Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2018

Recruitment Process Outsourcing (RPO)
Market Report – June 2018: Complimentary Abstract / Table of Contents

Our research offerings for global services

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  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

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Membership information

- This report is included in the following research program(s)
  - **Recruitment Process Outsourcing (RPO)**
- **If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com, unitedkingdom@everestgrp.com, or india@everestgrp.com**

More about membership

In addition to a suite of published research, a membership may include

- Price book
- Pinnacle Accelerators
- Data cuts
- Analyst access
- Virtual Roundtables
- Workshops

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
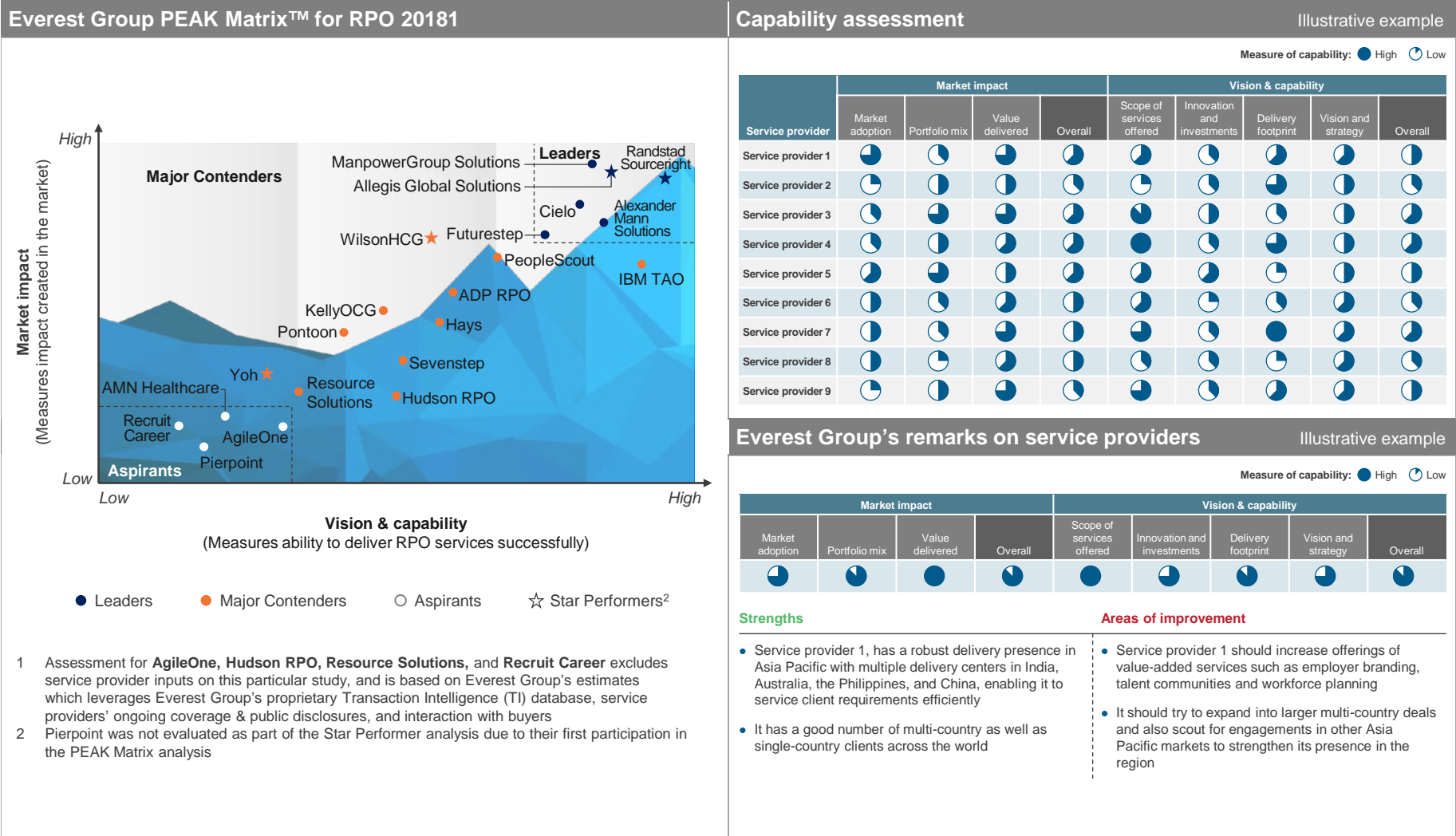
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This study offers two distinct chapters providing a deep dive into key aspects of the RPO market; below are three charts to illustrate the depth of the report

Everest Group PEAK Matrix™ for RPO 2018[1]

Market impact (Measures impact created in the market)

High

Leaders

Major Contenders

ManpowerGroup Solutions
Allegis Global Solutions
Randstad Sourceright
Cielo
Alexander Mann Solutions
WilsonHCG ★ Futurestep
PeopleScout
IBM TAO
KellyOCG
ADP RPO
Pontoon
Hays
Sevenstep
Yoh ★
Resource Solutions
AMN Healthcare
Hudson RPO
Recruit Career
AgileOne
Pierpoint

Aspirants

Low

Low — High

Vision & capability
(Measures ability to deliver RPO services successfully)

● Leaders   ● Major Contenders   ○ Aspirants   ☆ Star Performers[2]

1 Assessment for **AgileOne, Hudson RPO, Resource Solutions,** and **Recruit Career** excludes service provider inputs on this particular study, and is based on Everest Group's estimates which leverages Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers
2 Pierpoint was not evaluated as part of the Star Performer analysis due to their first participation in the PEAK Matrix analysis

Capability assessment

Illustrative example

Measure of capability: ● High   ◔ Low

| Service provider | Market impact | | | | Vision & capability | | | | |
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1									
Service provider 2									
Service provider 3									
Service provider 4									
Service provider 5									
Service provider 6									
Service provider 7									
Service provider 8									
Service provider 9									

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High   ◔ Low

| Market impact | | | | Vision & capability | | | | |
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

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The Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2018 report has 17 service provider profiles

XXX | RPO profile (page 2 of 4)
RPO client portfolio

RPO experience
- Total number of current RPO clients: xxx
- Total number of annual hires managed: xxx

Major RPO clients
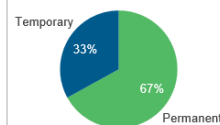
AB InBev · ATLASSIAN · CINTAS · FIRSTKEY HOMES · United Technologies

Frequency of inclusion of geographies in RPO deals

No. of clients = xxx

Geography	%
North America	66%
EMEA	51%
Asia Pacific	9%
Central & South America	6%

RPO split of hires by type
100% = xxx
- Temporary 33%
- Permanent 67%

RPO split of hires by job family
100% = xxx
- Healthcare professionals
- Blue collar[1] (5%)
- Senior management 8%
- Sales & marketing 22%
- Call-center professionals 10%
- 16%
- 22%
- Finance & legal professionals[3] 17%
- Technology professionals[2]
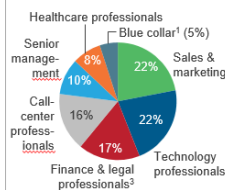
RPO split of clients by industry
100% = xxx
- Government / public sector (6%)
- Energy & utilities (2%)
- Media 6%
- Health-care/pharma 9%
- Hi-tech & telecom 25%
- Retail 10%
- 12%
- Manufacturing 14%
- BFSI 16%
- Others
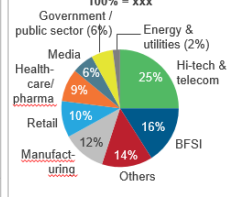
RPO buyer-size mix
100% = xx
- 3,000–15,000 employees 22%
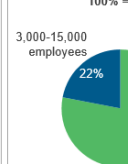
1. Blue collar includes jobs in operations, production, mining, construction, maintenance, technical installation, facilities, janitorial, security, etc.
2. Technology professionals category includes engineers, IT professionals, researchers, and scientists
3. Finance & legal professionals category includes accounting, finance, and legal professionals

XXX | RPO profile (page 1 of 4)
RPO service capability and strategy

Company profile: XXX is a global provider of innovative talent solutions that operates on the principle of providing true partnership to its clients. Delivering business-impacting talent solutions – including RPO, talent consulting, contingent workforce solutions, and executive search – XXX is transforming its clients' businesses through their integrated and highly configurable model – Talent Ecosystem™ . It provides services in more than 35 countries.
Headquarters: Tampa, Florida
Leadership: XXX
Website: www.XXX.com

Current RPO market segment focus
- **Buyer segment:** Targets both mid-market (3,000 to 15,000 employees) as well as the large-market (>15,000 employees) segment
- **Geography:** North America, Europe Middle East & Africa, Central and South America, and Asia Pacific

Partnership
- **RPO service provider:** Yes
- **HRO service provider:** None
- **MSP service provider:** Yes

Recent RPO-related developments/announcements
- **2017:** Expansion of service geography based upon market and client need
- **2017:** Additional investment in proprietary platform XXX
- **2017:** Continued expansion of service offerings which included the hiring of the head of Executive Search
- **2017:** Strategic investment partnership with XXX, a private equity firm focused on platform investments, to enable growth and investment across the organization

Analytics	Reporting	Descriptive	Predictive	Prescriptive
	✓	✓	✓	✓

Automation	Robotic Process Automation	Artificial Intelligence / Machine Learning	Natural Language Processing
	✓	✓	✓

	North America	EMEA	Asia Pacific	South America
xx	xx	xx	xx	xx
Total RPO delivery FTEs = xx				
Total RPO technology FTEs = xx				

Technology capabilities within key RPO areas

Key RPO areas	Proprietary/ Partnership	Details
Employer branding	Proprietary/ Partnership	xxx
Talent communities	Proprietary/ Partnership	xxx
Sourcing	Proprietary/ Partnership	xxx
Screening	Proprietary/ Partnership	xxx
Interview scheduling and coordination	Proprietary/ Partnership	xxx
Assessment	Proprietary/ Partnership	xxx
Background checking	Partnership	xxx
Onboarding	Proprietary/ Partnership	xxx
Outplacement	Not applicable	xxx

Note: Geography split of FTEs is available for xx

Research calendar – Recruitment Process Outsourcing (RPO)

■ Published ■ Planned ⬚ Current release

Flagship RPO reports	Release date
Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2017	March 2017
Recruitment Process Outsourcing – Service Provider Profile Compendium 2017	May 2017
Recruitment Process Outsourcing – Annual Report 2017	June 2017
"RPO Buyers are Satisfied" – Truth or Myth?	June 2017
Recruitment Process Outsourcing: Service Provider Landscape with PEAK Matrix™ Assessment 2017 – Asia Pacific	September 2017
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	April 2018
Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2018	**June 2018**
Recruitment Process Outsourcing – Annual Report 2018	Q2 2018

Thematic RPO reports	
RPO 3.0	March 2017
Patient Care to Talent Care: Optimizing Talent Acquisition in Healthcare through Holistic Talent Management	March 2017
Enterprise Total Talent Acquisition (ETTA) – The Future-Ready Talent Approach	May 2017
Digital Technologies: The Next Frontier in Talent Acquisition	December 2017
Reimagining Talent Acquisition in a Digital-First Era	March 2018
Digital Startups in Talent Acquisition	Q2 2018

Note: For a list of all RPO reports published by us, please refer to our website page.

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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 2018** (EGR-2018-26-R-2610); The global RPO market witnessed good traction in 2017 with over 250 new contracts signed. The market in North America slowed down as compared to last year and the market in Asia Pacific continued to exhibit strong growth. The RPO market in Europe, Middle-East & Africa also continued to grow at a fast clip. 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. **Recruitment Process Outsourcing (RPO) Annual Report 2017 – Strategic Value Creation in a Rapidly Evolving Market** (EGR-2017-3-R-2236); 2017. Recruitment Process Outsourcing (RPO) continued its momentum and grew at 16% to touch the US$2.8 billion mark in annualized spend in 2016. This research provides comprehensive coverage of the market across dimensions such as market overview, key business drivers, buyer adoption trends, solution & transaction trends, and service provider landscape

3. **Digital Technologies: The Next Frontier in Talent Acquisition** (EGR-2017-3-V-2457); 2017. The global services industry is undergoing a tremendous change from a receding arbitrage-first to a fast-growing digital-first model. The impact of such a transformation is being felt by every business function; HR and Talent Acquisition (TA) is no exception. The paper reviews evolution and relative maturity of different next-generation technologies – their current and future applications, factors fueling the growth of digital in TA, including the key outcomes of next-generation digital technologies, among others

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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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