



Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2017

Recruitment Process Outsourcing (RPO)
Market Report – June 2017 – Preview Deck

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▶ Service Optimization Technologies

▶ Transaction Intelligence

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- This full report is included in the following subscription(s)
 - **Recruitment Process Outsourcing (RPO)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**

* Banking, financial services, and insurance



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- Service provider profiles
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Everest Group's RPO research is based on three key sources of proprietary information

1

- Everest Group's proprietary database of over **2,000 RPO deals** (updated annually)
- The database tracks the following elements of each RPO deal:
 - Buyer details including industry, location, and signing region
 - Deal details including ACV, term, start date, hires managed, primary pricing structure, process coverage, and geographic coverage (at country level)
 - Technology ownership and maintenance
 - Global sourcing

2

- Everest Group's proprietary database of **operational capability of 18 RPO service providers** (updated annually)
- The database tracks the following capability elements for each service provider:
 - RPO clients, revenue, service suite, and employees
 - Recent RPO-related developments (investments and partnerships)
 - RPO clients split by geography, industry, scope, and buyer size
 - RPO hires split by geography, source of hires, and type of hires
 - RPO delivery locations and level of offshoring

3

- Ongoing buyer surveys and interactions
 - Everest Group's **executive interviews and data collection** from **RPO buyers**
 - The data contains the following detailed buyer perspectives about RPO deals:
 - ◆ Drivers for adopting RPO and buyer-provider relationships
 - ◆ The level of buyer satisfaction and the underlying reasons

Service providers covered in detail in the analyses



CAPITA RESOURCING



HAYS Recruiting experts worldwide



PONTOON



randstad sourceright SEVENSTEP



The analyses in this report are presented at two levels:

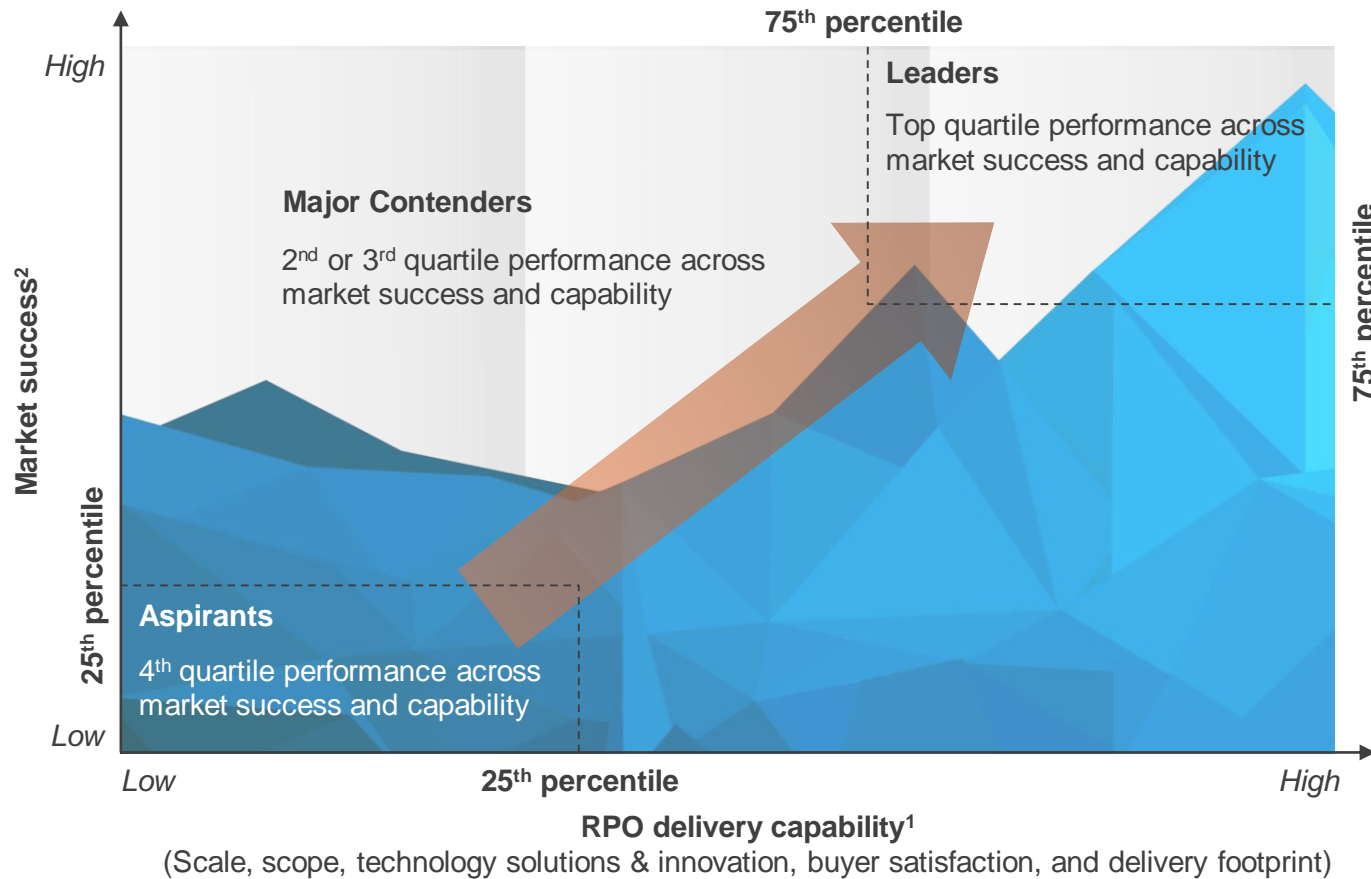
- Overall market analysis that highlights the market composition/dynamics
- The current market trends based on deal activities in the last five years

The sample size varies for different analyses based on the deal detail availability.

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected, is presented back to the industry only in an aggregated fashion

Everest Group classifies the RPO service provider landscape based on its PEAK Matrix

Everest Group PEAK MatrixTM for RPO service line



1 Service providers scored using Everest Group's proprietary scoring methodology given in its main report

2 Based on a combination of total number of RPO clients, revenue & growth, and total number of hires managed per year

Source: Everest Group (2017)

RPO service capability and strategy

Company profile: Founded in 2003, XYZ RPO is a U.S.-based RPO provider. It serves clients through multiple offerings – RPO services, recruitment technology, and recruiter training services. It also offers recruiting solutions to small, medium, and large firms.
Headquarter: Location XYZ
Leadership: XXXX
Website:

Current RPO market segment focus

- **Buyer segment:** Targets both the mid-market (3,000 to 15,000 employees) and the large-market segment (>15,000 employees)
- **Geography:** North America, Latin America, Asia Pacific, Europe Middle-east and Africa

Partnership

- **RPO service provider:** None
- **HRO service provider:** XYZ (parent company)

Recent RPO-related developments/announcements

- **2016:** Opened new RPO service center in city XYZ
- **2016:** Added new strategic service offering in XYZ
- **2016:** Added new market analytics service for sizing geographic talent pools and analyzing demographics & supply dynamics
- **2016:** Enhanced UX on XYZ recruiting management

Geography A	Geography B	Geography C	Geography D
XXXX	XXXX	XXXX	XXXX
Total RPO delivery FTEs = ~XXXX			

Functional capabilities within key RPO areas across regions

■ Coverage – self
 ■ Through partners
 ■ Not offered

Regions	North America	EMEA	Asia Pacific	LATAM
Employer branding	✓	✓	✓	✓
Sourcing	✓	✓	✓	✓
Screening	✓	✓	✓	✓
Applicant tracking	✓	✓	✓	✓
Interview scheduling and coordination	✓	✓	✓	✓
Assessment	✓	✓	✓	✓
Offer letter management	✓	✓	✓	✓
Background checking	✓	✓	✓	✓
Onboarding	✓	✓	✓	✓
Vendor management	✓	✓	✓	✓

Other capabilities	Offered	Description	Other capabilities	Offered	Description
Analytics	Yes	Recruiting operations performance, workforce planning, projections, and global metrics management	Assessment	Yes	XYZ Recruiting Management has a standard API integration used by assessment vendors and maintains active partnerships in this area
Employer branding	Yes	Corporate careers site, social media messaging, and posting jobs on relevant channels	Mobile-based solutions	Yes	Smartphone-enabled job applications, marketing initiatives, and networking activities
Talent community	Yes	Talent Community Builder (module for social media integration and channel management capability)	Proprietary/partnership add-on tools	Yes	XYZ Datacloud / Market Analytics, AIRS Online Recruiter Training/Certification, XYZ Screening & Selection Services, XYZ Tax Credit Services, XYZ, and XYZ Marketplace

Source: Everest Group (2017)

XYZ (page 2 of 4)

RPO client portfolio

RPO experience

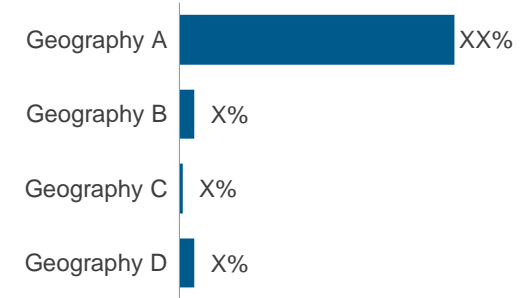
- Total number of current RPO clients: XX
- Total number of annual hires managed: XX

Major RPO clients



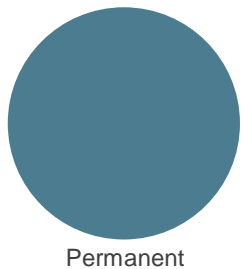
Frequency of inclusion of geographies in RPO deals

Number of deals = XX



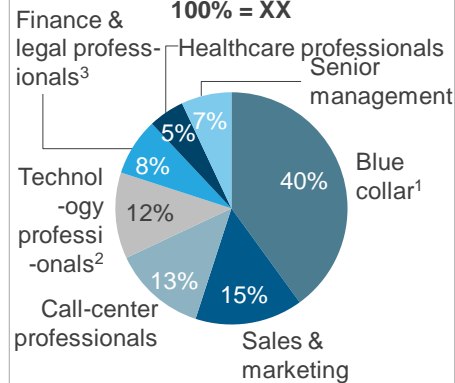
RPO split of hires by type

100% = XX



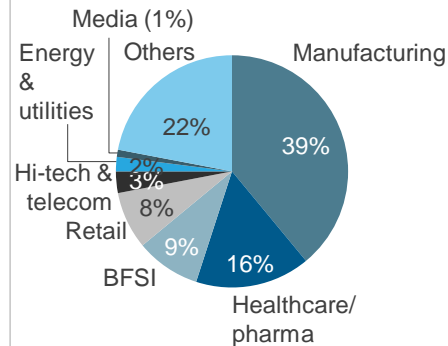
RPO split of hires by job family

100% = XX



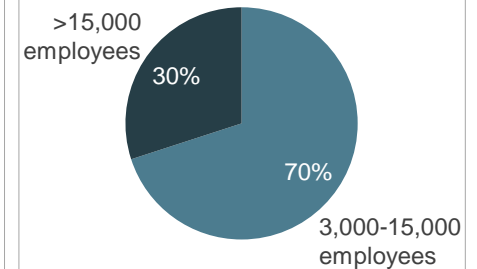
RPO split of clients by industry

100% = XX



RPO buyer-size mix

100% = XX



- 1 Blue collar includes jobs in operations, production, mining, construction, maintenance, technical installation, facilities, janitorial, security, etc.
- 2 Technology professionals category includes engineers, IT professionals, researchers, and scientists
- 3 Finance & legal professionals category includes accounting, finance, and legal professionals

Source: Everest Group (2017)

Key RPO delivery locations



Source: Everest Group (2017)

Everest Group assessment | Major contender

Measure of capability: Best-in-class Very high High Medium high Medium Medium low Low Not mature

Delivery capability ¹						Market success ¹
Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall	

Strengths

- XXXXXXXXXXXX
- XXXXXXXXXXXX
- XXXXXXXXXXXX
- XXXXXXXXXXXX
- XXXXXXXXXXXX

Areas of improvement

- XXXXXXXXXXXX
- XXXXXXXXXXXX
- XXXXXXXXXXXX
- XXXXXXXXXXXX
- XXXXXXXXXXXX

1 Based on contractual and operational information as of 2016

2 Deals involving both permanent and contingent hires

Source: Everest Group (2017)

RPO research calendar

■ Published ■ Current

Topic	Release date
Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2016	July 2016
Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2016	October 2016
Recruitment Process Outsourcing – Annual Report 2016	November 2016
Recruitment Process Outsourcing – Service Provider Landscape in Latin America with PEAK Matrix™ Assessment	December 2016
Technology in Recruitment Process Outsourcing - Enabling a Paradigm Shift	December 2016
RPO 3.0	March 2017
Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2017	March 2017
Enterprise Total Talent Acquisition (ETTA) – The Future-Ready Talent Approach	March 2017
Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2017	June 2017
Recruitment Process Outsourcing (RPO) Annual Report 2017	Q2 2017
Cognitive and Automation in Talent Acquisition	Q2 2017
Mega-sized deals in RPO	Q3 2017
RPO Service Provider Landscape in Asia Pacific with PEAK Matrix	Q4 2017

Additional RPO research recommendations

The following documents are recommended for additional insight into the topic covered in this research. The recommended documents either provide additional details or complementary content that may be of interest

- 1. Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2017** ([EGR-2017-3-R-2131](#)); The global RPO market witnessed good traction in 2017 with over 200 new contracts signed. The market in North America showed an uptick as compared to last year and the market in Asia Pacific continued to exhibit strong growth. Last year, especially, saw a lot of M&A (Mergers & Acquisitions) activity in the RPO market. As the market is becoming more competitive, service providers are taking the inorganic route to strengthen their capabilities in different geographies, industries, or recruitment technology
- 2. Enterprise Total Talent Acquisition (ETTA) – The Future-Ready Talent Approach** ([EGR-2017-3-V-2148](#)); This research report describes in detail the concept of Enterprise Total Talent Acquisition (ETTA), and highlights the drivers, challenges, and the financial & business benefits of adopting such an approach. It also suggests various models and methods that the buyers and service providers should leverage to effectively implement this approach.
- 3. RPO 3.0 – Paradigm Shift in RPO Value Proposition** ([EGR-2016-3-V-2116](#)); RPO is transitioning to the next phase of its evolution – RPO 3.0. This will enable organizations to create real strategic impact from RPO in these times of revolutionary transition. This report discusses the global shifts and their impact on the workforce, imperatives for the talent acquisition organization, the emergence of RPO 3.0, how it differs from the earlier generations of RPO, as well as challenges & best practices in realizing RPO 3.0

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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