



# **CedarCrestone 2013-2014 HR Systems Survey Highlights**

## **HR Technologies, Deployment Choices, and Metrics**

### **16<sup>th</sup> Annual Edition**

## **In Houston!**

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# What the 16<sup>th</sup> Annual CedarCrestone Survey Says About Key Trends and More

**Software as a Service  
(aka "the Cloud")**

**Replacements hit tipping point.**

**Social**



**Analytics**



**Adoption continues to increase  
and result in value.**

**Mobile**



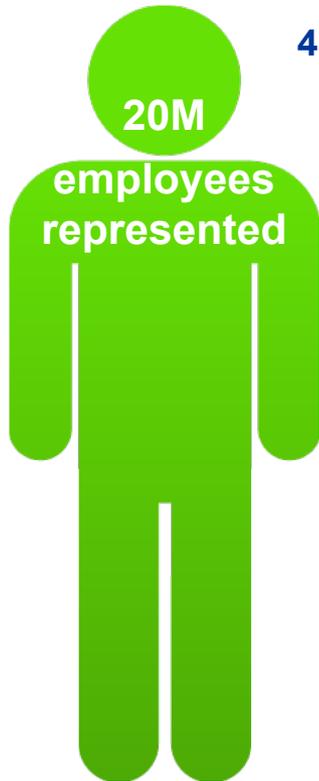
**Integration/Unification**  
**The new Holy Grail that  
few reach without a  
Unified solution.**



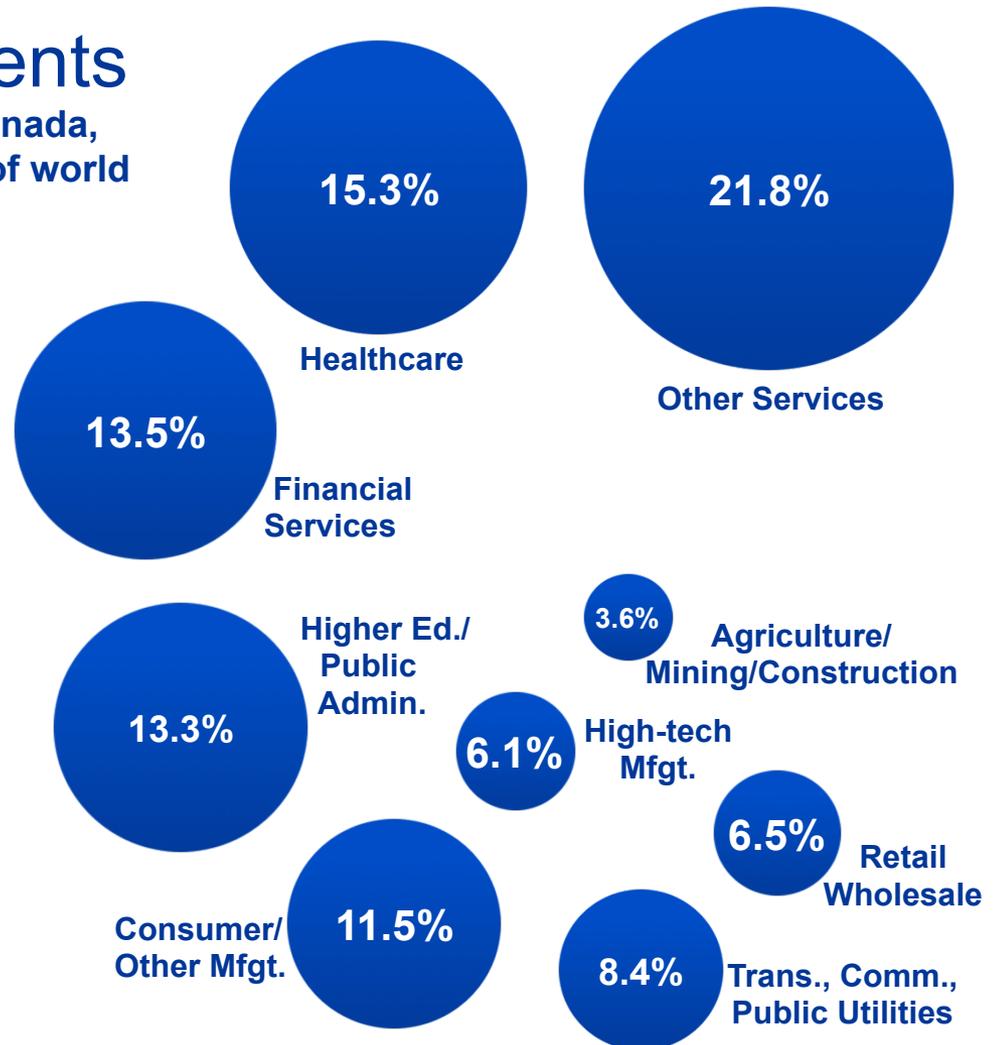
**User Satisfaction**  
**Newer products, later releases  
get higher scores.  
Improvement still needed!**

# CedarCrestone 2013–2014 HR Systems Survey Demographics

1,266 respondents  
85% US, 6% EMEA, 5% Canada,  
4% Australia/Asia and rest of world



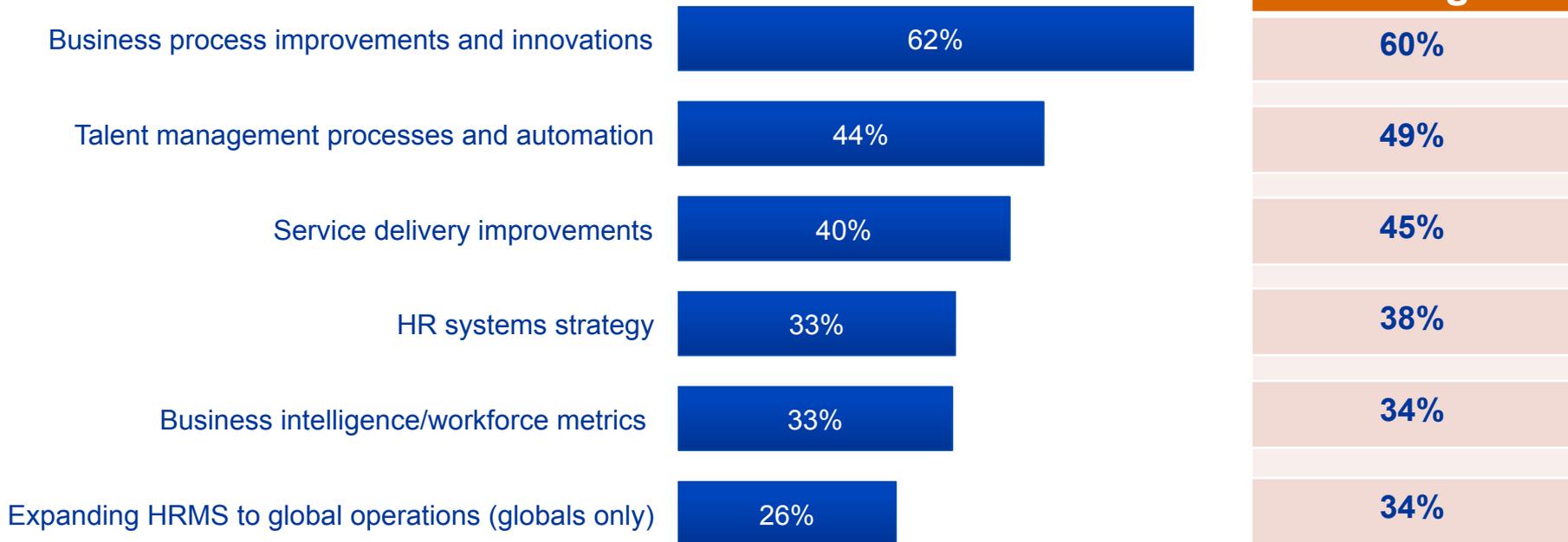
Average number of  
employees = **15,876**



# Major 2013 Initiatives

## Similar to 2012 with One Inflexion Point Reached!

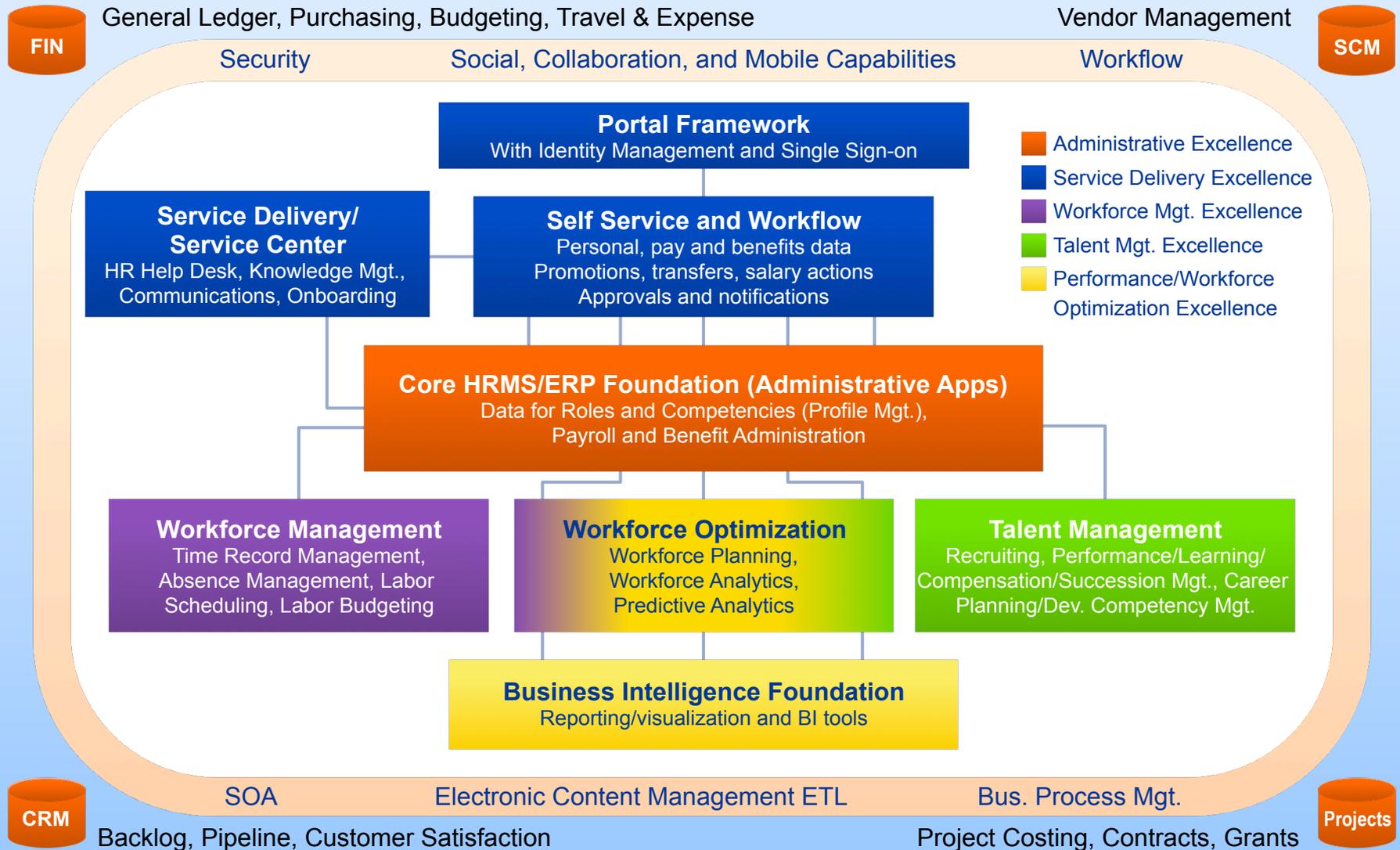
### Major Initiatives n=1,215



### Upgrade vs. Replacements: Inflexion Point Reached



# CedarCrestone HCM Integrated and Unified Application Blueprint



# Oil/Manufacturing Organizations

## Compared to Overall Adoption and Top Performers

### Kudos on Talent Management; Some Possible Opportunities!

Application	Overall Adoption	All Oil/Mfgt. n=138	Very Large n=24	Large n=54	Medium n=60	Top Performers n=57
Administrative	92%	At Market	At Market	At Market	At Market	At Market
Service Delivery	44%	At Market	At Market	At Market	Lags	Leads
Workforce Management	43%	Lags	Leads	Lags	Lags	At Market
Talent Management	52%	Leads	Leads	Leads	At Market	Leads
Business Intelligence	44%	Lags	Leads	Lags	Lags	Leads
Workforce Optimization	14%	At Market	Leads	Lags	Lags	Leads
Social Media	33%	At Market	Leads	Leads	Lags	Leads
Applications where cohort leads (out of 33)		8	24	16	2	26

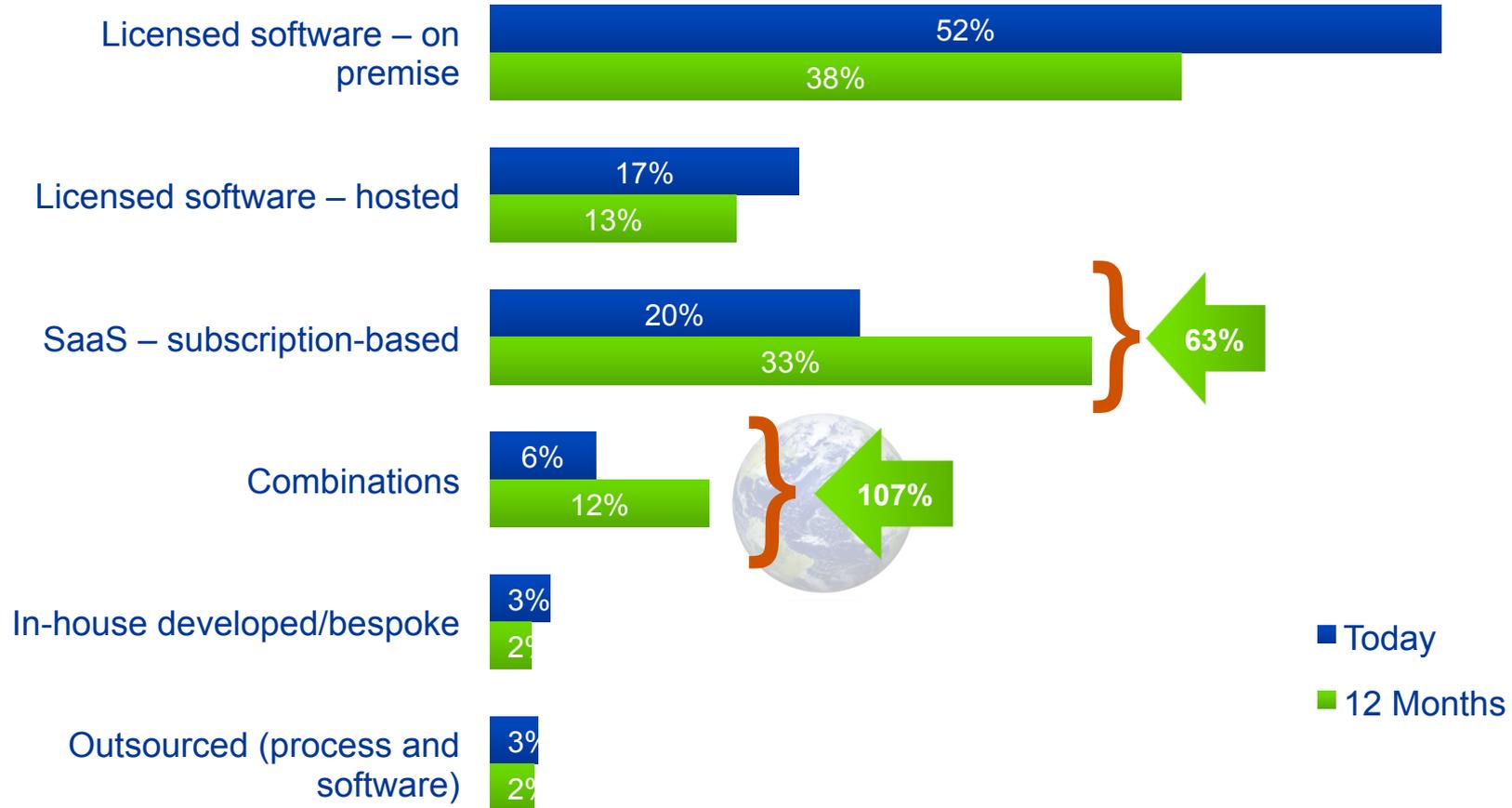
# SaaS is Already the Direction for Talent Management

## Now the HRMS Application is *Trending* Towards SaaS

Don't Forget Though that Licensed On Premise Still Leads

Core

### HRMS Application Deployment Only



# While 55% of Respondents Report They Will Not Move to a SaaS HRMS, Why Will 45%? n=1,231

## Reasons for Moving to a New SaaS Core HRMS n=556



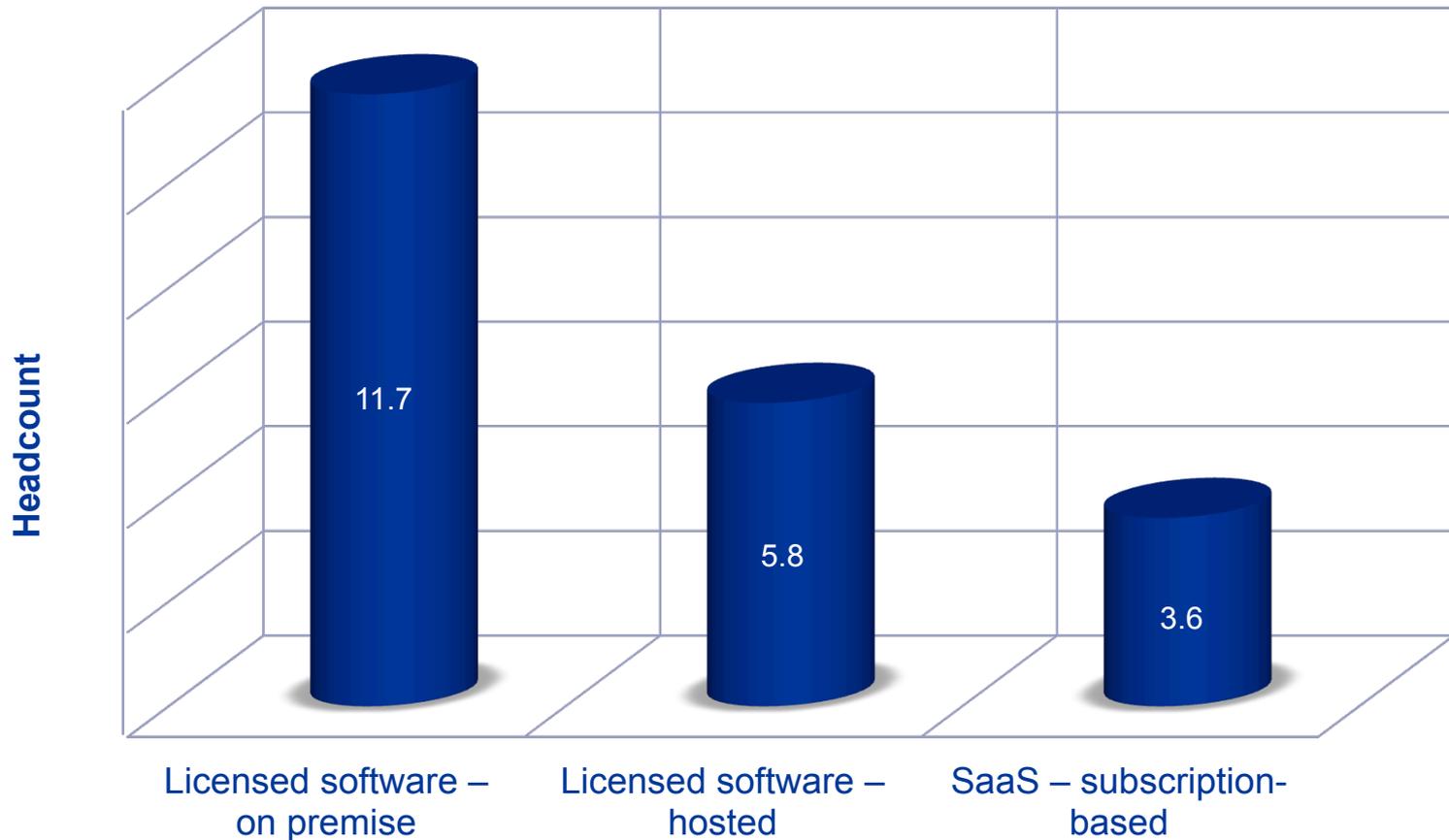
**Improving the User Experience Continues as #1 Reason to Move**

# SaaS Value Propositions:

A SaaS HRMS Takes 1/3<sup>rd</sup> the Staff Overall to Deploy/Support

Core

Impact of HRMS Deployment Type on  
HRIT/IT Headcount – Overall n=423



# SaaS Takes Less Time to Deploy, Yielding Faster Time to Benefit

Length of Time for New HRMS Deployments n=648



Time for New Deployment for an HRMS by Size of Organization  
in months



# The Future HRMS Battleground Will Be Fought Among Vendors with Cloud Offerings

Core

## HRMS Respondent Adoption Overall\*

n=636

	Overall	
	Today	In 12 Months
PeopleSoft	29%	26%
ADP	19%	18%
SAP	11%	12%
Ultimate Software	11%	12%
Kronos	11%	12%
Infor/Lawson	10%	10%
Oracle EBS	6%	5%
Workday	5%	12%
Ceridian HR	5%	4%
SuccessFactors	4%	6%
SumTotal	2%	2%
Oracle HCM Cloud (Fusion)	1%	4%
Ceridian Dayforce	1%	2%

\*Colored cells indicate greater than 5% gain or loss projected in 12 months.

Organizations may have multiple solutions in use.

## TOP PERFORMERS

**Choose Workday:  
11% vs. 5%**

# Since User Experience is the #1 Reason Most Organizations Plan to Move, How Are Vendors Doing?

- 1 = **Poor**: not user friendly, excessive steps, limits use
- 2 = **Acceptable**: workable but requires training to use
- 3 = **Excellent**: intuitive, user centered design, effectively promotes use

And, why is it is such a big deal?

It's about driving user adoption, so both employees and the organization get the most value from the solution!

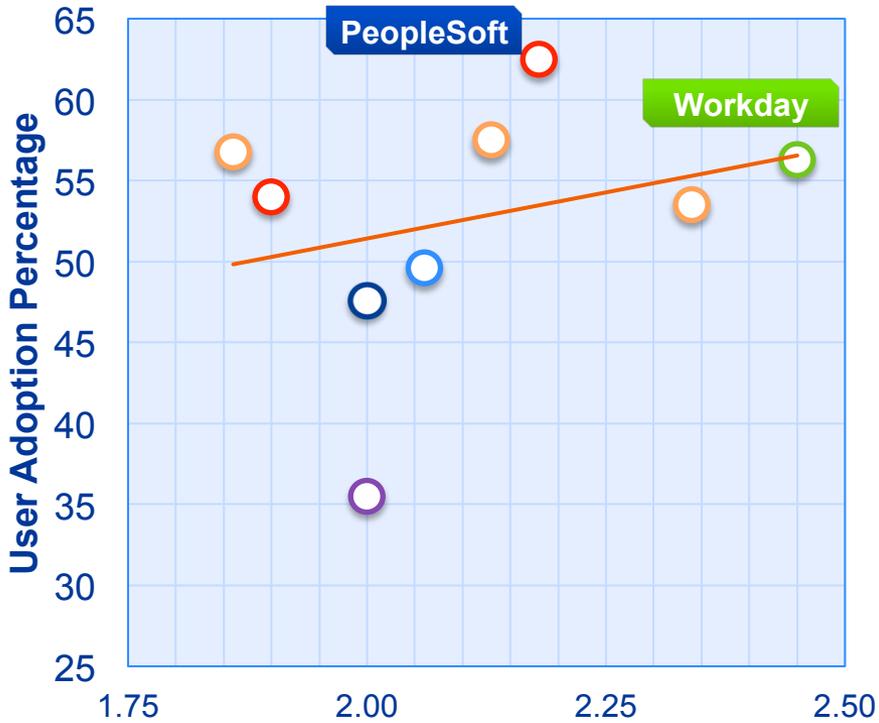
# User Adoption Level by User Experience Scores

Workday Leads with Highest User Experience Scores, with PeopleSoft leading on User Adoption for Employee Direct Access. Workday Leads for Manager Direct Access.

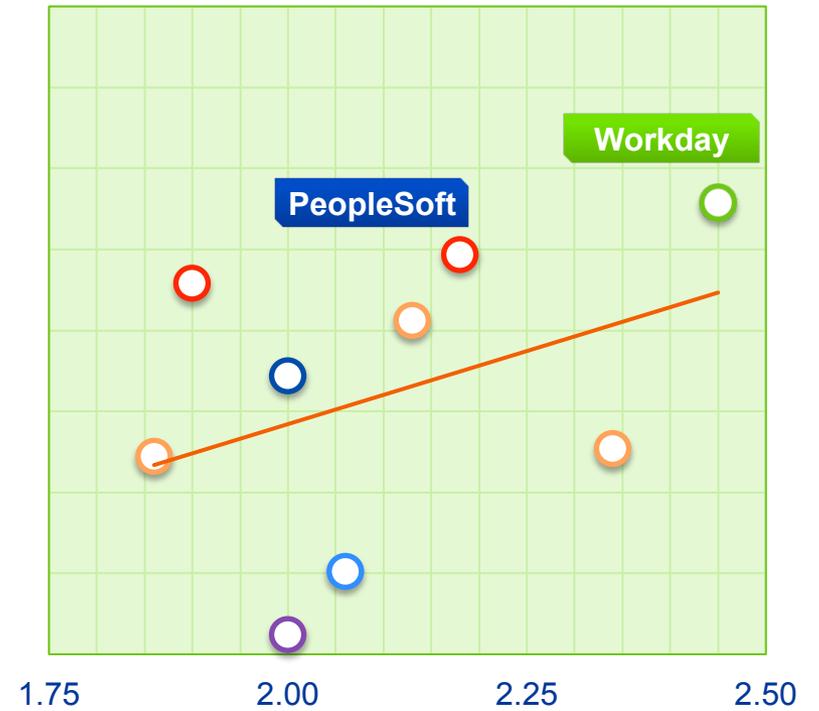
Core

## HR Management System User Adoption and User Experience

### User Adoption (Employee)



### User Adoption (Manager)



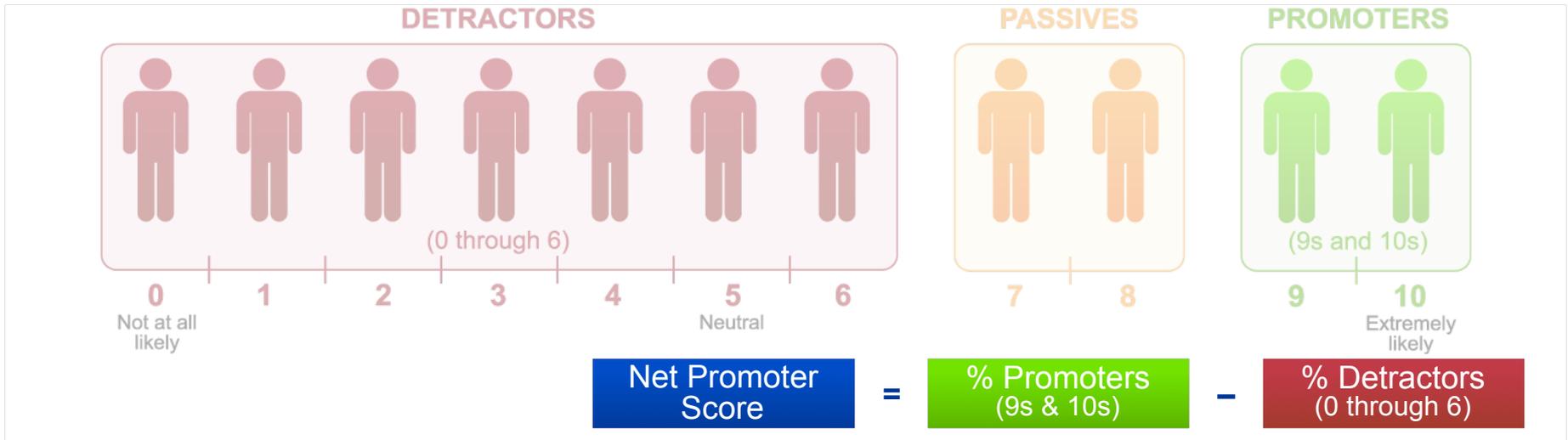
## User Experience Scores

# Most HRMS Customers Are DISSATISFIED!

## However, Overall NPS Went up 11 Points from 2012.

### Software as a Service Solutions Achieve Highest Scores!

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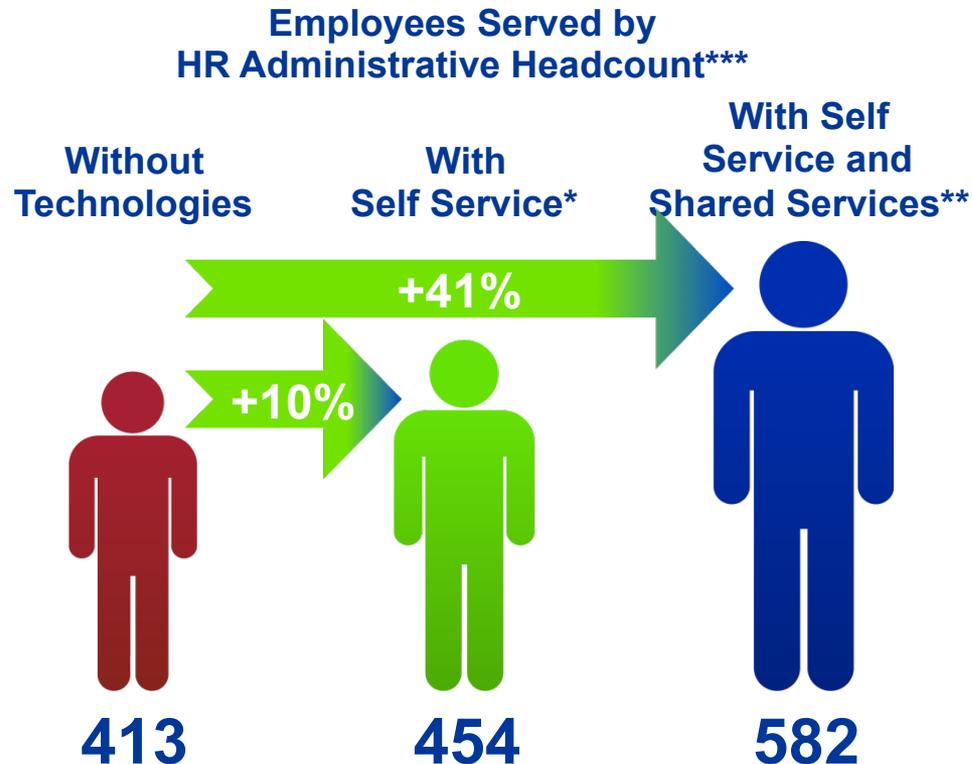


**Net Promoter Score by HRMS Deployment Approach**  
HRMS Vendors n=667

	Net Promoter Score	Promoters	Detractors
<b>Overall</b>	<b>-31</b>	<b>19%</b>	<b>50%</b>
Licensed on Premise (379)	-37	10%	47%
Licensed Hosted (123)	-48	14%	62%
Outsourced (19)	-46	7%	53%
Software as a Service (146)	-7	33%	40%

# Service Delivery Approach Value: Organizations *with Technologies*\* Serve More Employees

ESS/MSS



\*With Self Service: Employee and manager self service applications serve 40% or more of employees and 25% or more of manager populations

\*\*With Self Service and Shared Services: Also serving 75% or more of the workforce through a Shared Service Center

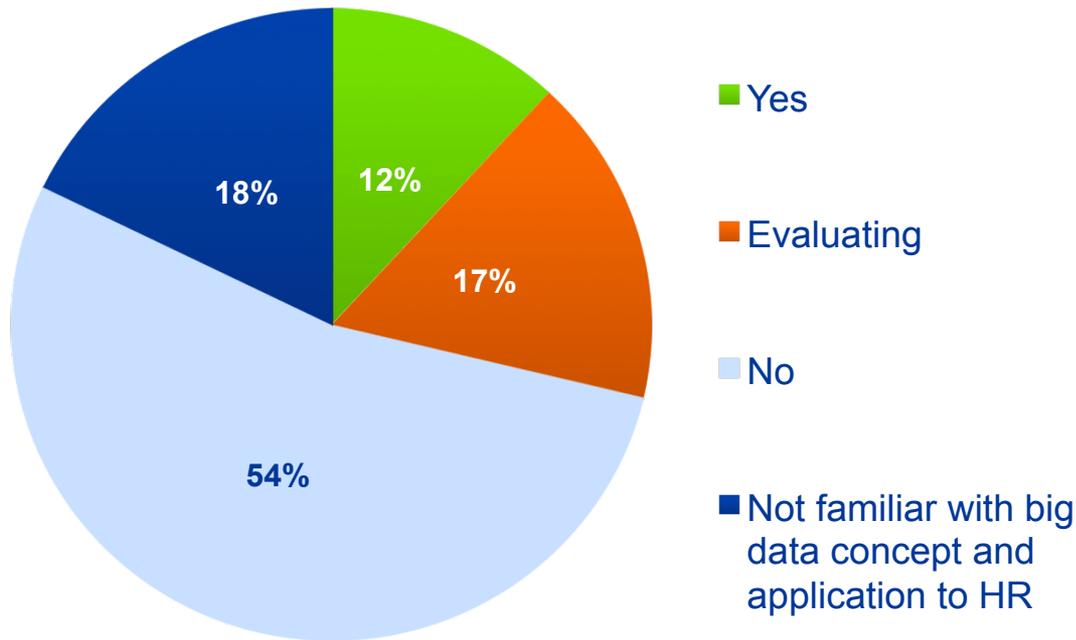
\*\*\*The CedarCrestone survey now calculates the ratio using HR administrative headcount rather than HR administrative FTE as in past years

**SERVICE DELIVERY VALUE:**  
The Shared Services Model—including an HR Help Desk Application  
consistently delivers the highest level of efficiency.

# Emerging Technology: Big Data

12% Report Adoption, Up from 7% in 2012. Among the Remainder Only 18% Report They are Unfamiliar, Down from 41% in 2012.

## Big Data



- Most frequently used in Large organizations
- More frequently used or under evaluation in Healthcare, High-tech, Higher Education, and Financial Services

Q: Do you leverage large scale data collection, data mining, and pattern recognition applied to workforce data to meet business outcomes? n=617

# Lessons Learned from 16<sup>th</sup> Annual Survey

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- Lesson #1: Get the basics right and keep it simple
- Lesson #2: Invest in more HR technologies
- Lesson #3: Make talent management a priority
- Lesson #4: Put technology into the hands of your employees and managers – especially BI

# Where to Go for More Information

- <http://www.cedarcrestone.com/survey> for survey report
- Sign up for survey updates on our website:

The screenshot shows the CedarCrestone website header. The logo is on the left. To the right, there are social media icons for YouTube, blog, RSS, Twitter, LinkedIn, and Facebook, which are circled in green. Further right are buttons for Research, Contact, and Careers, and a search bar with a 'Go' button. Below the header is a navigation menu with links for ABOUT, SOLUTIONS, SERVICES, INDUSTRIES, eRESOURCES, and CEDARCRESTONE INDIA. A secondary menu lists services: Consulting Services, Managed Services, Middleware Services, Strategic Services & Research, and Technology Integration Services. A third menu lists various survey topics: Annual Survey, Business Case Development & ROI, Business Process Improvement, Change Management, HR Effectiveness Assessment, Research, Workforce Metrics & Analytics Assessment, Workforce Technology Assessment & Strategy, and Vendor/Software Evaluation & Selection. Below this is a section for the ANNUAL SURVEY with a 'Share' button. The main banner features the CedarCrestone logo, a globe, and the text: 'NOW AVAILABLE! CEDARCRESTONE 2013-2014 HR SYSTEMS SURVEY WHITE PAPER HR Technologies, Deployment Approaches, Value, and Metrics 16<sup>th</sup> ANNUAL EDITION Register HERE to download!'.

## NEW! CedarCrestone 2013–2014 HR Systems Survey: HR Technologies, Deployment Approaches, Value, and Metrics, 16<sup>th</sup> Annual Edition

The White Papers, Press & Articles, and Events & Presentations below include the most recent publications in most cases. Some material is from prior years and will be updated in the coming months. Please visit our [Research](#) page to learn more about benchmarking services related to our Annual Survey effort and see other available White Papers.

### White Papers

- [CedarCrestone 2013–2014 HR Systems Survey White Paper](#)
- [Going Global with HR Technologies: 2013, Highlights and Recommendations of Organizations Operating Globally Taken from CedarCrestone 2012–2013 HR Systems Survey Results](#)
- *The Seven Drivings of Top Performing Organizations White Paper*

### Events & Presentations:

- [IHRIM Atlanta 4th Quarter Meeting and Holiday Reception](#) December 5, 2013
- [Workday and CedarCrestone: Human Capital Management for the Modern Enterprise](#) Denver, CO Luncheon – November 14, 2013
- [CedarCrestone and Workday: Human Capital Management for the Modern Enterprise](#) Houston, TX Luncheon – November 12, 2013

# Please Download the Whole Report

- Comparative expenditure data
- Value-chain factor analysis
  - Shows that social, mobile, and workforce management applications yield not only key HR outcomes but business outcomes.
- Key service delivery trends
  - System consolidation and shared service center increases leading to transformation
- Gamification and other emerging technologies
- Check out the latest IHRIM Wire for detail on point solution vendors and detail application adoption. [http://www.ihrim.org/Pubonline/Wire/Sept13/CedarCrestone\\_16thSurvey\\_IHRIMWire.pdf](http://www.ihrim.org/Pubonline/Wire/Sept13/CedarCrestone_16thSurvey_IHRIMWire.pdf)

# Benchmark Service: Application Dashboards

## Sample Customer Benchmark Analysis

	Your Organization	Direct Competitors	Same size, Global, white collar	Optimized service delivery
Administrative Applications	Leads	At market	At market	At market
Service Delivery Applications	Leads	Leads	Lags	At market
Workforce Management Applications	At market	Leads	Lags	At market
Talent Management Applications	At market	At market	Lags	At market
Business Intelligence Applications	Leads	Leads	Lags	Lags
Workforce Optimization Applications	At market	At market	Lags	Lags
Social Media Used Strategically	Leads	Leads	Lags	Lags
*Assessment by CedarCrestone based on review of all HR applications in use or planned for deployment		Adoption level leads by 5%		Adoption level lags by -5%

Sample dashboard that compares you to others in your industry, of your size, to the “top quartile” in your industry, or to overall industry top performers. It should be the starting place of any update to your HR systems strategy. Contact [HRSystemsSurvey@CedarCrestone.com](mailto:HRSystemsSurvey@CedarCrestone.com) for pricing.

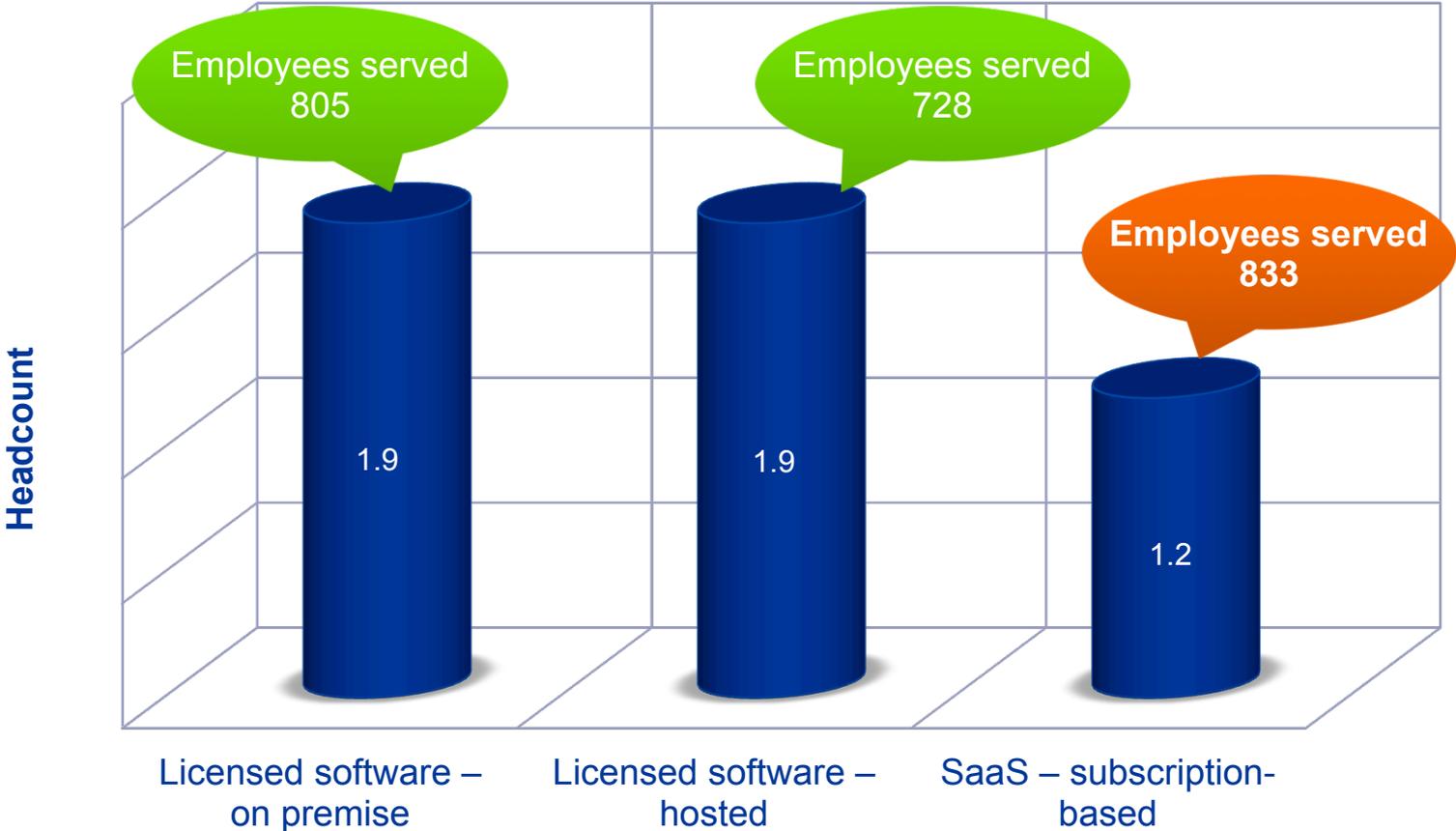
# Appendix



# 2013: And There's a Story Here:

In Small organizations, a SaaS HRMS serves more

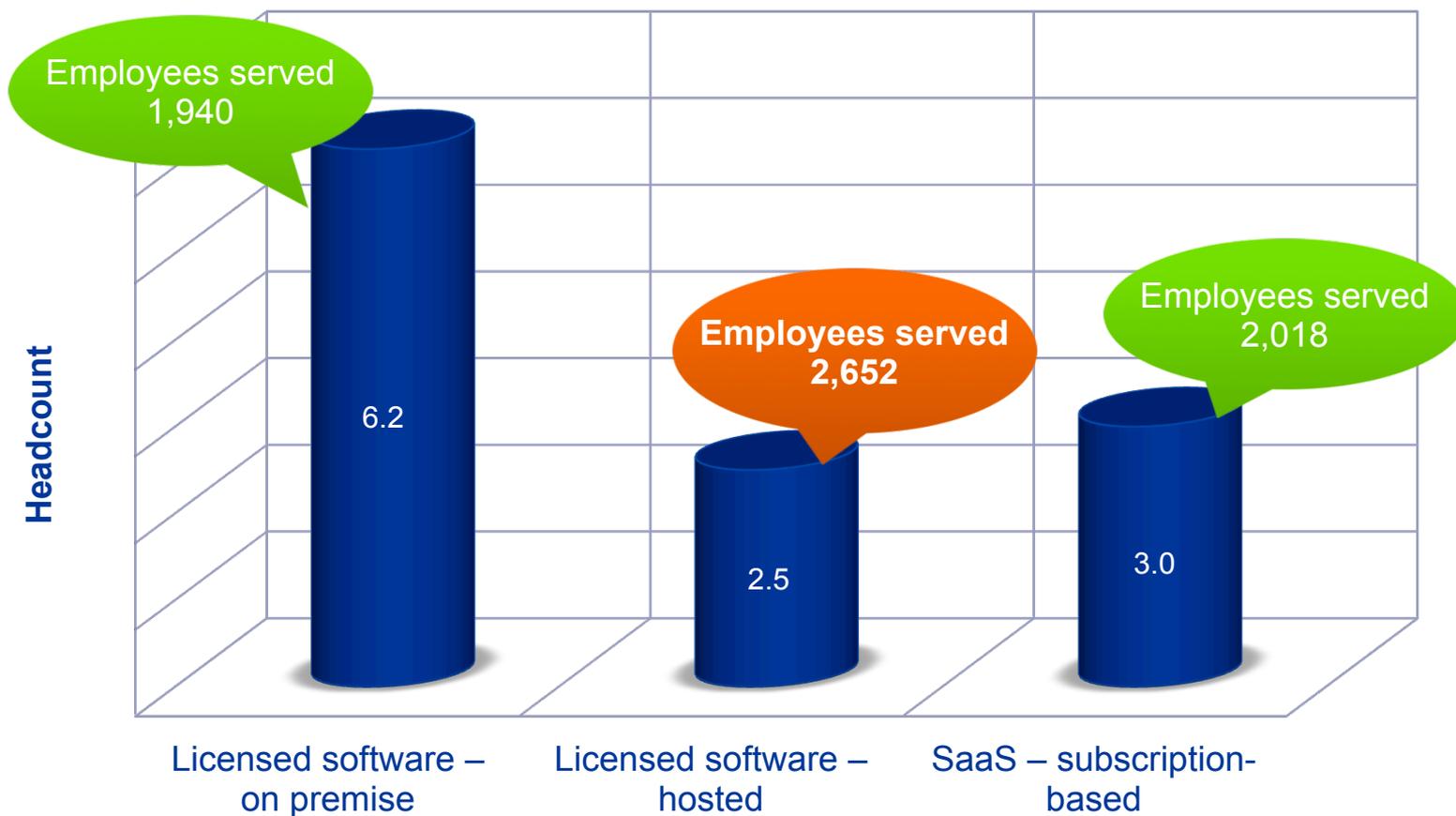
Impact of HRMS Deployment Type –  
Employees Served by Total HRIT/IT in Small Employers



# 2013: In Medium-sized Organizations, a Licensed Hosted Solution Serves More Employees

But not in All Industries

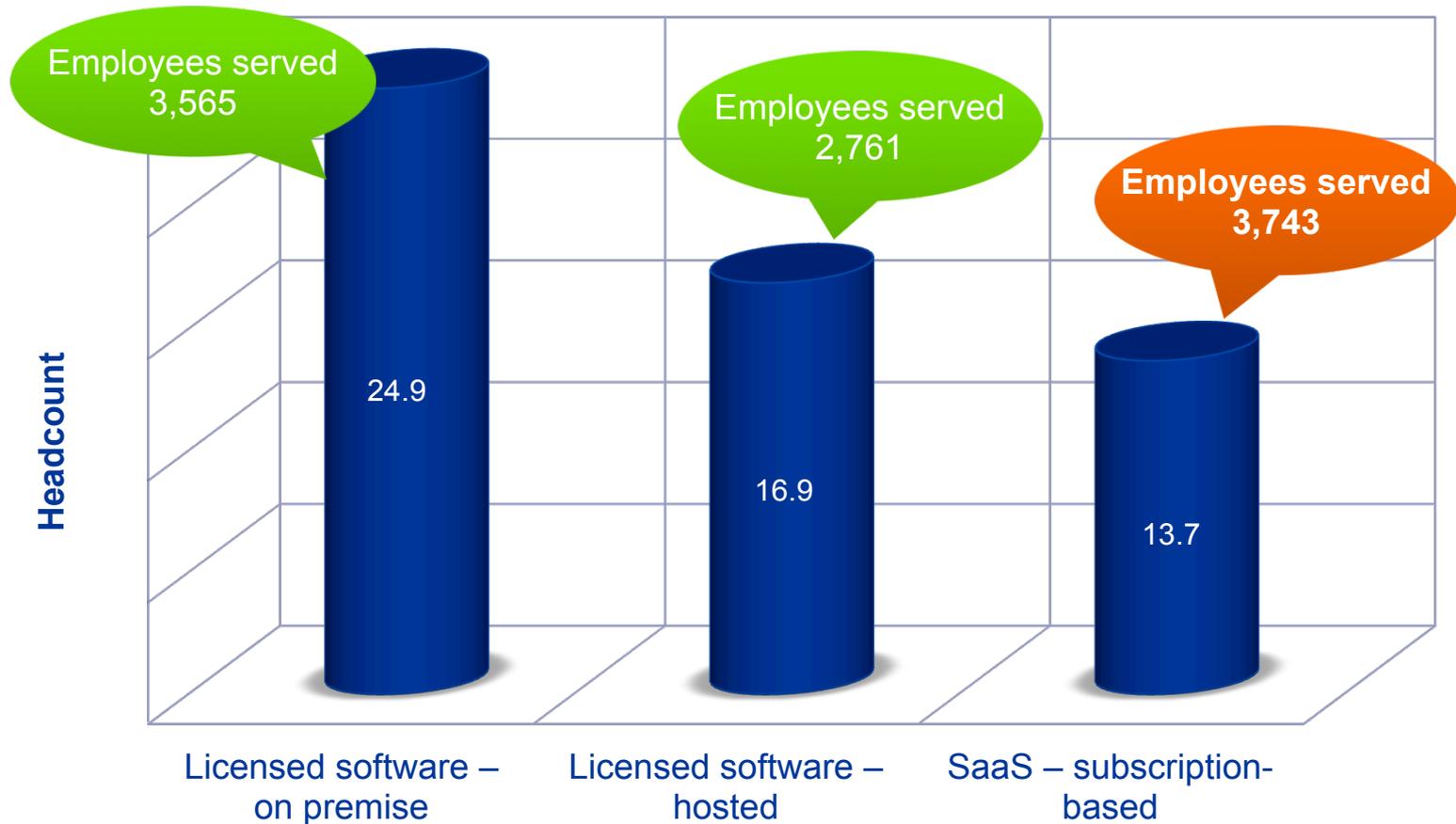
Impact of HRMS Deployment Type –  
Employees Served by Total HRIT/IT in Medium Employers



# 2013: In Large Organizations, the SaaS HRMS Approach Enables Those Organizations to Serve More

**MESSAGE IS: BENCHMARK!!**

Impact of HRMS Deployment Type –  
Employees Served by Total HRIT/IT in Large Employers



# Oil and Manufacturing Adoption by Employer Size

Application Categories	Overall Adoption		Large Oil	Large Manufacturing	Medium Oil and Mfgt	Top Performers
			n=10	n=49	n=55	n=57
<b>Administrative</b>	92%		At Market	At Market	At Market	At Market
<b>Service Delivery</b>	44%		Leads	At Market	At Market	Leads
<b>Workforce Management</b>	43%		Lags	At Market	Lags	At Market
<b>Talent Management</b>	52%		Leads	Leads	At Market	Leads
<b>Business Intelligence</b>	44%		At Market	At Market	Lags	Leads
<b>Workforce Optimization</b>	14%		Leads	Leads	Lags	Leads
<b>Social Media</b>	33%		Leads	At Market	Lags	Leads

# Application Adoption All Industries by Size

Application Categories	Overall Adoption	Large	Medium	Small	Top Performers
		n=326	n=326	n=612	n=57
<b>Administrative</b>	92%	At Market	At Market	At Market	At Market
<b>Service Delivery</b>	44%	Leads	At Market	Lags	Leads
<b>Workforce Management</b>	43%	Leads	At Market	Lags	At Market
<b>Talent Management</b>	52%	Leads	At Market	Lags	Leads
<b>Business Intelligence</b>	44%	Leads	At Market	Lags	Leads
<b>Workforce Optimization</b>	14%	Leads	At Market	Lags	Leads
<b>Social Media</b>	33%	Leads	At Market	Lags	Leads
<b>Applications where cohort leads (out of 33)</b>		<b>30</b>	<b>4</b>	<b>0</b>	<b>26</b>