Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019

Recruitment Process Outsourcing (RPO)
Market Report – June 2019: Complimentary Abstract / Table of Contents

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PEAK MATRIX™

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- Peer analysis | Scope, sourcing models, locations
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- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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

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Everest Group's RPO research is based on three key sources of proprietary information

- Everest Group's proprietary database of **~3,000 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

- Everest Group's proprietary database of **operational capability of 30 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

- 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

ACA Talent, ADP, Advantage xPO, AgileOne, alexander mann solutions, ALLEGIS GLOBAL SOLUTIONS, AMN Healthcare, CIELO, endevis, Engage2Excel, HIREVELOCITY, Hudson RPO, hueman, IBM, KELLYOCG, KORN FERRY, levelUP, ManpowerGroup Solutions, Method3, NEWTON TALENT, ORION NOVOTUS, peoplescout, PierPoinT, personify, pontoon, PrincetonOne, randstad sourceright, SEVENSTEP, WilsonHCG, Yoh

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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 activity 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 only presented back to the industry in an aggregated fashion

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Overview and abbreviated summary of key messages

This report examines the dynamics of the Recruitment Process Outsourcing (RPO) market in North America. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and delivery capability in North America. Based on the comprehensive Everest Group PEAK Matrix, 30 RPO service providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and areas of improvement.

Some of the findings in this report, among others, are:
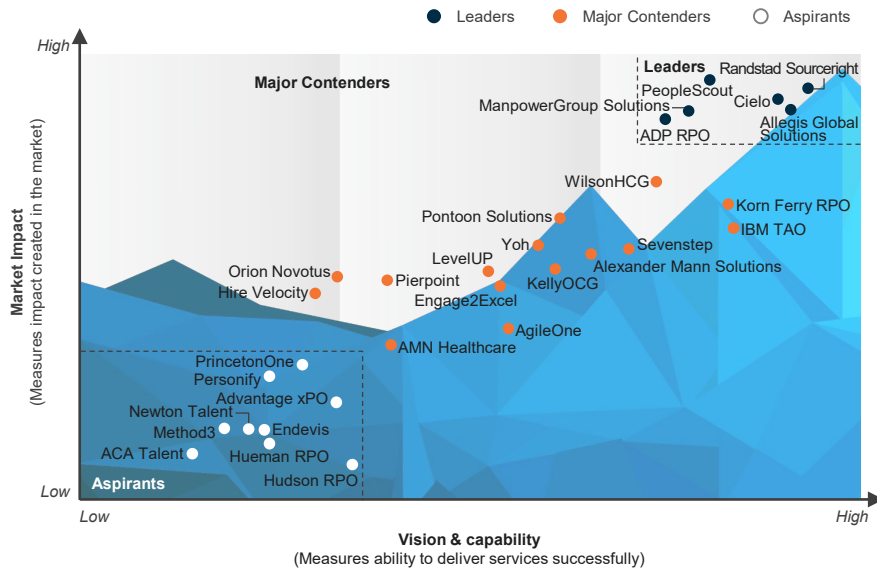
RPO in North America PEAK Matrix 2019

- Everest Group classifies RPO service providers in North America based on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants

- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 30 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):

  – **Leaders:** ADP RPO, Allegis Global Solutions, Cielo, ManpowerGroup Solutions, PeopleScout and Randstad Sourceright

  – **Major Contenders:** AgileOne, Alexander Mann Solutions, AMN Healthcare, Engage2Excel, Hire Velocity, IBM Talent Acquisition Optimization (IBM TAO), KellyOCG, Korn Ferry RPO, LevelUP, Orion Novotus, Pierpoint, Pontoon Solutions, Sevenstep, WilsonHCG, and Yoh

  – **Aspirants:** ACA Talent, Advantage xPO, Endevis, Hudson RPO, Hueman RPO, Method3, Newton Talent, Personify, and PrincetonOne

RPO in North America service provider commentary

Everest Group delineates each of the 30 service providers' strengths and areas of improvement. The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape in North America

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

Assessment for RPO in North America service providers 2019[1]

● Leaders   ● Major Contenders   ○ Aspirants

High ↑ Market Impact (Measures impact created in the market)

Major Contenders

Leaders

- Randstad Sourceright
- PeopleScout
- ManpowerGroup Solutions
- Cielo
- ADP RPO
- Allegis Global Solutions
- WilsonHCG
- Pontoon Solutions
- Korn Ferry RPO
- IBM TAO
- Yoh
- Sevenstep
- LevelUP
- Alexander Mann Solutions
- Orion Novotus
- Pierpoint
- KellyOCG
- Hire Velocity
- Engage2Excel
- AgileOne
- AMN Healthcare
- PrincetonOne
- Personify
- Advantage xPO
- Newton Talent
- Method3
- Endevis
- ACA Talent
- Hueman RPO
- Hudson RPO

Aspirants

Low ← → High

Vision & capability
(Measures ability to deliver services successfully)

1 Assessment for all Aspirants and AgileOne, Hire Velocity, and Orion Novotus among Major Contenders excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with RPO buyers. For these companies, Everest Group's data for assessment may be less complete

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

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

Everest Group RESEARCH

Research calendar – Recruitment Process Outsourcing (RPO)

■ Published   ■ Planned   ⌐ ┐ Current release

Flagship RPO reports	Release date
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 (RPO) – Annual Report 2018	July 2018
Multi-Country Recruitment Process Outsourcing (MCRPO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	September 2018
Recruitment Process Outsourcing: Service Provider Landscape with PEAK Matrix™ Assessment 2018 – Europe	September 2018
What Do The RPO Buyers Seek? Are They Satisfied?	January 2019
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019	March 2019
Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2019	May 2019
Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019	**June 2019**
Recruitment Process Outsourcing (RPO) – Annual Report 2019	Q3 2019

Thematic RPO reports	
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
Startups Redefining Talent Acquisition (TA) – Trailblazers	October 2018
Changing pricing dynamics in RPO contracts	Q3 2019

Note: For a list of all of our published RPO reports, 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 2019 (**EGR-2019-26-R-3113**)**; 2019. The global RPO market witnessed a tremendous growth in 2018 as the market witnessed a significant uptick in activity across buyer segments, industries and geographies. The year 2018 saw a few mega-sized deals being signed as well as significant activity in the mid- and small-market space. As the market continues to become more competitive, service providers are investing heavily in strengthening their capabilities in different geographies, industries, and recruitment technology, as well as expanding their portfolio of offerings (including value-added services such as consulting, total talent acquisition, etc.)

2. **Recruitment Process Outsourcing (RPO) Annual Report 2018: Orchestrating the Digital Talent Acquisition Symphony** (EGR-2018-26-R-2722); The RPO market is one of the fastest growing outsourcing markets in the world today with growth hovering above 15% consistently for the past three years. This research provides comprehensive coverage of the 2017 RPO market and analyses it across various dimensions such as evolving RPO value proposition, market overview, key trends, solution characteristics, buyer adoption trends, and digital in talent acquisition

3. **Startups Redefining Talent Acquisition (TA) – Trailblazers** (EGR-2018-26-R-2823); 2018. The global Talent Acquisition (TA) industry is undergoing a tremendous change, driven by an influx of tools and technologies built on the emerging digital technology landscape. "Startups Redefining Talent Acquisition – Trailblazers" is the third of a three-part series of reports outlining Everest Group's take on the impact of emerging digital technologies in the TA space. This paper identifies and analyzes 450+ startups in the TA space to arrive at a list of 50 high potential startups, and subsequently, a list of 25 top startups (also called "trailblazers") in the TA space

For more information on this and other research published by Everest Group, please contact us:

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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 empower 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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