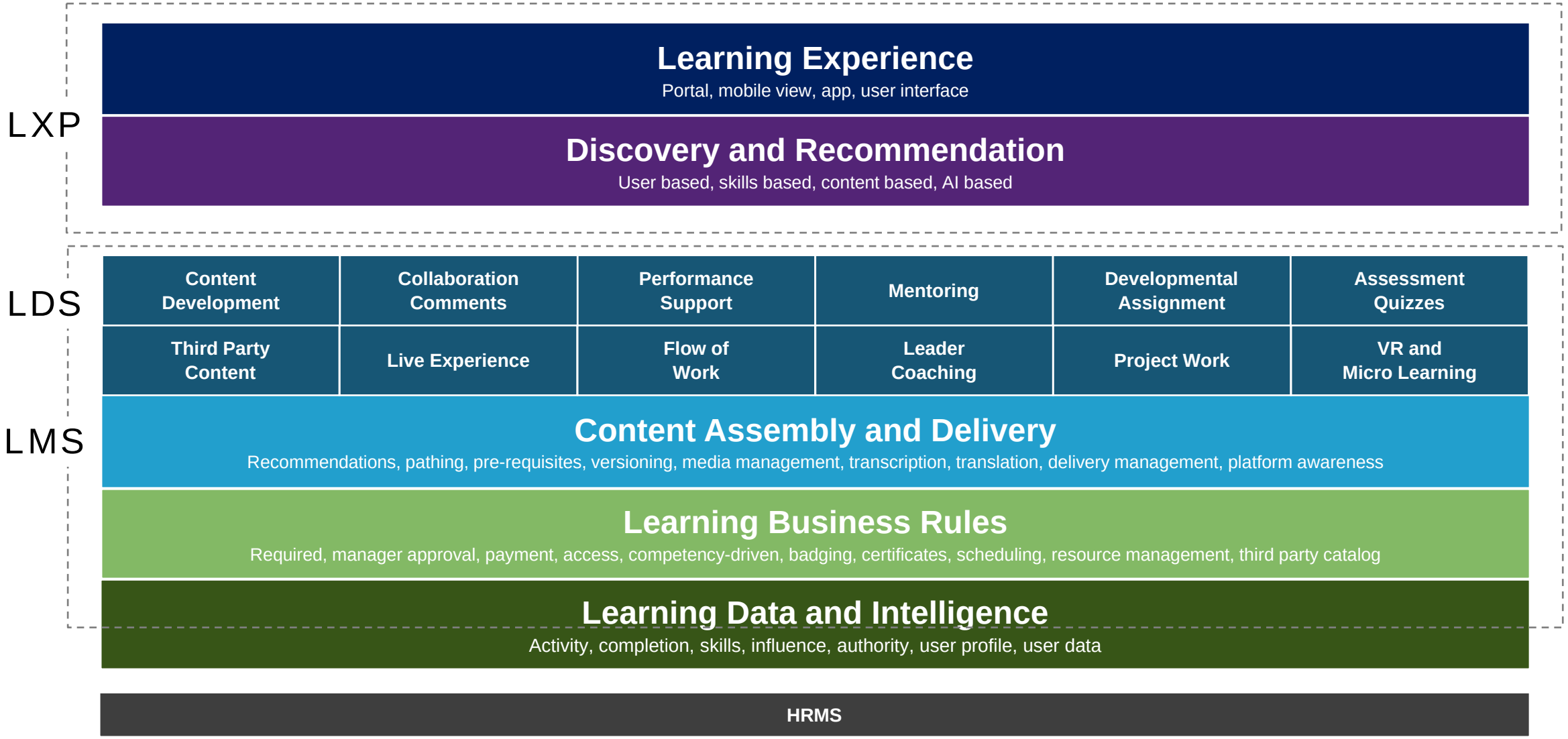
The Complexity Of Corporate Learning



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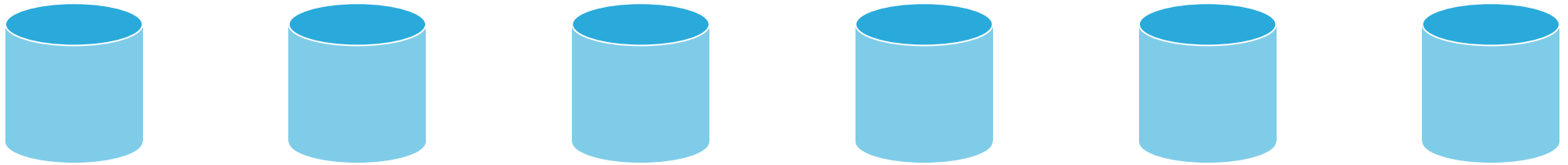
Learning Architecture of Today

Access — Productivity System (Office, Salesforce, MS Teams, Workplace by Facebook)

Discover — LXP | Mobile Apps | HR Portal | VR

Learn — Training | Onboarding | Academies | Talent Marketplace | Credential



LRS
Learning Transaction Data

LMS
Completion Reporting Data

HRMS
Job, Role, Hierarchy, Person Data

Content
Learning Content and Video Data

Skills
Skills data Associated With person

Providers
LinkedIn
Skillsoft
Others

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The War Of The Skills Clouds

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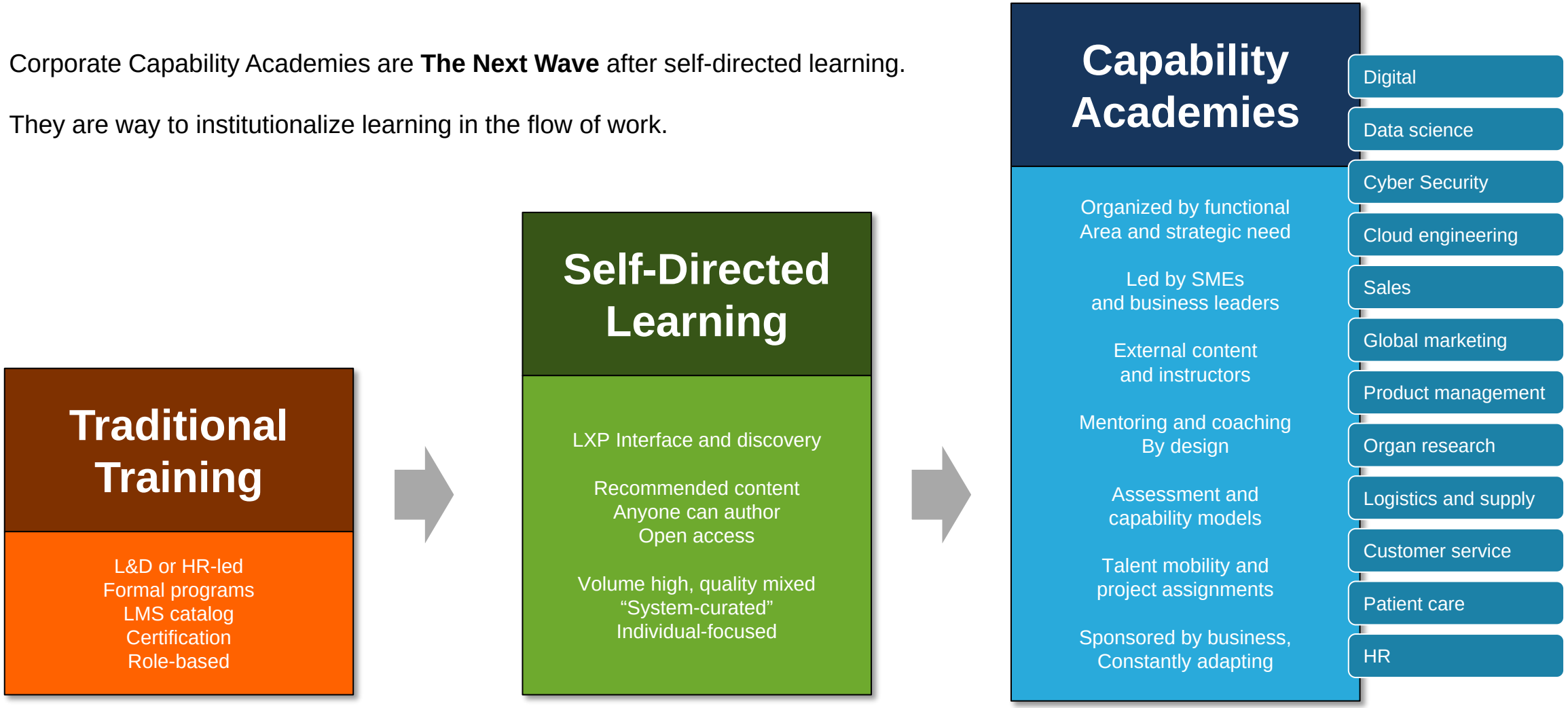
The Next Step: Capability Academies

Corporate Capability Academies are **The Next Wave** after self-directed learning.

They are way to institutionalize learning in the flow of work.



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What Is An Academy?

a·cad·e·my

/əˈkadəmē/

noun

noun: **academy**; plural noun: **academies**

1. An Academy is a place of study in a special field, “a police academy.”

2. A society or institution of distinguished scholars, artists, or scientists, that aims to promote and maintain standards in its particular field.

josh bersin academy

1. An Academy is a place you go to study, learn, and advance your professional capabilities.

2. An Academy is a place you go to update your skills and knowledge in your field on a continuous basis.

3. An Academy is a place you go to transform your career, change jobs, learn to get promoted.

4. An Academy is a place experts go to teach, share, collaborate and advance the state of the profession.

5. An Academy is a place the profession relies on to build and maintain standards, thought leadership, and new directions of the field.

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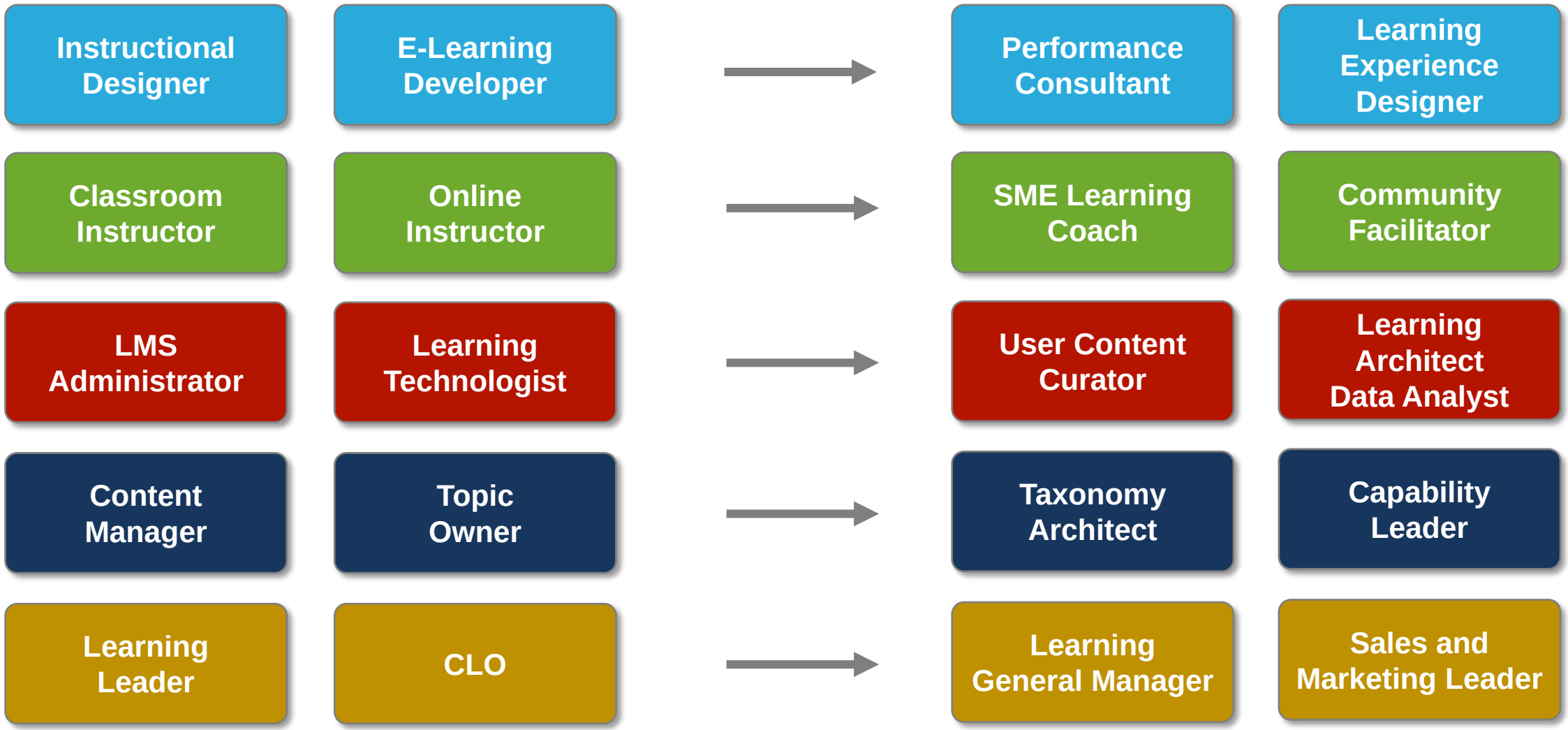
Evolving L&D Roles: Capability Development



Derived from LPI Capability Model, #LPICapMap

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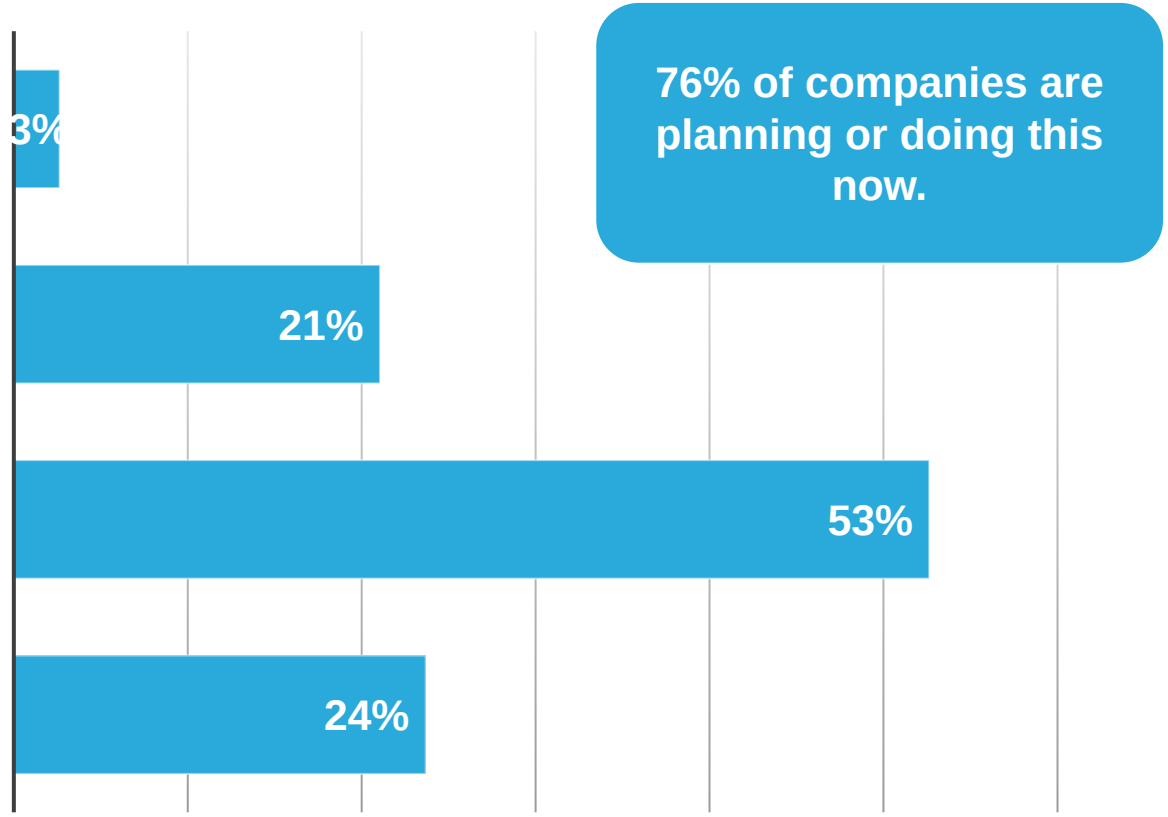
Learning In The Flow Has Arrived

We have used our LXP or other systems for Learning in the Flow of Work

We are developing implementation plans for Learning in the Flow of Work

We are augmenting existing programs with Learning in the Flow of Work content.

We have no plans for Learning in the Flow of Work



76% of companies are planning or doing this now.

Adaptive Learning Research, Josh Bersin Academy and NIIT, not yet published.

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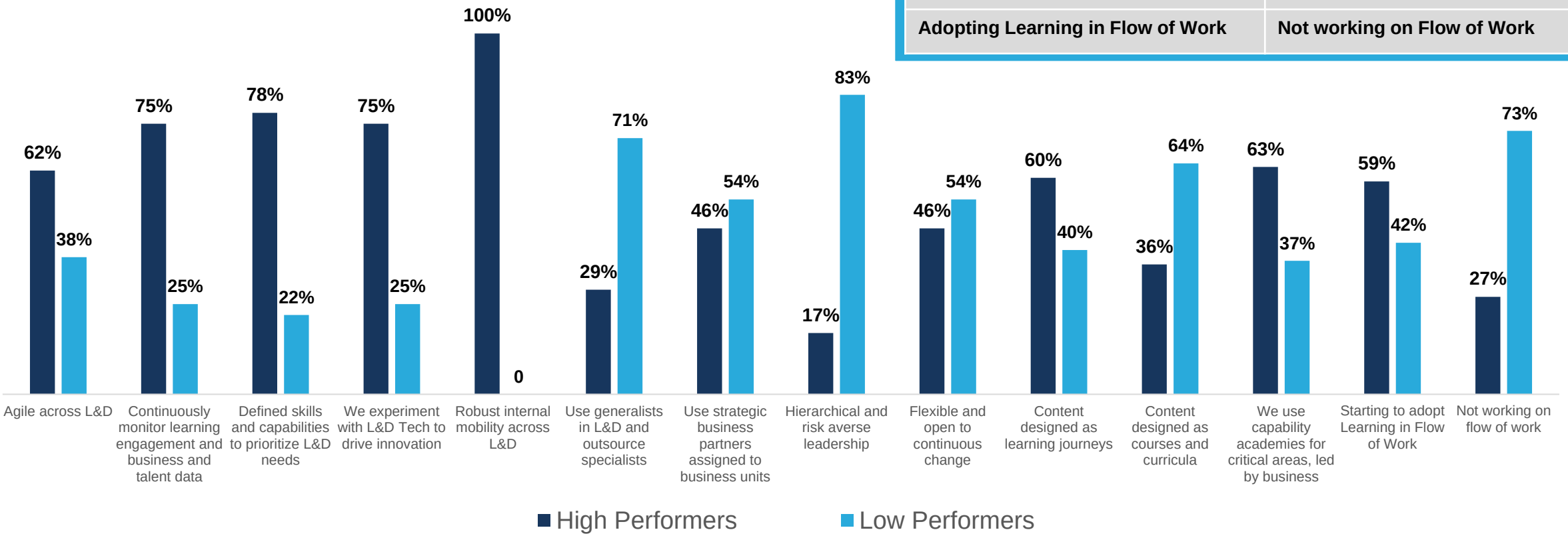
Adaptive Learning Drives Performance

JBA-NIIT Adaptive learning research, 53 companies, more than 14 million learners, High Performers are top 30% of sample based on business growth and Glassdoor ratings.

High Performers	Low Performers
Agile across L&D	Waterfall process
Monitor learner engagement	No real measurement of learner sat
Experiment with L&D and technology	Wait for others to pioneer new ideas
Move L&D team into and out of L&D	Little or no job rotation out of L&D
Design content as journeys not programs	Outsource specialists to others
Focus on capability academies	Focus on hierarchical buyers of L&D
Adopting Learning in Flow of Work	Not working on Flow of Work



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5

Careers
In the Future of Work

Career | Work | Talent Marketplace

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Three Models for Talent Mobility

Planned	Facilitated	Agile
• Skills and experience • Tenure and reputation • Assessments, gated paths	• Needs of the business • Developmental needs • May be stretch assignment	• Changeable at any time • Based on interest and skills • Skills models may help
Clear functional career paths which employees traverse over time with succession, talent reviews, and manager-led coaching integrated into talent management.	Job moves, relocations, stretch assignments, and promotions are facilitated outside the model for high-potentials, critical talent needs, restructuring, M&A, and other rapid changes.	Individuals can find new gigs, assignments, jobs, and roles themselves, apply for jobs, and move internally – including gig work and projects.

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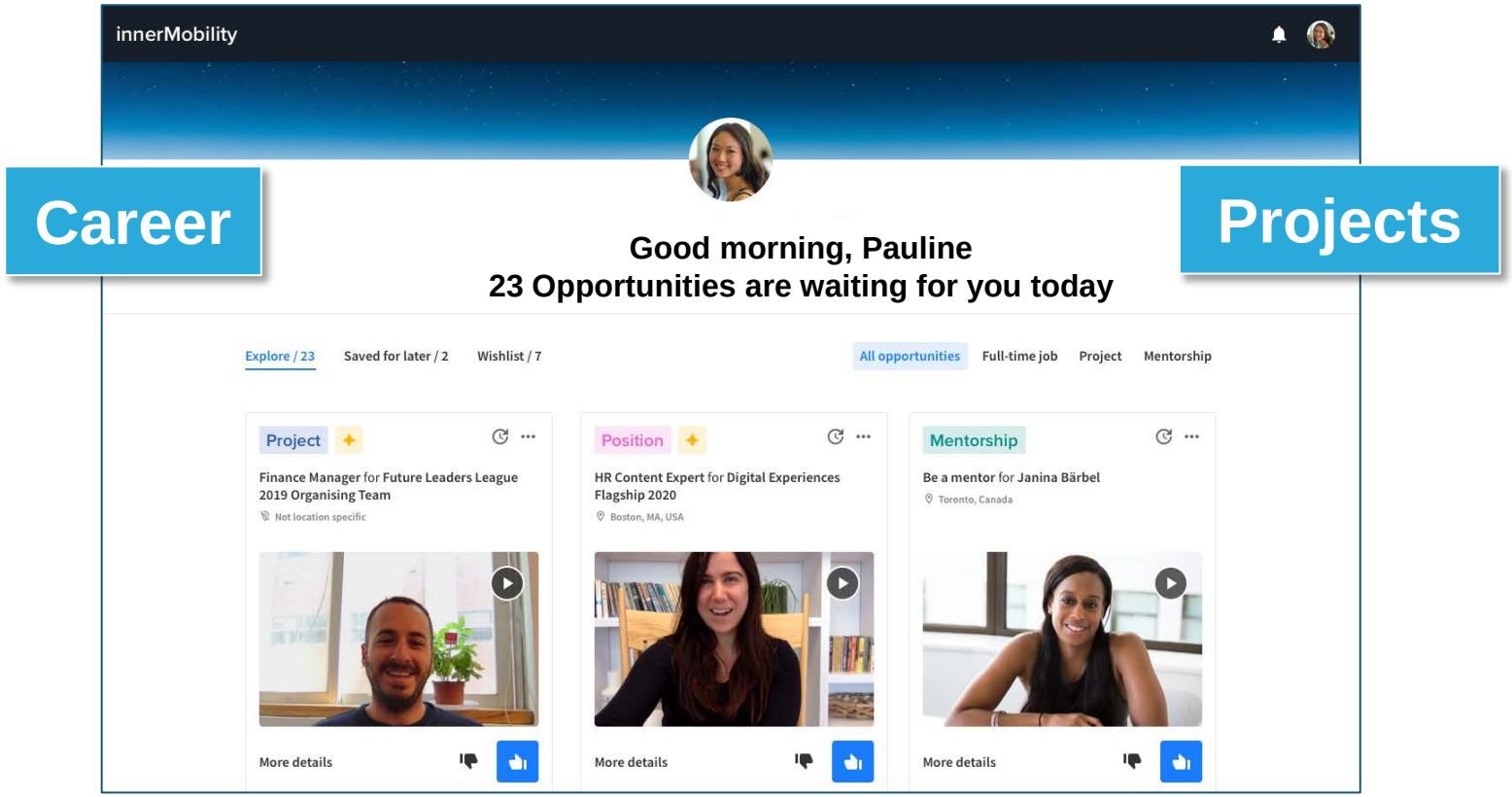
The Talent Marketplace Arrives



This is not just about adding a few more coding lessons. It is about fostering critical thinking, independent problem-solving, and lifelong learning that can help people adapt to change."

- Christine LaGarde

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Vendors Fit Different Models of Talent Mobility

Career Development

Planned	Facilitated	Agile
• Skills and experience • Tenure and reputation • Assessments, gated paths	• Needs of the business • Developmental needs • May be stretch assignment	• Changeable at any time • Based on interest and skills • Skills models may help

Sourcing & Recruiting

Development Planning — **Gig Work Management**

successfactors An SAP Company · fuel50 · edcast · hitch · gloat · eightfold.ai · Kahuna · degreed · pymetrics · workmarket · Avature · phenom people · TALENTGUARD · IBM Watson · workday · 365Talents · CATALANT

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Talent Marketplace Is Central To Talent Management

gloat

fuel50

hitch™

eightfold.ai

365Talents

IBM

L&D and Career Management

Gig Work Management

Performance Management

Rewards

Succession Management

Talent Acquisition

Workforce Management

workday.

edcast

pymetrics

degreed.

phenom people

TALENTGUARD

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6

Wellbeing Meets Employee Experience

Health | Productivity | Meaning

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An Explosive Market

- $46 billion market growing at 4.8% per year
- 32% of payroll now spent on benefits, a 19% increase in last 8 years
- Healthcare and wellbeing program spending increased by 43% in the last five years
- Only 10% of workers have access to workplace wellness programs

https://globalwellnessinstitute.org/wp-content/uploads/2018/10/Research2018_v5webfinal.pdf

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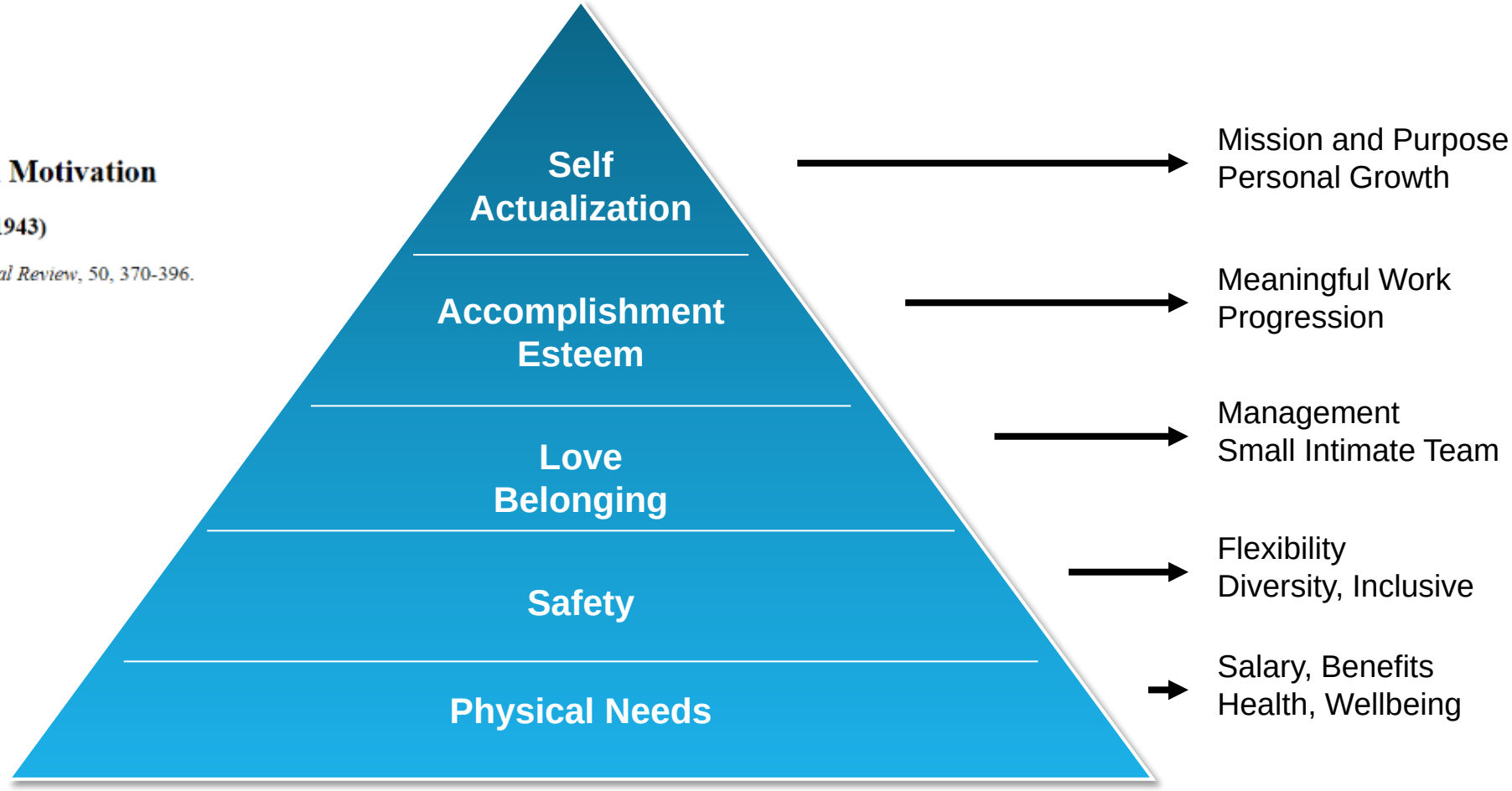
What Really Matters

A Theory of Human Motivation

A. H. Maslow (1943)

Originally Published in *Psychological Review*, 50, 370-396.



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Remote Work. The Five Topics To Consider

Tools	Rules	Norms	Culture
Integrated tools for conferencing, video, file sharing, messaging.	Established practices for security, time, space, communication, style.	How we join, appear, communicate, behave, listen, talk, and share.	How we get to know each other, level of hierarchy, trust, and psychological safety.
Simplicity	**Clarity**	**Accountability**	**Trust**
This is easy and it works.	*I know what's expected.*	*I understand how to behave.*	*I can be myself and thrive*
IT infrastructure, laptops, phones, systems, applications we use.	*Security, cameras, desks, chairs, internet access, space, time.*	*Scheduled meetings, behavior on calls, face time, 1:1s, coaching, feedback.*	*Trust, empowerment, psychological safety, development, growth.*
Resilience			

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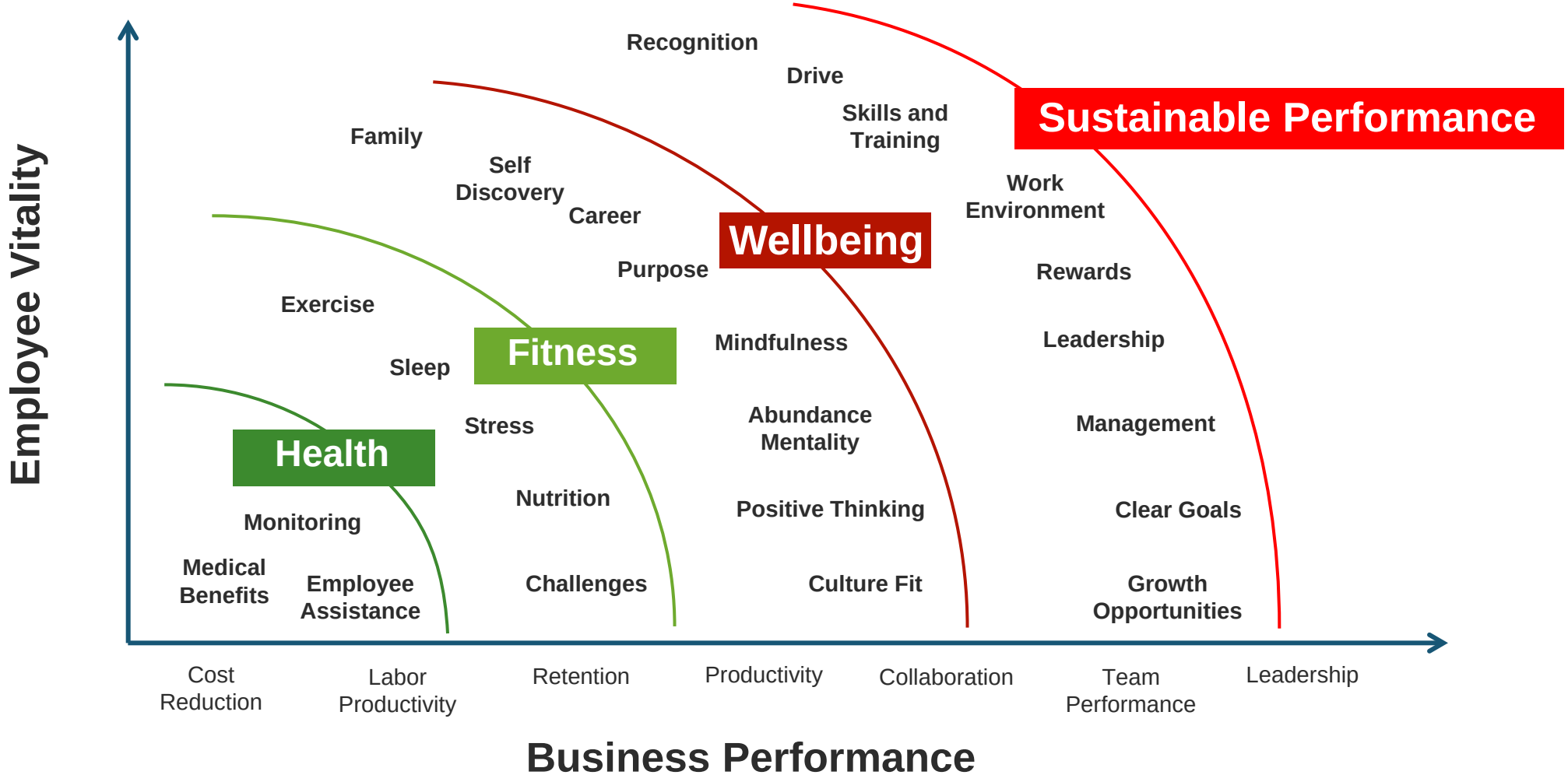
Remote Work: Creating Psychological Safety

Derived from “The Fearless Organization,” by Amy Edmondson

Wellbeing & Resilience: The New Performance Equation



VC Data: CB Insights

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Explosion of Wellbeing Vendors (small subset)

Financial

Physical

Emotional

Cultural

Platforms

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Maturity Model for Wellbeing Strategy

© Josh Bersin Academy, Wellbeing at Work Framework

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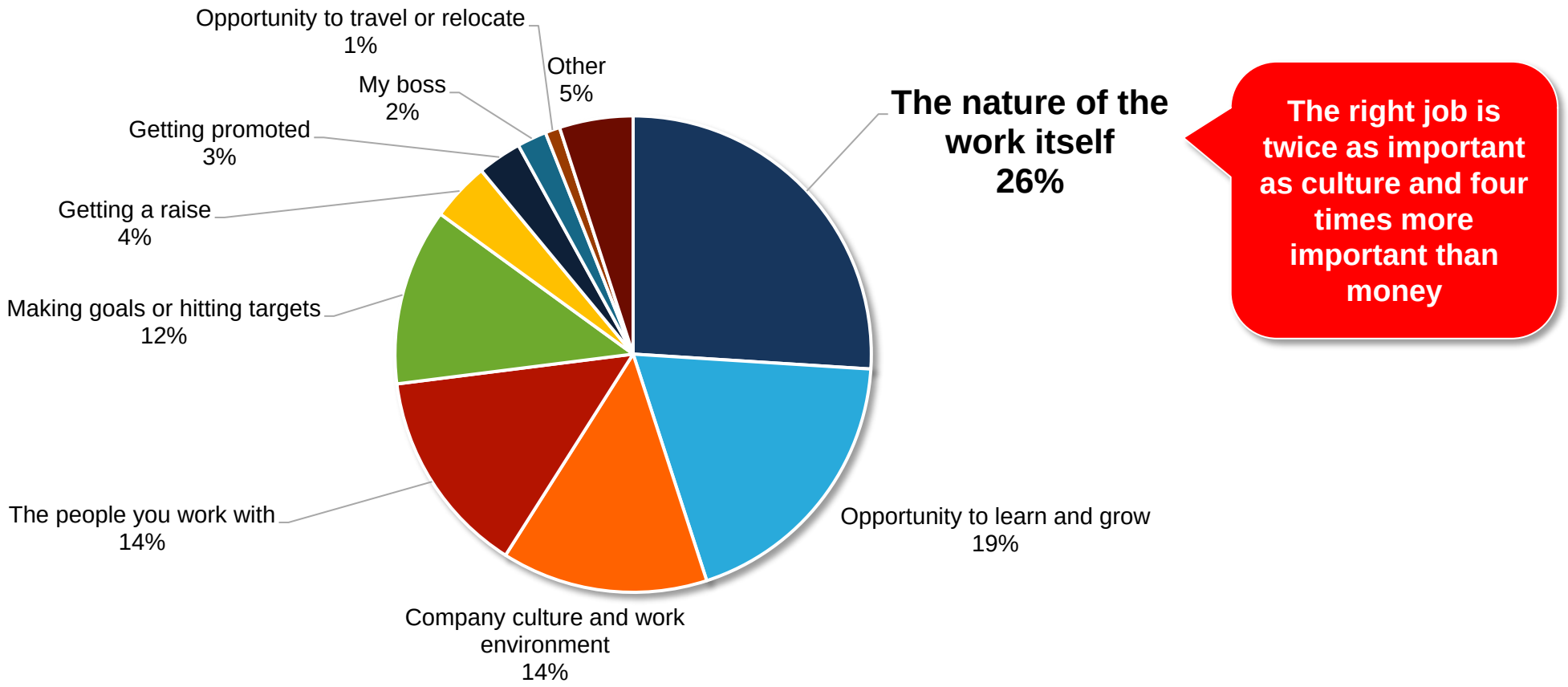
What Matters Most? Meaningful Work.

What Is The #1 Thing That Inspires You To Be Happy And Work Harder?



N=2,800 professionals, Fall 2018, Bersin and LinkedIn Research,
https://www.linkedin.com/pulse/want-happy-work-spend-time-learning-josh-bersin/

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7

People Analytics Is Now Essential

Merging People Data with Operational, Location, External

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People Analytics Is Now Essential

72%
of respondents rate analytics important;

1/3 are now doing some form of predictive modeling!

35% year-over-year improvement in analytics capabilities

31% have increased staff, and **19% are buying new tools**.

Year over year there has been major improvement in People Analytics.

The percentage of companies who believe they are "excellent" doubled from 4% to 8%, and the percentage who are now using analytics to predict business outcomes is 34%!

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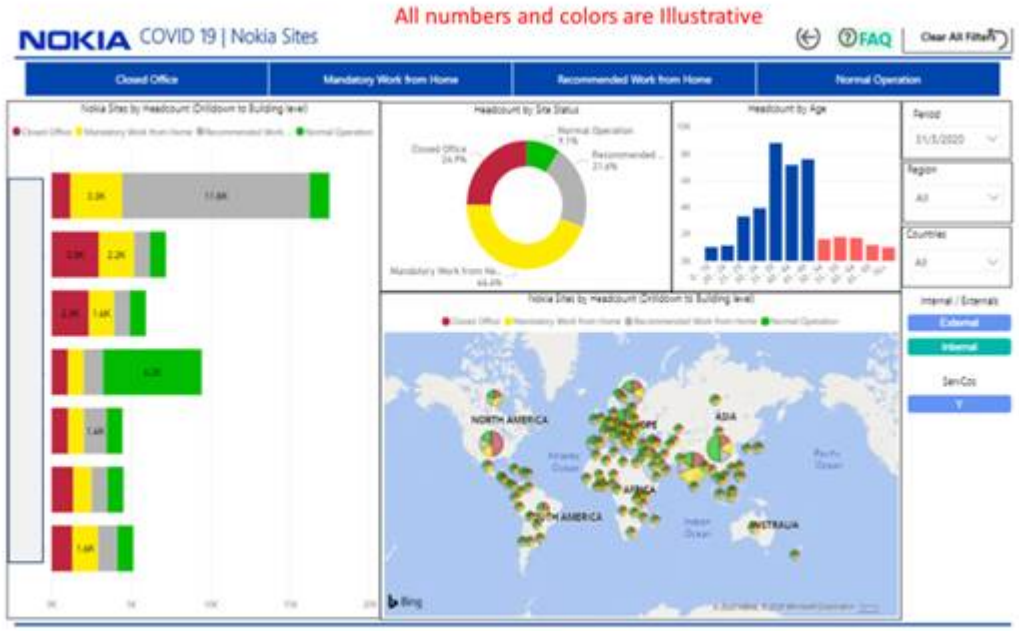
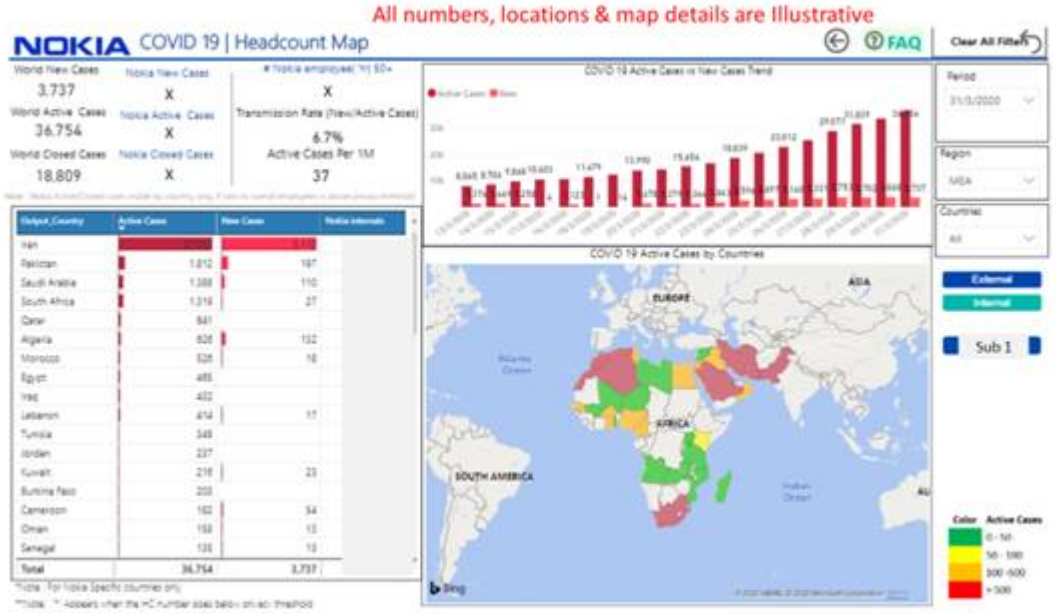
Leveraging People Analytics Immediately



Work from home profile.



Headcount by affected location.

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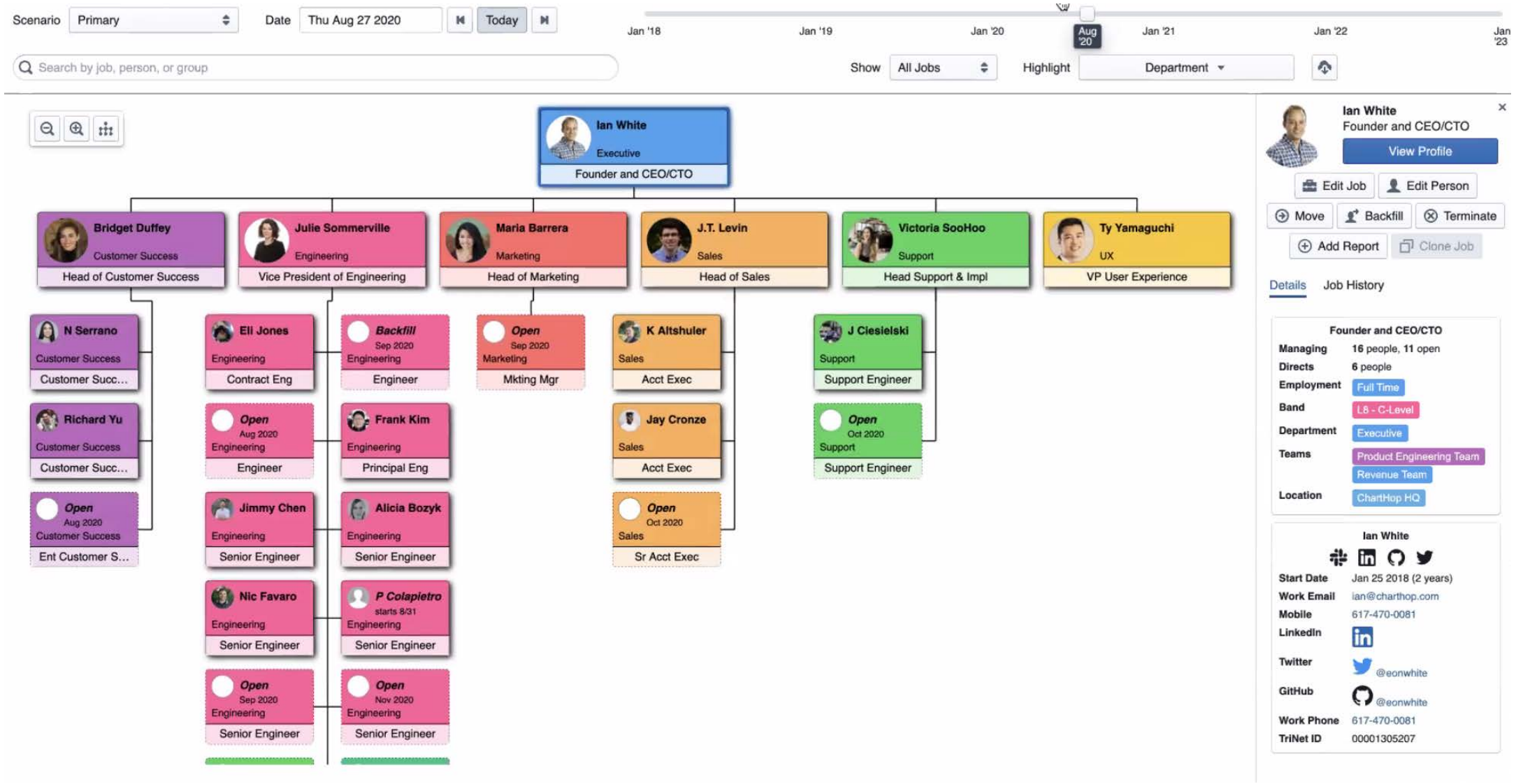
Visual People Analytics



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15 Keys To Success in People Analytics

Organizational	**Organization Design** (Reporting, leadership, ownership)	**Team Governance** (How projects are assigned, staffed, measured)	**Business Partners** (How business units or HRBPs are supported)	**Integration w/Finance And Ops**	**Workforce Planning** (data, knowledge, and processes for WFP)
Skills	**Business Knowledge** (Understanding of the systems, data, finance, and business itself)	**Analytics Skills** (data, statistics, reporting skills)	**Engineering Skills** (SQL, dbms, cloud, ETL expertise)	**Visualization Skills** (presentation, visualization, story telling)	**AI & Model Skills** (building, monitoring, and training AI)
Technical	**Systems Integration** (Integrating data systems, creating a dictionary)	**Data Quality** (quality, governance, ownership, trust, validity, recency of data)	**Privacy and Protection** (data privacy, protection, recovery)	**Tool Set** (visualization, analytics, and platform tools)	**AI-Enabled Systems** (AI apps or systems)

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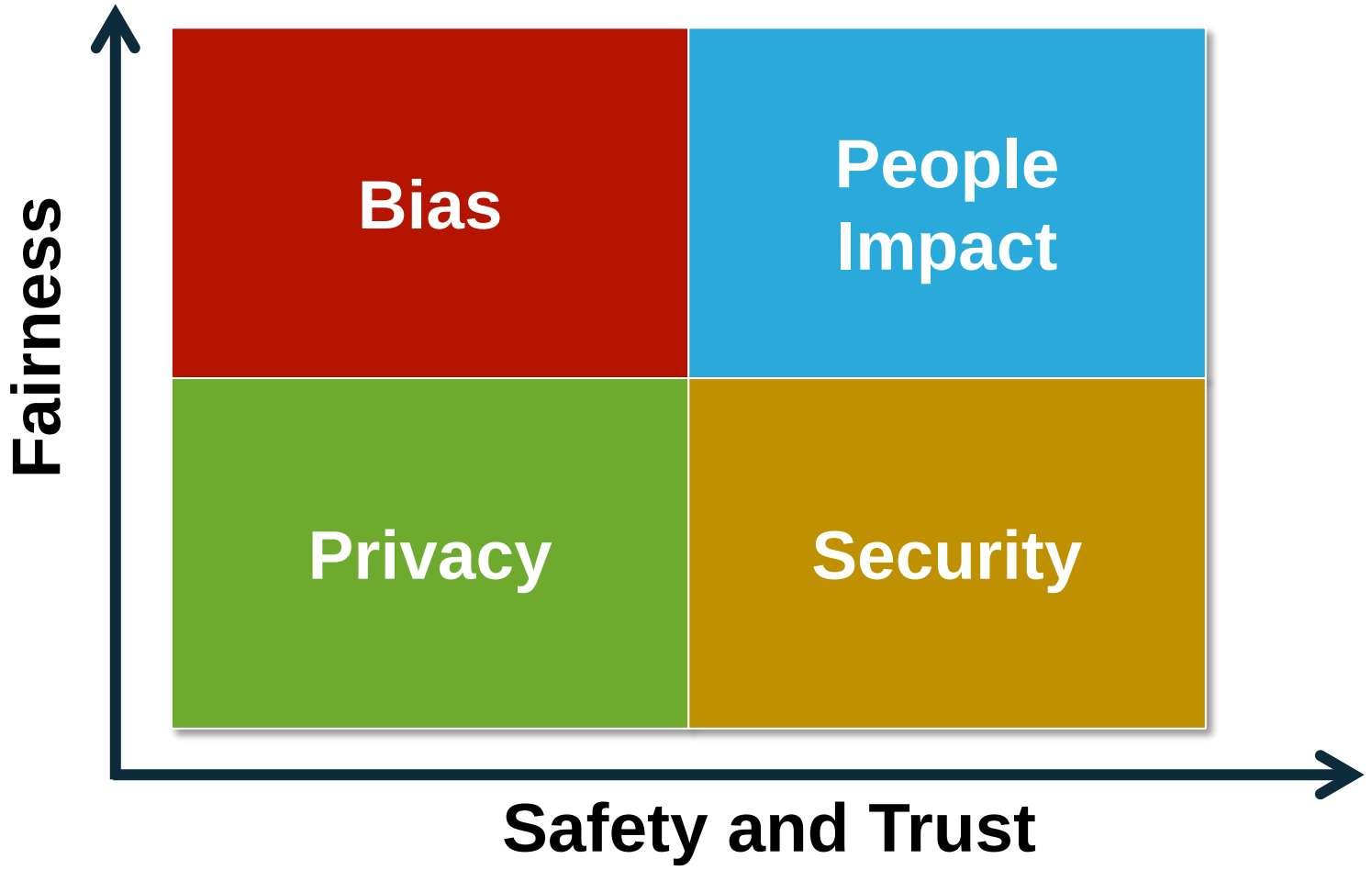
A Framework For Ethics of Data and AI



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Important Vendors To Watch

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8

Creating An Employee-Centric HR Tech Architecture

Flexibility | Adaptability | Growth

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Lots Of Room for Improvement

"After analysis of work practices, we found that we were losing approximately 174 man-years of wasted effort in our performance and talent review process."

"By studying the time we spend in meetings, we found that we could save $24 million per year by reducing size and frequency of meetings."

"We had 52 different steps and managerial actions involved to order an employee credit card."

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Crisis Response

"We took our onboarding program and turned it into a "Crisis-Response" platform over the weekend."

"95% of our employees are now working at home. We developed new policies for volunteerism, family leave, and home technology within one week."

"Not all our HR teams have to do crisis response. We are still running the business, and responding to this too.

"Our local business partners are calling the shots now, we are supporting them.

UnitedHealth Group

IBM

Nextdoor

NOVARTIS

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The Process Shredder at Pepsi

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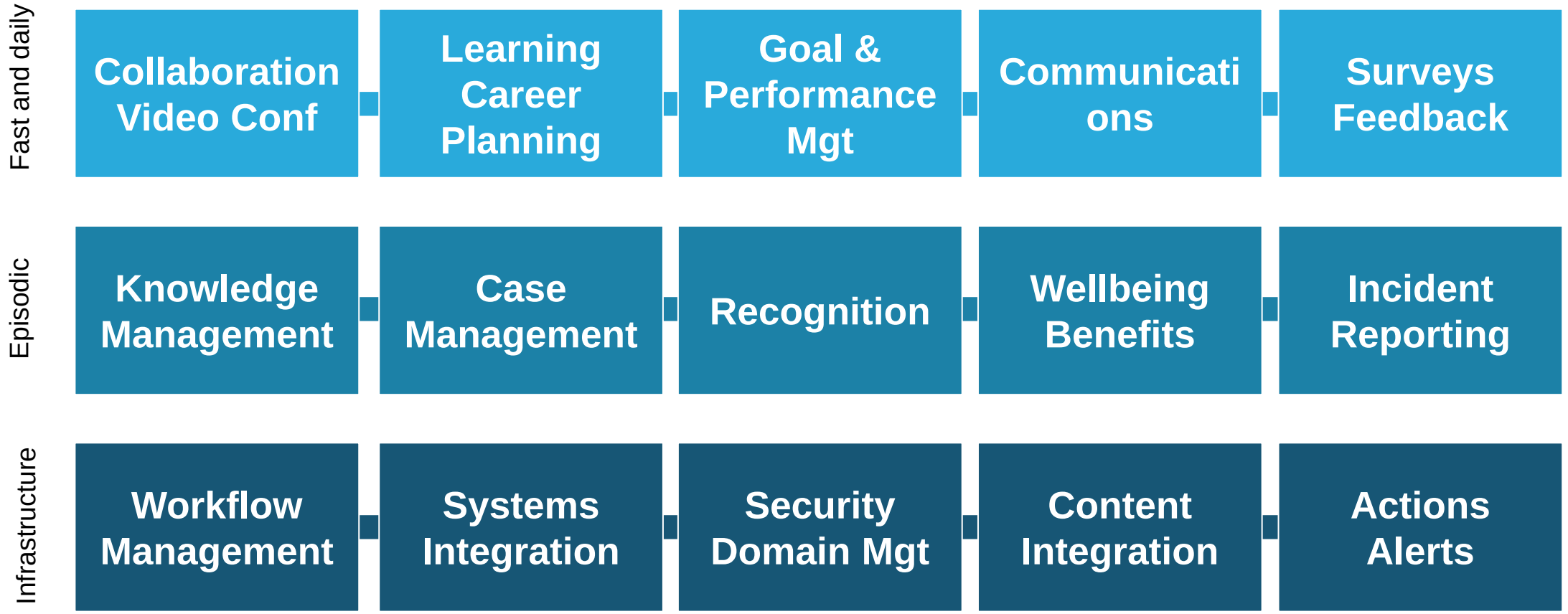
Focus On Employee Experience Apps



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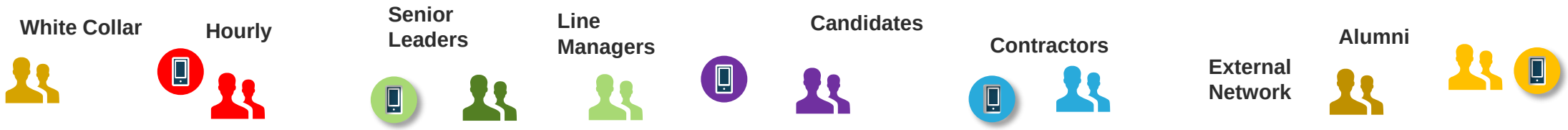
HR Technology Architecture: 2021 and Beyond



Work Tech: Systems of Productivity

Microsoft | Workplace | slack | salesforce | Google

Employee Experience Workflows: Chat | Survey | Communicate | Route Cases | Resolve

Self Service | Case and Expertise Management | Document, Knowledge Management | COVID Response | Transition Programs | Employee Communications | Surveys Feedback | IT, Finance Legal Services

Sourcing
Recruitment
Assessment

Learning
Career
Coaching

Performance
Goals
Succession

Engagement
Feedback
Recognition

Wellbeing
Rewards
Benefits

HRMS
Payroll/Time
Communications

ONA
Analytics/AI
Workforce Mgt

Senior Geographic Business Partners

Junior Geo Bus Partners

Talent Specialists (OD, sourcing, recruiting, learning, organized in networks of excellence)

Wellbeing, safety, culture, engagement, recognition

HR Ops, AI and Bots, Intelligence

Analytics, Monitoring, Predictive, WF Planning

Comp, Ben, Rewards

HR Tech, App development

HR Prof Development

Research, Market Best Practices,

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joshbersin academy

Programs Resources User Guide About

Welcome to the Josh Bersin Academy

The Josh Bersin Academy is a global community of HR professionals connected through powerful digital learning experiences that combine the best HR learning and education on the planet with unparalleled opportunities to collaborate with your peers. The Academy's mission is to prepare the HR community for the radical disruptions already happening in the workplace.

Josh Bersin
Founder, The Josh Bersin Academy

WATCH VIDEO

https://bersinacademy.com

Programs Resources

The HR Tech Workshop

Bersin Academy members will receive a copy of this report.

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