

Vendor Management System (VMS) Products PEAK Matrix® Assessment 2023

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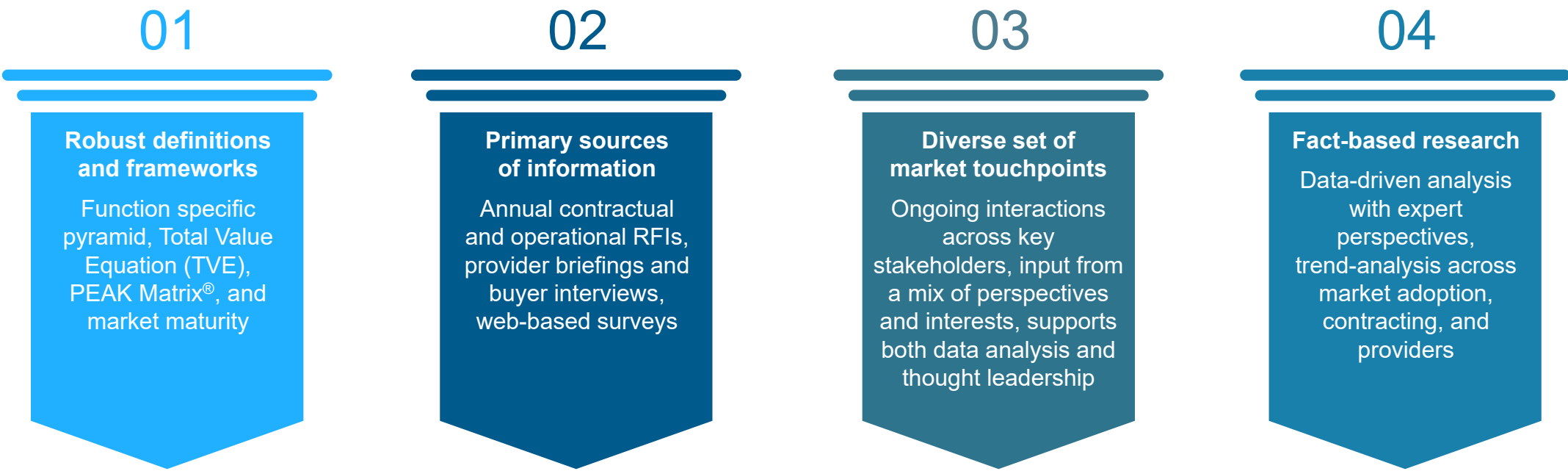
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01

Introduction and overview

- Research Methodology
- Background and scope of the research
- Understanding Vendor Management System (VMS)
- VMS provider shift towards Total Talent Management (TTM)
- VMS provider key investment areas
- Source of information

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry



Proprietary database on Vendor Management System (VMS) capabilities of 22 providers

Repository of existing research in VMS

Dedicated team for VMS and Contingent Workforce Management (CWM) research

Executive-level relationships with buyers, providers, technology vendors, and industry associations

Background of the research

Vendor Management System (VMS) continues to be an important technology solution for enterprises across the globe. There is wide adoption across industries and geographies, as more enterprises are leveraging contingent workers as a part of their workforce and are needing a capable technology solution to manage the entire Contingent Workforce Management (CWM) life cycle. In recent years, VMSs have not only enhanced the features and functionalities of core technology but have also expanded the scope of services delivered to other areas within CWM. The increasing scope of needs has led to an evolution in the vendor landscape, with many technology vendors building capabilities to cater to specialized client needs across geographies and industries.

The VMS technology landscape is evolving, with providers increasing the breadth and depth of their functionalities/offerings. They are investing to enhance the User Interface / User Experience (UI/UX) of the solution and providing a mobile-enabled solution for their clients. They are building additional capabilities to enhance compliance management, talent pool creation, and vendor and candidate sourcing. It is a burgeoning market, rapidly evolving in terms of product features, deployment options, product architecture, training & support, and a partner ecosystem.

In this study, we analyze the VMS technology landscape across various dimensions:

- Everest Group’s PEAK Matrix® evaluation, a comparative assessment of 22 leading VMS providers
- Competitive landscape in the VMS technology vendor market
- Remarks on key strengths and areas of improvement for each VMS provider
- Assessment of VMS capabilities

Scope of this report



Geography
Global



Providers
22 leading VMS providers

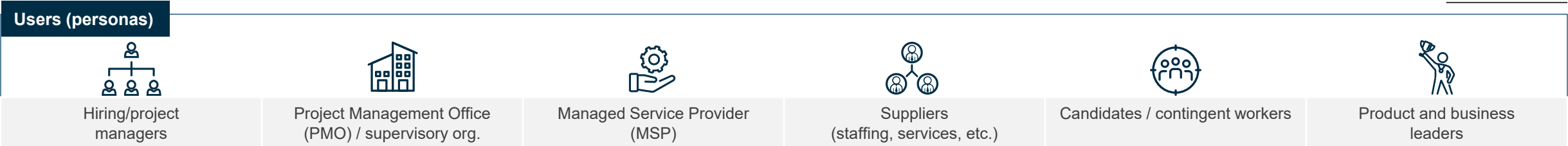


Products
Vendor Management System (VMS)

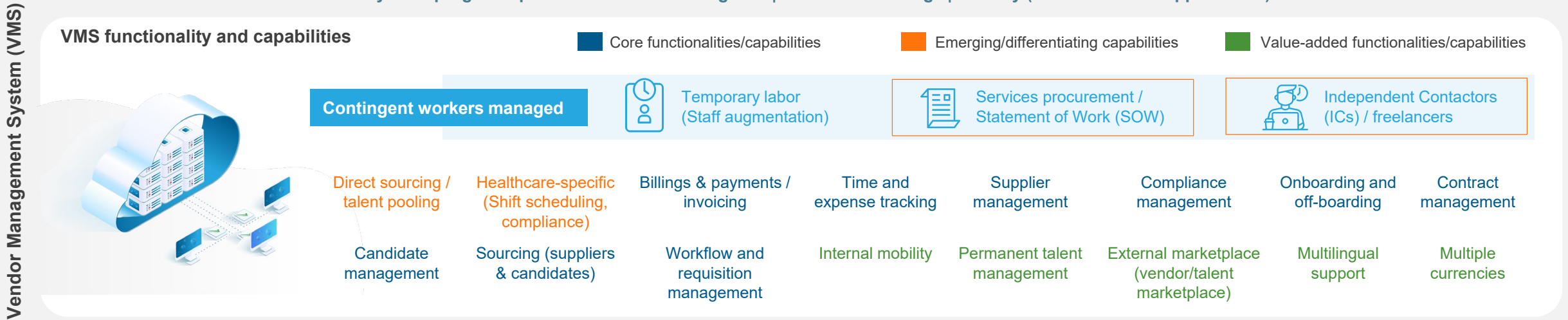
Understanding Vendor Management System (VMS)

Vendor Management System (VMS) is the core technology for procuring and managing contingent work

ILLUSTRATIVE



Analytics – program-specific and market intelligence | AI/ML/RPA leverage | Mobility (web and mobile applications)



Note: The above is a schematic representation of all existing and emerging functionalities/capabilities of VMSs. It is important to note that the focus of VMSs can include all/specific elements within the above listed elements

VMSs evolving as enablers of Total Talent Management (TTM)

Enterprises are holistically looking at total talent to address talent-related challenges and create a flexible/agile talent management practice; leading VMSs are building capabilities to operationalize TTM for clients



Workday’s acquisition of VNDLY will not only provide its clients total talent visibility, but allows for holistic and integrated talent acquisition and management



With Utmost acquisition, Beeline is investing in enabling companies to access total talent insights across their entire workforce, both employees and non-employees



SAP Fieldglass’ integration with other core SAP applications, such as SAP Ariba and SAP SuccessFactors, positions it uniquely to manage clients’ end-to-end procurement needs, including total talent

Key VMS investment areas

Evolving business needs and changing enterprise contingent workforce management practices are the major factors determining key investment areas of VMSs



User experience

VMSs are improving user experience by offering intuitive interfaces, simplified navigation, and mobile accessibility for all stakeholders



Reporting and analytics

VMSs are expanding their reporting and analytics capabilities to provide more in-depth insights into supplier/vendor performance, compliance, and cost optimization



Integration and automation

VMSs are enhancing their platforms to integrate with various enterprise systems and automate workflows to reduce manual effort



Supplier management

VMSs are investing in functionalities to track and manage diverse suppliers and help enterprises make data-driven decisions on supplier engagement



Direct sourcing

VMSs are either building proprietary direct sourcing capabilities or developing strategic partnerships with providers of self-sourcing solutions



Job-role specific capabilities

VMSs are ramping up healthcare and blue collar specific capabilities such as shift scheduling, compliance/credential management, and time and attendance tracking

Everest Group’s VMS research is based on multiple sources of proprietary information

Proprietary database of 22 VMS providers

- The database tracks the following elements for each provider:
 - Breadth and depth of the product functionalities
 - Core and emerging technology capabilities
 - Innovation and investments
 - Partnerships with service providers and other technology vendors
 - Deployment and hosting options
 - Product-related training and support services
 - Availability and adoption of commercial model(s)
 - Security and governance

Proprietary operational information database of providers (updated annually)

- The database tracks the following operational information for each provider:
 - Spend Under Management (SUM) and revenue
 - Number of clients
 - Number of FTEs and FTE split by geography
 - Portfolio coverage in terms of industry, geography, process areas, and buyer size

Demonstrations and interactions with providers and other industry stakeholders

- Detailed demos for a comprehensive product view and executive-level discussions with VMS providers that cover:
 - Current state of the market
 - Vision and strategy
 - Annual performance and outlook
 - Opportunities and challenges
 - Emerging areas of investment

Buyer reference interviews, ongoing buyer surveys, and interactions

- Interviews with providers’ reference clients and enterprise VMS buyers to get the buyer perspective around:
 - Drivers and objectives for adopting VMS
 - Apprehensions and challenges
 - Assessment of providers’ performance
 - Emerging priorities / buying criteria
 - Outcomes achieved
 - Lessons learned and best practices adopted

VMSs assessed¹



1 In this study, we have assessed providers’ offerings / product capabilities as of 2022
Note 1: Connecting-expertise was acquired by Pixid Group in December 2020; however, it continues to operate as a separate company
Note 2: The source of all content is Everest Group unless otherwise specified
Note 3: Worksuite and Magnit were formerly called Shortlist and PRO Unlimited, respectively
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion

02

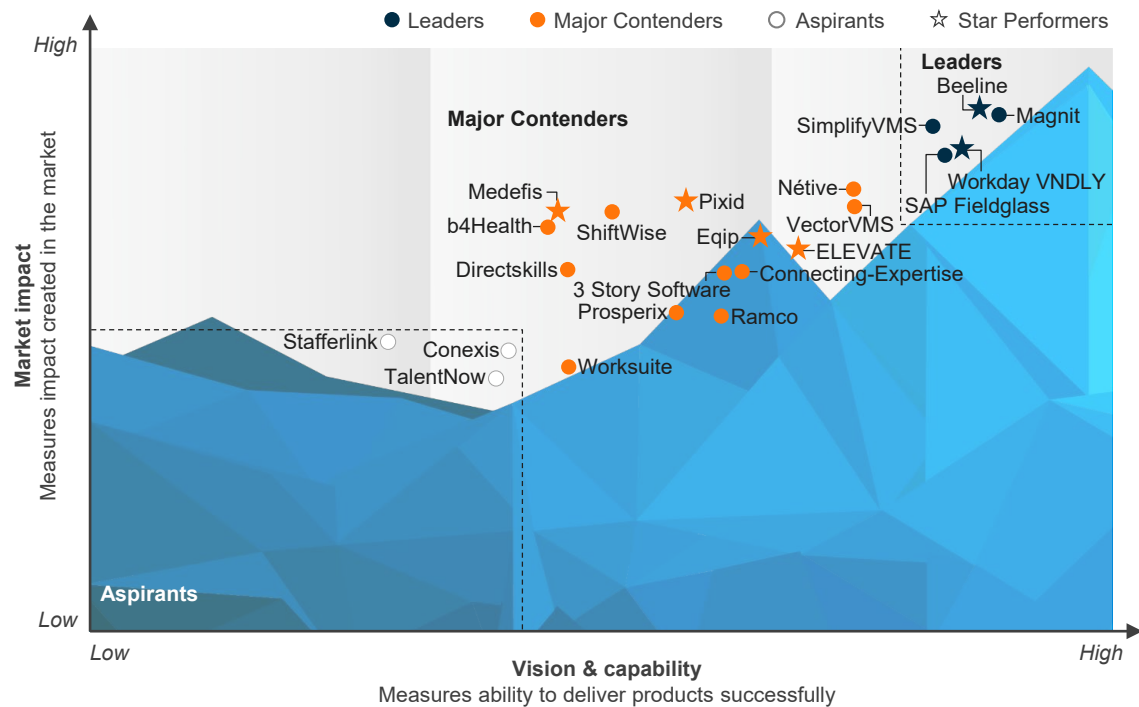
Summary of key messages

Summary of key messages

- The Products PEAK Matrix® is a proprietary framework used to assess the market impact and overall vision & capability of providers
- Everest Group classifies 22 VMS providers on the Everest Group Products PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants (arranged alphabetically below):
 - **Leaders:** Beeline, Magnit, SAP Fieldglass, SimplifyVMS, and Workday VNDLY
 - **Major Contenders:** 3 Story Software (3SS), b4Health, Connecting-Expertise, Directskills, ELEVATE, Equip, Medefis, Nétive, Pixid, Prosperix, Ramco, ShiftWise, VectorVMS, and Worksuite
 - **Aspirants:** Conexis, Stafferlink, and TalentNow
- Everest Group also identified the following VMS providers as Star Performers based on their YOY movement on the PEAK Matrix® (in alphabetical order): Beeline, ELEVATE, Equip, Medefis, Pixid, and Workday VNDLY



Everest Group Vendor Management System (VMS) Products PEAK Matrix® Assessment 2023^{1,2,3}



1 Assessment for Connecting-Expertise, Ramco, SAP Fieldglass, and Worksuite, and all Aspirants (except Conexis) excludes provider inputs. The analysis for these providers is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with VMS buyers. For these companies, Everest Group's data for assessment may be less complete.

2 Connecting-Expertise was acquired by Pixid Group in December 2020; however, it continues to operate as a separate company. Worksuite and Magnit were formerly called Shortlist and PRO Unlimited, respectively

3 Some of the other major VMS players such as Coupa and SmartERP are not positioned on the PEAK Matrix® due to lack of tangible data on them.

Source: Everest Group (2023)

03

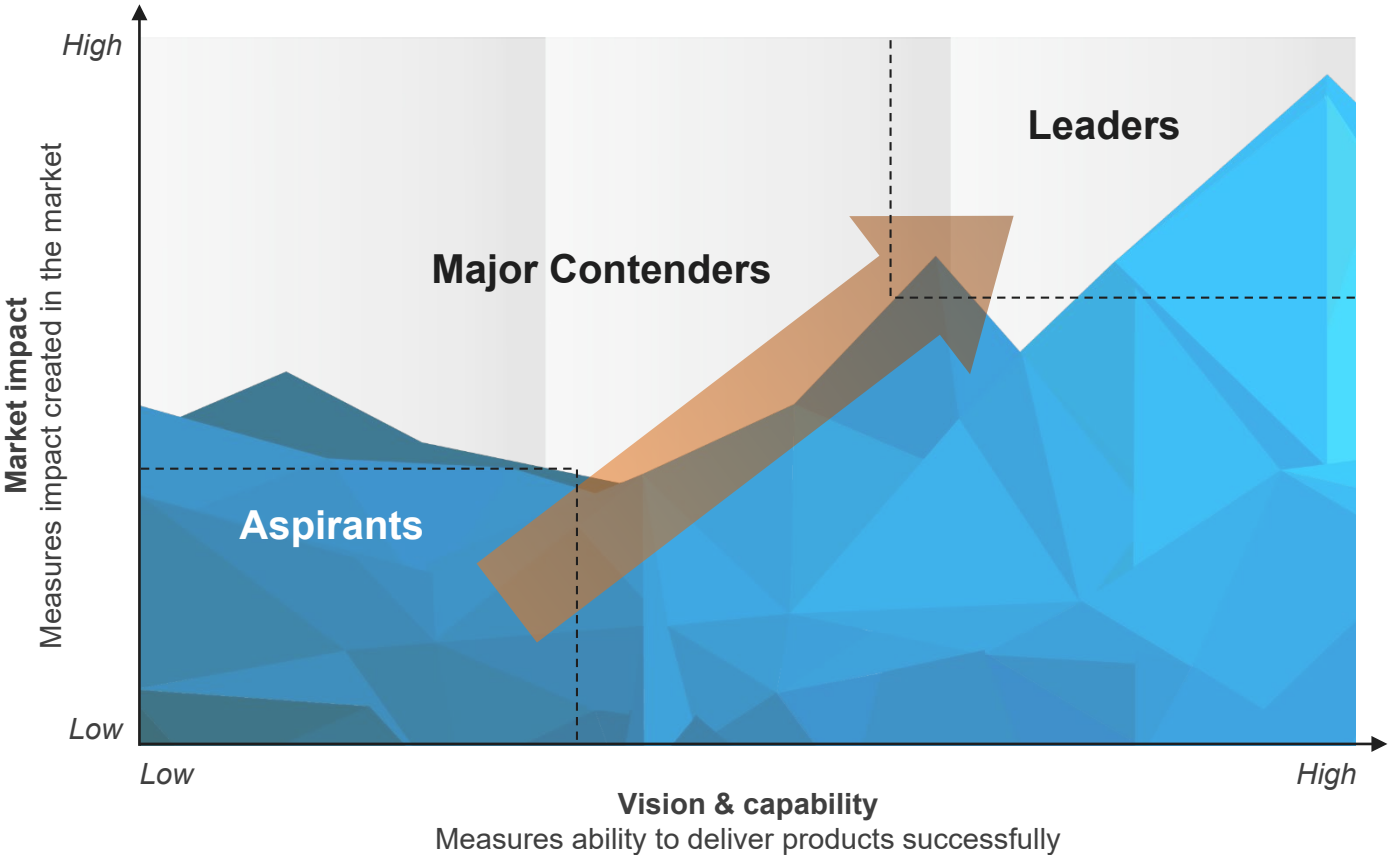
VMS PEAK Matrix® characteristics

- PEAK Matrix framework
- Everest Group PEAK Matrix for VMS
- Star performers capability overview
- VMS provider capability summary dashboard

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



Everest Group PEAK Matrix





Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

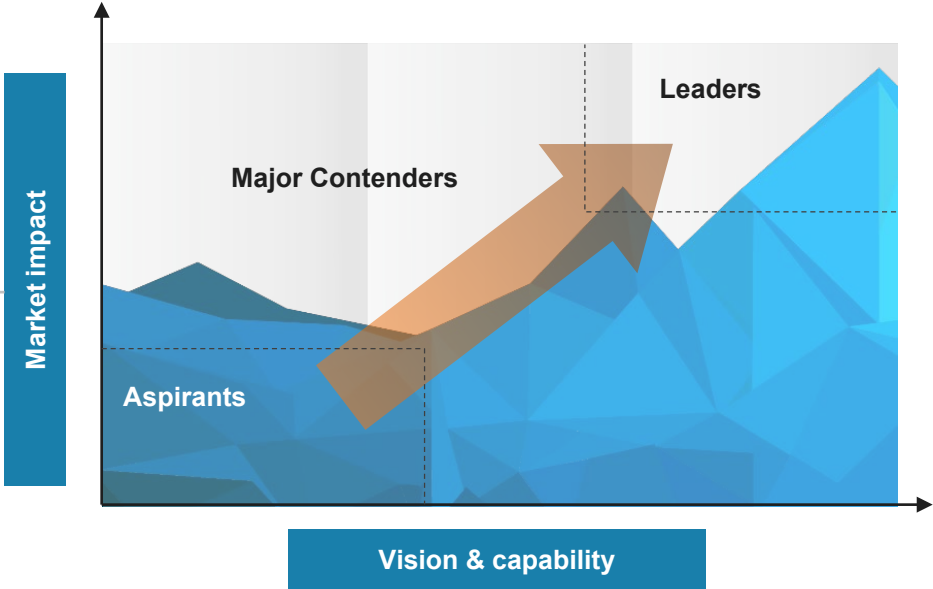
Number of clients, revenue base, and YOY growth

Portfolio mix

Diversity of client base across industries, geographies, environments, enterprise size class

Value delivered

Value delivered to the client based on customer feedback and other measures



Measures ability to deliver products successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Core technology capability

Technical sophistication and breadth/depth across the technology suite

Emerging/differentiating capability

Capabilities related to emerging categories such as services procurement, independent contractor management, and healthcare

Implementation, UI/UX, and support

Configurability/customize-ability, hosting and tenancy, integration, training, and security; user interface, and user experience

Engagement and commercial model

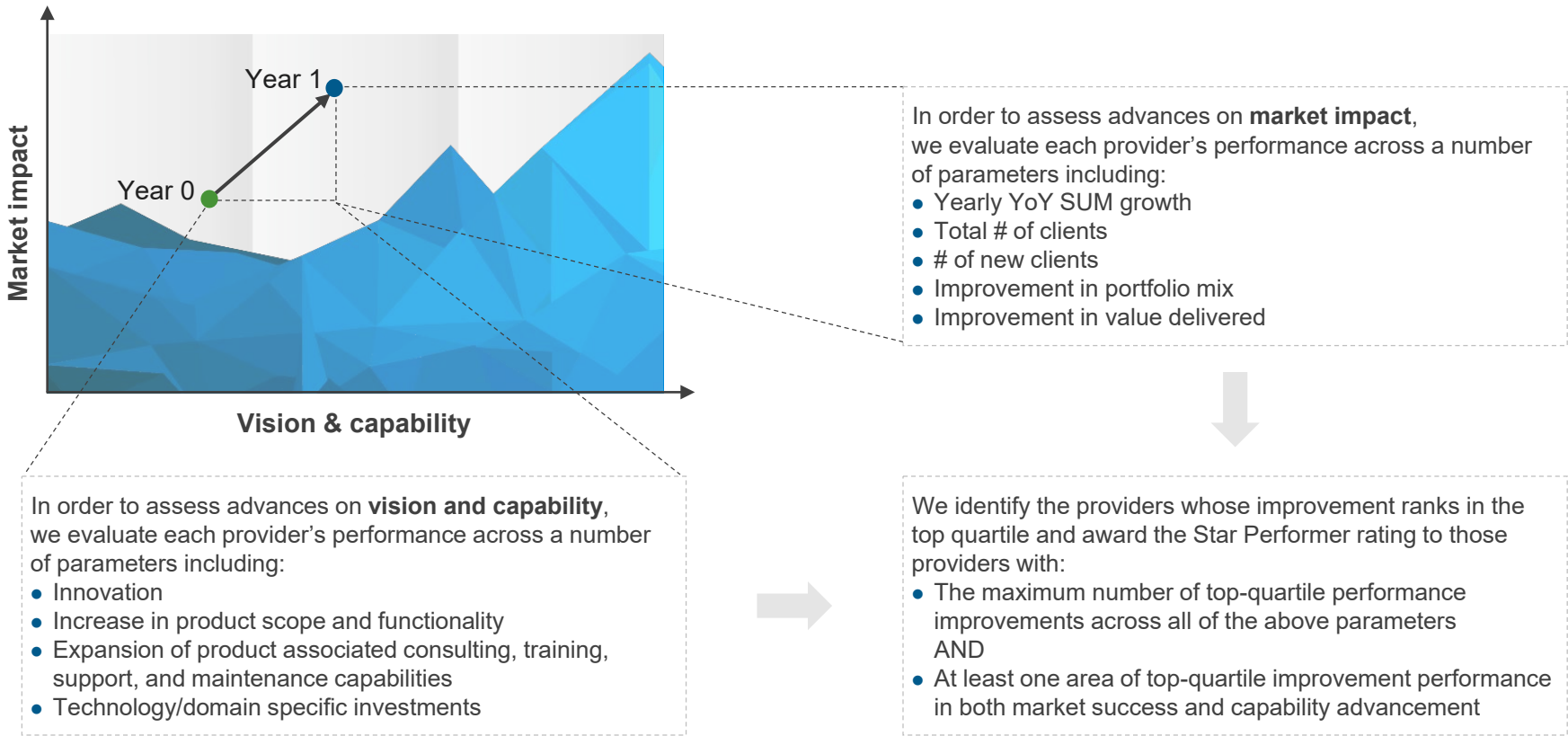
Progressiveness, effectiveness, and flexibility of engagement and commercial models



Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



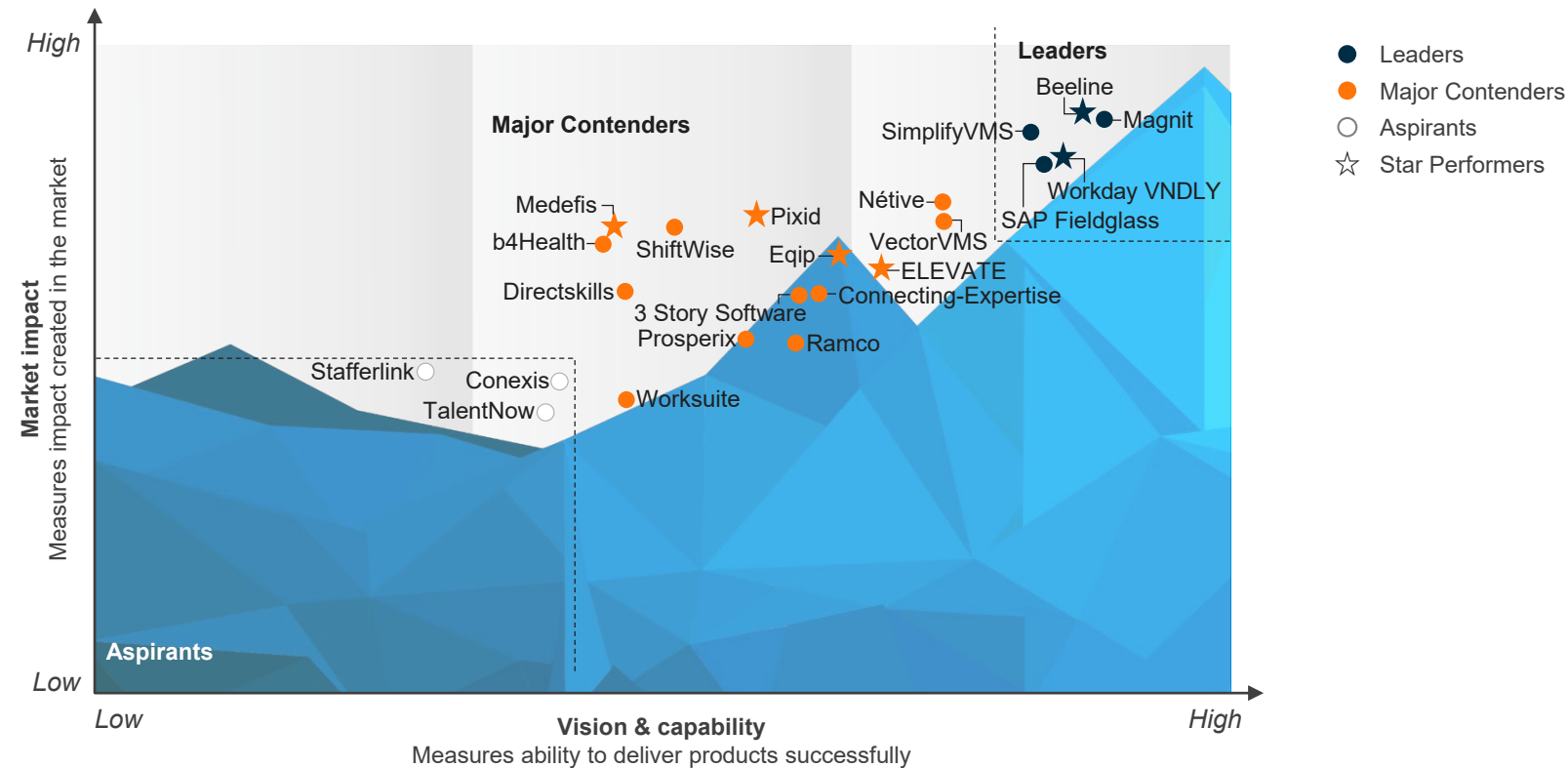
The Star Performers title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

Everest Group PEAK Matrix®

Vendor Management System (VMS) Products PEAK Matrix® Assessment 2023



Everest Group Vendor Management System (VMS) Products PEAK Matrix® Assessment 2023^{1,2,3}



1 Assessment for Connecting-Expertise, Ramco, SAP Fieldglass, Worksuite, and all Aspirants (except Conexis) excludes provider inputs. The analysis for these providers is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with VMS buyers. For these companies, Everest Group's data for assessment may be less complete

2 Connecting-Expertise was acquired by Pixid Group in December 2020; however, it continues to operate as a separate company. Worksuite and Magnit were formerly called Shortlist and PRO Unlimited, respectively

3 Some of the other major VMS players such as Coupa and SmartERP are not positioned on the PEAK Matrix® due to lack of tangible data on them

Source: Everest Group (2023)

Everest Group has identified six providers as the 2023 Star Performers (page 1 of 2)

VMS Star Performers	Distinguishing features of market impact in 2022	Distinguishing features of capability advancements in 2022	Change in PEAK Matrix® positioning for VMS
	• Displayed good growth in spend under management (SUM) in 2022 • Expanded geographic presence and secured new clients in Europe • Displayed ability to deliver good value to clients, validated by positive buyer feedback	• Launched a new Global Workforce Intelligence module after acquisition of Utmost • Designed and implemented a personalized hiring manager experience and is investing in a new talent experience	Strengthened its Leaders positioning
	• Displayed strong double-digit growth in number of new clients in 2022 • Displayed ability to deliver good value to clients validated by positive buyer feedback	• Enhanced integration capabilities with features like low-code / no-code integration and workflow automation • Launched meal and break time handling and tracking functionality	Strengthened its Major Contenders positioning
	• Displayed strong growth in SUM and won several new clients in 2022 • Improved client portfolio in industries such as media and professional services • Displayed ability to deliver good value to clients validated by positive buyer feedback	• Incorporated Verified Digital Profiles (VDP) for internal candidates and independent contractors in its direct sourcing module • Enhanced its reporting capabilities and functionalities related to custom report building	Strengthened its Major Contenders positioning

Source: Everest Group (2023)

Everest Group has identified six providers as the 2023 Star Performers (page 2 of 2)

VMS Star Performers	Distinguishing features of market impact in 2022	Distinguishing features of capability advancements in 2022	Change in PEAK Matrix® positioning for VMS
	- Achieved strong double-digit growth in SUM in 2022 - Displayed ability to deliver good value to clients, validated by positive buyer feedback	- Built comprehensive market intelligence dashboards to provide clients visibility into real-time rate trends - Developed automated timekeeping functionality allowing suppliers to enter time directly into the platform	Strengthened its Major Contenders positioning
	- Achieved good double-digit growth in SUM in 2022 - Achieved geographic expansion and secured new clients globally	- Developed a new talent pooling feature to simplify job requisition process - Launched a new business intelligence module to create customizable dashboards	Strengthened its Major Contenders positioning
	- Expanded geographic coverage in terms of the number of countries serviced - Displayed strong double-digit growth in SUM and the number of new clients in 2022 - Displayed ability to deliver good value to clients, validated by positive buyer feedback	- Developed decision wizard to help managers make right talent-related decisions - Made major improvements in its rate calculator and customized invoicing functionalities - Deepened its integrations with Workday to offer several compelling total talent use cases to clients	Strengthened its Leaders positioning

Source: Everest Group (2023)

Summary dashboard | market impact and vision & capability assessment of providers for VMS 2023

Leaders

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
Beeline										
Magnit										
SAP Fieldglass										
SimplifyVMS										
Workday VNDLY										

Note 1: Providers scored using Everest Group’s proprietary scoring methodology given on page 16

Note 2: For a detailed service provider profile, please refer to the forthcoming report **Vendor Management System (VMS) – Technology Provider Compendium 2023**

Note 3: Value delivered score impacted for providers that did not provide adequate number of buyer references

Summary dashboard | market impact and vision & capability assessment of providers for VMS 2023

Major Contenders (page 1 of 2)

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
3 Story Software (3SS)										
b4Health										
Connecting-Expertise										
Directskills										
ELEVATE										
Equip										
Medefis										

Note 1: Providers scored using Everest Group’s proprietary scoring methodology given on page 16

Note 2: For a detailed service provider profile, please refer to the forthcoming report **Vendor Management System (VMS) – Technology Provider Compendium 2023**

Note 3: Value delivered score impacted for providers that did not provide adequate number of buyer references

Summary dashboard | market impact and vision & capability assessment of providers for VMS 2023

Major Contenders (page 2 of 2)

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
Nétive										
Pixid										
Prosperix										
Ramco										
ShiftWise										
Vector VMS										
Worksuite										

Note 1: Providers scored using Everest Group’s proprietary scoring methodology given on page 16

Note 2: For a detailed service provider profile, please refer to the forthcoming report **Vendor Management System (VMS) – Technology Provider Compendium 2023**

Note 3: Value delivered score impacted for providers that did not provide adequate number of buyer references

Summary dashboard | market impact and vision & capability assessment of providers for VMS 2023

Aspirants

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
Conexis										
Stafferlink										
Talent Now										

Note 1: Providers scored using Everest Group's proprietary scoring methodology given on page 16

Note 2: For a detailed service provider profile, please refer to the forthcoming report **Vendor Management System (VMS) – Technology Provider Compendium 2023**

Note 3: Value delivered score impacted for providers that did not provide adequate number of buyer references

04

Competitor overview

- VMS provider landscape
- VMS landscape by geography
- Major VMS providers in key countries
- VMS capability overview
- VMS market share by Spend Under Management (SUM)
- VMS market share by industry
- VMS provider capability by job type

VMS provider landscape

A rapidly evolving provider landscape with varying provider value propositions and backgrounds is disrupting the VMS market

	Pure-play VMS	Staffing/MSP affiliation or broad-based providers (services and technology)	Enterprise software provider affiliation (ERP, HR, etc.)
	beeline® connectingexpertise X Conexis Directskills nétive pixid X worksuite	3 STORY SOFTWARE A HAYS COMPANY ELEVATE Magnit @simplify	coupa ramco SAP Fieldglass WILCO SMART Talent Procurement VectorVMS workday. VNDLY
Evolved from a marketplace background	equip talentnow™	prosperix Medefis™	
Exclusively healthcare-focused	stafferlink™ Healthcare Staffing Software	b4health SHIFTWISE™	

Note: Some of the other major VMS players such as Coupa and SmartERP are not positioned on the PEAK due to lack of tangible data on them.
Source: Everest Group (2023)

VMS landscape by geography

The VMS provider landscape is evolving rapidly across the three major regions ...

VMS providers by geography (based on headquarter region)

Arranged alphabetically



Note: Some of the other major VMS players such as Coupa and SmartERP are not positioned on the PEAK due to lack of tangible data on them.

Source: Everest Group (2023)

VMS landscape in key countries

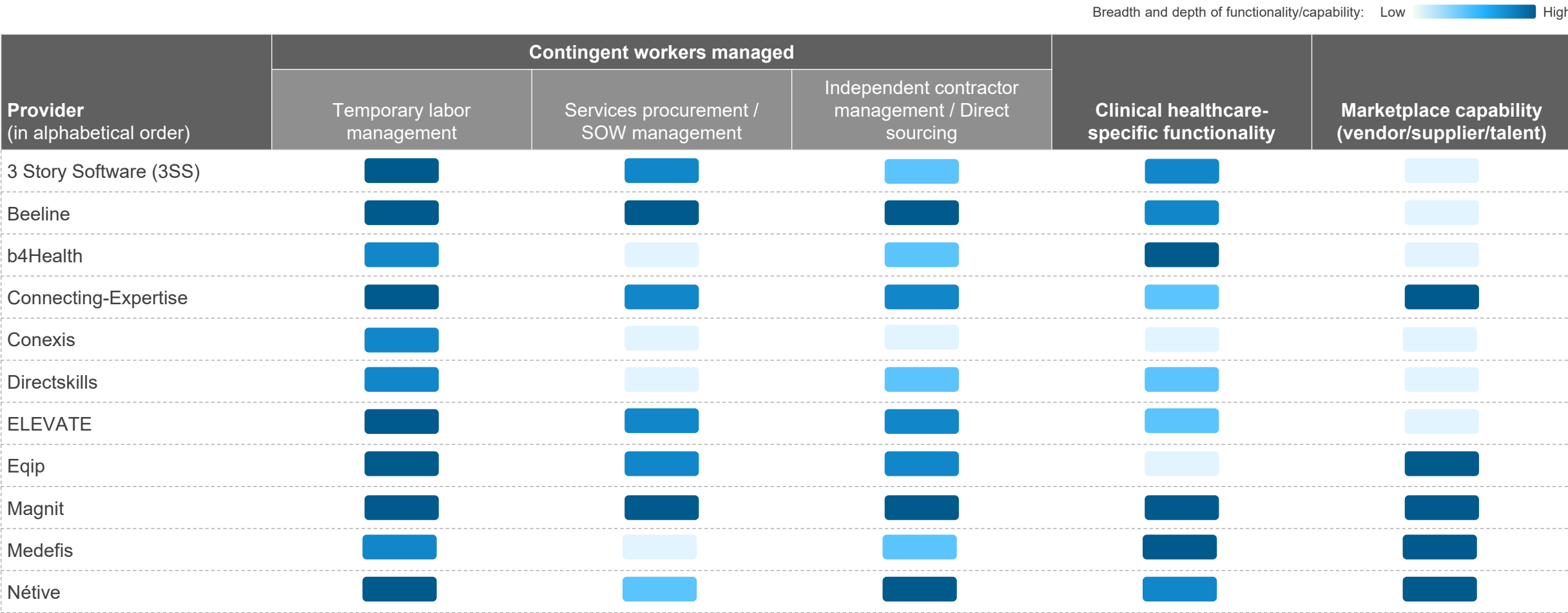
... and several of them have a regional (multiple countries in a region) and global (multi-regional) presence

Major VMS providers in key countries
Arranged alphabetically

Australia	Belgium	Canada	France	Germany	India
					
Sweden	Switzerland	The Netherlands	UK	US	
					

VMS capability overview (page 1 of 2)

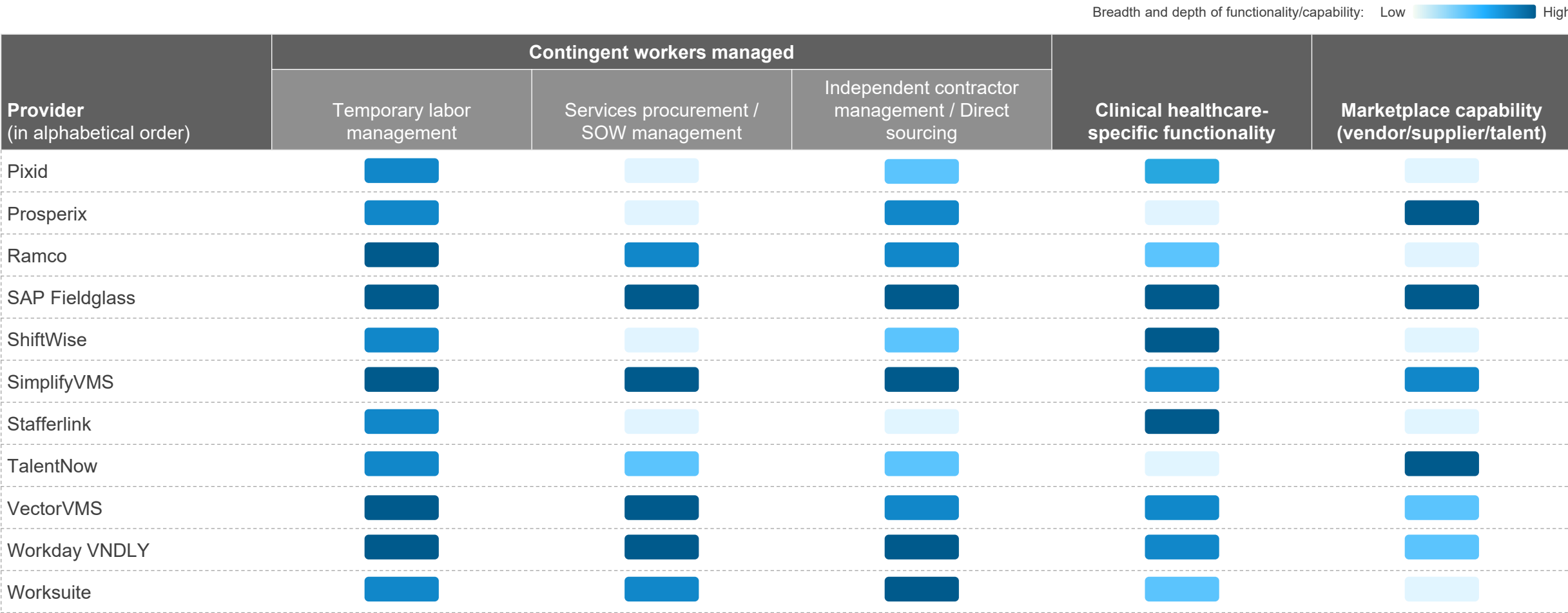
VMSs are evolving beyond traditional temporary labor management (staff augmentation) into other contingent workforce areas; however, the focus and maturity of VMSs vary significantly



Note: The above analysis is based on providers' relative functionalities/capabilities across different modules. However, enterprises need to evaluate the breadth and depth of capabilities against their specific set of requirements when selecting a VMS

VMS capability overview (page 2 of 2)

VMSs are evolving beyond traditional temporary labor management (staff augmentation) into other contingent workforce areas; however, the focus and maturity of VMSs vary significantly



Note: The above analysis is based on providers' relative functionalities/capabilities across different modules. However, enterprises need to evaluate the breadth and depth of capabilities against their specific set of requirements when selecting a VMS

VMS market share by Spend Under Management (SUM)

The VMS market witnessed strong growth momentum in 2022 across regions, as providers expanded their market presence, service offerings, and client portfolios

Providers' VMS market share by Spend Under managed (SUM); 2022
(Providers are listed in alphabetical order within each category)



Providers' YoY growth in VMS SUM; 2022
(Providers are listed in alphabetical order within each category)



VMS market share by industry

VMS providers continue to expand their industry coverage, including in high-volume, shift-based verticals, such as light industrials, and relatively untapped industries, such as government / public sector

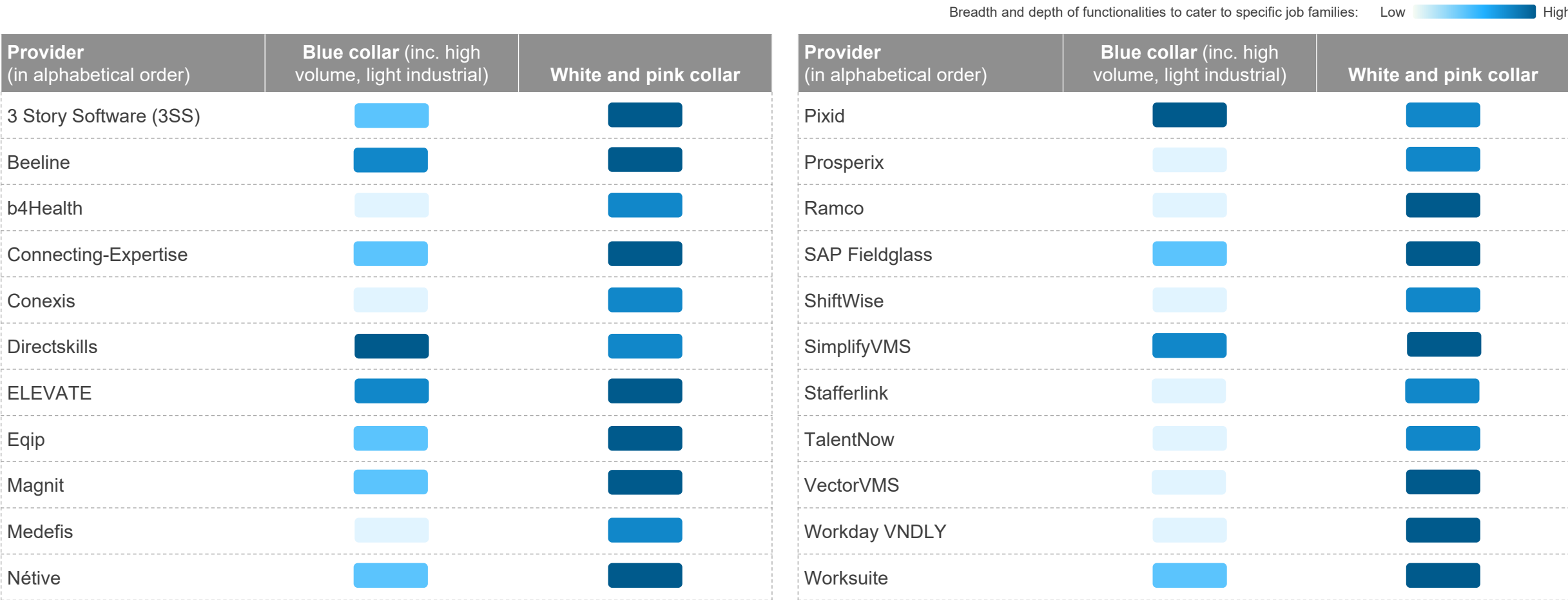
Top service providers across industries by number of active clients

Top service providers (arranged alphabetically)

 BFSI	 Energy & utilities	 Healthcare	 Hi-tech & telecom
 A HAYS COMPANY beeline® connectingexpertise X ELEVATE Magnit @simplify prosperix SAP Fieldglass	beeline® connectingexpertise X equip Magnit pixid X SAP Fieldglass workday VNDLY	b4health Magnit Medefis SHIFTWISE SAP Fieldglass @simplify stafferlink VectorVMS	 A HAYS COMPANY beeline® Conexis Magnit ramco SAP Fieldglass talentnow worksuite
 Government / public sector	 Manufacturing	 Pharmaceutical & life sciences	 Retail
beeline® Magnit nétive SAP Fieldglass VectorVMS workday VNDLY	beeline® Conexis Directskills ELEVATE nétive pixid X SAP Fieldglass workday VNDLY	beeline® connectingexpertise X Magnit pixid X SAP Fieldglass @simplify	beeline® Directskills Magnit pixid X SAP Fieldglass worksuite

VMS provider capability by job types

Most VMSs focus on white-collar job roles; however, with increased demand, they are adding blue collar job-specific functionalities to their platforms



Note 1: Blue collar includes operations, production, mining, construction, maintenance, technical installation, facilities, janitorial, security, and soldiers
Note 2: White and pink collar includes engineers / IT professionals / Research / Scientist, accounting, finance, legal professionals, life sciences, and call-center professionals

05

Enterprise sourcing considerations

- Leaders
 - Beeline
 - Magnit
 - SAP Fieldglass
 - SimplifyVMS
 - Workday VNDLY

Beeline (page 1 of 2)

Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Beeline is a US-based extended workforce platform for sourcing and managing contingent workforce. Its VMS solution supports the management of temporary workers, services procurement / Statement of Work (SOW), and Independent Contractors (ICs) / freelancers
- It has experience in catering to clients across all the major industries, geographies, and deal sizes. Some referenced clients also highlighted its global reach as a key strength
- Beeline is making rapid investments to realize its transformation vision of offering a platform-driven approach for CWM. Its recent acquisition of Utmost enables it to offer total talent visibility to clients through its Global Workforce Intelligence module with real-time comprehensive dashboards
 - It is also developing a configurable centralized interface to source all types of workers
 - It is investing in Worker Hub, a talent pool, to enable searching of all types of work and workers
 - It is developing a compliance anomaly engine to report, control, and proactively manage risks
- Beeline is taking a person-specific view to enhance its offerings. It has designed and implemented a personalized hiring manager experience and is investing in a new talent experience as well. Its talent experience aims to increase workforce participation and accurately capture DE&I metrics
 - It has developed features, such as AI-based resume visualizer and quick approvals, to enhance the hiring manager experience
 - It is also investing in self-managed worker profiles to improve talent experience
- Beeline has strong capabilities to support direct sourcing. It offers API-based architecture to allow seamless integration with talent pooling technology partners. It also has features such as automated bill rate calculation for directly sourced workers
- It has developed an end-to-end SOW module by building capabilities across source-to-contract and procure-to-pay processes including RFx for vendor sourcing and negotiation and SOW creation
- Beeline has acquired JoinedUp, a shift-based workforce solution, and added functionalities, such as shift planning and scheduling, to its suite to cater to high-volume as well as healthcare-specific job roles
- It offers advanced analytics with visualization options to build comprehensive and interactive dashboards for different stakeholders. It leverages its strategic partnership with Brightfield and incorporates its market data, in addition to Beeline’s client data, to offer market and peer benchmarking analytics. It is also expanding its supplier analytics dashboards to provide supplier performance scorecards
- Referenced clients lauded the overall partnership and relationship management of Beeline

Beeline (page 2 of 2)

Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- While Beeline has a global solution with experience across geographies, enterprises need to evaluate its capabilities to address local/country-specific requirements
- Though it is trying to enter the small and mid-market segments, Beeline’s offerings have traditionally been more attractive to the large-market clients. Hence, the extent of tailoring of features and functionalities for the mid-market is still unclear
- Following recent acquisitions of Utmost and JoinedUp, Beeline has been focusing on rapidly integrating these platforms with its own platform. Prospective clients needs to evaluate the extent of integration of these technologies vis-à-vis their needs
- While Beeline is investing in a cloud modernization strategy, it currently does not offer its clients a complete, multi-tenant SaaS offering. Clients need to consider their specific requirements in terms of the configuration and integrations required
- While Beeline enables direct sourcing platforms and channel integrations, it currently does not offer its own talent marketplace
- Referenced clients expect Beeline to improve its configurability and self-service capabilities. Clients also expect it to get quicker at the resolution of fixes
- Few referenced clients further highlighted integration with enterprise software and other applications as an area of improvement for Beeline

Magnit (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Magnit is a US-based provider of solutions for the procurement and management of contingent labor to clients globally. Apart from its proprietary VMS solution, it also offers MSP, direct sourcing, market intelligence, and payrolling solutions to its clients
- It has significant experience in managing all contingent categories including temporary labor, services procurement / SOW, and ICs
- Magnit is continuously adding several technologies to its suite through both organic and inorganic investments to meet the end-to-end talent management needs of its clients
 - It acquired Workforce Logiq, a VMS, MSP, RPO, direct sourcing, payrolling, and talent analytics provider, to strengthen its core offerings and expand its geographic presence
 - It has also been able to achieve significant expansion into the direct sourcing space with its clients, backed by its acquisition of WillHire and strategic partnership with eightfold.ai
 - It has also developed strategic partnerships with Glider AI (assessment and skill intelligence platform) and Ceredian (on-demand pay platform) to enhance its offerings to clients
- It has developed an end-to-end SOW module by building capabilities across source-to-pay, including RFx for vendor sourcing and negotiation and SOW creation
- It has developed a proprietary integration platform called Magnit IO, which is a highly configurable, scalable, and a system agnostic integration platform
- It has strong capabilities on the healthcare side, backed by its sister company Right Sourcing. It supports the entire gamut of workflow and requirements for the healthcare industry
- It is supported across web, mobile, tablet, and wearables. It is one of the few VMSs in the market with dedicated mobile applications for managers, workers, and suppliers
- It has a strong analytics portal, Magnit Discovery, which provides comprehensive real-time workforce analytics and actionable insights. Referenced clients were also particularly appreciative of its market intelligence and data analytics capabilities
 - It offers real-time rate intelligence through its agile RatePoint platform. It has recently introduced a new decision wizard combined with pay intelligence to help hiring managers make external resource decisions
 - It continuously incorporates new dashboards related to areas such as spend, DE&I, total talent, SOW, and other contingent workforce metrics, to provide the most relevant insights to its clients
 - With the acquisition of Workforce Logiq, it now has access to IQ Analytics CenterSM and ENGAGE Talent, which provides it with data and AI-driven models for discovering and retaining talent
- Referenced clients highlighted customer support and end-to-end service availability as its key strengths

Magnit (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- While Magnit has strengthened its global capabilities and supports multiple currencies and languages, its current client base is the strongest in North America. Clients beyond North America, looking for a completely localized solution, need to evaluate its capabilities vis-à-vis their requirements
- Magnit is currently underway integrating the host of technologies it acquired recently; however, clients need to evaluate the extent of integrations currently available vis-à-vis their requirements
- Traditionally, Magnit offers its MSP and VMS as a bundled solution. Clients need to carefully evaluate the extent of access to different components and Magnit’s experience in case of leveraging specific/piecemeal solution components
- While it has made significant investments to enhance its shift scheduling functionalities to manage blue collar workforce, enterprises should carefully evaluate the depth and breadth of these capabilities vis-à-vis their requirements
- While Magnit has clients across several industries, its experience in catering to clients from industries, such as manufacturing, government / public sector, and energy and utilities, is limited. Clients from these industries need to evaluate its capabilities carefully
- Some referenced clients highlighted the scope for Magnit to be more proactive in sharing its product features and developments to help them become more efficient

SAP Fieldglass (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- SAP is a multinational software corporation that develops enterprise software to manage business operations and customer relations. SAP Fieldglass, its VMS solution, has significant experience in managing all contingent categories including temporary labor, services procurement / SOW, and ICs / freelancers
- It is one of the largest VMS providers in terms of spend managed and its value proposition is particularly appealing to large-market clients with significant contingent headcount and associated spend to manage. Its expertise spans all the major industries and geographies
- SAP Fieldglass offers end-to-end services procurement management functionalities to support the entire source-to-pay cycle including RFx for vendor sourcing and negotiation and SOW creation
- Over the years, it has developed partnerships with all the leading talent-related service and technology providers that are accessible to clients through its digital app store, including MSPs, talent pool curation tools, freelancer platforms, and compliance tools
- In response to the growing demand for direct sourcing, it has recently launched a talent network module. This allows hiring managers to source, maintain, and manage a central repository of contingent workers including ex-contractors
- Its integrations with other core SAP applications, such as SAP S/4 HANA, SAP Ariba, and SAP SuccessFactors, provide total talent benefits to clients
- SAP Fieldglass recently released a new module to manage blue collar job roles in asset-intensive industries such as oil and gas, chemicals, mining, and utilities
 - It allows organizations to quickly onboard large volumes of external workers, integrate with gate pass systems, and process complex time rules daily
 - It is expanding its ecosystem network through partnerships and integrations to enhance transparency and enable asset and access management
- SAP Fieldglass also uses analytics to support decision-making across the entire application
 - It offers advanced capabilities, such as guided workflow / decision tree support and peer benchmarking, for managing the entire contingent workforce hiring process effectively
 - It provides real-time rate benchmarks through its rate guidance tool that helps users compare rates with the Fieldglass community
- It has a dedicated mobile application for hiring managers and workers. The application supports various features from requisition management to timesheet filling

SAP Fieldglass (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- SAP Fieldglass is a global platform and has deployed instances in more countries than any other VMS. However, prospective clients need to evaluate the extent of integration and localization to attain the maximum benefits of a centralized contingent program
- Small- and mid-market clients with relatively simpler requirements may not find its offering compelling in terms of the configuration to meet their needs as well as pricing requirements
- While SAP Fieldglass supports management of all contingent worker categories, the breadth and depth of its independent contractors / freelancers may not be as robust as purpose-built freelancer management platforms
- Given SAP Fieldglass has been built on a legacy infrastructure, its ability to quickly incorporate changes, including addition of next-generation technologies such as AI and automation, is somewhat limited
 - As a result, its UI/UX may not be the most intuitive and changes/updates to the system take longer compared to some of the newer VMSs in the market
 - Lack of agility and longer time-to-market with key changes have been highlighted as limitations by prospective clients
- While SAP Fieldglass is developing its own features and functionalities to support direct sourcing, prospective clients need to evaluate the available options vis-à-vis their specific requirements
- While SAP has invested in reporting and analytics functionalities, it does not offer other advanced capabilities such as predictive analytics to its clients

SimplifyVMS (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- SimplifyVMS is a US-based contingent workforce technology solutions provider offering a comprehensive VMS solution that supports the management of temporary workers, services procurement / SOW, and ICs / freelancers
- It continues to gain significant traction owing to its modern UI/UX and architecture, as well as its rapidly deployable functionality. It has been able to demonstrate ability to cater to the needs of clients across all the major industries, geographies, and client sizes (small, mid, and large)
- It has strong capabilities and functionalities to support direct sourcing and talent pool creation and management
 - It can white-label and customize the direct sourcing module to replicate configurations based on clients’ requirements from aesthetics, functional, and engagement perspectives
 - Its direct sourcing module is connected to several job boards by using macro-integration and a job can be released from SimplifyVMS to internal as well as external job boards
- SimplifyVMS has developed an end-to-end services procurement management module with functionalities supporting SOW creation, RFx for vendor sourcing, redlining, multi-bidding, and negotiation
- SimplifyVMS has developed several innovative features to simplify platform usage and enable collaboration
 - It offers a customizable and configurable decision tree wizard to clients that enables users to manage worker classification and guides them to appropriate workflows
 - It offers skill-based candidate comparison and matching features
 - It has a chatbot that offers contextual support and enhances collaboration between various stakeholders
- It has a dedicated mobile application having role-based access for hiring managers, workers, and suppliers. The application supports various features and functionalities for requisition, timesheet, and expense management as well as analytics dashboards
- SimplifyVMS has a built-in reporting and analytics module that can connect to multiple data platforms and provides custom report builder options for clients
 - It allows self-service reporting and incorporates advanced functionalities such as trend and predictive analytics
 - It also offers market rate intelligence for similar roles across countries to help clients make informed sourcing decisions
- SimplifyVMS has the vision to enable Total Talent Management (TTM) for clients by supporting permanent worker-related features and seamless integrations. It integrates with HCM, ERP, ATS, and other tools and can trigger actions such as job posting, onboarding/off-boarding, and payroll
- Referenced clients highlighted flexibility of the tool, customization, and user experience as area of strength

SimplifyVMS (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- SimplifyVMS is a global platform and has deployed instances in many countries. However, prospective clients need to evaluate the extent of localization with their country's regulations and requirements
- While it caters to buyers of all sizes (small, mid, and large), its ability to cater to large multi-country programs with complex requirements is not completely tested
- Even as it continues to invest in direct sourcing and talent pooling functionalities, prospective clients need to evaluate the breadth and depth of its capabilities carefully
- While it has a strategic focus on healthcare industry, prospective clients need to carefully evaluate the comprehensiveness of the capabilities, such as shift scheduling and credentialing, in the healthcare context
- While it has an end-to-end module for services procurement, its flexibility and expertise in configuring services procurement-related workflows to meet varying client requirements is not completely tested
- Referenced clients highlighted speed and accuracy of enhancement requests as one of the areas of improvement
- Referenced clients also expect SimplifyVMS to improve its compliance-related functionalities

Workday VNDLY (page 1 of 2)

Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Workday VNDLY is a US-based provider of end-to-end contingent workforce management technology. Its VMS solution supports the management of temporary workers, services procurement / SOW, and ICs / freelancers
- VNDLY continues to rapidly expand its market presence and share, that received a further boost following its acquisition by Workday. Given the deep integrations between the two platforms, it is positioned the strongest in the market to offer true Total Talent Management (TTM) solutions to its clients
 - It has developed an integrated dashboard which holistically represents an enterprise's organizational structure, including both permanent and contingent workers, and allows it to take actions directly from the dashboard
 - It has interoperable functionalities such as onboarding workflows, conversational AI, and time and expense tracking, which are also integrated and available through the Workday mobile application
- Workday VNDLY's modern SaaS offering with a next-generation UI/UX and integration-savvy architecture continues to be its core strength. It has also developed strategic partnerships with MSPs to offer customized solutions to its clients
- It has robust capabilities to manage services procurement with functionality to support the entire source-to-pay cycle including RFx for vendor sourcing and negotiation and SOW creation
- Its USP is its data migration capability, which is much in demand among enterprises amid the paucity of VMSs with strong data migration capabilities. It additionally provides bulk upload and bulk edit capabilities to reduce the manual intervention needed to execute these tasks
- It has capabilities to support talent pool creation and management in its platform. It continues to develop integrations with third-party platforms for direct sourcing
- Workday VNDLY continues to make significant investments to utilize next-generation technologies such as automation, AI/ML, and NLP
 - It has an automated virtual assistant, AVA, which helps stakeholders make decisions and reduces support-related questions to the program team
 - It has a configurable decision wizard that helps the manager to make right talent-related decisions like choosing correct type of requisition and performing cost analysis
- It continues to build on its partnership network with various other ERPs, provisioning, and identity management systems as well to cater to varying requirements of clients
- Workday VNDLY offers comprehensive reporting capabilities including custom report builder, permission management, scheduling and sharing functionality, and a dashboard with high granularity
- Its billing and payments functionalities include a rate calculator that provides customization options for bill rate calculations, an invoice builder that can tailor the different invoice fields to meet their specific needs, and customizable taxation
- Referenced clients were particularly appreciative of the reporting feature and the ease of use of the platform. Clients also highlighted customer service and continuous improvement of the platform as areas of strength

Workday VNDLY (page 2 of 2)

Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- While Workday VNDLY has global capabilities, its current client base is the strongest in North America. Clients beyond North America, looking for a completely localized solution, need to evaluate its capabilities vis-à-vis their specific requirements
- Workday VNDLY supports the entire gamut of workflow and requirements for the healthcare industry. However, considering the complex shift and credential management in clinical healthcare, clients should carefully evaluate the product’s suitability in the healthcare context
- Enterprises looking for robust direct sourcing and talent pooling-related functionalities should carefully evaluate the breadth and depth of Workday VNDLY’s current capabilities. Referenced clients also highlighted the scope for Workday VNDLY to improve its direct sourcing module
- Although it has robust reporting and analytics capabilities, it is yet to expand its capabilities to advanced analytics features such as predictive and prescriptive analytics
- Given its deep integration with Workday, some of its features and functionalities are available through the Workday mobile application. However, it does not have native mobile applications for different stakeholder personas
- Workday VNDLY aims to leverage Workday Skills Cloud to offer candidate-matching functionality to its clients; however, it is currently still under development and not fully operational
- Referenced clients highlighted the lack of an automated interview scheduling functionality as a limitation. Some clients also expect Workday VNDLY to improve platform flexibility according to client requirements

05

Enterprise sourcing considerations

- Major Contenders

-
- | | |
|--------------------------|-------------|
| – 3 Story Software (3SS) | – Nétive |
| – b4Health | – ShiftWise |
| – Connecting-Expertise | – Pixid |
| – Directskills | – Prosperix |
| – ELEVATE | – Ramco |
| – Equip | – VectorVMS |
| – Medefis | – Worksuite |

3 Story Software (3SS) (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- 3 Story Software (3SS) is a US-headquartered VMS provider owned by Hays Plc, a specialist recruitment and human resource services firm. 3SS helps clients manage traditional temporary workers, services procurement / SOW, and ICs / freelancers
- While its origin is in North America, it has been able to gain significant traction in EMEA and APAC (primarily in ANZ) on the back of Hays' MSP business. It has recently integrated its German instance with the global instance to provide its clients with a more integrated solution
- It is also one of the few VMS providers with experience in catering to buyers of all types – across industries and client sizes (small, midsize, and large) – and across all the key regions
- 3SS developed a highly configurable platform to support the MSP environment, particularly to cater to the needs of its sister MSP and biggest client (in terms of common clients served) – Hays
 - Owing to in-house MSP expertise, 3SS has been quick to latch on to the latest trends. Its ongoing investments – in direct sourcing, integrations, time and expense management enhancements, and DE&I-related features – are all in line with its vision to cater to MSP programs better
 - It also has a strong network of other MSP partnerships, through which it serves multiple clients
- 3SS provides a customizable workflow creation capability enabling tailor-made configurations at granular levels such as workflow creation based on organization structure and site- and client-level configuration capability
- 3SS continues to invest to improve the product for better stakeholder experience, mainly by improving its UI/UX
 - It invested in rewriting of its timesheets and expense module for quick and efficient submission, approval, and overall management processes
 - It further implemented a digital adoption platform to provide immediate and context-sensitive help to its users
- It has pre-built integrations with various enterprise systems
 - It has a VMS as a hub strategy with partner connectors/APIs to link direct sourcing, FMS, ATS, and talent pool solutions to the VMS ecosystem
 - It has a pre-built integration with Boomi, a Dell integration middleware product, to connect various applications. Connections include Oracle HCM, SAP, NetSuite, SuccessFactors, Salesforce, and Workday
- 3SS is continuously investing in developing functionalities to help its clients achieve their DE&I goals. It has functionalities for candidate surveys, anonymous data collection, analytical reporting, and blind recruiting. It provides a Web Content Accessibility Guidelines (WCAG) 2.1-compliant interface. The platform automatically recognizes users with disabilities by employing an assistive reading technology

3 Story Software (3SS) (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Considering the limited number of direct clients in its portfolio owing to the majority of its clients being with their own and partner MSPs, enterprises looking for a direct partnership with the VMS provider should carefully evaluate its features and engagement model
- While 3SS is configurable and offers shift and compliance-related features, these functionalities may be limited currently, particularly in the context of the healthcare. It also has limited experience in managing blue collar job roles and hence, clients need to evaluate its capabilities carefully
- It has the functionality to manage administrative services procurement activities such as headcount tracking and billing and payments. However, it lacks advanced functionalities such as RFx (RFI/RFP) management and contract negotiation
- 3SS offers web applications and its platform is optimized for mobile. Clients looking for a VMS provider with native mobile capabilities may find its offerings limited currently
- While it has made significant advances in its reporting and analytics capabilities, 3SS currently does not offer predictive analytics and the ability to benchmark different metrics, such as rate and salary data, against other similar enterprise talent management programs
- It has basic talent pooling functionalities, and it is looking to partner with other direct sourcing and talent pooling technologies. However, clients need to carefully evaluate the extent of integration vis-à-vis their specific needs

b4Health (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- b4Health is a US-based VMS provider, owned by AMN Healthcare, that services MSPs. It helps healthcare entities manage their staffing relationships and internal resource pool as well as the temporary labor and independent contractors / freelancers
- It offers self-service and flexible custom configuration options primarily catering to the healthcare talent acquisition-related workflows of its clients and has strategic partnerships with multiple MSPs as well
- b4Health has comprehensive shift management, credentialing, and time capture capabilities to meet the complex healthcare-specific requirements. It can manage shifts for different healthcare roles (per diems, locums, travel nurses, etc.)
 - Apart from integrating with external timekeeping systems, its web-based and mobile time capture functionality also allows for paper timecard uploading
 - It has an automatic shift creation capability that is based on provider time capture incorporating rate assignment, placement rules, and contract terms
- It can manage both internal resources and agency pools. Orders and assignments can be first made available to internal labor pool and then to external contingent labor pools. Additionally, it has a business rules engine that can match candidates to open roles based on compliance documentation
- It has a dedicated mobile application for hiring managers and workers, which is completely integrated with the VMS
 - It enables time capture agility. The application is additionally geo-enabled and can automatically identify the location of the worker
 - It allows both internal resource pool and agency providers to self-serve and search for both per diem and contract travel assignments
- As b4Health is an AMN Healthcare-owned VMS provider, enterprises also have access to the domain expertise and additional offerings of the broader group including MSP and RPO as well as its suite of other healthcare-specific technologies
- b4Health is constantly investing in developing new features to improve its VMS user experience
 - It has developed the functionality to provide automated updates to clients on documents upload or expiration
 - It has made custom rate configuration enhancements for better rate management for clients
- Referenced clients lauded the b4Health platform for its ease of use and flexibility. Clients also highlighted its customer support as a key strength

b4Health (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- b4Health is yet to expand the geographical reach of its capabilities in catering to healthcare clients outside North America
- So far, it only has experience in managing small healthcare providers and lacks the experience of managing midsize and large clients. Enterprises with large spends and requirements need to evaluate its capabilities carefully
- Buyers looking for a VMS solution with services procurement / SOW may find its capabilities inadequate
- For first time users, its UI/UX may not be the easiest to navigate. Referenced clients opined that b4Health can improve management of locums to improve overall user experience
- Given it is one of the more recent additions to AMN Healthcare’s portfolio, the extent of integration with broader AMN Healthcare technologies needs to be evaluated carefully by prospective clients
- It currently does not offer many solutions leveraging next-generation technologies such as chatbots, automated interview scheduling, or guided workflows
- While b4Health supports basic reporting and analytics capabilities, it does not yet offer advanced analytics capabilities such as predictive analytics and the ability to benchmark different metrics, such as rate and salary data, against other similar enterprise talent management programs

Connecting-Expertise (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Connecting-Expertise, a Pixid Group company, is a Belgium-based contingent workforce management solutions provider. Its VMS supports temporary labor management, services procurement / SOW, and independent contractor (ICs) / freelancer management
- Its total talent vision received a boost following its acquisition by Pixid. It now has access to the wider Pixid Group products such as ATs and screening tools through the Pixid hub. Small- and mid-market clients looking for a one-stop technology provider will find this a compelling proposition
- It has a vendor marketplace with over 5,000 registered suppliers and is used by a significant proportion of its clients for direct sourcing
 - The marketplace provides access to both suppliers and freelancers with clear categorization
 - One of its differentiators is its ability to match the specialization requirements of clients with the type of talent they are looking for, which includes both freelancers and suppliers
- Connecting-Expertise continues to invest in its services procurement capabilities to expand its coverage across the SOW management spectrum including RFX for vendor sourcing and negotiation and SOW creation
- Over the past years, Connecting-Expertise has enhanced its capabilities to manage requirements for the healthcare industry:
 - It has launched C-Cares, a separate healthcare application to facilitate efficient requisition and sourcing of medical professionals
 - It also has partnerships with dibbs, a students and young professionals requisition platform, and Lancr, a mobile talent pool platform
- Connecting-Expertise is further enhancing its AI/ML and automation capabilities and has developed use cases such as recommending suppliers on which requisitions to work on, sourcing the right suppliers for clients, and predicting the number of candidates to expect for a particular role
- It has also been making investments in its analytics and reporting capabilities and has made several improvements in it
 - It now offers pre-configured reports in multiple languages
 - It also supports interactive dashboards and customizable drill-down capabilities with features to export data as well

Connecting-Expertise (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Connecting-Expertise has the strongest presence in Belgium and has limited presence beyond the Continental European market, which could be a deterrent for enterprises looking for global VMS deployments
- So far, it only has experience in managing small clients and lacks experience in managing midsize and large clients
- Its marketplace provides access to white-collar workers, particularly engineers / IT professionals; clients from industries, such as manufacturing and retail, with a blue-collar-heavy workforce may find its experience in managing blue collar roles to be limited
- While Connecting-Expertise’s own marketplace aids in direct sourcing, its ability to support end-to-end and complex direct sourcing programs is not completely tested
- Lack of native mobile applications for hiring managers, workers, and suppliers is a limitation for clients looking for a VMS provider with native mobile capabilities
- While Connecting-Expertise currently offers functionalities to track and report program and supplier performance, providers looking for comprehensive analytics capabilities, such as salary/rate benchmarking, may find its functionalities to be limited

Directskills (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Directskills is a France-based VMS provider that primarily caters to the French market and manages temporary labor procurement for its clients
- Its strength lies in its comprehensive shift management capabilities, making it a compelling platform for managing high-volume and shift-based work. Clients looking for strong shift management will find its offering compelling
 - Its functionalities support one-day shift management, shift management on specific days, and workers swapping assignments
 - Its strength is in managing blue collar workers across industries such as manufacturing, retail, construction, and transport and logistics
- Directskills offers robust compliance management-related functionalities adhering to all local French laws. Its expertise in the French market is a differentiator given the complexity of laws governing temporary labor in the country
 - It is the one of the very few providers in France that offer self-billing and contracting functionality to help clients reduce errors, achieve cost savings, and increase productivity
 - Its platform also incorporates and facilitates complex payroll rules including pay parity / equal pay treatment and the associated rules and calculations
 - Referenced clients also highlighted compliance capabilities of the platform in France as an area of strength
- It has a partnership with Qlik Sense to offer reporting and analytics to clients. It continues to develop multilingual, multi-currency, and multi-format dates functionality with the vision to support its client's geographic expansion plans outside France
- It is investing in enhancing its existing temporary workforce management functionalities to make the platform agile and flexible
 - It aims to develop a comprehensive solution that can cater to an agile workforce by developing in-depth talent pooling, internal mobility, and compliance capabilities
 - Referenced clients were also particularly appreciative of its temporary workforce module

Directskills (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- While Directskills is developing capabilities and expanding its presence in the European market, it currently has limited experience in serving markets beyond France. Referenced clients also highlighted its limited global coverage as a constraint
- It lacks experience in catering to skilled industries such as hi-tech and telecom and healthcare and pharmaceuticals. Clients looking to manage skilled workers with complex requirements should carefully evaluate its capabilities
- Directskills’ limited coverage, beyond temporary labor management, can be a limitation for clients looking to manage all contingent talent through the VMS
 - It is yet to expand its capabilities to manage services procurement and ICs/freelancers
 - It currently has limited functionalities to support direct sourcing and talent pooling for its clients
- While it has invested in its reporting and analytics functionalities, providers looking for advanced analytics may find its capabilities limited
- As enterprises are moving from single technologies to best-of-breed technologies, lack of integration capabilities with next-generation point solutions can be an area of concern for enterprises
- Referenced clients highlighted ease of use of the platform as an area of improvement

ELEVATE (page 1 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- ELEVATE is a proprietary VMS solution of Elevated Resources, a US-based talent acquisition services and technology provider. It supports the management of all contingent categories including temporary labor, services procurement / SOW, and ICs / freelancers
- Its sweet spot is the mid-market and its strength lies in managing high-volume shift-based workers across light industrial, manufacturing, distribution, logistics, and food processing industries. The platform offers several features, such as dynamic rate cards and shift management capabilities, which facilitate high-volume and mass-action tasks
- While ELEVATE has the backing of its MSP arm, it has also formed strategic partnerships with several other MSPs and staffing players that primarily cater to the mid-market
- ELEVATE has strong capabilities and functionalities to support direct sourcing and talent pool creation and management. It has a dedicated mobile platform, which in partnership with Clowder, a third-party engagement management solution, allows for community building and content management for direct sourcing and talent pool creation
- It is developing ELEVATE Connect, a proprietary integration hub, with the vision of seamlessly integrating with key enterprise applications by leveraging features such as low-code/no-code integrations, workflow automation, and access to enterprise application connectors
- ELEVATE has built an effective SOW module capable of managing specific key processes within the SOW management life cycle, both on the source-to-contract and procure-to-pay sides
- It offers a robust in-app analytics capability and is further investing in expanding its visualizations. It offers interactive widget-based dashboards featuring a fully configurable drag-and-drop interface that provides real-time insights into workforce and spend
- ELEVATE continues to invest in innovative features to enhance its VMS user experience
 - It supports email channels to help hiring managers take action on approvals without signing into the system
 - It offers meal and break time handling and tracking functionality to meet the mandates of the California Meal Break and Rest Break Law
 - Its dedicated mobile application supports all personas and provides functionalities ranging from requirement creation to timesheet and expense approvals
- Referenced clients highlighted reporting and analytics dashboards, responsiveness, and flexibility of the platform as key strengths

ELEVATE (page 2 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- While ELEVATE has presence in the UK and India, its current client base is the strongest in the US. Clients within the US, looking to expand to other regions, need to evaluate its capabilities vis-à-vis their specific requirements
- So far, it only has experience in managing small- and mid-market clients and lacks experience in managing large clients. Enterprises with large spends and complex requirements need to evaluate its capabilities carefully
- It has functionalities to manage several services procurement activities such as vendor sourcing, headcount tracking, and billing and payments. However, it lacks a few of the advanced functionalities such as redlining capability and SOW creation
- While ELEVATE leverages AI in analytics solution, it is yet to invest in use cases employing next-generation technologies such as chatbots and Digital Adoption Platform (DAP) for self-service
- While it has a vision to create a robust integration-enabled platform, it is still in the early stages and is not completely tested yet. Some referenced clients also expect ELEVATE to improve integrations with the HRIS system

Equip (page 1 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Equip is a Switzerland-based enterprise talent-tech solutions provider that focuses on the management of external workforce. Its VMS supports management of temporary workers, services procurement / SOW, and ICs / freelancers
- It has evolved from a marketplace background with over 8,000 pre-identified and vetted suppliers with more than one million verified contractors across regions
 - Its marketplace is an important channel for direct sourcing for its clients
 - Further, it has developed a dedicated module for internal mobility and skill management, Worksource, to identify internal resources and skills prior to using suppliers or the marketplace
- Equip is built on a modern technology infrastructure and offers an interactive and customizable solution with a good UI/UX and multi-tenant SaaS offering. It also supports guided workflow / decision tree capability for selecting the right requisition option based on client requirements
- It recently developed a quick-to-deploy VMS light solution with an easy to use and customizable interface, currently catering to only white-collar job roles. Small- and mid-market enterprises with simple requirements may find the offering compelling
- It has a self-service portal for hiring managers with Verified Digital Profiles (VDP) of candidates. It also offers AI-driven supplier selection, screening, and candidate ranking/matching features. Its Worksource module also incorporates VDP for internal candidates and independent contractors
- Equip continues to make significant enhancements to its services procurement module by building functionalities across both the source-to-contract and procure-to-pay processes
 - It offers functionalities for contract negotiation and SOW creation, and recently incorporated additional features to support PO changes for ongoing projects
 - It also supports hybrid SOW functionality for providing maximum flexibility of options with self-billing and invoicing capability
- It continues to enhance its reporting capabilities with over 40+ standard reports in the system. It also offers the ability to create custom reports for its clients to obtain real-time insights
- Equip has a strong focus on integrations and its API-based architecture allows integration into various technologies such as ERP, badge systems, contract management tools, document management systems, as well as MSP tools
- Referenced clients have lauded Equip’s proactiveness in new functionality updates as well as responsiveness and collaborative approach in managing its client relationships. They have also highlighted the speed and ease of use as areas of strength for the platform

Equip (page 2 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- While Equip is expanding its presence in other geographies, its current capabilities in regions apart from Continental Europe, primarily Switzerland and Sweden, are limited, which could be a deterrent for enterprises looking for global VMS deployments. Referenced clients also highlighted the need for a more global solution
- It has experience in managing small and midsize programs (in terms of spend managed) and lacks experience in managing large/complex programs. Thus, clients wishing to manage a large spend through the system should carefully evaluate the breadth and depth of its capabilities
- Though Equip offers basic shift scheduling and credentialing management, it has limited functionalities and experience in managing healthcare-specific programs and clinical workers such as per diems and locums
- While Equip has contract negotiation and SOW creation capabilities within its services procurement module, it does not support redlining functionality between managers and vendors to track changes
- Equip’s quick-to-deploy VMS light solution is not completely tested yet
- Equip offers a web application for its VMS for all involved user groups that is completely optimized for mobile as well. However, it does not have platform-specific mobile applications
- While Equip continues to invest in its reporting and analytics functionality and has integrations with analytics portals of MSP partners, self-managed programs (without MSP partners) may find its capabilities to be limited. Referenced clients also highlighted the need for further enhancements with regards to its reporting capabilities

Medefis (page 1 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Medefis is a US-based VMS provider owned by AMN Healthcare. It exclusively focuses on the healthcare industry and supports the management of temporary labor and ICs/freelancers
- It offers an Open Talent Marketplace (OTM) comprising over 1,000 registered suppliers. OTM is an open, competitive bidding marketplace of pre-identified and vetted suppliers where clients can post their requisitions for both clinical and non-clinical hires
 - OTM offers real-time visibility of bill rates offered by suppliers, thereby ensuring that its clients pay fair market rates
 - It provides access to candidates open for both permanent and contract positions
- It also offers credentialing management functionalities to pre-vet candidates before the start of their engagements
- Medefis' key differentiator lies with its TalentMatch functionality that ranks prospective candidates based on several parameters including rate, previous experience, and certifications and licenses
- It has built comprehensive market intelligence dashboards by feeding in data from its marketplace and broader AMN Healthcare data to provide clients visibility into real-time rate trends prevailing in the healthcare market
- As Medefis is an AMN Healthcare-owned VMS provider, enterprises also have access to the domain expertise and additional offerings of the broader group including MSP and RPO and other complementary VMS technologies (ShiftWise and b4Health)
- Medefis focuses on constantly updating its features and functionalities for clients. Some of the most recent capability enhancements include:
 - Per diem capability improvements for better management of orders
 - Automated credential management feature
 - Automated timekeeping functionality with suppliers entering time directly into the platform
- Referenced clients highlighted the ease of use and intuitiveness of the platform as areas of strength. They were also particularly appreciative of Medefis' overall relationship management and quick response to queries

Medefis (page 2 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Medefis is yet to expand the geographical reach of its capabilities to cater to healthcare clients based in regions outside North America
- The majority of the programs it currently caters to are small and midsize ones for healthcare providers. Enterprises with large and complex spend categories and requirements need to evaluate its capabilities carefully
- Medefis' primary proposition is its B2B marketplace. Enterprises looking for end-to-end traditional VMS functionalities may find its capabilities to be limited
 - It lacks capabilities to manage services procurement
 - It is yet to expand some of the key healthcare-specific capabilities such as advanced shift scheduling
- Even though Medefis has investment plans to utilize next-generation technologies, it currently does not offer many solutions employing technologies such as chatbots and guided workflows
- It does not currently offer native mobile applications for different stakeholders
- Although Medefis has readily available dashboards to provide real-time analytical insights to its users, it does not yet offer advanced analytics capabilities such as predictive analytics
- Some referenced clients highlighted the need for better process optimization

Nétive (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Nétive is a Netherlands-based workforce solutions provider. Its VMS solution has a component-based modular architecture built on Salesforce. It supports management of temporary labor, ICs / freelancers, and specific aspects of services procurement / SOW
- Its additional functionalities to manage permanent and shift-based blue collar roles (supported by a partner tool) offer a compelling proposition for mid-market clients looking for a one-stop solution. It is also investing in expanding its global capabilities by developing multi-currency and multi-language functionalities
- It has an open marketplace comprising various vendors and ICs. The marketplace helps users create talent pools for direct sourcing; it has also gained significant traction with its client base
- Nétive is a flexible self-service application that allows creation of customizable workflows
 - Recently, it added a configurable guided workflow/decision tree functionality to its suite of offerings to help clients select the right requisition option based on their requirements
 - Referenced clients were also particularly appreciative of the ease of use of the platform
- It provides its users with a Salesforce Einstein-based workforce analytics module that offers interactive widget-based dashboards and customizable drill-down features
 - In addition to descriptive and predictive analytics features, it also offers a skill-based hiring solution backed by comprehensive skills database and matching algorithms
 - It also offers diversity tracking, in addition to total talent analytics across all types of talent categories being managed in a program
- The company has a comprehensive compliance management system. It incorporates compliance management on various levels including GDPR, country-specific taxation and legislative rules, supplier terms and conditions, and employee and assignment-specific requirements
- Nétive continues to invest and enhance its integration capabilities. It has launched a data exchange and integration platform called Nétive Connect, which enables suppliers to directly use the VMS within their own front-/back-office systems through integration
- It supports healthcare-specific capabilities such as healthcare-specific taxation rules, shift management including worker ability to swap shifts on an assignment, and healthcare-specific compliance requirements
- Nétive has an AI-based CV parsing and matching software and has features to support multi-language matching, calculate rates, fulfillment time, as well as candidate market availability/retention. It also offers a job description analyzer functionality to scan for biased language in job description to increase inclusivity
- Referenced clients further highlighted relationship management and quick service as Nétive’s key strengths

Nétive (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Nétive is expanding its presence beyond its core market, the Netherlands, into other European countries such as Belgium and the UK. However, clients looking for multi-country and multi-regional VMS deployments should carefully evaluate its capabilities vis-à-vis their requirements
- It has experience in managing small and midsized programs (in terms of spend managed). Clients with large and complex spend management needs should carefully evaluate the breadth and depth of its capabilities given its relatively limited experience in managing such programs
- While it has clients across several industries, its experience in catering to clients from specific sectors, such as retail and hi-tech and telecom, is fairly limited
- Nétive currently has capabilities to manage administrative services procurement processes such as headcount tracking and billing and payments. It is investing in advanced sourcing-related functionalities such as RFx (RFI/RFP) management and contract negotiation; however, these are in the nascent stages and are yet to be tested fully
- It currently has a native mobile application only for hiring managers. Mobile applications for workers and suppliers are in its roadmap
- While Nétive has invested in its reporting and analytics capability, it currently does not offer integrations with third-party market data sources to benchmark different metrics, such as rate/salary, with the external market
- Referenced clients highlighted the speed and configurability of the platform as areas of improvement. They further opined that Nétive can improve its UI/UX and be more proactive in adopting next-generation technologies

ShiftWise (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- ShiftWise is a US-based talent management platform owned by AMN Healthcare. It is exclusively focused on midsize and large healthcare providers and supports management of temporary labor and independent contractors / freelancers
- It is one of the few healthcare-specific VMSs in the market that has the experience and capability to manage clinical (locums, per diems, travel nurses, etc.) as well as non-clinical roles
- ShiftWise's functionalities are highly tailored for the healthcare industry. It has robust shift scheduling and management as well as float pool management functionalities
 - It allows automated requirement checking against submitted candidates to ensure only qualified candidates come through
 - It allows the flexibility to incorporate healthcare-specific rate structures including complex shift differentials, markups and bill rate driven structures, and time and cost allocation by a healthcare facility
 - It is further adding features related to off-contract rate submissions, rate governance on extensions and maximum submittal thresholds, and supplier user experience enhancements
- In addition to ShiftWise's VMS capabilities, AMN Healthcare's MSP and RPO, its suite of technologies including complementary VMSs (Medefis and b4Health) provide it with the capability to offer a digital Total Talent Acquisition (TTA) solution
- It offers a dedicated mobile application, AMN Passport, especially designed for workers. It has features such as job matching, onboarding, credentialing, and timekeeping
- ShiftWise has a robust credentialing and compliance management capability to meet stringent healthcare requirements. It provides automated tracking of pending and expired credentials to keep them compliant in accordance with federal, state, and local laws
- It can manage both internal resources and agency pools. As part of the system, orders and assignments can be first made available to the internal labor pool and then as per business rules, to external contingent labor pools
- Over the past years, ShiftWise has invested heavily in business intelligence and reporting capabilities
 - It has developed advanced analytics dashboards with customizable drill-down capabilities and exportable reports to provide clients total visibility and insights into their workforce data, process efficiency, vendor performance, compliance, and financial management
 - It has built comprehensive market intelligence dashboards by feeding in data from sister AMN VMS platforms (Medefis and b4Health) to provide clients visibility on workforce usage and spend. Clients were also particularly appreciative of its market intelligence capabilities
- Referenced clients highlighted relationship management and customer support as key strengths. They further lauded the platform for its ease of use

ShiftWise (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- ShiftWise's current focus is exclusively on the US market and is yet to expand its geographical outreach to cater to healthcare clients beyond the US
- It is yet to expand its capabilities to manage services procurement. Buyers looking for a provider to manage services procurement using the VMS may find this to be a limitation
- While it allows for management of non-clinical roles and workflows through the system, its existing capabilities may be limited considering that it is built primarily to manage clinical hires
- While it has a dedicated mobile application for candidates/workers, it is yet to develop applications for other stakeholder personas
- While ShiftWise has investment plans to utilize next-generation technologies, it currently does not offer many use cases for employing these such as chatbots, AI-based candidate matching and ranking, and guided workflows
- Referenced clients expect ShiftWise to be more proactive in initiating rate conversations to drive down cost

Pixid (page 1 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Pixid Group is a France-based end-to-end recruitment solutions provider. Its Pixid VMS primarily supports staffing and recruitment supplier management for its clients. It offers its platform directly to staffing suppliers to let them onboard and manage their clients
- Pixid VMS is one of the largest in France and has an international VMS version primarily focused on EMEA. Its quick-to-deploy solution, plug-and-play infrastructure, and pay-as-you-go pricing offer compelling proposition to clients. Referenced clients are particularly appreciative of its ease of deployment and implementation
- It has added several technologies to its suite through both organic and inorganic investments to meet the end-to-end talent acquisition needs of its clients. Some investments include:
 - Acquisition of Connecting-Expertise, a cloud-based VMS platform focused on the Belgian market with automation capabilities across the hiring process
 - It also acquired Carerix for its ATS and CRM functionalities and The Internet Corporation for its Amris ATS and Zao social referral and background screening solutions
- Pixid intends to accelerate the total talent vision for clients through its Pixid hub, an integration hub for connecting multiple solutions such as ATS, VMS, and supplier technologies
 - It allows clients to integrate internal and external technologies under one ecosystem. These can be Pixid-owned/partner technologies, client-owned, or MSP-owned technology solutions
 - It has also developed a two-way integration with Bullhorn to enable seamless data transfer and single system use for clients
- It has a native mobile application for hiring managers and workers. The application can also be white-labeled and supports various features from contract signing to document management
- Pixid is constantly investing in developing new features to improve its VMS capability
 - In addition to Broadbean integration to support direct sourcing, it has also developed a new talent pooling feature that allows its suppliers to share talent pools with their clients even before a job requisition is created
 - It has also launched a new business intelligence module to create customizable dashboards to track important contingent workforce metrics for clients
- It has a strong partnership network to provide enhanced features and functionalities for its clients such as internal mobility, background verification, resume scoring, and reporting and analytics
- Referenced clients highlighted relationship management and quick service as areas of strength for Pixid

Pixid (page 2 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Pixid VMS has made significant inroads, beyond France, into the European market. While it continues to build additional capabilities and has plans for expansion in the US as well, clients looking for a global solution should evaluate its capabilities vis-à-vis their regional/local requirements
- Pixid has significant experience and capabilities in managing blue collar roles and its client base is also skewed toward blue collar industries such as manufacturing. Its experience in managing white-collar roles and clients in other industries is relatively untested
- Though Pixid offers basic shift scheduling and credentialing management, it has limited functionalities and experience to manage healthcare-specific programs and workers such as per diems and locums
- While Pixid has rich experience in procuring and managing temporary labor from staffing suppliers, it lacks experience and functionalities to manage services procurement / SOW and independent contractors
- Pixid has plans to utilize next-generation technologies such as AI/ML and NLP; however, some of the solutions employing these technologies, such as chatbots and guided workflows, are currently in evaluation phase
- Though Pixid offers basic direct sourcing functionalities, they are not completely tested, and it currently lacks advanced features for talent matching, communication, and engagement
- Referenced clients opined that Pixid can be more organized in training different stakeholders and assuring their tool adoption. They further highlighted configurability of the platform as an area of improvement
- Referenced clients also expect Pixid to improve its reporting and business intelligence capabilities for markets outside France

Prosperix (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Prosperix is a North America-based provider of contingent labor management solutions. Apart from its proprietary VMS platform, it also offers MSP, direct sourcing, market intelligence, workforce advisory, and payrolling solutions to its clients
- It labels itself as Prosperix VMS Network as it has a built-in crowd staffing hiring marketplace that provides its clients access to a network of 3,000+ talent suppliers across domains and geographies
 - It uses intelligent algorithms to match jobs to suppliers in real-time based on the supplier profile, the pool of talent they represent, and performance for similar positions in the past
 - Apart from manual tiering, it also supports automated tiering of its own and marketplace talent suppliers at program, department, and job levels based on specific requisition requirements
- Although it is a comparatively new provider, it has rapidly developed capabilities in line with its vision to emerge as an end-to-end solution provider. Mid-market clients looking for a one-stop solution provider will find its offerings compelling
- Owing to its recent evolution, Prosperix offers a flexible platform with good UI/UX and modern architecture. It offers capabilities to create highly configurable and customizable hiring workflows for every job, department, or an entire program using a drag-and-drop interface
- Prosperix provides reporting and analytics capabilities with interactive dashboards to support clients in their data-driven decision-making process
 - It offers clients real-time insights on SLAs/KPIs such as supplier performance, candidate coverage, spend management, and other key contingent hiring metrics
 - It also provides prescriptive and predictive capabilities on areas such as hiring, supplier success, position coverage, and long-term trends to its clients
- It provides automated supplier management capability to its clients by removing the hassle of manually reviewing the contracts allowing new suppliers to be onboarded into their programs quickly
- Prosperix focuses on providing candidates with an enhanced experience to keep them engaged in the platform
 - It offers candidates control to directly manage their profiles, apply to jobs, schedule interviews, and receive status updates through Prosperix accounts
 - It allows candidates to select the talent supplier they prefer to work with through its ‘digital right to represent’ features to increase transparency and reduce duplicate submissions

Prosperix (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Though it is trying to expand to other regions, Prosperix focuses majorly on the North American market currently and has limited presence in other regions
- Prosperix currently only has limited capabilities on the services procurement front. While it can support administrative aspects, such as headcount tracking, it is yet to develop advanced capabilities such as redlining, RFx (RFI/RFP) management, and contract negotiation
- While the Prosperix application is mobile responsive, it does not have a dedicated mobile application for suppliers, hiring managers, and workers
- Considering that it is from a marketplace background, its capabilities on the VMS side are still evolving. Enterprises looking for a sophisticated VMS technology should carefully evaluate its depth and breadth of capabilities
- Prosperix currently has limited functionalities and experience to manage healthcare-specific programs

Ramco (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Ramco is an India-based enterprise software provider. Its suite of offerings includes ERP, payroll and HR, and logistics software. Its VMS supports the management of temporary workers, services procurement / SOW, and ICs / freelancers
- It is one of the few providers that has a strong experience in managing clients in the Southeast Asian and Middle Eastern regions
- Ramco’s capabilities across the enterprise software landscape including ERP and HR are a differentiator. It can offer an integrated one-stop solution, also incorporating support for processes such as permanent hiring, provisioning and asset management, and direct sourcing
- While Ramco’s VMS has dedicated mobile applications for hiring managers and workers, it is currently moving toward Zero UI to enable stakeholders to act from anywhere without logging into the system or using a mobile application – through channels such as mail, chat, and voice
 - It provides clients with multiple timesheet channels including desktop, mobile, WhatsApp, Microsoft Teams, browser extension / offline timesheet, Google Assistant / smart watch, and geolocation
 - It supports facial and voice recognition features for time and attendance
 - It supports features such as offer letter management through Gmail adaptive cards and onboarding through WhatsApp
- It has developed several other innovative features to enhance its VMS user experience
 - It has deployed self-service bots to answer stakeholder queries and help perform tasks such as time and attendance, onboarding, workforce productivity, and blacklisting poor-performing workmen
 - It supports the DIY offer letter functionality that allows users to configure multiple contract letter templates for different job and worker types
- Ramco can additionally assist its VMS clients with payrolling and invoicing services. It incorporates country-specific tax rules through its partnerships with various taxation providers and offers validation of taxation rules for its clients
- It offers insights into operational, financial, and performance metrics of contingent workforce programs through its analytics capabilities
 - It offers widget-based predictive analytics with interactive dashboards and customizable drill-down features
 - It also provides real-time rate benchmarks that help users compare rates with the current market rates

Ramco (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- While Ramco has global capabilities, its current client base is the strongest in APAC, followed by EMEA, particularly in the Middle East. Clients beyond these regions looking for a completely localized solution should evaluate its capabilities vis-à-vis their specific requirements
- It has capabilities to manage administrative services procurement activities such as headcount tracking and billing and payments. However, its ability to support upstream processes, such as redlining, RFx (RFI/RFP) management, and contract negotiation, is not completely tested
- Ramco lacks experience in catering to the healthcare and pharmaceutical industries. Clients looking to manage healthcare workers with complex requirements should carefully evaluate its capabilities
- While Ramco’s broader enterprise software expertise allows it to extend a broad suite of offerings, clients need to carefully evaluate the extent of integration and applicability in their contexts carefully
- Its ability to offer end-to-end direct sourcing and talent pooling support is not fully tested
- It continues to invest in its reporting and analytics capabilities. However, there is further scope to strengthen its analytics functionalities by integrating with third-party data sources to offer features such as peer benchmarking

VectorVMS (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- VectorVMS, a Learning Technologies Group (LTG) company, is a US-based provider of contingent workforce management technology. Its VMS solution supports the management of temporary workers, services procurement / SOW, and independent contractors / freelancers
- Being a part of LTG, VectorVMS can offer an attractive proposition for clients looking for a provider with total talent management-related technology capabilities. It can leverage its sister companies' ATS capabilities with PeopleFluent and Breezy, diversity planning and management with Affirmity and PDT Global, and learning solutions with Instilled and Gomo Learning
- It has proven experience in managing government / public sector and healthcare enterprises
 - It has shift management, credentialing, and time capture capabilities to meet complex healthcare-specific requirements
 - It is WCAG 2.0 compliant and hence meets government / public sector compliance standards
- VectorVMS offers a custom Shared Managed Services (SMS) program to its clients with services around vendor management, technology delivery, program optimization, and rate management. First-generation and self-managed clients with simpler requirements may find this offering compelling
- It has capabilities to manage services procurement with functionality to support the entire source-to-pay cycle including RFx for vendor sourcing and negotiation and SOW creation
- VectorVMS uses advanced ranking algorithms to rank candidates based on several parameters and match them to open roles. It also offers timesheet configurability, billing rules customization, and diversity tracking and reporting for candidates
- It has robust reporting and analytics capabilities to support decision-making across the entire application. Referenced clients also lauded its business intelligence capabilities
 - It offers 120+ standard reports as well as the ability to create custom reports for its clients to obtain real-time insights on parameters such as supplier performance and KPI/SLAs
 - It provides real-time rate benchmarks through updated rate cards to help its users compare with current market rates
 - It also supports advanced analytics functionalities such as peer benchmarking and total talent analytics
- VectorVMS offers a dedicated mobile application for hiring managers, through which they can manage all the approval processes from timesheets and expenses
- Referenced clients lauded its customer support and relationship management as other key strength areas

VectorVMS (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Although VectorVMS has presence in EMEA and APAC, its current client base is stronger in North America and the UK. Clients beyond North America and the UK, looking for a completely localized solution, need to evaluate its capabilities vis-à-vis their specific requirements
- It has expertise in managing small and midsize programs. Thus, clients wishing to manage a large spend through the system should carefully evaluate the breadth and depth of its capabilities
- Even though VectorVMS has some AI-driven features, such as candidate compare and NLP, it is yet to augment itself with other next-generation technologies such as chatbots and RPA/automation
- While it has functionalities to support services procurement management, the comprehensiveness of the module is not completely tested yet
- While it has clients across industries, its expertise is the most with the healthcare and public sector. Clients across industries, such as energy and utilities, retail, and logistics, should evaluate its offerings carefully vis-à-vis their requirements
- It is taking the partnership route to offer direct sourcing and talent pooling capabilities to its clients, but its experience in catering to the end-to-end direct sourcing needs of its clients is still limited
- Referenced clients expect VectorVMS to have more customization options in its reporting and improve user-friendliness of the platform

Worksuite (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Worksuite is a US-based provider of technology solutions for external workforce management. While it started as a Freelancer Management System (FMS), its VMS solution is evolving to support the procurement and management of temporary workers and services procurement / SOW
- While its origin is in North America, Worksuite has been able to gain traction in EMEA and APAC. It provides a flexible suite of solutions to manage the full life cycle of external workforce management including sourcing, onboarding, payments, and 24-hour live support
- Worksuite is building an interactive solution with a focus on intuitive functionalities such as candidate profiles and grouping and cataloging features
- It has good credentialing and compliance management capabilities to meet the complex compliance requirements for contingent workers. Its clients can access its talent qualification service as a value-add
- Worksuite has been making significant investments in improving its offerings. It continues to invest in its services procurement capabilities to expand its coverage across the SOW management spectrum including RFx for vendor sourcing and negotiation and SOW creation
- It has an integrated payments/payroll processing module. Clients have the option to track payments and automatically pay contingent workers through its Worksuite Pay module based on the payment frequency of their choice (weekly/fortnightly/monthly)

Worksuite (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Considering that it originated from an FMS, its capabilities on the VMS side are still evolving. Enterprises looking for a sophisticated VMS offering should carefully evaluate its depth and breadth of capabilities
- As it is still evolving its VMS capabilities, enterprises across industries and geographies need to evaluate its existing capabilities against the extent of localization with their country’s regulations and requirements
- It lacks experience in catering to the healthcare and pharmaceutical industries. Clients looking to manage healthcare workers with complex requirements should carefully evaluate its capabilities
- Worksuite has limited direct sourcing-related capabilities. It is largely used to manage pre-identified freelancers rather than offering a marketplace of its own
- While Worksuite offers a fully mobile-optimized interface, it lacks native mobile applications for different stakeholder personas

05

Enterprise sourcing considerations

- Aspirant
 - Conexis
 - Stafferlink
 - TalentNow

Conexis (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Conexis is a Canada-based contingent workforce technology provider. Its VMS solution supports the management of temporary labor and independent contractors / freelancers. Additionally, it also supports sourcing and hiring of permanent employees
- It offers an easy-to-implement solution with a user-friendly interface. It is further enhancing its UI/UX by making upgrades to its architecture. Conexis will appeal to first-generation and small-/mid-market buyers that are generally price-sensitive and are looking for a simple solution
- Conexis has experience in managing both white-collar job roles, such as engineering/IT, as well as blue collar job roles pertaining to the light industrial sector
- While Conexis does not have full-fledged direct sourcing capabilities, it does offer a basic functionality to create repositories of pre-identified candidates in the system
- It has launched an ad-hoc report generator for clients to create customized reports and offers basic analytics and dashboarding functionality to help clients with real-time insights
- Conexis offers its clients-several time and expense management-related features and functionalities to improve time tracking, billing, and invoicing processes
 - It provides bulk upload functionality and allows for time and expense tracking across different business units, GL codes, and cost centers to its clients
 - It has recently completed front-end integration with Dormokaba on time feeds, while back-end integration is still in progress
- It uses Freshchat to provide instant support to the users; the chat is connected to the customer support agent
- Conexis also provides its MSP clients with an application center functionality, which supports them in the sourcing of new suppliers
- Referenced clients highlighted its implementation support and simplicity of the platform as key strengths

Conexis (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Conexis is focused exclusively on the North American market and is yet to expand its outreach to other regions. It focuses mainly on small clients and lacks experience in managing midsize and large clients
- Its experience is limited to certain industries such as retail and consumer goods, pharma and life sciences, and business services. Clients beyond these industries need to evaluate its capabilities carefully vis-à-vis their specific requirements
- It lacks functionalities to manage services procurement / SOW and is in its 2024 roadmap
- While Conexis supports basic reporting and analytics, clients looking for advanced features, such as peer/rate benchmarking and descriptive and predictive analytics, will find its capabilities limited. Referenced clients highlighted the reporting granularity as one of the areas of improvement
- While Conexis can adapt to mobile devices, it does not offer dedicated mobile applications for hiring managers and workers
- It lacks experience in integrating with broad-based enterprise applications/platforms such as HCM/HRIS and ERP. It also does not currently offer integrations with external sources to facilitate direct sourcing in the system
- Referenced clients also expect Conexis to improve its approval management for processes such as timesheets and proposal workflows

Stafferlink (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Stafferlink is a US-based healthcare staffing software provider. It has two main solutions – Stafferlink FSM™, a talent procurement and management solution, and Stafferlink ASM™, a staffing agency management solution. Its VMS solution, Stafferlink FSM™, manages temporary labor for its clients
- It also offers features that support the management of permanent hires. Healthcare providers looking for a single solution to manage both temporary and permanent workers will find its offering compelling
- Stafferlink can manage both internal resources and agency pools. Orders and assignments can be made available to internal and external talent pools based on client requirements. It additionally provides self-service capabilities and notifications for candidates to support internal pool management
- It is a flexible application that allows customizable workflow creation in the platform. Clients can set up different workflows, job classes, and approval workflows for different departments within the same organization
- Stafferlink has robust shift management and credentialing management capabilities to meet complex healthcare requirements. Clients can tailor the required credential list from a pre-defined list based on their needs

Stafferlink (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- Its focus is exclusively on the US market and is yet to expand its geographical outreach to cater to healthcare clients abroad
- As the VMS is specifically tailored for healthcare needs, its functionalities are primarily geared toward managing clinical hires
- Stafferlink is yet to expand its capabilities to manage services procurement, independent contractors / freelancers, as well as enable direct sourcing for clients. This may be a limitation for buyers looking for a holistic provider
- It does not offer a native mobile application for different stakeholders currently
- While it has basic tracking and reporting capabilities, there is further scope to develop advanced analytics capabilities with interactive dashboards and customizable drill-down capabilities

TalentNow (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- TalentNow is a US-based workforce technology provider. Its VMS supports the management of contingent/temporary workers, SOW / services procurement, and ICs / freelancers
- It also offers a SaaS-based ATS solution to its clients. Small and mid-market buyers looking for a one-stop total talent technology provider may find this a compelling proposition
- One of the key differentiators for TalentNow is its unified marketplace connecting employers to contingent candidates across different talent sources. Apart from its own private vendor pool, it can also integrate with external talent channels such as direct sourcing platforms and marketplaces
 - It offers real-time visibility of bill rates prevalent in the market, ensuring that its clients pay fair market rates
 - It uses an AI-driven approach to pre-identify the most suitable and available candidates for common job roles before the start of their engagements for efficient hiring
 - It also provides functionalities to assist enterprises in the rehiring of specific candidates of their choice
- TalentNow follows a partnership approach with various technology partners to provide enhanced features and functionalities, such as assessments and video interviewing, for its clients
- TalentNow provides reporting and analytics capabilities with customizable dashboards to support clients in their data-driven decision-making process
 - It offers 90+ standard reports to its clients to obtain real-time insights on parameters such as supplier performance and KPI/SLAs
 - Through its partnership with multiple data curation partners, it also enables its clients to have real-time insights into workforce demographics, job posting analytics, compensation data, and employment market data
- It offers an easy to use and intuitive platform with various other features and functionalities to improve user experience, such as white-labeling of the platform, SMS, and email-based capabilities, to complete daily tasks and processes
- TalentNow has invested in capabilities to eliminate bias in the recruiting process, improve diversity, and increase inclusion

TalentNow (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Limitations

- TalentNow focuses exclusively on the North American market and has limited presence in other regions
- Although TalentNow has an SOW module, its experience in managing end-to-end complex SOW projects is limited
- While TalentNow does support SMS-based functionalities, it does not have a dedicated mobile application for hiring managers and workers
- Considering that it evolved from a marketplace background, its capabilities on the VMS side are still developing. Enterprises looking for a sophisticated VMS technology should carefully evaluate its depth and breadth of capabilities
- While TalentNow has invested in reporting and analytics functionalities, it does not offer other advanced capabilities, such as predictive analytics
- Though TalentNow has some AI-driven features, such as candidate matching and NLP, these are still at a nascent phase, and it is yet to augment itself with other next-generation technologies such as chatbots and RPA/automation

06

Appendix

- Glossary
 - Research calendar
-

Glossary of key terms used in this report

ATS	An Applicant Tracking System is a software application that enables the electronic handling of recruitment needs. An ATS system can be implemented on an enterprise or small business level, depending on the needs of the company
Best-of-breed	Best-of-breed solutions are point solutions for specific processes or subprocesses
Blue collar worker	A person who performs factory-/warehouse-based work; blue collar work may involve skilled or unskilled labor
Buyer	The company/entity that purchases outsourcing services from a provider of such services
Independent contractors (ICs)	Independent contractors include freelancers, consultants, and gig workers who are not represented or employed by any type of staffing agency or consulting firm; they are self-employed individuals who perform services for an enterprise with fixed end objectives, and enterprises generally contract directly with them
Managed spend / Spend Under Management (SUM)	Managed spend refers to the expenditure incurred by a company to procure services (and goods), and is actively managed by the MSP or PO provider
MSP	Managed Service Provider (MSP) is the transfer of ownership of all or a part of the management of an organization’s contingent/temporary staffing activities on an ongoing basis
PO	Procurement Outsourcing (PO) is the transfer of ownership of all or a part of procurement processes or activities on an ongoing basis
RPO	Recruitment Process Outsourcing (RPO) is the transfer of ownership of all or a part of recruitment processes or activities on an ongoing basis, and must include permanent hires
SaaS	Software-as-a-Service is a software that is deployed on the internet and/or is run behind a firewall in the local area network or personal computer
SOW / services procurement	In SOW, enterprises contract with third-party professional services firms to provide services on a fixed price / milestone basis; the third-party services firms employ and pay SoW workers
Temporary labor / staff augmentation	Temporary workers hired for a fixed period of time based on enterprise requirements; these workers are employed by and on the payroll of third-party temporary staffing agencies
VMS	Vendor Management System is a software application that helps manage and procure contingent labor through staffing agencies
White-collar worker	A person who performs professional desk, managerial, or administrative work; white-collar work may be performed in an office or other administrative setting

Research calendar

Contingent Workforce Management

Published Planned Current release

Reports title	Release date
Vendor Management System (VMS) PEAK Matrix® Assessment with Technology Vendor Landscape 2022	May 2022
Vendor Management Systems (VMS) – Vendor Profile Compendium 2022	July 2022
Contingent Workforce Management (CWM) / Managed Service Provider (MSP) and Services Procurement / SOW PEAK Matrix® Assessments 2022	August 2022
Direct Sourcing as a Gateway to Total Talent Acquisition (TTA)	September 2022
The Role of Technology in Enabling Strategic Contingent Workforce Management (CWM)	October 2022
Contingent Workforce Management (CWM) / Managed Service Provider (MSP) and Services Procurement / SOW – Service Provider Compendium 2023	November 2022
Contingent Workforce Management (CWM) and Vendor Management System (VMS) State of the Market Report 2023 – Thriving in the Next Normal	December 2022
Beeline Acquires Utmost: Enabling a Platform-driven Model for Total Talent Visibility	January 2023
Contingent Workforce – a Strategic Lever to Drive Resilience and Sustainable Agility	March 2023
Operationalizing the Total Talent Acquisition (TTA) Model	April 2023
Vendor Management System (VMS) Products PEAK Matrix® Assessment 2023	May 2023
Vendor Management Systems (VMS) – Technology Provider Compendium 2023	Q2 2023
Contingent Workforce Management (CWM) / Managed Service Provider (MSP) and Services Procurement / SOW PEAK Matrix® Assessments 2023	Q2 2023
Contingent Workforce Management (CWM) / Managed Service Provider (MSP) and Services Procurement / SOW – Provider Compendium 2023	Q3 2023
CWM and VMS State of the Market 2024	Q4 2023

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