Session Number # 256
Caveat Emptor
Raising Your HRIS Market IQ

Freddye Silverman
Principal
Silver Bullet Solutions
Freddye Silverman

• Qualifications to present on this topic
  – Former VP of HR Technology Solutions at Cendant, now independent consultant
  – In the HRIS field since 1986, with responsibility for HR technology strategic planning and oversight of global HR systems and the U.S. payroll system
  – Active IHRIM member since 1988 and past president of the Association

• Information About Company
  – Independent consultant specializing in strategic planning, software selection, organizational/operational analysis, sourcing advisory services and project management
• Source credit is given
• No recommended products – vendor neutral and not all products or providers in any category may be mentioned
• Not a case study
• As always, find the best fit for your requirements, environment and culture
Agenda

- Human Capital Management
- Talent Management
- Onboarding
- Workforce Analytics
- Social Networking
- Deployment options
- Product evaluation
Components of HCM

Core HRMS
- Personnel
- Payroll
- Benefits

Portal/ Self-Service
- ESS
- MSS
- Strategic MSS (embedded in TM and WFM apps)

Service Center
- Call Center
- Case Management
- Knowledgebase Solutions

Workforce Management
- Labor Scheduling
- Time and attendance

Talent Management
- Workforce Planning
- Talent Acquisition
- Performance Management
- Career Development
- Succession Management
- Learning
- Compensation Management

Workforce Analytics
- Dashboards with key performance indicators (KPIs)
- Decision support

Source: James Holincheck, Gartner
HCM Landscape – How are the vendors meeting this challenge?

- No one vendor has the requisite depth and breadth in all aspects of HCM solutions today

- **Ultimate Software**
  - Acquired solutions in recruiting and performance management to expand its talent management functionality
  - Partnered with Infor (formerly Workbrain) for its workforce management solution

- **Meta4**
  - Built out its own talent management functions to complement existing core HRMS and workforce management functionality

Source: James Holincheck, Gartner
HCM Landscape – How are the vendors meeting this challenge?

• **Workday**
  – SaaS-delivered solution intended as comprehensive HCM but still in progress
  – Partnering right now – Taleo (recruiting) and Kronos (workforce management)

• **Lawson**
  – Built new solution “Lawson Talent Management” combining multinational HR (not payroll or benefits) with integrated talent management apps
  – Licensed on-premise as well as SaaS model

Source: James Holincheck, Gartner
HCM Software Landscape (Sample Vendors)

**Employee Access**
- Self-Service/Portal
  - IBM
  - iEmployee
  - MBH
- Contact Center
  - Workscape
  - PeopleSoft
  - SAP
  - Enwisen

**Application**
- Core HRMS
  - ADP
  - BroadVision
  - Ceridian
  - CGI
  - Empagio
  - Emportal
  - High Line
  - HR Access
  - Lawson
  - Meta4
  - Microsoft
  - NorthgateArinso
  - Oracle/PeopleSoft
  - P&I
  - Sage
  - SAP
  - Ultimate
  - Umantis
  - Workday
- Recruitment
  - Bernard Hodes
  - Bond
  - Cytiva
  - First Advantage
  - HRsmart
  - iCIMS
  - Jobpartners
  - Kenexa
  - MrTed
  - neoGov
  - Peopleclick
  - SilkRoad
  - StepStone
  - Taleo
- Perform Mgt.
  - Authoria
  - Cezanne
  - Halogen
  - PeopleStreme
  - Pilat
  - Salary.com
  - Softscape
  - SuccessFactors
  - TalentScope
  - Watson Wyatt
  - Workscape
  - Workstream
  - WWC
- Learning
  - ACS
  - Certpoint
  - Cornerstone
  - GeoLearning
  - IMC
  - Learn.com
  - MKS
  - Mzinga
  - Outstart
  - Plateau
  - Saba
  - SumTotal
- Talent Management
- Workforce Management
  - API
  - Concur
  - Cybershift
  - Infor/Workbrain
  - Kronos
  - Red Prairie/BlueCube
  - Stromberg
  - Workforce Software

**Information Delivery**
- Workforce Analytics
  - Capital Analytics
  - COA
  - Cognos
  - DoubleStar
  - InfoHRM
  - SAS

Source: James Holincheck, Gartner
Global Market Landscape Changing

• Current leaders: Oracle/PSFT and SAP

• Regional successes
  – Frontier (UK and ANZ)
  – HR Access (France and other European countries)
  – Meta4 (Spanish/Portuguese-speaking countries but also France, UK and recently US)

• Targeting the opportunity
  – Using SAP as a hosted solution: ADP and Northgate Arinso
  – Buildout of multinational solutions that leverage SaaS model: Lawson, Workday, BroadVision, Emportal

Source: James Holincheck, Gartner
Private Equity in the HCM Game

**Acquirer/Investor**
- Hellman & Friedman [acq]
- Infor (owned by Golden Gate Capital) [acq]
- Kohlberg, Kravis & Roberts [acq]
- GTCR Golder Rauner [inv]
- Bedford Funding [acq]

**Vendor**
- Kronos
- Workbrain
- Northgate Arinso
- IQNavigator
- Authoria

- Provides access to capital to fund expansion, often international in focus
- Expansion by acquisition: Kronos acquired Captor, Belgian time and attendance provider
- Expansion organically: $$ for localization of products and building out local service and support

Source: James Holincheck, Gartner
Talent Management market – consolidating but still shaking out

Googling ‘Talent Management Solutions’ produced these results
135,000 (2007)
172,000 (2008)
(2009) – a UK firm bought the domain name... no more googling
History repeats itself...

Oracle
Lawson
SAP
ADP

Peoplesoft
Workday

ERP:
Financials
Inventory
HR

Added modules:
Payroll
Ben Admin
Applicant Tracking
Employee Self-Service

Authoria
Taleo
Plateau
SuccessFactors
Silk Road

ETM?
Software Suites
Specialty Software/Niche Bolt-Ons
Talent Management Vendor Framework
... circa 2006

In 2009:
- Knowledge Planet, part of Mzinga
- Plateau – TM Suite
- Saba – Learning and PM Suite
- SumTotal – Learning and PM Suite
- Cornerstone – TM Suite

Learning Management Vendors
- Cornerstone on Demand
- KnowledgePlanet
- Saba
- SumTotal Systems
- Plateau
Market Shakeout

- Some stay in niche – Skillsoft
- Some branch out – GeoLearning and GeoTalent, Enwisen (from Benefits to Onboarding)
- Some acquire to achieve ‘suitedom’ – Plateau, Silk Road
- Some go direct B2C – XpressHR Onboarding product by KMS
- New niche players enter – small market or new application
- Consider non-U.S. entries – e.g. Sonar6 from New Zealand for performance/talent mgmt
Silk Road Technologies –
Build and Acquire to create “Life Suite”

- **OpenHire**
  - acquired from Outtask, Inc 05/2006

- **Red Carpet**

- **Eprise**

- **Wingspan**
  - acquired Human Asset Technologies 10/2005

- **Greenlight**
  - (rebranded from acquired VTN Technologies Ole 11/08)

→ Recruiting Mgmt

→ Onboarding & life events

→ Employee Intranet

→ Performance Mgmt

→ Learning Environment
Why Acquire?

❖ To increase product superiority
  ◼ Fill gaps in the product portfolio

❖ To expand geographic reach
  ◼ Gain a foothold in expanding markets such as EMEA or Asia-Pac

❖ To expand market reach
  ◼ Transition from small to midmarket or into a particular vertical

❖ To increase market share
  ◼ In a mature market, take out a competitor to grow the base

Source: Lisa Rowan, IDC
## Talent Management

### Merger/Acquisition Evolution

<table>
<thead>
<tr>
<th>Acquiring Company</th>
<th>Firm Acquired</th>
<th>Functionality</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Advantage</td>
<td>Projectix</td>
<td>Recruiting Technology</td>
<td>2005</td>
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<td>Taleo</td>
<td>Recruitforce</td>
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<td>Brass Ring</td>
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<tr>
<td>ADP</td>
<td>Virtual Edge</td>
<td>Recruiting Technology</td>
<td>2006</td>
</tr>
<tr>
<td>Kronos</td>
<td>Unicru</td>
<td>Recruiting Technology</td>
<td>2006</td>
</tr>
<tr>
<td>Authoria</td>
<td>Hire.com</td>
<td>Recruiting Technology</td>
<td>2006</td>
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<td>Kronos</td>
<td>Deploy</td>
<td>Recruiting Technology</td>
<td>2007</td>
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<tr>
<td>Stepstone</td>
<td>Norge AS (Norway)</td>
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<td>Kenexa</td>
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<td>Taleo</td>
<td>Vurv</td>
<td>Recruiting Technology &amp; Other Talent Mgmt</td>
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<td>Talent Technology</td>
<td>PeopleFilter</td>
<td>Recruiting Technology</td>
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<td>The Right Thing</td>
<td>AIRS</td>
<td>Recruiting Technology</td>
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Source: Lisa Rowan, IDC & Jason Corsello, KI
### Talent Management Merger/Acquisition Evolution

#### Performance

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<tbody>
<tr>
<td>Workscape</td>
<td>Performaworks</td>
<td>Performance Management</td>
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<td>AIM</td>
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<td>Ultimate Software</td>
<td>RTIX</td>
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<td>SumTotal</td>
<td>Mindsolve</td>
<td>Performance Management</td>
<td>2006</td>
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<td>Workstream</td>
<td>Exxceed</td>
<td>Performance &amp; Competencies</td>
<td>2006</td>
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<tr>
<td>Watson Wyatt</td>
<td>Widsomnet</td>
<td>Performance and other talent management</td>
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<td>Stepstone</td>
<td>ExecuTRACK</td>
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#### Competency

<table>
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<tr>
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<tbody>
<tr>
<td>Lawson</td>
<td>Competency Assessment Solution</td>
<td>Competencies</td>
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<td>Vurv</td>
<td>InScope</td>
<td>Competencies</td>
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<td>Salary.com</td>
<td>ITG</td>
<td>Competencies</td>
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<td>Salary.com</td>
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<td>2008</td>
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Source: Lisa Rowan, IDC & Jason Corsello, KI
## Talent Management

### Merger/Acquisition Evolution

#### Compensation

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<th>Acquiring Company</th>
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<tbody>
<tr>
<td>Workstream</td>
<td>Kadiri</td>
<td>Compensation</td>
<td>2004</td>
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<td>Vurv</td>
<td>InfoTechWorks</td>
<td>Compensation</td>
<td>2005</td>
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<tr>
<td>Plateau</td>
<td>Nuvosoft</td>
<td>Compensation</td>
<td>2007</td>
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#### Learning

<table>
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<th>Functionality</th>
<th>Year</th>
</tr>
</thead>
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<tr>
<td>SumTotal</td>
<td>Merger of Docent/Click2Learn</td>
<td>Learning Management</td>
<td>2004</td>
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<tr>
<td>Saba</td>
<td>Centra</td>
<td>Virtual Classroom</td>
<td>2005</td>
</tr>
<tr>
<td>Saba</td>
<td>THINQ</td>
<td>Learning Management</td>
<td>2005</td>
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</table>

#### Miscellaneous

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<thead>
<tr>
<th>Acquiring Company</th>
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<th>Year</th>
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<tbody>
<tr>
<td>PreVisor</td>
<td>Merger of Qwiz, ePredix, PDRI</td>
<td>Assessments and Testing</td>
<td>2005</td>
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<td>Kenexa</td>
<td>Psychometric Services</td>
<td>Assessments</td>
<td>2006</td>
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<td>Kenexa</td>
<td>Gantz Wiley</td>
<td>Employee Research</td>
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<tr>
<td>Talx</td>
<td>PAN</td>
<td>Assessments</td>
<td>2006</td>
</tr>
<tr>
<td>Vurv</td>
<td>People Business Network</td>
<td>Offboarding, Analytics</td>
<td>2007</td>
</tr>
</tbody>
</table>

*Source: Lisa Rowan, IDC & Jason Corsello, K1*
New Acquisition Direction

• Salary.com acquired Genesys Software 12/08
• Interesting combo of traditional talent management with ‘core system’: HR administration/Benefits/Payroll/Tax Filing
• Why? Genesys [once typical in-house implementation] transformed itself into a full service SaaS firm. Fits the TM model
• “For HR organizations to leverage technology to become more strategic contributors to the business, the proper foundation must be in place. This means that organizations must implement core HRMS’s. Also, it is important to have a well-integrated set of talent management applications built on top of a common competency foundation. “

[Thomas Otter and James Holincheck, “Hype Cycle for Human Capital Management Software 2008”]
# Talent Management Vendor Framework

<table>
<thead>
<tr>
<th>Key Functionality</th>
<th>Talent Management Suite Vendors</th>
<th>Core Performance Management Vendors</th>
<th>Pay For Performance Vendors</th>
<th>Enterprise Vendors</th>
<th>Learning Management Vendors</th>
<th>Talent Acquisition Vendors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Components</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Advanced Components</td>
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<td></td>
</tr>
<tr>
<td>Pay – Perf. Components</td>
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<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Talent Acq. Components</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Old Talent Management Competitive Landscape

**Forget the categories!**
## Functionality Matrix

<table>
<thead>
<tr>
<th>Key Functionality</th>
<th>Vendor Name</th>
<th>Vendor Name</th>
<th>Vendor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company level goals, cascading</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Employee goal setting, monitoring</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Employee performance appraisal</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Multi-rater or 360 degree feedback</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Development planning/training</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Succession planning</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Talent management, career planning</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Competency management</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Learning management</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Compensation management</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
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<td>Incentive management</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Survey data management</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
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<tr>
<td>Market data</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Sourcing</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>
What does ‘Integration’ mean to you?

• Single data model/shared database
• Streamlined navigation
  – Common gui
  – Single sign-on
• Information-sharing across functions
• Look under the hood – a ‘suite’ can be organic or acquired
  – Vendors will highlight this as a differentiator
Why ITM? Learning Linkages

- To Performance
  - Learning events addressing performance gaps
- To Compensation
  - Drive skill based pay
- To Succession Planning
  - Who needs what to move up
- To Career Development
  - Learning requirements to get an employee to the next job(s)

Source: Rick Fletcher, HRchitect
Workforce Onboarding

• One of the last areas of HR to be automated but the first to touch employees in their lifecycle
• Typically not integrated with core system - agnostic
• Most applications are SaaS
• Examples
  ▪ Answersource by Enwisen
  ▪ Red Carpet by Silk Road
What is Workforce Onboarding?

• **Not** a checklist, handshake, new hire orientation or lunch with your manager

• A guided process which effectively delivers to the prospective employee, their manager and the HR/Payroll function – the necessary information, tasks and acknowledgements required to ensure a productive day-one start ... with continued momentum during the critical period when a new employee decides to stay at the job

Source: Enwisen
Key Benefits of Onboarding

- Engages employees via personalized experience
- Improves time to productivity
- Improves new hire retention
- Builds employer brand
- Reduces paper and administrative time
- Captures and routes new hire data
- Reduces legal exposure
- Promotes fair execution of company policies
Components of Onboarding

- Process orchestration
- Task regulation (comp dates, overdue & at risk tasks, etc.)
- Integration of foreign systems
- Step by step or open access

Task Management

- Backend HRMS forms capture
- Standalone forms capture
- Pre-delivered library of forms
- I9, W4, State Tax, etc.

Forms Management

- Content
- Engagement techniques (flash, video, etc.)
- Decision support

Socialization
Welcome Aboard

You have just joined a very special team of people who are dedicated to changing the communications world. With your help, we will continue to build a unique and special company.

During the interview process you should have gotten a good sense of the people at Acme Communications and the team you’re joining. People who succeed here understand and embrace what Acme Communications is all about.

Once again, welcome!

Bob Rubin, CEO Acme Communications

Now, let’s get started...

Employee Information

Employee Name: John Smith
Employee Start Date: 8/14/2007
Manager Name: Fran Gillespie

Helpful Links

Company Newsletter
Parking Pass Form
Holiday Schedule
Cafe Menu
Phone Directory
Policy Manual

About Your Personalized Onboarding Tour

Our commitment is to make your onboarding experience as pleasant as possible. At the same time, we want to ensure that you will be productive the day you join. It all starts with this tour. Once you’re ready to begin, you will be guided through the Onboarding process where you will:

- Complete personal information and compliance documents
- Review company policies and proprietary agreements
- Elect into our benefit, retirement and insurance plans

Our Company, Mission, Goals & Objectives

We’re proud to be on the top 100 list of best companies to work for. That in large part is due to our culture, mission, goals and objectives.
Read more...

At Acme Communications we foster a culture that keeps us one of the top companies to work for. Please take a look at this video which will give you insight into this very important company objective.
Watch video...
The CareMore Experience

Now that you’ve learned a little bit about our Company, we’d like to show you a brief video clip of what it’s like to work for CareMore.
FORMS

Before you report for your first day of work, we’d like you to complete a few forms. You will find a separate link for each of these forms in the menu for your onboarding tour.

Completing the forms. Some parts of the forms have already been completed for you, based on information you provided in your employment application. Please review all of the information to ensure that it is accurate, make any changes, and complete all applicable required blank fields.

Electronic signature. For some of the forms, you will be asked to provide a legally binding electronic signature. Simply type your first and last name into the required field.

Printing. When you finish each form, please print a copy (click on “Print this” in the column to the far right), then add it to the items you will bring with you on your first day of work.
Acknowledgment of Receipt

The Company requires each employee to acknowledge receipt of the company policy documents listed below. The documents were distributed electronically and you have acknowledged, by clicking the designated "Acknowledgment" check that you are responsible for reading and understanding all of the documents.

Print this form and bring the hard copy with you on your first day. Click here to Print.

<table>
<thead>
<tr>
<th>Policy</th>
<th>Electronic Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I have read and acknowledge the Harassment policy.</td>
<td>Aug 30 2007 2:10PM EST</td>
</tr>
<tr>
<td>2. I have read and acknowledge the Code of Ethics policy.</td>
<td>Aug 30 2007 2:10PM EST</td>
</tr>
<tr>
<td>3. I have read and acknowledge the Insider Trading policy.</td>
<td>Aug 30 2007 2:10PM EST</td>
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<tr>
<td>4. I have read and acknowledge the Confidentiality policy.</td>
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<tr>
<td>5. I have read and acknowledge the Conflicts of Interest policy.</td>
<td>Aug 30 2007 2:10PM EST</td>
</tr>
<tr>
<td>6. I have read and acknowledge the Records Retention policy.</td>
<td>Aug 30 2007 2:10PM EST</td>
</tr>
<tr>
<td>7. I have read and acknowledge the Electronic Communication policy.</td>
<td>Aug 30 2007 2:10PM EST</td>
</tr>
</tbody>
</table>

I confirm that I am responsible for reading and understanding all of these documents, and I agree to adhere to their provisions. I understand that these policies are extremely important and agree to seek immediate clarification of any issues unclear to me.

Signed: ___________________________ Date: ____________

Sam Smith
### Benefits Preview

#### In-Network Providers

<table>
<thead>
<tr>
<th>Plan</th>
<th>Individual Deductible</th>
<th>Family Deductible (Two or More Individuals)</th>
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</thead>
<tbody>
<tr>
<td>Aetna High Deductible Health Plan (HDHP)</td>
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<tr>
<td>Blue Shield PPO</td>
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#### Out-of-Network Providers

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<th>Plan</th>
<th>Individual Deductible</th>
<th>Family Deductible (Two or More Individuals)</th>
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<td>$2,100</td>
</tr>
<tr>
<td>Blue Shield PPO</td>
<td>$1,000</td>
<td>$2,000</td>
</tr>
</tbody>
</table>

#### Preferred Providers are Used

<table>
<thead>
<tr>
<th>Plan</th>
<th>Individual Deductible</th>
<th>Family Deductible (Two or More Individuals)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aetna High Deductible Health Plan (HDHP)</td>
<td>$1,050</td>
<td>$2,100</td>
</tr>
<tr>
<td>Blue Shield PPO</td>
<td>$1,000</td>
<td>$2,000</td>
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</tbody>
</table>

#### Non-Preferred Providers are Used

<table>
<thead>
<tr>
<th>Plan</th>
<th>Individual Deductible</th>
<th>Family Deductible (Two or More Individuals)</th>
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</thead>
<tbody>
<tr>
<td>Aetna High Deductible Health Plan (HDHP)</td>
<td>$1,050</td>
<td>$2,100</td>
</tr>
<tr>
<td>Blue Shield PPO</td>
<td>$1,000</td>
<td>$2,000</td>
</tr>
</tbody>
</table>

#### Kaiser HMO

<table>
<thead>
<tr>
<th>Plan</th>
<th>Individual Deductible</th>
<th>Family Deductible (Two or More Individuals)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kaiser HMO</td>
<td>$1,000</td>
<td>$2,000</td>
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</tbody>
</table>

#### Expenses Limit Per Person

<table>
<thead>
<tr>
<th>Plan</th>
<th>Individual Limit</th>
<th>Family Limit (Two or More Individuals)</th>
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</thead>
<tbody>
<tr>
<td>Aetna High Deductible Health Plan (HDHP)</td>
<td>$2,200</td>
<td>$5,000</td>
</tr>
<tr>
<td>Blue Shield PPO</td>
<td>$2,000</td>
<td>$5,000</td>
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</tbody>
</table>

#### Out-of-Pocket Expense Limit

<table>
<thead>
<tr>
<th>Plan</th>
<th>Individual Limit</th>
<th>Family Limit (Two or More Individuals)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aetna High Deductible Health Plan (HDHP)</td>
<td>$2,200</td>
<td>$5,000</td>
</tr>
<tr>
<td>Blue Shield PPO</td>
<td>$2,000</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

#### Notes
- Expenses covered under the Prescription Drug benefit do not reduce the medical out-of-pocket expense limit. In addition, certain medical benefits have individual annual limits. Refer to the plan details below.
- Not all potential employee costs are necessarily included in this out-of-pocket expense limit. Certain benefits have individual annual limits. Refer to the plan details below.
PREPARING FOR YOUR "CHECK-IN"

Make sure you have the following as you head out the door for your first day at work:

- the printed copies of your forms,
- an acceptable form of I.D. to back up your I-9 form, and
- the acknowledgment documents for the policies and agreements.

Your check-in point and time will be as designated in the letter confirming your employment.

When you check in, you will be issued a Company security badge and directed to the Human Resources representative who will collect your forms, answer any questions you may have on the forms or Company policies, and direct you to the department where you will be working.
THE WIDER COMPANY WORLD

Besides finding your way through your immediate physical surroundings, you'll want to familiarize yourself with our Human Resources web site pages, which include job listings, directories, FAQs, links to community service opportunities, and information on trends in our industry, among other things.

Human Resources Site

Exploring our corporate web site, if you have not already done so, is also a good way to inform yourself about the Company.

Company Site
PERFORMANCE REVIEW

At Acme, we think of performance review as an ongoing process between you and your supervisor. We encourage you to schedule a one-on-one talk with your supervisor soon after your start to discuss your department’s functions, the direction your supervisor would like to see it go, and how you can contribute to the department’s success.

We also encourage you to hold weekly follow-up meetings to discuss your and your supervisor’s goals for your position and how your progress toward meeting those goals will be measured.

We have a formal performance review process as well. Your supervisor will prepare a written review of your performance after your first 6 months of employment and once a year thereafter.
<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Approval Status</th>
<th>Data Status</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>Joan Honig</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>60</td>
<td>Steve Malloy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>61</td>
<td>Kirk Jacobsen</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>62</td>
<td>DeDe McNeal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Joan Honig**
  - Welcome To Acme: 07/24/2007, 00:25
  - Getting To Know Us: 07/24/2007, 00:09
  - Forms: 07/24/2007, 17:43
  - Personal Information: 07/24/2007, 00:00

- **Steve Malloy**
  - Welcome To Acme: 07/24/2007, 00:25
  - Getting To Know Us: 07/24/2007, 00:09
  - Forms: 07/24/2007, 17:43
  - Personal Information: 07/24/2007, 00:00

- **Kirk Jacobsen**
  - Welcome To Acme: 07/24/2007, 00:25
  - Getting To Know Us: 07/24/2007, 00:09
  - Forms: 07/24/2007, 17:43
  - Personal Information: 07/24/2007, 00:00

- **DeDe McNeal**
  - Welcome To Acme: 07/30/2007, 00:25
  - Acme Employees: 10/05/2007, 00:08
  - Getting To Know Us: 07/30/2007, 00:13
  - Forms: 07/30/2007, 18:31
  - Personal Information: 07/30/2007, 00:59
  - Emergency Contact [View]: 07/30/2007, 00:00
  - 1-9 Eligibility [View]: 07/30/2007, 00:10
  - Form W-4 [View]: 07/30/2007, 00:11
  - State Tax Withholding [View]: 07/30/2007, 00:12
  - Payroll Direct Deposit [View]: 07/30/2007, 00:05
  - Company Policies: 10/10/2007, 12:58
  - Harassment: 10/10/2007, 13:36
  - Standards of Conduct: 10/10/2007, 13:15
  - Insider Trading: 10/10/2007, 00:05
  - Confidentiality: 10/10/2007, 00:05
  - Conflicts of Interest: 10/10/2007, 00:04
The toughest challenge – *everyone can get data in but how do you get information out?*

**Tools**
- Vendor-bundled tools typically address only current data and often don’t enable complex if/then conditions
- Third party tools (Cognos, Crystal) provide more functionality but don’t “know the data”
- Look for vendor partners who have developed tools for specific systems (e.g. KBACE for Oracle)
Some of the challenges

• For global companies, what are the options for consolidated reporting and feeding data to many other systems (e.g. Talent Management, Learning & Development, Security)?

• Outsourcing – with so many functional areas on disparate systems, how do we funnel the data back in to a single repository?
Analytics – Market response

❖ Doublestar
  – Talent measurement
  – Software and consulting services

❖ e-Thority
  – Began in higher education vertical
  – Recognized potential in HR
  – Excel-based but next generation data repository and presentation tool
Workforce Analytics - Doublestar

- **Talent Measurement** is a key component of Talent Management
  - Readiness = occupancy X competency

- Is HR ready to deal with analytics?
  - Address lack of an analytic culture within HCM
    - Charter a small team to develop and manage an Adoption Plan
    - Assess and remedy competency deficiency within HR community
      - Ensure users have sufficient capability thru learning and training interventions; group and individual level

- Each company’s key indicators can be unique and not necessarily obvious
  - Southwest Airlines – ESOP participation of ground crew
    - GC is key to cost: turnaround time on the ground
    - On company scorecard as part of employee satisfaction and retention
  - Most use red/green/yellow dashboard approach for quick visual assessment

Source: Doublestar
Three Tier Workforce Analytics

Source: Doublestar
Workforce Analytics
Link Talent to Strategic Success

Business Strategy
- Use Innovation as a competitive differentiator
- Expand into international markets
- Expand product breadth and market share through M&A
- Drive and leverage customer satisfaction

Analytic
- Readiness of design engineers
- Time to start
- Workforce integration time
- Employee engagement

Action
- Focus Talent Acquisition and Development on enhancing complement of engineers
- Adapt Talent Acquisition capabilities for timely hiring of top talent in foreign locations
- Develop platform for immediate integration of workforce information.
- Address top 5 areas for improvement from employee survey

Result
- Increased revenue derived from new products
- New offices staffed and meeting market share goals
- Achieve synergy goals, staff key roles, meet sales plan.
- Increased customer retention and reduced COS

Source: Doublestar
eThority™

Changing the way you interact with data.

www.eThority.com
* Track employee performance metrics
* Evaluate staff in relation to their peers
* Easily spot top performers to ensure proper incentives are in place
"User-Obvious" Interface

- Less technical users are capable of self-service
- Fewer IT resources required

Reporting

- Ad Hoc reporting allows users to slice and dice--easily
- Report Libraries provide great data analysis "out of the box"
- Automated report generation keeps all stakeholders up-to-date on relevant information
- Ability to report on historical data

Security and Compliance

- Org Node structure ensures that only users with authorization can view sensitive data
- Confidential HR data is kept secure and ready for an audit
Deploying Social Networking Tools

• For the past 25 years HR has focused on automating transactions.

• New direction: "moving from transaction to interaction".

• A company can block Facebook on their intranet and employees will access it on their cellphones.

• Collaboration and participation are the keys.

  **The world is flat**

  **With zero investment you can communicate with the world**

  **Collective intelligence = competitive advantage**

Source: Knowledge Infusion
Social Networking Tools are now part of Talent Management

- Personal and Professional have merged
  - Blogs
  - Wikis
  - MySpace
  - Facebook
  - AOL IM
  - Linked In
  - Mzinga (customers, prospects, partners, emps)
  - Select Minds (closed corporate social network software)
  - Second Life
  - Twitter

- Recruitment tool
  - To source candidates-recruiters
  - Internal blogs - employees

- Retention
  - Build communities of interest
  - Facilitate sense of belonging
  - “I know my CEO”
  - Enable collaboration

- Manage talent
  - Map knowledge pathways
  - Recognize true sources of knowledge and ‘power’
  - Disregard org hierarchy
  - New measurement product – SONAR

Age vs Adaptability:
Do you wear a watch?...
“Digital natives” vs “Digital immigrants”
By 2010, US business will be short 10 million workers. In the European Union, there will be a shortage of at least 300,000 IT employees. And in Japan, prospects for skilled labor are so dim that some companies are even encouraging fertility treatments. The global war for talent is a reality. What are you doing to gain an advantage?

It's time to tap into a brave new world of sourcing. Learn how you can use social networking and online career sites to build your talent pipeline by reading:

**Sourcing in a Time of Scarcity: The Evolution of Social Networking as an Aid to Hiring**

More than half the respondents to a 2007 Newman Group survey cited sourcing as their greatest challenge. This new white paper explains how social utilities like Facebook® and LinkedIn® open the door to attracting, recruiting, and hiring top candidates online.

When you're ready for social network recruiting, be sure to consider Taleo Business Edition™ featuring Taleo Smart Sourcing™. Get a single fast and easy solution at an affordable price:

- Tap directly into the most popular social utility with job postings on Facebook® using the Now Hiring! platform application feature.
- Save time and money using predictive job board tools and popular Free Job Boards from eQuest.
- Simplify your workflow and recruiting process with Outlook Plug-In.

Download Sourcing in a Time of Scarcity now and receive a Complimentary 30 Day Trial of Taleo Business Edition!
SONAR Suite
SONAR Server text analytics cluster/grid processor is the heart of SONAR Suite

- SONAR Server analyzes, mines, and visualizes information flows (email, blogs, wikis, etc.) to generate an enterprise social graph for networks of people, their communication patterns, and relevant interests.

- It first identifies people connections then themes in enterprise communications including key items of importance to each person with automatic updates.

- By combining contextual "what" (intelligence) with causal human relationship patterns "why" (insight) SONAR shows how you’re connected and where the knowledge flow pathways are to better illustrate how real work gets done.

Enterprises are moving towards "emergence" dictated by social construction of dynamic information flows between people in the enterprise network.
SONAR Dashboard and Flightdeck
User Interfaces to SONAR Server

Dashboard for Social Intelligence

- Intuitive Web browser user interface to view and harness relevant information with people connections.
- Fully automated profile generation with automated activity updates (themes and connections) from each user’s network.
- Generates ‘connection visibility’ e.g. search for people with the right expertise.

Flightdeck for Passive ONA + expertise analysis

- Map the flow of knowledge using automated ONA fused with expertise analysis. Structural positions reveals central connectors, brokers, peripheral players, documents, wikis, blogs, etc as well as email.
- Supports a network of 100,000. Data can be exported to ONA consultant for deeper analysis or to scope a survey.
Deployment Options

• Build and maintain internal infrastructure
• Buy and maintain internal infrastructure
• SAAS
  – Software as a service, “right to use” vs license
  – Subscription model – multitenancy
  – Web-based software
  – Not ASP – limited to configuration not customization
  – Currently SaaS rules the roost

• Hosted License
  – Outsource the infrastructure without giving up ownership
  – Personalization of application
  – Example: Oracle on Demand

• Outsource – specific functions or CHRO
Software as a Service

Pros

- Different cost structure
  - No upfront license fee
  - No annual maintenance
- Eliminate server mgmt
  - No hardware purchase
  - No/minimal IT involvement
- Quicker startups – faster ROI
- Ease of deployment
  - Rapid changes in features with efficient delivery
  - No internal testing – upgrades delivered overnight

Cons

- Long term contract
  - Rental – never owned
  - ‘PEPM’ cost model less advantageous for large clients
  - Can cost more long-term
- Multi-tenancy limitations
  - Configurability may not be sufficient
  - Conformity to vendor’s ‘best practices’ – BPR required?
- Customer service can be a challenge
- Security concerns
CHRO – Current Status

• North America dominates the market
  – Three times total contract value (DuPont, Bristol-Meyers Squibb, P & G)
  – Slower in Europe due to influential unions and workers councils and country-specific regulatory complexity
  – Steady growth in Asia outside of Japan and China

• Concept of Comprehensive HR Outsourcing is stable but provider community is not

Source: Synco Jonkeren, Equaterra
CHRO - Trends

New entrants in the Marketplace
- India – from back office IT to full HR service
- TaTa Consultancy Services – standardized software and delivery based on SAP
- Hexaware Technologies – Europe to US – considering different delivery models

Private Equity
- KKR took major financial interest in Northgate Arinso, revitalized smart growth strategy
- China Talent Group (direct payroll in China) is backed by equity investment

Consolidation of traditional providers
- Most providers of jumbo deals are concentrating on established clients (Accenture with Unilever, Convergys with Dupont and Johnson & Johnson)
- Some concentrate on specific spaces (Hewitt-benefits, ACS-learning, ADP-transactional HR)

Some early providers have floundered
- AON with AT&T, EDS with CIBC
- Economic benefits to providers did not measure up to predictions. Did not standardize and could not leverage economies of scale across multiple clients.

Source: Synco Jonkeren, Equaterra
Product Evaluation

- Conferences – IHRIM (April), HRTech (October)
- Various formalized network organizations
- Webinars
- **Technology Evaluation Center**
  - Electronic consultant
  - Vendor neutral
  - Guided analysis
  - Must register
  - Far better alternative than just googling phrases
**Objective Vendor Analysis – What are your decision drivers?**

<table>
<thead>
<tr>
<th>Decision Drivers</th>
<th>Weight</th>
<th>Vendor A</th>
<th>Vendor B</th>
<th>Vendor C</th>
<th>Vendor D</th>
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<tbody>
<tr>
<td>Vendor Viability</td>
<td>XX%</td>
<td></td>
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<tr>
<td>Usability</td>
<td>XX%</td>
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<tr>
<td>Functionality</td>
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<tr>
<td>Technology</td>
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<td>Configurability</td>
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<td>Scalability</td>
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<tr>
<td>Global Capability</td>
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<tr>
<td>Integration</td>
<td>XX%</td>
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<tr>
<td>Cost/ROI</td>
<td>XX%</td>
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</tr>
</tbody>
</table>

*Source: Rick Fletcher, HRchitect*
Look for Differentiators

Bells and Whistles in Talent Acquisition

• Conceptual search
• Pre-screening/assessment testing
• Configurable portals
• Calendar/email integration
• Compliance reporting

• On-boarding
• Reporting & analytics
• Recruiter personalization
• Contact management
• Workflow & alerts flexibility

Source: Rick Fletcher, HRchitect
Fast, Accurate Software Evaluations

TEC helps enterprises evaluate and select software solutions that meet their exacting needs by empowering purchasers with the tools, research, and expertise to make an ideal decision.

Your software selection starts here

Learn more about TEC's software selection process
Technology Research

TODAY'S ARTICLE
Can ERP Speak PLM?
Jim Brown
September 5, 2008

Because product lifecycle management (PLM) offers a host of benefits to manufacturers, it has become one of the fastest growing categories of enterprise applications. But a PLM system needs to work...

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Stay ahead! Get daily enterprise market news and research

E-mail Address [ ] Submit

Join over 740,000 worldwide readers!
View the latest newsletter

Special Access Key

If you have a special access key enter it here:
# Webcasts and Live Events

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Time</th>
<th>Presenter</th>
<th>Register</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-demand Event: Using Network Behavior Analysis to Improve End-user Application Performance</td>
<td>10/20/2008</td>
<td>Archived</td>
<td>NetQos</td>
<td>Register</td>
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<tr>
<td>On-demand Event: Building Performance-first Application Delivery Networks with Cisco and NetQoS</td>
<td>10/20/2008</td>
<td>Archived</td>
<td>NetQos</td>
<td>Register</td>
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<tr>
<td>Gartner Business Process Management Summit</td>
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<td>Warehouse Management EXPO</td>
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<tr>
<td>Gartner Web Innovation Summit</td>
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<tr>
<td>Gartner Portals, Content, and Collaboration Summit</td>
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<td>all day</td>
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<td>Register</td>
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<tr>
<td>Gartner Fall Symposium/ITexo</td>
<td>10/12/2008</td>
<td>all day</td>
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<tr>
<td>ERP Vendor Shootout</td>
<td>11/13/2008</td>
<td>all day</td>
<td>VAR Community</td>
<td>Register</td>
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<tr>
<td>BI Reporting: Improving Decision-making Abilities for Midsize</td>
<td>on demand</td>
<td>archived</td>
<td>Cognos</td>
<td>Register</td>
</tr>
</tbody>
</table>

Are we missing your event? Submit your webcast or live event.
Responding to requirements – 18 or 24 questions (in this case, an LMS)

- Type of solution (learning mgmt, content mgmt, authoring/publishing, virtual classroom, suite solution)
- Vertical segment or industry
- Org structure (single site/subsidiary/division, national, multinational)
- Number of sites
- Total operating budget for organization (range)
- Total # users and implementation budget range
- Vendor services required (customization/integration, yearly maintenance, training and support)
- # concurrent administrators (content, not technical)
- Licensing options (ASP, per use, software lease, other)
- # of employees
- Geographic presence and localization/compliance requirements
- Languages
- Functional requirements (e.g. analytics, authentication, classroom training mgmt, content mgmt, portal support, workflow, other, etc)
- Implementation time frame
- Outsourced and customized services
- Reason for inquiry (new system, replacing legacy system, integration of multiple systems, etc)
- Six technical questions which you can skip or answer (server platform, database platform, compliance standards, technology standard (eg http, java),
- Level of integration required with internal and 3rd party systems
- Customization, thin client access and standards
Produces these results...

• Can check ‘disqualify vendors who fail to meet the requirements above’ on any of these questions
• Creates a short list of qualified vendors with hyperlinks to a description of each vendor which includes:
  o An overview of the product with a link to their website
  o Corporate and contact information
  o A product portfolio and how they qualified on some of those 16 questions
  o Links to any white papers about the product
  o The ability to modify your responses to alter results
### Your Shortlist

#### Qualified Vendors

- Intelladon - Advanced Learning Platform
- GeoLearning - GeoMaestro
- KMSI - KMx
- GeoMetrix Data Systems - Training Partner LMS
- Learn.com - LearnCenter
- Edo Knowledgeware Corporation - Edo ForceTen
- Advance Mentoring Healthcare - edept Training Solutions
- Excelsoft Technologies Pvt Ltd - SARAS
- Meridian Knowledge Solutions, LLC - Meridian Knowledge Centre
- OutStart - Evolution LMS
- EffectiveSoft - Intellexer - CDT
- SumTotal Systems - SumTotal Talent Development Suite
- Element K - KnowledgeHub
- UMTND - ulearn & uSim

#### What is next?

- **Free 2-hour Trial**
  - Compare three vendor solutions head to head, according to your specific needs

- **Shortlist Evaluation**
  - Select up to five vendor solutions to see how each one stacks up against the requirements you've just entered

- **Software Evaluation Report**
  - Select any number of vendors to see how well each one supports a comprehensive list of functional criteria

- **RFP Templates**
  - Industry-standard TEC RFP templates give you the most comprehensive list of functional criteria available anywhere

- **Ask the expert**
  - Contact our experts with questions you have concerning the selection or evaluation of software solutions
Meridian Knowledge Centre 6.0 by Meridian Knowledge Solutions

Overview | Summary | Corporate Info | Related Articles

Meridian Knowledge Centre 6.0 Overview

Headquartered in Chantilly, Virginia (US), Meridian Knowledge Solutions is a full-service e-learning company, offering a robust learning management infrastructure as well as implementation and development consulting and services. The company helps large organizations realize the potential of e-learning through the effective use of technology tied directly to specific business objectives.

Meridian is a leader in total learning asset management, leveraging its learning and knowledge management products and services to achieve individual and organizational excellence. Since its inception in 1997, Meridian has been dedicated to meeting the specific human performance needs of its customers. By integrating traditional and online learning methodologies with knowledge management principles, the company creates innovative approaches to educating employees and students, as well as reference centers containing information critical to job performance.

Meridian’s target market consists of government and Fortune 1000 organizations. It has substantial experience in highly secure implementation, supporting numerous classified and sensitive organizations and content. It also provides rapid implementation capabilities, with successful initial implementations in as little as two weeks and averaging two months.

Meridian Knowledge Centre 6.0 is a versatile and powerful learning management system (LMS) that blends robust technology with Sharable Content Object Reference Model (SCORM)-conformant learning content management functionality and a fully featured competency modeling suite. The Knowledge Centre redefines blended learning entirely, going far beyond just classroom and Web-based training, to include any learning asset.

The company also offers Meridian Anywhere 3.0, a revolutionary desktop application that allows user organizations to deliver SCORM-conformant content to anyone, anywhere, without connectivity to the organization’s learning management system.

The Knowledge Centre is an all-in-one suite of enterprise learning management tools, including
- a robust blended learning tool with all required instructor-led training (ILT) and online functionality,
- a knowledge management solution for communities of practice and functional teams,
- Web-based content management supporting SCORM and reusable learning objects,
- a full-featured competency modeling and performance management suite driving organizational performance,
- a robust reporting engine to quantify success and measure return on investment (ROI).

For more information, visit the company’s web site
http://www.meridianski.com/
or the product home page
Meridian Knowledge Centre 6.0 Summary

Industry Focus
- Aerospace and Defense (A&D)
- Associations/Non-Profit
- Automotive
- Banking
- Chemicals
- Consumer Packaged Goods (CPG)
- Education (elementary or secondary)
- Electronics/High-Tech
- Energy
- Engineering and Construction
- Fabricated Metals
- Financial Institutions
- Food and Beverage
- Forestry
- Furniture and Fixtures
- Gaming and Hospitality
- Health Care
- Higher Education
- Industrial and Commercial Products/Machinery
- Insurance
- Manufacturing
- Medical Devices and Laboratory Equipment
- Mining

Product Portfolio
- Analytics
- Authentication and security
- Blended learning (integrated e-learning, classroom, and collaboration content)
- Certification and compliance tracking
- Classroom training management
- Communication and collaboration
- Competency and performance management
- Content creation
- Content creation in multiple languages
- Data sharing in virtual classrooms
- Digital asset management
- Document management
- E-commerce B2B
- E-commerce B2C
- E-learning management
- Facilities management
- Instructor scheduling
- Interactivity in courses (branching, feedback, simulations)
- Interoperability with third party/custom courseware
- Learner management and tracking
- Learning object repository
- Learning portal supporting personalization
- Mobile user support
Caveats

- You need to know the correct answers to the 18/24 questions to get a valid response.
- There may be other options to consider vs your current analysis (e.g. fewer languages, centralized admin) which would produce different results.
The Consulting Landscape

Silver Bullet Solutions
HR Technology Solutions
(google on names)

Executive Alliance
HRchitect
Jeitosa Group
WorkStrategy

Accenture
Deloitte & Touche
Bearing Point (?)
PWC
Towers Perrin
Watson Wyatt
IBM

Gartner
Yanke Group

AMR
IDC (no advisory svcs)

Research & Advisory

Independents

Implementation

Broad Boutique

The Big Boys –
Multiple practices

Strategic/C-Level

Niche Centric

Benchmarking

The Hackett Group

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The Hackett Group

ERP Vendors
SAP
Oracle
IT body shops
CSC
EDS
Product boutiques –
Oracle:
Kbace
Excelicor (Deloitte)

Recruitment mgmt –
The Newman Group
(Futurestep)
Talent Management –
Knowledge Infusion
Bersin & Associates
BPO/IT outsourcing –
Equaterra
TPI
Everest Research Inst

Silver Bullet Solutions
HR Technology Solutions
(google on names)

Executive Alliance
HRchitect
Jeitosa Group
WorkStrategy

Accenture
Deloitte & Touche
Bearing Point (?)
PWC
Towers Perrin
Watson Wyatt
IBM
What’s current and What’s up (but not new!)

Observations from HRTech08

- SaaS is king
- Mid-market is the promised land
- Resumes are problematic
  - Newer technologies concentrate on better interviews with candidates
- Cool stuff comes from overseas
  - Sonar6 from NZ for performance and talent mgmt
- Deep relevant partners
  - Sage software w/Motivano - pay card functionality

Trends

- Web 2.0 will be institutionalized
- Core HR systems will focus on master data
- Definition of the workforce will continue to evolve
- Talent mgmt solutions will be more integrated
- Analytics will help HR become more strategic
- HR outsourcing will become more focused and selective

Source: Brian Sommer, Techventive

Source: Forrester Research, 2009
Caveat Emptor –
Be an intelligent consumer

- Don’t fall for the flashy presentation – be a healthy skeptic
  - Always remember what your drivers are (e.g. better reporting)
  - Use scripted demos and real business scenarios
  - A long list of features doesn’t matter unless they match your requirements - skip the RFP if possible

- Search reference lists for current users who are reasonably comparable to your situation
  - If software, what version? If services, what selection?
  - If consultants or implementation partners, what role? (project mgmt, staff augmentation, full outsourcing) Look for the ‘personal click’

- Be sure the product or services are compatible with your organization
  - Bad marriages lead to ugly divorces
  - Best practices aren’t necessarily the ‘best’ for your company

- Watch out for that stylish haircut...
Embrace new ideas but be aware of the trends

- Keep up with new developments in technology

- The Pony Express assembled 50 riders, 500 horses and 190 relay stations over 2000 miles between Missouri and Sacramento to speed mail service in 1860 knowing that inevitably telegraphs and trains would surpass it. It operated for about a year and shut down two days after the transcontinental telegraph reached Salt Lake City.

Does this sound like one of your tech projects???
For More Information about this or any HR Technology related topics go to www.ihrim.org
IHRIM needs your feedback!
Please complete a session evaluation for

Session 256
Raising Your HRIS Market IQ

Freddye Silverman
Principal
Silver Bullet Solutions

Thank you!