

Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with PEAK Matrix® Assessment 2021

July 2021: Complimentary Abstract / Table of Contents



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Background of the research

North America continues to be the largest RPO market at a global level. It is one of the most mature and intensely competitive RPO markets globally, with significant presence of all the major global and regional service providers. Service providers in North America are constantly differentiating themselves by investing in upgrading technology capabilities, expanding value-added and consulting offerings, providing a customized value proposition to buyers of all sizes, and catering to clients from upcoming industries.

This report examines the dynamics of the RPO service provider landscape in North America and its impact on the North American RPO market. It gives an overview of the market and analyzes the areas where service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, all the 31 RPO service providers in North America are segmented into Leaders, Major Contenders, and Aspirants.

In this research, we focus on:

- Everest Group's Services PEAK Matrix® evaluation, a comprehensive assessment of 31 RPO service providers
- 2021 RPO in North America PEAK Matrix® and Star Performers
- Service provider delivery capability assessment
- Remarks on key strengths and areas of improvement for each RPO service provider
- Service provider landscape

Scope of this report:



Geography
North America



Industry

Coverage¹: Across 31 RPO service providers with multi-process capability including ACA Talent, ADP RPO, Advantage xPO, AgileOne, Allegis Global Solutions, AMN Healthcare, AMS, Broadleaf Results, Cielo, Endevis, Engage2Excel, Hire Velocity, Hudson RPO, Hueman RPO, IBM TAO, KellyOCG, KinetixHR, Korn Ferry RPO, LevelUP HCS, Newton Talent, Orion Talent RPO Solutions, PeopleScout, Personify, Pierpoint International, Pontoon Solutions, PrincetonOne, Randstad Sourceright, Sevenstep, Talent Solutions RPO (ManpowerGroup), WilsonHCG, and Yoh/DZConneX



Services
Recruitment Process Outsourcing (RPO)

Overview and abbreviated summary of key messages

This report examines the RPO in North America service provider landscape and its impact on the RPO market. It focuses on service provider position and growth in the RPO market, changing market dynamics and emerging service provider trends, and assessment of service provider delivery capabilities. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, among others, are:

RPO PEAK Matrix 2021

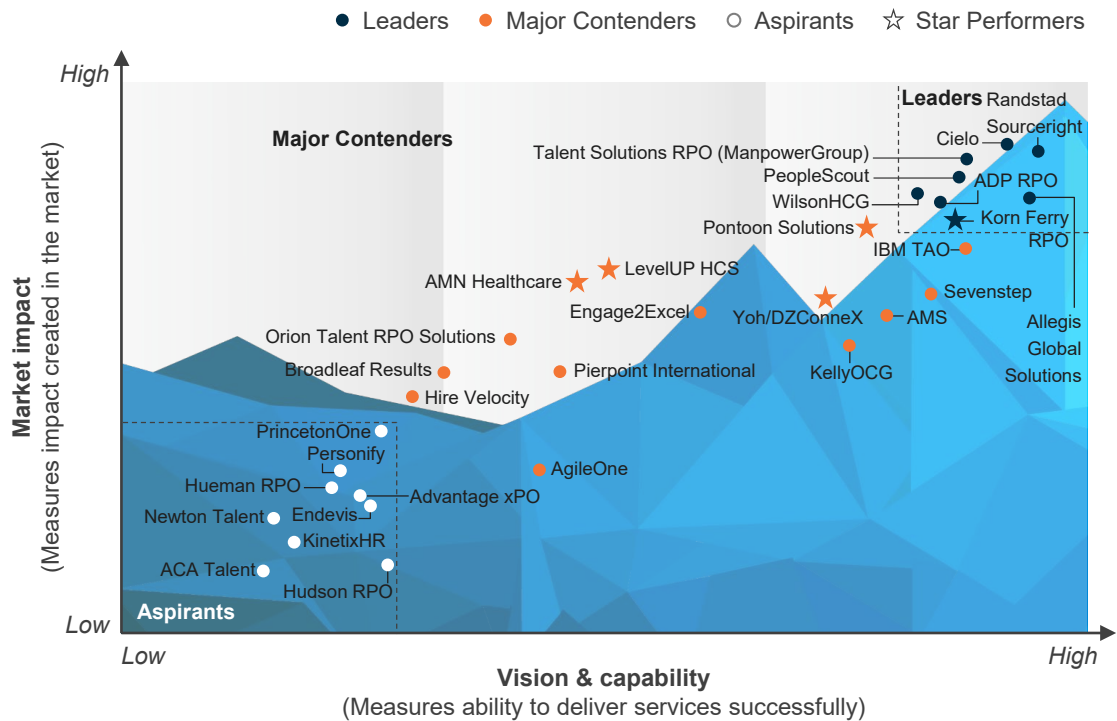
- Everest Group classifies RPO service providers based on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 31 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** ADP RPO, Allegis Global Solutions, Cielo, Korn Ferry RPO, PeopleScout, Randstad Sourceright, Talent Solutions RPO (ManpowerGroup), and WilsonHCG
 - **Major Contenders:** AgileOne, AMN Healthcare, AMS, Broadleaf Results, Engage2Excel, Hire Velocity, IBM Talent Acquisition Optimization (IBM TAO), KellyOCG, LevelUP HCS, Orion Talent RPO Solutions, Pierpoint International, Pontoon Solutions, Sevenstep, and Yoh/DZConneX
 - **Aspirants:** ACA Talent, Advantage xPO, Endevis, Hudson RPO, Hueman RPO, KinetixHR, Newton Talent, Personify, and PrincetonOne
 - Everest Group also identified the following providers as Star Performers based on their year-over-year movement on the PEAK Matrix (in alphabetical order): AMN Healthcare, Korn Ferry RPO, LevelUP HCS, Pontoon Solutions, and Yoh/DZConneX

RPO service provider commentary

- Everest Group delineates each of the 31 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

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

RPO in North America Services PEAK Matrix® Assessment 2021^{1,2}



Capability assessment

Illustrative example

Measure of capability: ● Low ● High

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

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● Low ● High

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

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

1 Service providers scored using Everest Group's proprietary scoring methodology given on page 20 in the main report
 2 Assessment for all Aspirants, AgileOne, and Hire Velocity 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

Source: Everest Group (2021)

Research calendar

Recruitment Process Outsourcing (RPO)

Published Planned Current release

Flagship reports

Release date

Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	April 2020
Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	June 2020
Navigating the Waves of a Global Pandemic: Recruitment Process Outsourcing (RPO) State of the Market Report 2020	October 2020
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with PEAK Matrix® Assessment 2021	April 2021
Recruitment Process Outsourcing (RPO) – Service Provider Compendium 2021	June 2021
Recruitment Process Outsourcing (RPO) in North America Services PEAK Matrix® Assessment 2021	July 2021
Recruitment Process Outsourcing (RPO) – State of the Market Report 2021	Q3 2021
Outplacement and Career Transition Services PEAK Matrix® Assessment 2021	Q3 2021

Thematic reports

Release date

The Concept of Ideal Talent – A Game-Changer in Talent Management	December 2019
Unlocking the Digital Potential in Talent Acquisition	January 2020
Impact of Recession on the Business Process Services (BPS) Industry	March 2020
Recruitment Process Outsourcing (RPO) in Europe: Charging Through Heterogeneity	September 2020
Outplacement Services – A Key Ingredient in the Age of Digital Disruption to the Workforce	February 2021
RPO 4.0: Heralding a New Era	May 2021
Multi-country RPO	Q4 2021

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