

# SAPIENT INSIGHTS GROUP



SAPIENT  
INSIGHTS GROUP

ANNUAL HR SYSTEMS  
SURVEY RESEARCH

26<sup>TH</sup>

EDITION

**Voice of the Customer:  
HR Analytics & Planning  
Segment**

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# INTRODUCTION AND TABLE OF CONTENTS

## SECTION 1

# INTRODUCTION AND TABLE OF CONTENTS

## INTRODUCTION

This is a licensed report, made for Visier®, taken directly from the Sapien Insights 2023–2024 HR Systems Survey White Paper, 26th Annual Edition, which is the latest installment in our ongoing service of providing data and information directly from the practitioner’s perspective, the Voice of the Customer. None of the “Voice of the Customer” information in this report has been modified from its original version.

Since 1997, this invaluable resource has provided insight and guidance to practitioners around the world. Sapien Insight’s renowned survey is the industry’s most extensive global research effort of the HR systems market, delivering views of current and future technology spending, adoption, and achieved outcomes. The cumulative 26-year research effort represents more than 20,000 companies and 300 million employees, in more than 80 countries.

This year’s report covers the current and future adoption plans for 50 specific HR-related application categories, Voice of the Customer feedback on specific vendor solutions, and value achieved for the categories of HR applications listed below.

- Core HR
- HR Service Delivery
- Time Management
- Talent Management
- Analytics and Planning
- Emerging Technology

Additionally, we cover key HR operational topics critical to the success and outcomes organizations hope to achieve with HR System investments, including:

- Systems governance, planning, and strategies
- Selections, implementations, and maintenance
- Service delivery models and system enablement
- Expenditures, resourcing, and organizational structures
- Adaptive change management and system adoption
- Vendor negotiations and relationships



The survey was conducted from May 9th through July 15th, 2023.



For more details on our full research methodology and demographics on participating organizations, please see this paper's Research Methodology and Demographics section.

The full **Sapien Insights 2023–2024 HR Systems Survey White Paper** contains 200 pages and 150 figures containing charts and graphics on the latest industry data and analytical insights for consumers, HR and business leaders, end-users, and solution providers. The **Sapien Insights HR Systems Survey 26th Annual Edition: HR Analytics & Planning Segment** contains 26 pages and 15 Figures. The figure numbers in this report are reflective of where they can be found in the complete White Paper and thus may appear out-of-order in this Licensed Report.

Sapien Insights Group does not endorse any solution or vendor depicted in our research. This report consists of aggregate research data gathered from Sapien Insights Group 2023-2024 HR Systems Survey, 26th Annual Edition and insights from Sapien Insights Group research organization, which is provided for informational purposes only.

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# VOICE OF THE CUSTOMER HR: ANALYTICS & PLANNING

## SECTION 2

# VOICE OF THE CUSTOMER, ANALYTICS & PLANNING SYSTEMS

HR Analytics and Planning solutions have matured from a disparate set of generic tools to a cohesive set of HR Analytics and Planning modules that can be acquired either within larger Business Intelligence platforms, embedded in existing HR systems, or combined in new stand-alone HR Intelligence and Analytics platforms.

Our Voice of the Customer (VoC) section of the paper is based directly on feedback, ratings, and comments from customers of these applications. For more details on our methodology for all Voice of the Customer charts and research, see [our Research and Methodology section of this paper.](#)

## Workforce Planning

*Data and planning is cost-effective and allow input from everyone on the team.*

Business 20+ EE

## Generic Visualization Tool

*World-class visualizations that make data insights very accessible to leaders.*

Financial Services 6200+ EE

### HOW THESE SYSTEMS MAKE A DIFFERENCE!

Applications we track in this category include:

Category	Adoption
Embedded HR Tech Analytics Applications	54%
Generic Analytics, and Visualization Tools	71%
Data Storage Applications: Warehouses and Lakes	61%
HR Intelligence / Analytics Platforms	41%
Standalone Statistical Tools	35%
Enterprise Business Intelligence Platforms	34%
Workforce and Org Planning Applications	31%
Data Mapping and Integration Tools - (Assessing)	

## Embedded Analytics

*We are provided a lot of analytics that we can customize to the information we need. The system provides charts and graphs along with the data which is helpful.*

Energy / Utilities 150+ EE

## Datawarehouse Solutions

*It's a great, easy to use data warehousing tool.*

Education 8200+ EE

## HR Analytics Platform

*Data aggregation and visualization has allowed our HRBP community to have easy access to information.*

Manufacturing 6500+ EE

## Enterprise BI Platforms

*Versatile tool that brings the best of enterprise capabilities including collaboration and sharing.*

Manufacturing 9200+ EE



# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

## HR ANALYTICS AND PLANNING SYSTEMS

HR has gone from a late adopter of data and analytics to some of the most voracious purchasers and users of new HR analytics tech – and that perception has only intensified as HR increases the use of HR analytics systems for good or ill.

### Traditional HR Analytics solutions consisted mostly of:

- Excel
- Generic visualization tools
- Embedded HR reporting tools
- Structured relational data warehouse solutions
- Complex analytics software, requiring programming

Each of these traditional HR analytics solutions are still in use today, in fact over 95% of organizations state that they are still using Excel at some level for at least some form of data analysis, which has been the case for many years.

As this HR systems category continues to mature though, we are also seeing increased adoption of more sophisticated applications, platforms, and embedded HR solutions as noted below.

### Emerging HR Analytics and Planning solutions:

- Standalone HR Intelligence/Analytics platforms
- Enterprise ERP Business Intelligence platforms
- Embedded AI for HR analytics and intelligent reporting
- Unstructured data lakes, data mapping, and data integration tools

A major shift in the buyer market occurred very quickly in HR Analytics systems. **Figure 111** shows that 91% of organizations overall do not plan to change their HR Analytics system yet as recently as last year, it was much closer to half of all organizations that were seeking out a new solution. Although we have repeatedly mentioned the stability inherent in the 2023 HR Systems market, the drastic difference in 2023 is more likely due to the nature of HR Analytics systems that do require some specific user knowledge and are therefore harder to replace once that training has been completed.

FIGURE 110: USING CORE HRMS DATA ANALYTICS MODULE

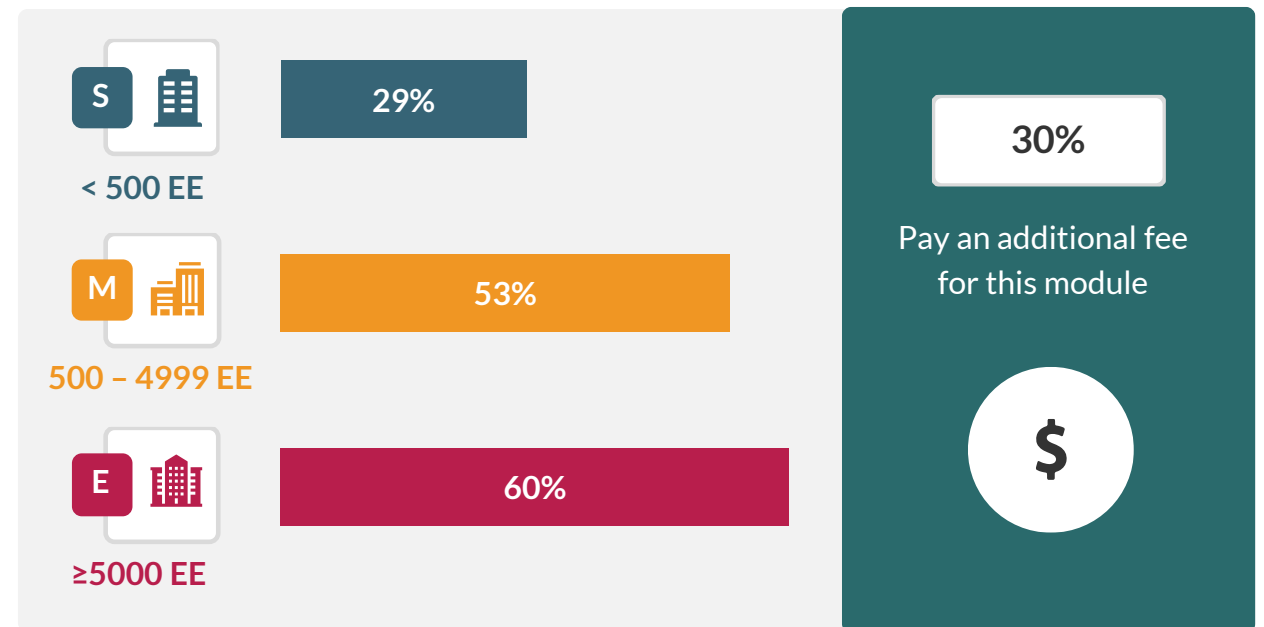
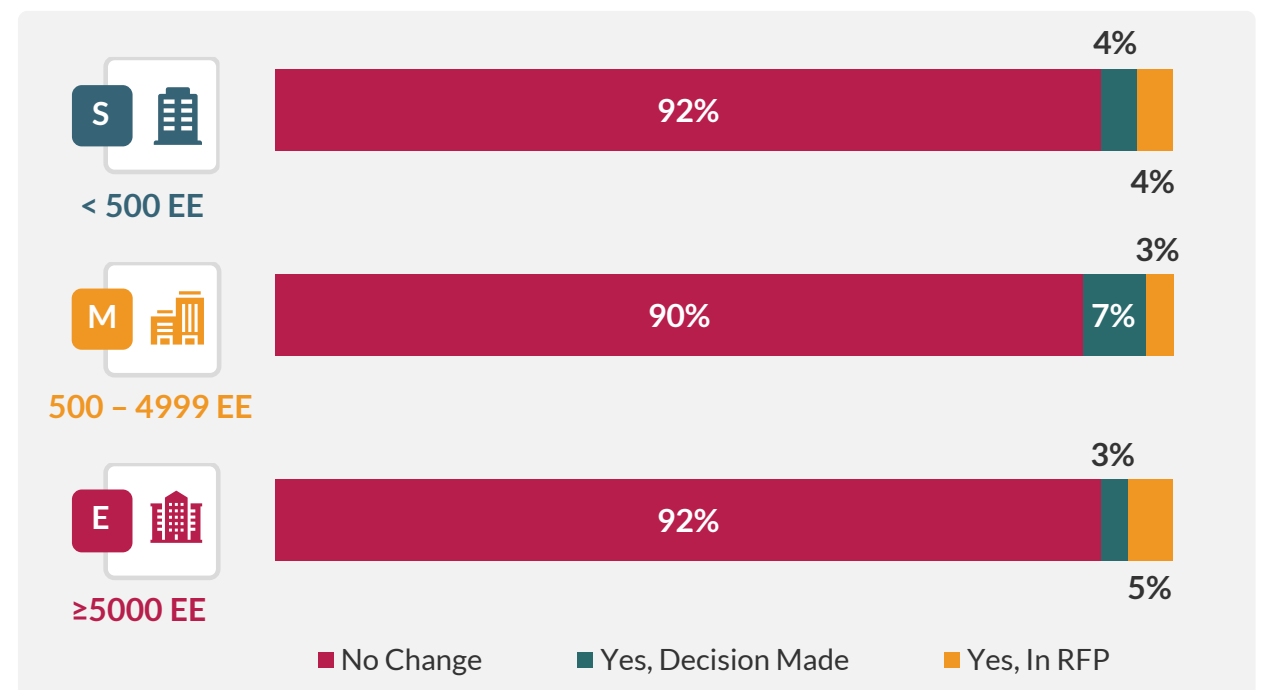


FIGURE 111: HR ANALYTICS AND PLANNING REPLACEMENT PLANS






# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

The HR Analytics and Planning Vendor Adoption chart is expressed as a percentage of total responses achieved for each vendor solution, viewed by organization size (see Figures 112, 113, 114). Please note: These charts are not market-size data. They are best used to view the predominant vendors in each size category and to identify trends in future adoption

**FIGURE 112: HR ANALYTICS & PLANNING VENDOR SOLUTION ADOPTION, ENTERPRISE**

 ≥5000 EE	Today Adoption Level	Expected Growth	12 Month Adoption Level	Appears in RFP
In-house (Excel/R/Python/etc.)	23.47%	↓	23.00%	0.00%
Microsoft Power BI	19.72%	↑	20.66%	7.69%
Tableau	8.45%	→	8.45%	7.69%
Workday Prism Analytics	7.04%	→	7.04%	7.69%
SAP SuccessFactors	6.57%	→	6.57%	0.00%
Visier	6.10%	↑	7.04%	23.08%
Oracle Transactional Bus Int OTBI	5.16%	→	5.16%	0.00%
Workday People Analytics	5.16%	↑	7.51%	0.00%
IBM Cognos	3.29%	↓	2.82%	0.00%
Other Solution	3.29%	↗	3.76%	0.00%
Qualtrics	1.88%	→	1.88%	0.00%
ServiceNow Performance Analytics	1.88%	→	1.88%	0.00%
ADP Data Cloud	1.41%	↗	1.88%	0.00%
Oracle Analytics Cloud	1.41%	↑	2.82%	0.00%
Workday Adaptive Planning	1.41%	→	1.41%	15.38%
SAP Analytics Cloud	0.94%	→	0.94%	0.00%
Perceptyx	0.47%	→	0.47%	7.69%

## ENTERPRISE HR ANALYTICS & PLANNING ADOPTION - ANALYST INSIGHTS:



Just as we saw in 2022, In-House created solutions developed within Excel or programmed in environments like R and Python continue to see the largest overall adoption numbers in HR Analytics and Planning. However, unlike in 2022 the expected adoption levels of these types of analytics solutions is expected to decrease in the coming year. This expected decline is seen in the Mid-Market tier as well, showing a growing need, and budget, for analytics solutions specifically designed for people operations.

The most adopted HR Analytics and Planning applications remained fairly consistent from 2022 with Microsoft BI and Tableau as the top solutions that have been purchased separately as analytics platforms with dedicated HR applications. Embedded HR and ERP solutions, including Workday Prism Analytics and SAP's analytics modules round out the Top 5 in terms of adoption, with Visier following closely behind but with a much higher expected growth rate.

### Expected Growth Legend

- ↑ Substantial Growth
- ↗ Slight Growth
- Flat
- ↘ Slight Decline
- ↓ Substantial Decline

Expected Growth calculation is based on the difference between Today and 12 Month Adoption plans in addition to data points from future replacement plans. Items with \* adjusted based on external data and market information.

Note: These data sets do not equal 100% as we have removed responses below 1% in the size breakout data set, or below 2% in the aggregate data set in either the Today or 12-month adoption levels.





# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

**FIGURE 113: HR ANALYTICS & PLANNING VENDOR SOLUTION ADOPTION, MID-MARKET**

500 - 4999 EE	Today Adoption Level	Expected Growth	12 Month Adoption Level	Appears in RFP
In-house (Excel/R/Python/etc.)	27.46%	↓	26.64%	9.09%
Microsoft Power BI	22.13%	↑	23.77%	18.18%
ADP Data Cloud	10.25%	↗	10.66%	9.09%
Other Solution	6.97%	↑	8.20%	0.00%
IBM Cognos	5.33%	→	5.33%	0.00%
Tableau	4.92%	↑	5.74%	0.00%
Workday People Analytics	3.28%	↑	4.51%	9.09%
Google Analytics	2.46%	→	2.46%	0.00%
Workday Adaptive Planning	2.46%	↗	2.87%	0.00%
Oracle Analytics Cloud	1.64%	↗	2.05%	9.09%
Oracle Transactional Bus Int OTBI	1.64%	→	1.64%	0.00%
SAP Crystal Reports	1.23%	→	1.23%	9.09%
Visier	1.23%	→	1.23%	0.00%
Domo	0.82%	↘	0.41%	0.00%
Oracle Enterprise Planning Mgmt EPM	0.82%	→	0.82%	0.00%
Qualtrics	0.82%	↗	1.23%	9.09%
SAP SuccessFactors	0.82%	→	0.82%	0.00%
UKG Employee Voice	0.82%	↑	1.64%	9.09%
Workday Prism Analytics	0.82%	↗	1.23%	9.09%

## MID-MARKET HR ANALYTICS & PLANNING ADOPTION - ANALYST INSIGHTS:



In Mid-Market-sized organizations we continue to see increased adoption in almost every category as organizations of all sizes harness the use of people analytics, whether it be from bundled analytics modules, standalone platforms, or any tools they have at hand.

As with the Enterprise category, Microsoft Power BI is seeing by far the highest levels of adoption (non-In-House) and some of the highest expected future adoption levels as well. The ability for Power BI to work with in-house systems and create an integrated view of people data is clearly helping it stand apart. Note that MS Power BI is also the solution appearing in the most RFPs so their adoption levels in 2024 may be ahead of even these high expectations.

Last year's most adopted solution in the category. ADP DataCloud continues to see success not only in usage but in User Experience and Vendor Satisfaction as well. Other solutions with expected increases in adoption include Tableau, Workday People Analytics and Adaptive Planning, and Oracle Analytics Cloud. Considering the increased understanding of the power of integrated data and insights, it is not surprising to see so many embedded HCM analytics solutions so high in adoption in the current and future state.

### Expected Growth Legend

- ↑ Substantial Growth
- ↗ Slight Growth
- Flat
- ↘ Slight Decline
- ↓ Substantial Decline









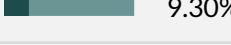

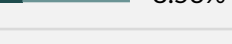
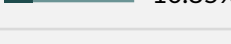
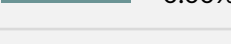
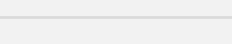
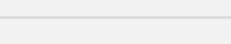
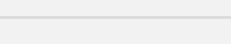












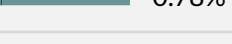
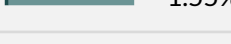
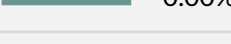
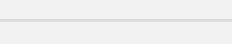
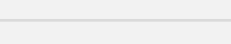
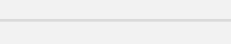
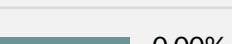
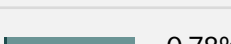
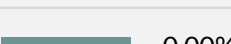









Expected Growth calculation is based on the difference between Today and 12 Month Adoption plans in addition to data points from future replacement plans. Items with \* adjusted based on external data and market information.

Note: These data sets do not equal 100% as we have removed responses below 1% in the size breakout data set, or below 2% in the aggregate data set in either the Today or 12-month adoption levels.



# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

**FIGURE 114: HR ANALYTICS & PLANNING VENDOR SOLUTION ADOPTION, SMB**

 <500 EE	Today Adoption Level	Expected Growth	12 Month Adoption Level	Appears in RFP
In-house (Excel/R/Python/etc.)	 48.06%	↑	 49.61%	 14.29%
Other Solution	 10.85%	↑	 14.73%	 0.00%
ADP Data Cloud	 8.53%	↑	 9.30%	 14.29%
Microsoft Power BI	 8.53%	↑	 10.85%	 0.00%
Tableau	 6.20%	↑	 6.98%	 0.00%
Paycor Analytics	 4.65%	→	 4.65%	 14.29%
IBM Cognos	 3.88%	↓	 3.10%	 0.00%
Google Analytics	 3.10%	→	 3.10%	 14.29%
UKG Employee Voice	 2.33%	↑	 4.65%	 14.29%
Qualtrics	 0.78%	→	 0.78%	 0.00%
Workday Adaptive Planning	 0.78%	↑	 1.55%	 0.00%
SAP Analytics Cloud	 0.00%	↑	 0.78%	 0.00%
SAP SuccessFactors	 0.00%	↑	 0.78%	 0.00%
Visier	 0.00%	↑	 0.78%	 0.00%
Workday People Analytics	 0.00%	↑	 0.78%	 14.29%

## SMB HR ANALYTICS & PLANNING ADOPTION – ANALYST INSIGHTS:



Organizations under 500 employees are less likely to adopt any analytics application or module that isn't part of their current HRMS / Payroll solution. In-House solutions including Excel or programming options continue to be the highest adopted solutions, just as in larger organizations. ADP, Microsoft Power BI, and Tableau are all in the top 5 in adoption levels and all will continue to see more use in 2024 and beyond as those solutions have become indispensable to even smaller organizations.

Microsoft Power BI is notable as it appears near the top in adoption level at the SMB, Mid-Market, and Enterprise levels and appears in the Top 5 highest-rated solutions in terms of User Experience and Vendor Satisfaction for all size categories as well. By taking already existing data from employee productivity tools and helping organizations make advanced data models and predictions with little advanced user knowledge needed, Microsoft has created a market for its services among nearly all organizations that require people analytics beyond the very basics.

SMB organizations continue to expand the usage of people analytics beyond basic compliance and reporting, and the Payroll and HRMS solutions that provide those more advanced analytics such as Paycor, UKG, and ADP are all seeing high adoption levels although this year's data does show interest in standalone applications such as OneModel, Anaplan, and IBM Cognos at the SMB level, once again reinforcing the increased maturity of smaller organizations in their data-based decision-making strategies.

### Expected Growth Legend

- ↑ Substantial Growth
- Slight Growth
- Flat
- ↘ Slight Decline
- ↓ Substantial Decline

Expected Growth calculation is based on the difference between Today and 12 Month Adoption plans in addition to data points from future replacement plans. Items with \* adjusted based on external data and market information.

Note: These data sets do not equal 100% as we have removed responses below 1% in the size breakout data set, or below 2% in the aggregate data set in either the Today or 12-month adoption levels.



## VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

As **Figure 114** shows on the previous page, the HR Analytics and Planning space is becoming crowded with solutions that are both generic and tailored. This year we have 20 vendor solutions selected by 1% or more of our survey population across the various size categories.

### **BHR Analytics vendor differentiators now include:**

- Automation of collection and reporting
- Data importing and exporting capabilities
- Benchmarking data sets (either existing or accessible)
- Easy of use, especially on reporting or visualization creations
- Intelligent features\* including predictive, forecasting, and modeling

The Other category (vendors that did not reach the minimum statistical threshold in our data set) includes several generic solutions and less-used niche solutions. On average, 7% of organizations use a vendor in the Other category or an In-House solution; the most often mentioned solutions are:

- Gartner CEB
- IBM SPSS
- Infor Birst
- IntelliHR
- MicroStrategy
- Orgvue
- One Model
- Oracle EPM
- Sisense
- Snowflake
- TIBCO Spotfire
- UKG Pro People Analytics

We currently combine the analytics and planning applications into one area, as many organizations overlap the use of these tools. But we do, however, expect over time in the HR area that these two categories may eventually become more distinct platforms. Currently, the average organization is using 2.3 different HR Analytics and Planning Application solutions to meet all of their HR Analytics and Planning needs – increasing both the cost and complexity of these efforts.

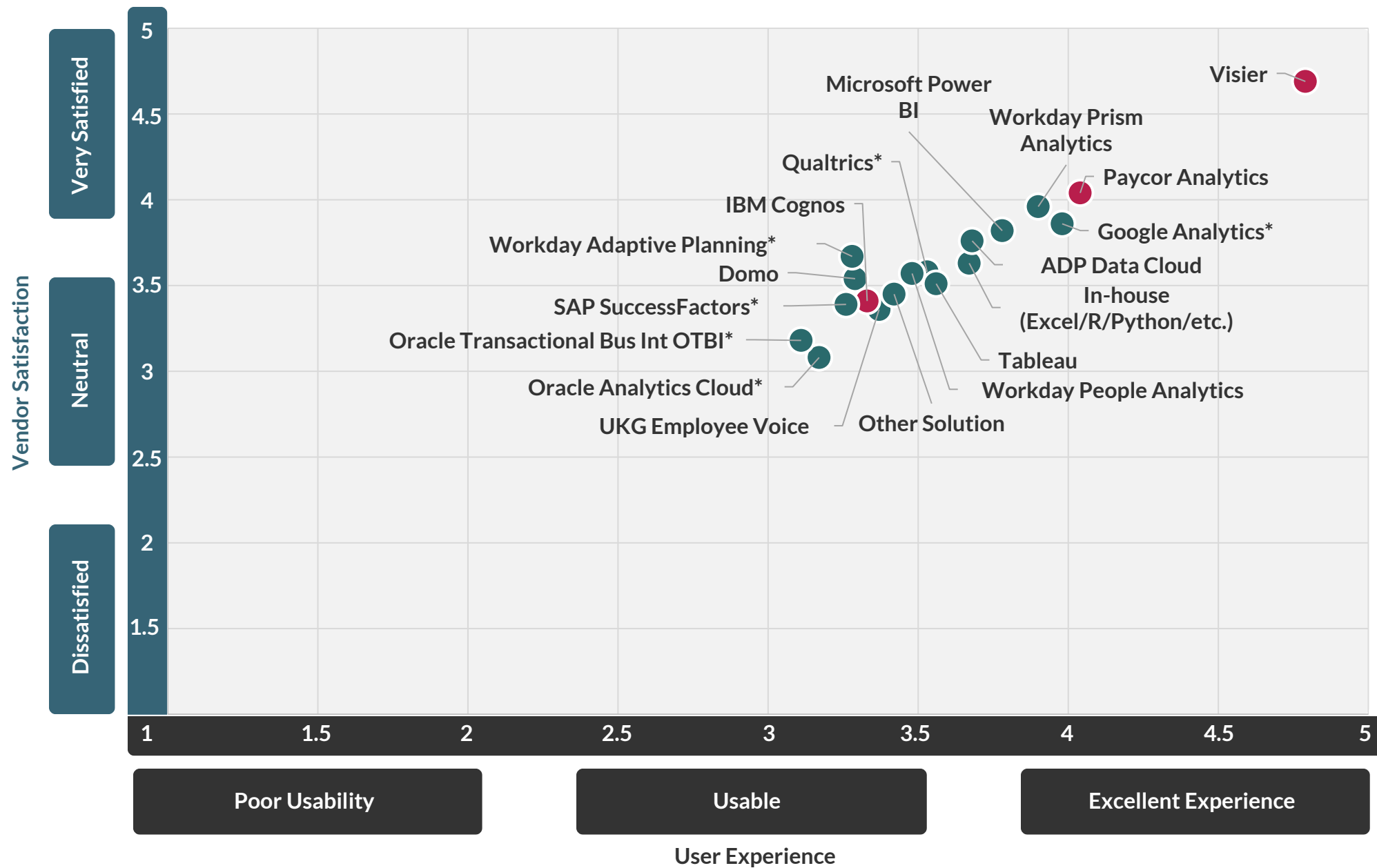
\*By intelligent features, we refer to such technologies as machine learning, artificial intelligence, etc



# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

Our annual HR Analytics and Planning Voice of the Customer (VoC) User Experience and Vendor Satisfaction chart showcases how crowded this space is becoming for buyers. Each year we ask survey respondents to rank the quality of their system User Experience (UX) and Vendor Satisfaction (US) on a scale of 1-5, and we average those ratings for each solution. This year the HR Analytics and Planning categories' average scores sit at 3.54 (UX) and 3.58 (VS), 6% higher than last year's HR Analytics and Planning averages. There were 18 vendor solutions that received the minimum validated customer ratings to make our HR Analytics and Planning VoC chart this year.

FIGURE 115: ANALYTICS AND PLANNING, VOC USER EXPERIENCE AND VENDOR SATISFACTION CHART



**Analytics & Planning**

Vendors with high ratings that did not have enough responses to make the chart:

- ServiceNow PA
- Onemodel
- Perceptyx
- Sisense

\*These solutions did not meet our response threshold numbers and are being shared as directional indicators only.



# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

Our aggregate Voice of the Customer (VoC) Vendor Satisfaction (VS) and User Experience (UX) charts are valuable tools for obtaining a broad perspective of how the HR community is evaluating current applications. Over the last 26 years of gathering and analyzing customer feedback, we have seen a wide range in customer ratings based on the global complexity and total workforce size managed within the application. These ranges are most evident in payroll, HRMS, time management, and HR service delivery applications.

Our Voice of the Customer Top Five ranking is hard-won and worthy of celebration. In **Figure 116**, we provide a snapshot of the solutions achieving the Top 5 average ratings, in **HR Analytics and Planning Systems** by size. We are also launching a series of Voice of the Customer badges for vendors who achieve these notable ratings from their customers.



\*Full adoption details and breakdowns of data by company size can be accessed through our research subscriptions, contact us at [Research@SapientInsights.com](mailto:Research@SapientInsights.com) for further information.

**FIGURE 116: TOP FIVE VOC RATINGS BY WORKFORCE SIZE**

SMB, <500 EE HR ANALYTICS AND PLANNING SYSTEMS		
	User Experience	Vendor Satisfaction
Top, #1	Paycor Analytics	Paycor Analytics
Top	Google Analytics	Google Analytics
Top	ADP Datacloud	ADP Datacloud
Top	MSFT Power BI	MSFT Power BI
Top	Tableau	Tableau

MID-MARKET, 500 - 4999 EE HR ANALYTICS AND PLANNING SYSTEMS		
	User Experience	Vendor Satisfaction
Top, #1	IBM Cognos	IBM Cognos
Top	MSFT Power BI	MSFT Power BI
Top	ADP Datacloud	ADP Datacloud
Top	Tableau	Tableau
Top	Workday Adaptive Planning	Workday Adaptive Planning

ENTERPRISE, ≥5000 EE HR ANALYTICS AND PLANNING SYSTEMS		
	User Experience	Vendor Satisfaction
Top, #1	Visier	Visier
Top	Workday Prism Analytics	Workday Prism Analytics
Top	MSFT Power BI	MSFT Power BI
Top	Workday People Analytics	Workday People Analytics
Top	Tableau	Tableau





# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

As the HR Analytics and Planning vendors begin to solidify a standard set of expected functionality, with interfaces that allow fewer technical users to input, access, and view valuable data, we expect to see adoption levels increase and entry-level cost points start to decrease. At the onset, HR analytics solutions were designed for large complex organizations with specialized HR analytics roles – but there is a need for solutions that will work at the Mid-Market and SMB levels and vendors are responding in kind.

## The top factors given for low User Experience and Vendor Satisfaction ratings:

- Poor usability
- Low adoption
- Cost
- Global issues
- Data security concerns

*Scalability is poor, and their pricing models are confusing.*

Manufacturing 9200+ EE

## The top factors given for high User Experience ratings:

- Ease of use, HR specific
- Strong reporting or visualization
- Integrations / Accessible external data
- Global capabilities

## The top factors given for high Vendor Satisfaction ratings include:

- Data is packaged with action items / next steps
- Partner relationships
- Available training

### ENTERPRISE

### HR ANALYTICS AND PLANNING UX AND VS RATINGS – ANALYST INSIGHTS:



Sapient Insights started tracking the HR Analytics and Planning UX and VS data five years ago, and in that time, we’ve noted that solutions such as Visier, Qualtrics, Workday, and UKG are consistently near the top in ratings for User Experience and Vendor Satisfaction. This year Visier was the highest rated in the Enterprise size category, the first year we have broken out the ratings into these more narrowly defined groups. Visier continues to emphasize their user-friendly GUI that makes sense to all levels of HR and operations but also contains the deep capabilities that make them valuable for multinational complex organizations. Visier also continues to invest in multiple levels of customer service that are helping customers focus on the use of the data over basic reporting.

### VISIER CUSTOMER QUOTES:



*Visier is far and away the best application for workforce analytics and planning on the market. Visier hits all requirements of a workforce analytics solution and the support and services offered by Visier round out the offering.*

Manufacturing 9200+ EE

Achieving the second highest UX and VS ratings this year is a Workday Prism Analytics, which focuses on bringing external data into the Workday environments providing more flexibility for users. The other HR Analytics solutions in the Top 5 at the Enterprise level were Microsoft’s Power BI tool, Workday People Analytics, and the more general use Data and Analytics visualization solution, Tableau.



# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

## MID-MARKET

### HR ANALYTICS AND PLANNING UX AND VS RATINGS – ANALYST INSIGHTS:



IBM Cognos had the highest ratings for both UX and VS in the Mid-Market category, and its focus on optimized decision-making and the ease with which HR users can generate and share reports were constant refrains among the user comments of their product. As with other workforce applications that have uses outside of HR, the ability to integrate with other data sources in a secure environment has led to rapid increase in the amount of interest in tools such as Cognos.

#### IBM COGNOS CUSTOMER QUOTES:

*Once learned, the tool is easy to use; It's fairly simple to create detailed reports.*

Financial Services 1120+ EE

Other HR Analytics solutions that made the Top 5 were Tableau and Microsoft Power BI, both representing more generalized analytics platforms, but also in the Top 5 of HR Analytics and Planning solutions were ADP Datacloud and Workday Adaptive Planning which function within their respective ERP/HRMS environments but still allow for much more robust modeling and predictive analytics the is seen in the base platform.

## SMB

### HR ANALYTICS AND PLANNING UX AND VS RATINGS – ANALYST INSIGHTS:



In HR Analytics and Planning Paycor Analytics achieved the top UX and VS ratings for the SMB size category, in this first year we've broken it out for the three tracked sizes. Functioning just as a dedicated HR Analytics platform, Paycor allows for data collection, visualization, and benchmarking but they have the added bonus of leaning on their own data pool for trend lines and analyses.

#### PAYCOR ANALYTICS CUSTOMER QUOTES:

*Analytics are front and center on my homepage, and we really love that visibility.*

Trade Services 385+ EE

Microsoft Power BI is an interesting case, as Tableau and Power BI were the only analytics platforms to be in all size categories. For Microsoft, this is very likely due to the fact that they cater to users using the “free” easy capabilities and also the power users using more complex reporting and modelling. Other standouts in this size category were ADP and Google Analytics, who have a vast already existent data pool to compare against.



# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

HR Analytics and Planning is still an evolving category of HR applications – and only 50% of organizations feel their primary application “meets their business needs most of the time,” and 22% feel it “always meets their needs.”



Only 22% of Organizations are “confident” their primary HR Analytics and Planning solutions are meeting all of their business needs.

The lack of confidence is not surprising, as the top reason this year was customization or configuration.. The 2nd biggest gap this year was reporting capabilities, showing not much movement in addressing these issues from last year.

## TOP HR ANALYTICS AND PLANNING GAPS IN MEETING BUSINESS NEEDS

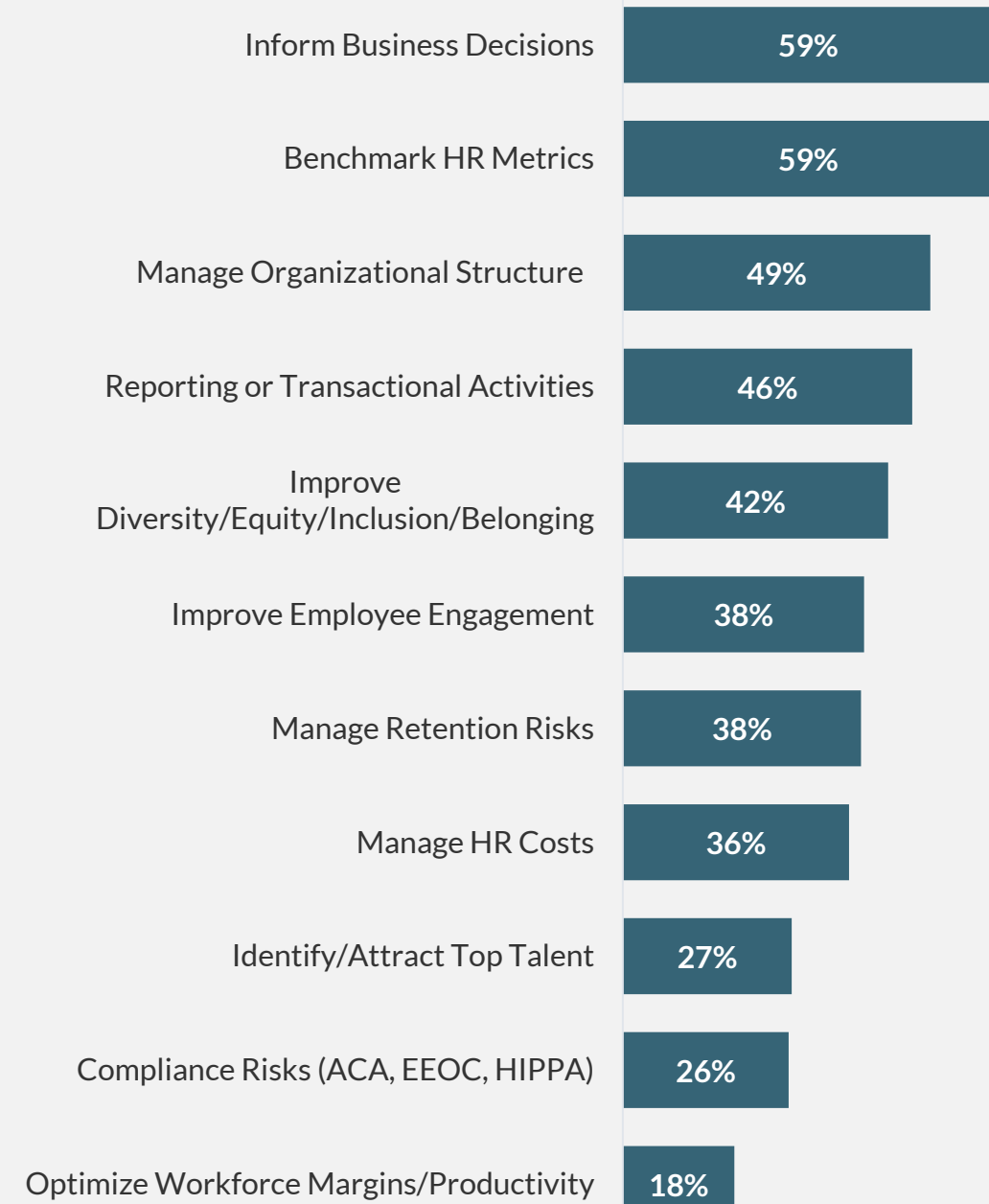


Analytics and Planning

- Customization/Configuration 41%
- Reporting functionality 36%

Another way to look at this question is to assess what organizations are currently using HR Analytics and Planning applications to achieve within their organization. As seen in **Figure 117**, in aggregate when we asked this question the top achievement continues to be Benchmarking HR Metrics, but we are seeing an increased focus on improving employee engagement and managing retention risks this year. On the next page in **Figure 118**, we look at this analysis by the top three achievements aligned with specific HR Analytics and Planning applications.

FIGURE 117: WHAT ARE THE HR ANALYTICS AND PLANNING APPLICATIONS BEING USED TO ACHIEVE?







# VOICE OF THE CUSTOMER HR ANALYTICS & PLANNING SYSTEMS

When reviewing the top categories HR professionals are using Analytics and Planning applications for, patterns emerge based on the type of application. General productivity analytics and HR-focused applications show common use cases around reporting, informing business decisions, and benchmarking metrics. However, Planning and BI applications align more with managing HR costs, with some overlap with productivity and HR-focused apps in reporting and benchmarking. What these apps are NOT being used for might be more telling. Both compliance and talent acquisition activities saw few use cases for any of these analytics tools, at least in Top 3 appearances.

Understanding how and why HR applications get deployed is critical. These use cases and priorities should be key factors in selecting HR analytics solutions. Evaluating where you need to evolve is important context when reviewing top application categories and their correlations to HR analytics objectives.

**FIGURE 118: TOP 3 USES OF HR ANALYTICS AND PLANNING APPLICATIONS BY PRIMARY HR ANALYTICS AND PLANNING SOLUTIONS**

	Optimize Workforce Margins/ Productivity				Planning/BI Applications				Human Resources Focused Applications								Feedback Apps	
	Microsoft Power BI	Tableau	IBM Cognos	Google Analytics	Anaplan	Oracle Analytics Cloud	SAP Analytics Cloud	Workday Adaptive	Other Embedded	ADP Data Cloud	Paycor Analytics (Visier)	Visier People	Workday People Analytics	Workday Prism Analytics	SAP WF Analytics	In House	UKG Employee Voice	Qualtrics
Benchmark HR Metrics	2	1	1		2	1	1	3	1	1	1	2	1		1	2	1	1
Identify / Attract Top Talent																		
Reporting or Transactional Activities	3	2		3	1	1		2						1	1			
Manage Retention Risks									2	3	2						2	
Organizational Structure				2		1						1		2	1			
Improve Employee Engagement											1					3		
Manage HR Costs			2		1		1											
Inform Business Decisions	1	1	1	1				1	2	2		3	1			1	1	1
Improve DEIB							1						1	2				1
Compliance Risks (ACA, EEOC, HIPPA)																		

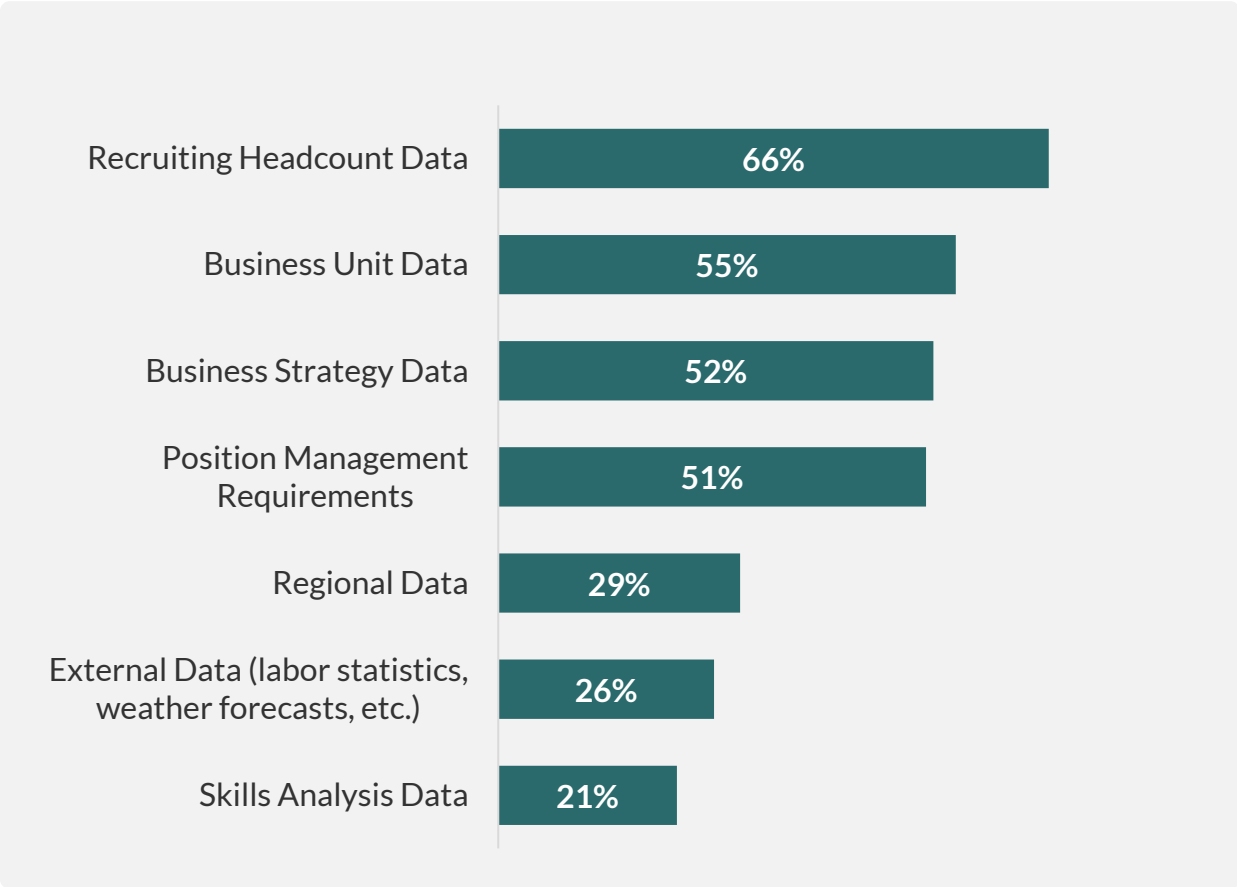


# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

## TOTAL WORKFORCE PLANNING

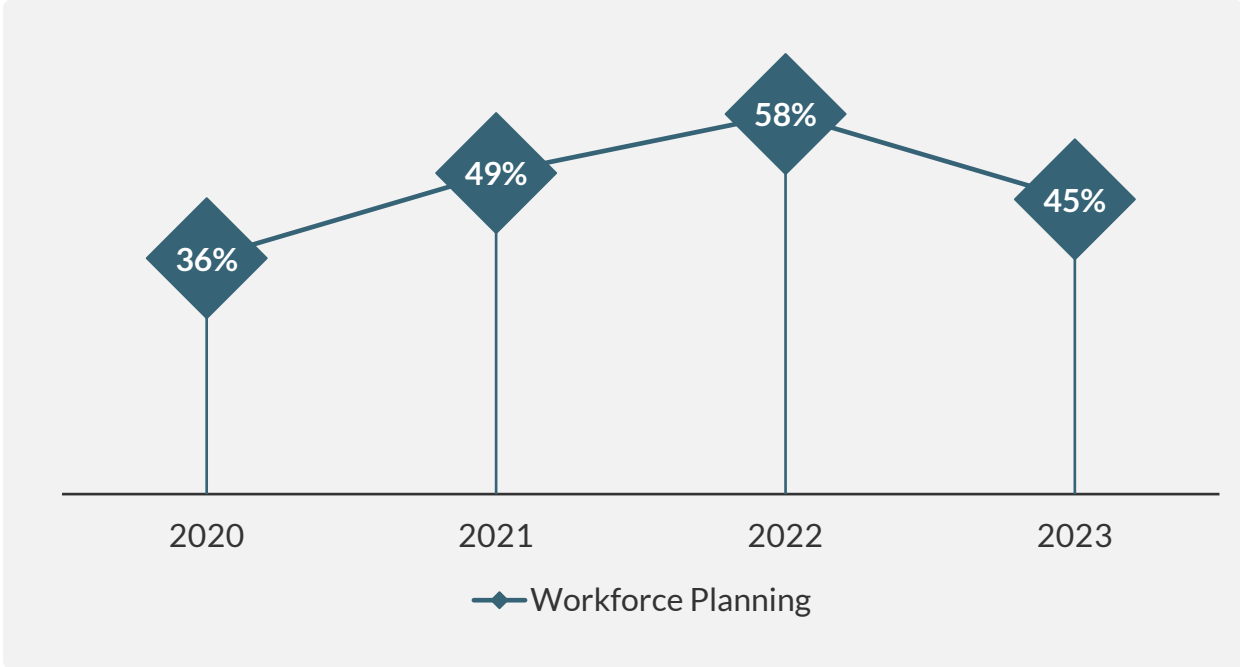
As seen in Figure 119, over the last four years, we've seen the percentage of organizations conducting some level of workforce planning efforts increase, and although there was a slight dip this year compared to the last two, the general trend is that organizations of any size must be prepared for a more VUCA (Volatile, Uncertain, Complex, Ambiguous) world; a world that requires more long-term, strategic workforce planning that includes more scenarios and complex modeling.

**FIGURE 119: DATA INCLUDED IN WORKFORCE PLANNING EFFORTS**

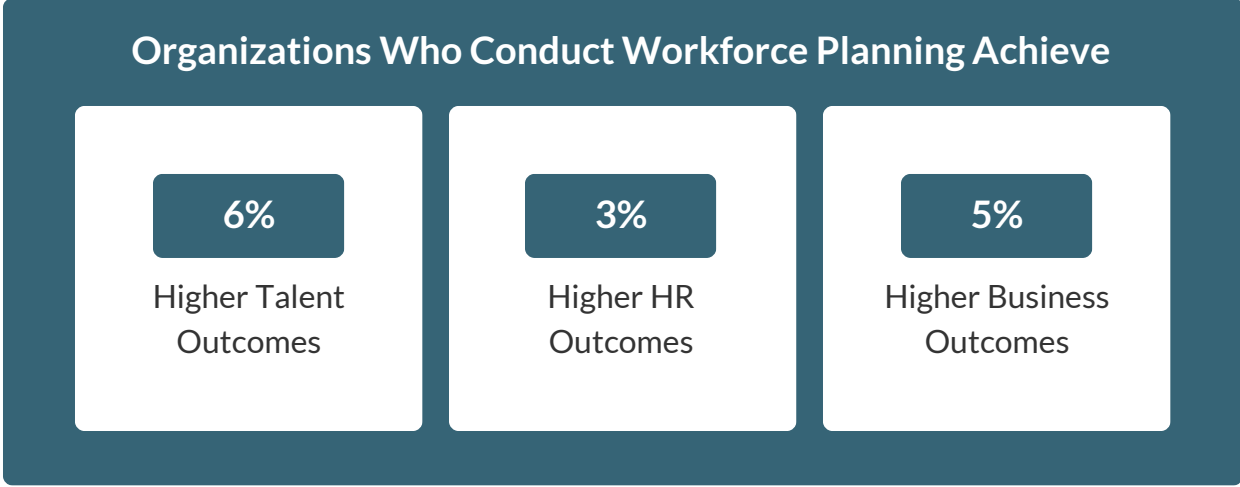


When workforce planning is conducted, we are seeing an increasing number of organizations use multiple datasets, with Skills Analysis and Position Management Requirements seeing the largest increases in use over last year's data.

**FIGURE 120: ORGANIZATIONS CONDUCTING SOME LEVEL OF WORKFORCE PLANNING**



For the last few years, we've assessed the outcomes of those organizations who conduct any form of Workforce planning against those who conduct no workforce planning at all, and each year we continue to see better Talent, HR, and Business outcomes from those who invest in workforce planning efforts, and this year is no exception as seen below.





# VOICE OF THE CUSTOMER: HR ANALYTICS & PLANNING SYSTEMS

This category is continuing to evolve rapidly. Buyers are looking for easier ways to integrate data, compare information, and share insights throughout the organization safely. Recent increases in new regulations and requirements for better reporting and data transparency, both in the US and globally, have created a need to increase our ability to report on all forms of workforce data. In 2020, the SEC mandates concerning public reporting of human capital metrics by companies subject to SEC reporting requirements were released and are now part of many organizations' common reporting practices. We've also seen an increasing number of regulations being submitted for people-related Artificial Intelligence decisions, compensation transparency, resourcing risk plans, and engagement levels.

## Additional emerging trends to watch in HR Analytics and Planning applications include:

- Extended security – limiting access to data at the page, cell, and even filter levels
- Planning process workflows and predefined templates
- Embedded predictive analytics and machine learning applications
- Bias analysis, and cleaning of existing and new benchmarking/AI training datasets
- Data extraction, mapping, and integration platforms
- Sentiment analysis of noncategorized data
- HR standards benchmarking, based on ESG requirements

One of the aspects of HR Analytics and Planning systems that separate them from many other HR or HR-related solutions is that they often require large amounts of training or specialized skills to use and deploy. That means there is a risk of a low ROI on these systems if the right people aren't available in your organization or if those people leave.

That consideration is one of the reasons there is a big push for more automation and AI-backed assistance in HR Analytics, to take a complex system and make it into something that more employees can pick up and use quickly.

### CUSTOMER QUOTES:

*Our analytics and planning solution has a licensing model that makes it difficult to scale at small to mid-sized companies. The capabilities and pricing models are complex. Also, security in [the analytics platform] is limited, so that using the tool with sensitive HR data is sometimes frowned on by legal and compliance teams.*

Manufacturing 9200+ EE

### CUSTOMER QUOTES:

*Security and information sharing is challenging.*

Financial Services 1190+ EE

### CUSTOMER QUOTES:

*It is not a good platform for historical information and the algorithms cannot be modified.*

Government 1800+ EE

Here are just a few of 5,000 + comments we received from respondents on other ways their current technology provider could make their lives, and their employees lives better and are great ideas for questions in your next selection process.



# RESEARCH METHODOLOGY AND DEMOGRAPHICS SECTION

## SECTION 3

# RESEARCH METHODOLOGY AND DEMOGRAPHICS

## SURVEY AND RESEARCH HISTORY

The Sapiient Insights 2023-2024 HR Systems Survey White Paper, 26th Annual Edition, is the latest installment in a continuous annual research effort that began in 1997 by The Hunter Group.

While the sponsoring organization has changed its name several times since the inception of this research initiative, the project continues to follow a rigorous research methodology and is overseen by well-known and trusted industry analysts. The Annual HR Systems Surveys and resulting published research continue to be invaluable resources that provide insights and guidance to business leaders around the world concerning their HR and finance technology decisions.

## THE DEPTH AND BREADTH OF THE RESEARCH

Each year, thousands of organizations worldwide complete our systems surveys, providing us with valuable research data from companies of all sizes and industries. Multiple well-known technology and service providers support a wide distribution of the survey.

This outreach gives us a broad and varied audience for gathering data on tech adoption and usage metrics while safeguarding against data bias toward any particular vendor or user community. The data is, therefore, representative of the overall HR tech community and its practices.



Target survey participants are HR and IT practitioners and leaders at the center of HR technology decisions.

Participants answer in-depth enterprise systems questions that cover multiple topic areas, including:

- Enterprise outcomes and business financials
- HR technology selection, replacement, and deployment plans
- HR technology Integration and implementation practices
- HR resourcing and system budgets
- HR functional processes and social responsibility behaviors
- Customer feedback and satisfaction drivers for major HR applications

Target participants are HR, finance, IT, and shared services leaders and practitioners at the center of HR or workforce tech decisions, implementations, maintenance, and/or change management efforts. Each year, our annual reach provides a wealth of knowledge that we share within the HR and finance communities. Many executives and business leaders who focus on workforce and finance technology use these survey results to make better, more informed business decisions.

# RESEARCH METHODOLOGY AND DEMOGRAPHICS

## VOICE OF THE CUSTOMER METHODOLOGY

The importance of an organization’s relationship with its HR technology solution providers is often overlooked and under-appreciated. A solid solution provider relationship involves more than basic implementation work and communication between the primary contacts; it also encompasses how well the solution meets the organization’s business needs and is perceived by the end users.

**We ask participants to identify the following for each solution in 50 different categories:**

- In use today
- Implementing in the next 12 – 36 months
- Replacing in the next 12 – 36 months

This data creates our Vendor Adoption charts (sample below), which include only those applications that represent a certain percentage (based on the number of providers in each category) of the overall **in use or planned to be in use** solution responses. In certain cases, there are hard caps on the number of applications we can chart in a given category. In such cases, we show that maximum number based on the reported percentage of use.

Payroll Adoption Levels	Today	Growth	12 Months
Sample Solution Provider	8.92%	↓	7.46%

Our research then gathers quantitative and qualitative data from survey participants on four key factors that impact the overall customer relationship for each of their identified solutions:

### Meets Business Needs:

We ask our respondents to rate how effective their specific HR solution is at meeting their organization’s current business needs.

- Participants responding that the system always meets their needs are asked additional questions about the impact of that application.
- Participants responding that the system does not meet their needs are asked additional questions concerning the type of gaps and specific examples of those gaps.

### User Experience:

Respondents rank the quality of the user experience for all deployed applications on a scale of 1-5 (poor to excellent). We specifically ask them to focus their answers on the applications end-user experience for all stakeholders, including IT, HR, managers, and employees.

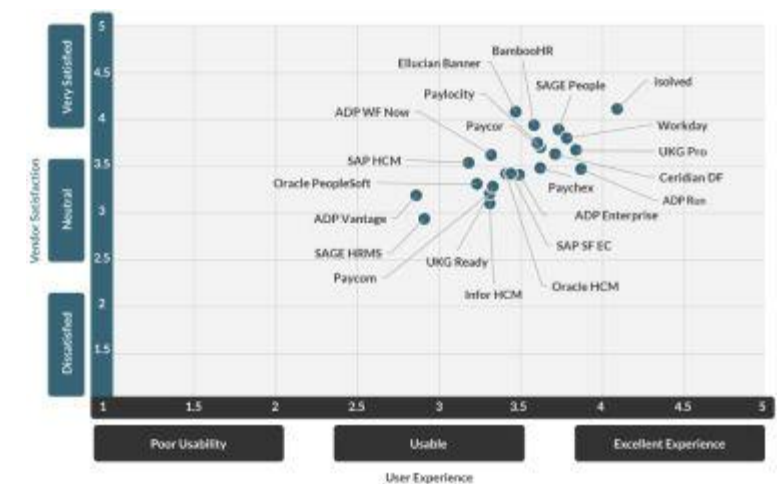
### Vendor Satisfaction:

Respondents rank the quality of their vendor relationships for all deployed applications on a scale of 1-5 (very dissatisfied to very satisfied).. We ask them to specifically focus on relationship factors such as service levels, vendor communications, and alignment of product roadmap to their needs.

All survey participants are then asked additional open-ended questions to provide further details on the reasons behind the specific ratings for user experience and vendor satisfaction.

Based on these answers, we provide an average user experience and vendor satisfaction rating for every application that receives a qualifying number of responses from validated buyers. This data is used to create our Voice of the Customer (VoC) charts for these 12 HR solutions:

- HRMS
- Benefits
- Payroll
- Time Management
- HR Service Delivery
- HR Engagement Survey
- Learning
- Recruiting
- Onboarding
- Performance Management
- Compensation Management
- Analytics and Planning






Our goal with the data in this section is to provide a broad overview of the vendor landscape for all buyers and HR technology community members as they assess their current solutions and needs. Details on the vendors that achieving top ratings in each HR technology category can be found on the **Voice of the Customer HR Systems Top 5 Performers Page**.

# RESEARCH METHODOLOGY AND DEMOGRAPHICS

## LEGEND






### Organization Sizes:

-  SMB  
<500 Employees
-  Mid-Market  
500-4999 Employees
-  Enterprise  
≥5000 Employees

### The HR Systems Blueprint:

-  Data Governance
-  Strategy
-  Culture

### Generational Compositions:








-  Greatest Generation  
1930-1945
-  Baby Boomers  
1946-1964
-  Gen X  
1965-1980
-  Millennial  
1981-1996
-  Gen Z  
1997-2012

### Contacts:

-  Email

[Research@SapientInsights.com](mailto:Research@SapientInsights.com)

### Voice of the Customer:















-  Core HR Management Systems
-  Payroll Systems
-  Benefits and Wellness
-  HR Service Delivery Systems
-  Time Management Systems
-  Talent Management Systems
-  HR Analytics & Planning Systems

Information contained in this survey analysis (report) is compiled and analyzed by Sapient Insights Group as part of our commitment to provide thought leadership on human resources technologies and trends, and the impact their adoption has on business outcomes.

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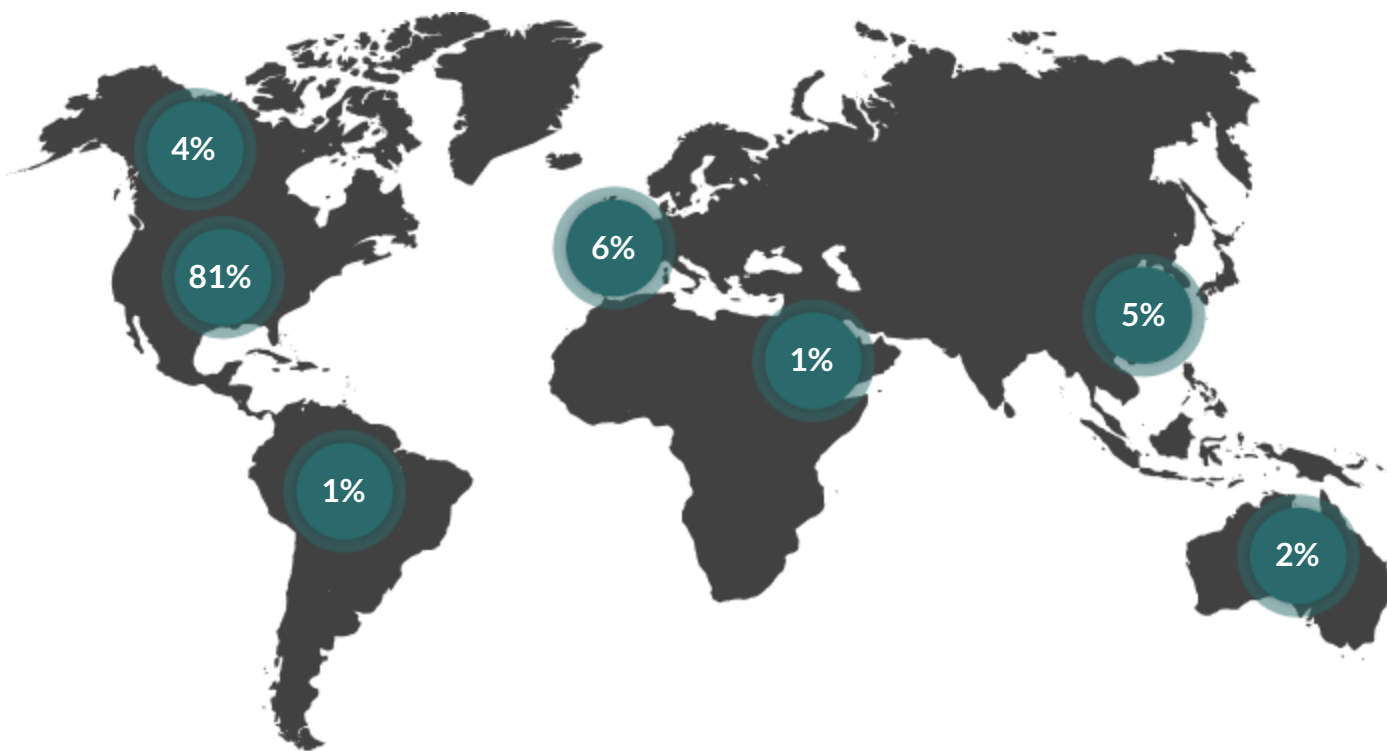
### Applications we track in seven categories:

- |  |  |
|--|--|
|  Payroll                                     |  Recruiting and Acquisition                        |
|  HRMS                                       |  Onboarding and Mobility                          |
|  Benefits                                   |  Performance Management                           |
|  Health and Safety                          |  Learning and Development                         |
|  Wellness                                   |  Compensation Planning                            |
|  Employee and Manager HR Self-Service       |  Rewards and Recognition                          |
|  HR Portals and Communications              |  Skills Management                                |
|  HR Content and Document Management         |  Career Planning and Succession                   |
|  Employee Engagement/ Surveys               |  Embedded HR Tech Analytics Applications          |
|  Employee Help Desk/Case Management         |  Generic Analytics, Vis, and Stats Tools          |
|  Time and Attendance                        |  Enterprise Business Intelligence Platforms       |
|  Absence Management                         |  HR Intelligence / Analytics Platforms            |
|  Leave Management                           |  Workforce and Org Planning Applications          |
|  Labor Scheduling                           |  Data Mapping and Integration Tools – (Assessing) |
|  Labor Budgeting                            |  Data Storage Applications: Warehouses and Lakes  |
|  Productivity / Task Management (Assessing) |  |

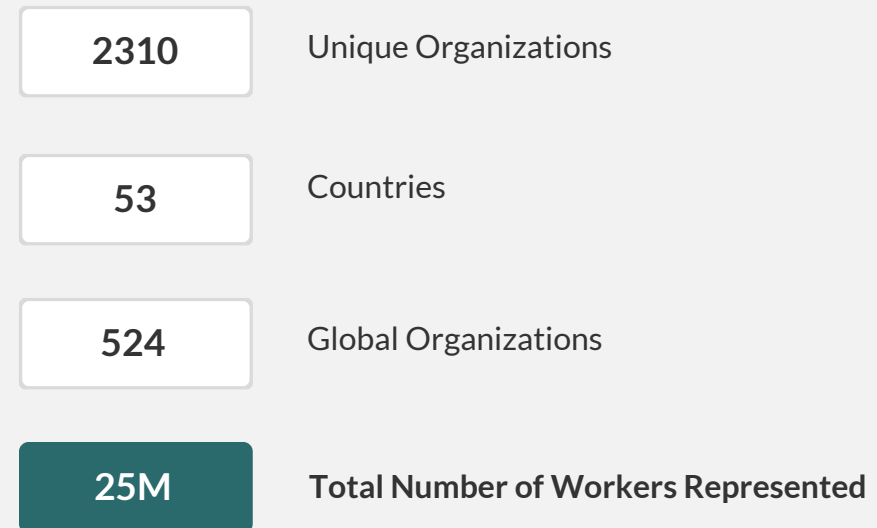
# RESEARCH METHODOLOGY AND DEMOGRAPHICS

## ORGANIZATIONAL DEMOGRAPHICS OF SURVEY RESPONSES


The 26th Annual HR Systems Survey was conducted from May 9th through July 15th, 2023. The survey had 5,100 initial responses; our research methodology includes an extensive cleansing process to remove duplicate organization details and responses with known inaccuracies based on a series of data validation steps. This year's white paper and research analysis are based on **2,310 unique organizations** representing a total workforce of 25 million employees and contingent workers.



Twenty three percent of respondents (524 organizations) have a workforce population in at least one additional country outside their headquarter locations. These global organizations have, on average, employees outside of headquarter locations in 20 countries. A total of 437 organizations (**19% of respondents**) are headquartered outside the United States.



**PARTICIPATION REMAINS STEADY IN OUR 26TH YEAR!**

  
**Thank you! 2023-2024  
Annual HR Systems Survey  
Participation**





# ABOUT SAPIENT INSIGHTS



**RESEARCH AND  
ADVISORY SERVICES.  
BRINGING CONFIDENCE AND  
CLARITY TO OUR CLIENTS**



HR | Finance Systems Research  
and Selection



Strategy and Transformation



Communication and Change  
Management



Culture Building and  
Leadership Coaching

Sapient Insights Group is a women-owned research and advisory firm; we bring to our work a strong code of business ethics and a passion for adding value to the clients, partners and HR and finance communities we work with.

All that we publish is based on statistically valid research results and our direct work with clients and the broad HR community. We pride ourselves on offering information and practical advice tailored to the unique needs, budgets, and size of our clients. We have the confidence to challenge our clients to focus on what actually drives results rather than so-called best practices that could waste staff resources and dollars.

Everything we offer our clients is rooted in decades of experience, primary research, and proven practices. When we can't do it all, we know the people who can! We'll create the team, guide you to the right results and inject some fun along the way...

**We specialize in serving these communities by:**

- Supporting HR, finance, IT, and sales/marketing teams as they tackle technology transformation, modernize business practices, and invest in the change management and people development required for success.
- Informing technology vendors and investors using primary data, market landscapes, and analyst insights to guide product roadmaps, sales strategies, market pricing and vendor partnerships.
- Providing consultants with targeted data to shape their advice to customers and inform their consulting practices.

## LICENSED RESEARCH POLICY

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Sapiient Insights Group does not endorse any solution or vendor referenced in our research. This report consists of aggregate research data gathered from Sapiient Insights Group's 2023-2024 HR Systems Survey, 26th Annual Edition, and insights from our analysts and consultants. The report, based on responses from over 2,300 organizations, is provided for informational purposes only.

Sapiient Insights Group is an independent research and advisory organization that focuses on providing primary research data gathered directly from the practitioner community to deliver a unique "Voice of the Customer" perspective. Our research approach is vendor-agnostic and open to all organizations for participation.

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To request a media interview, email us at [Research@SapiientInsights.com](mailto:Research@SapiientInsights.com).



More details on our research approach can be found in our [research methodology](#).



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Our research is an annual community effort and key aggregate findings can be found [here](#).



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