

Workforce Management Basics Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY



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Bend, Oregon

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The information contained in this Ventana Research Buyers Guide provides a baseline of knowledge that enterprises can use to evaluate the sophistication of software providers and products in the area of workforce management. Our findings are drawn from thorough, research-based analysis of product and customer experience categories that best represent how an enterprise should evaluate software providers.

Nothing in this report or our research is intended to imply that one software provider or product is the right choice for any one particular enterprise. Rather, our goal is to provide an objective rating of software providers and products related to the topic of this Buyers Guide using our research methodology and blueprint for successful evaluation and selection. We performed this research independent of any external influence, charged no fees for any software provider to participate in the research and invited all relevant providers that met our inclusion criteria. This report includes products generally available as of March 15, 2024.

The complete Buyers Guide report and research is available to be licensed for use across an enterprise or the internet. We provide insights on the technology industry, software categories and providers related to this Buyers Guide to enterprises through our Ventana On-Demand research and advisory service. We also offer assessment services using this research to help discover and provide guidance on software provider selection.

We certify that Ventana Research performed this research to the best of our ability, that the analysis is a faithful representation of our knowledge of software providers and products and that the ratings are our own.

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Workforce Management Basics

A major focus of investment and optimization efforts for decades, workforce management processes and activities have undergone a huge transformation in recent years. In our view, this is mostly a function of two significant trends: the continuing maturation of technology innovation associated with maximizing artificial intelligence, machine learning and embedded analytics in human capital management processes and operations and the solidification of the change in employer/employee relationships stemming from the now-universal emphasis on elevating the employee experience.

The focus on EX has intensified as the labor market remains tight with ongoing challenges regarding workplace logistics and ensuring the optimization of labor. Delivering substantial enhancements to EX through all aspects of human resources technology, including workforce management, is considered non-negotiable. In the absence of this, workers tend to become disengaged, and many will leave. The same can be true of customers serviced by those workers.

The scope of adaptation required for enterprises to align with worker expectations regarding EX is substantial and has been growing steadily over the past few years. Workers are more willing and better equipped to articulate their expectations for employers. Balancing the needs and expectations of salaried and hourly workers is more critical than ever. Job openings are decreasing, and turnover is holding relatively steady, resulting in the need for organizations to be more committed than ever to delivering great EX.



Workers expect organizations to use the latest technological advances, such as AI, to gain efficiencies and support continuous learning.

These dynamics have continued to deeply impact organizations, particularly enterprises with substantial numbers of hourly workers like those in retail, manufacturing, healthcare, hospitality and dining services. These industries are now embracing a renewed focus on the experiences of hourly workers, aligning with the U.S. Department of Labor Fair Labor Standards Act overtime provisions and regulations that emphasize the importance of accurately tracking work hours. This landscape is evolving, especially after a pivotal 2019 decision by the European Court of Justice, which requires all companies within the European Union to diligently record the work hours of all employees. This ruling has not only reshaped compliance strategies for organizations but also significantly influenced the market for workforce management software, time-

tracking devices and other related technologies across Europe. As history often shows, such legislative and regulatory shifts in one region can set a precedent for global change.



For enterprises, aligning the workforce to business goals remains a top priority when managing workers. As important as this is, it's even more important when considering hourly employees, as their jobs can require less education, professional experience and independent judgment. Therefore, the activities and tasks worked on often need to be tracked more closely and supervised to ensure that alignment with business goals is clear and tracked as granularly as necessary. Workers expect organizations to use the latest technological advances, such as AI, to gain efficiencies and support continuous learning. When you combine these considerations with the legislative and regulatory compliance issues associated with managing this population, it's easy to see why technology plays such a vital role.



At its heart, workforce management software is like the supportive backbone of a company, offering a suite of tools that streamline processes and foster a culture of self-service, open communication and teamwork.

At its heart, workforce management software is like the supportive backbone of a company, offering a suite of tools that streamline processes and foster a culture of self-service, open communication and teamwork. It's built on four key pillars: smart forecasting, thoughtful scheduling, comprehensive absence management and precise time and activity tracking. By ensuring that the right people with the right skills are in the right place at the right time, organizations can efficiently and profitably meet customer needs and business demands. This adaptability is at the core of what makes a company agile and responsive.

For leaders like chief human resource officers and other executives, this isn't just a concern—it's a dynamic puzzle that involves understanding not just who is available but who works best together, how to manage staffing levels and how to leverage diverse talents, including those of gig workers. It's about seeing the big picture and the fine details. As we look to the future, enhancing this agility becomes a mission for every organization, valuing every member of the workforce, from full-time employees to the gig workers who are

increasingly becoming a vital part of the team.

In the vibrant world of workforce management, the focus on uplifting every employee's journey and integrating AI/ML into WFM products has sparked a delightful array of capabilities that leading software providers are excited to offer. Imagine a workplace where scheduling goes beyond mere qualifications, embracing each worker's career aspirations and ensuring fairness in shift allocations. Picture a system where time off is granted seamlessly, guided by rules that reflect the unique needs of customers. Envision a platform where virtual assistants are always on hand to provide prompt and accurate responses to employee inquiries, and shift-swapping is as easy as a friendly chat, thanks to intuitive messaging tools.



There's also a newfound freedom in time recording, with options like finger scanning and facial recognition that cater to today's preferences. Managers receive gentle nudges and alerts powered by analytics to safeguard against the risk of fatigue-related mishaps. And perhaps one of the most groundbreaking advancements in WFM products is the ability to forecast labor demands with astonishing precision—down to 15-minute intervals—using a rich tapestry of data. It's a future where every decision is informed, every need is anticipated and every employee feels valued and heard.

Mobile-first product strategies are the industry standard, similar to most employee-facing enterprise software deployed. In the realm of WFM tools, employees should not only be able

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to log time and request time off but also determine eligibility for different shifts and, ideally, swap shifts as permitted by the organization. Moreover, advanced mobile capabilities in the WFM domain are increasingly connecting workers with targeted learning opportunities in the flow of work to be eligible for certain shifts or jobs. Although critical integrations involving WFM platforms usually focus on passing hours worked and rates to payroll processing engines, the aforementioned “spot learning” functionality tied to core WFM processes and functionality really speaks to the broader integration of WFM software with talent management and other HCM software.

In the landscape of workforce management, we've witnessed a surge of creativity and progress, sparking not only innovation within the products themselves but also fostering dynamic partnerships between hardware and software providers alike. To capture the essence of this evolution and to guide our research with precision, we've introduced two distinct categories: Basics and Suites. While multiple providers will appear in both categories, the scope of functionality is limited in Basics to ensure fair comparisons.

In the realm of workforce management, the Basics category has a streamlined focus on the foundational elements of timekeeping and scheduling. Tailored for organizations seeking a focused approach, these solutions offer a straightforward, user-friendly experience with a wide range of features to support timekeeping and scheduling needs. The Basics category provides a robust yet focused toolkit designed to ensure that the essential aspects of workforce management are handled with precision and ease, making it an ideal choice for those who value simplicity and efficiency.



The Suites category evaluated in a separate Buyers Guide is reflective of comprehensive WFM solutions, encompassing a broad spectrum of features from activity and task management to time-clock enhancements, seamless collaboration, extensive analytics and robust integrations with HR, financial and business productivity platforms. This thoughtful segmentation ensures that providers are recognized for true specialties, aligning them with peers of similar breadth and depth and paving the way for a future where every organization can find its perfect match in the WFM landscape.

This research evaluates the following software providers that offer products that address key elements of workforce management as we define it: ADP, Blue Yonder, Dayforce, Infor, Oracle, Paychex, Paycom, Paycor, Quinyx, Replicon, SAP, UKG, Workday, WorkForce Software and Zebra.



Buyers Guide Overview

For over two decades, Ventana Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

This Ventana Research Buyers Guide: Workforce Management Basics is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for workforce management software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, Ventana Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the Ventana Research Value Index methodology and blueprint, which links the personas and processes for workforce management to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of workforce management technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its performance potential. In addition, this approach can reduce the project's development and deployment



time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

Ventana Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of workforce management software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating workforce management systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise’s established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds ADP atop the list, followed by Oracle and Dayforce. Companies that place in the top three of a category earn the designation of Leader. ADP, Oracle and UKG have done so in four of the seven categories; Dayforce in three; Workday and WorkForce Software in two; and Replicon and Infor in one category.

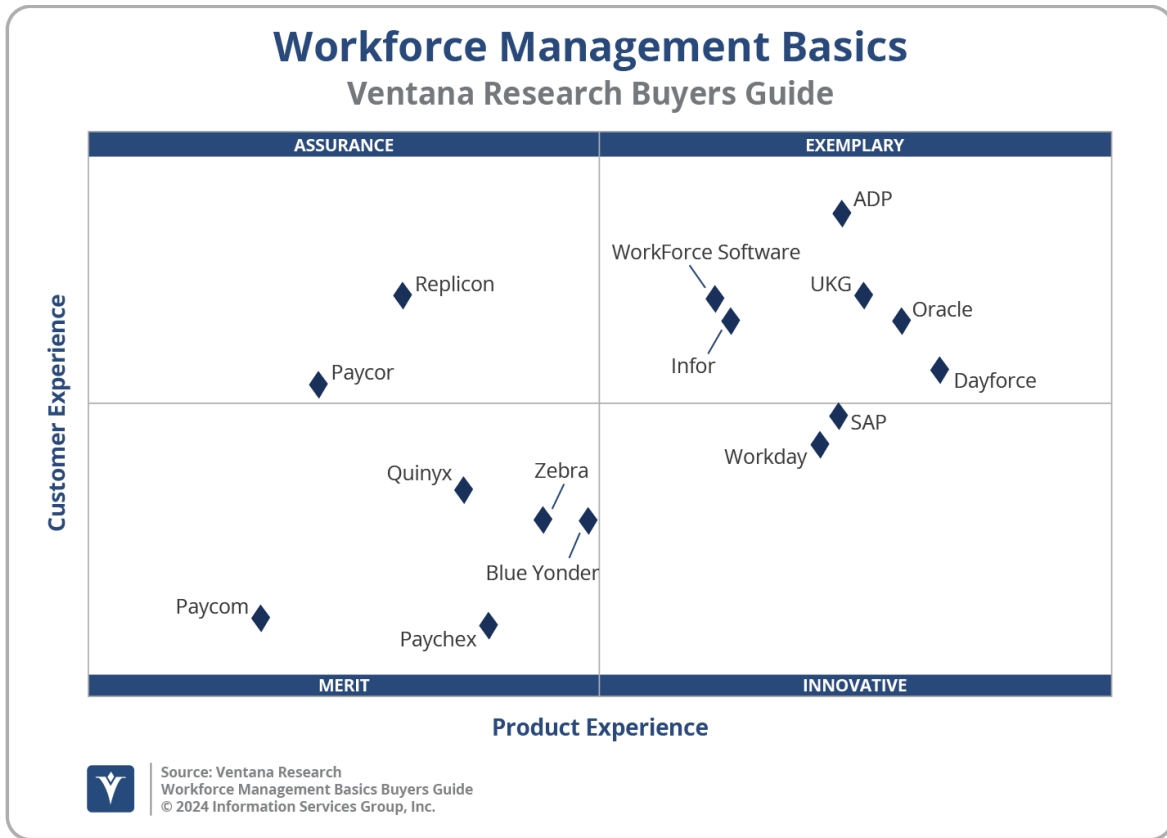
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines their placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Workforce Management Basics
Overall

Vendors	Grade	Performance
ADP	A	Leader 88.3%
Oracle	A	Leader 87.8%
Dayforce	A	Leader 87.6%
UKG	A-	87.4%
SAP	A-	85.5%
WorkForce Software	A-	85.0%
Infor	A-	84.9%
Workday	A-	84.7%
Blue Yonder	B++	79.6%
Replicon	B++	79.4%
Zebra	B++	79.2%
Quinyx	B++	77.7%
Paychex	B++	76.7%
Paycor	B++	75.5%
Paycom	B+	71.7%

Source: Ventana Research
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The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers’ overall weighted performance.



Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: ADP, Dayforce, Infor, Oracle, UKG and WorkForce Software.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: SAP and Workday.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: Replicon and Paycor.

Merit: The categorization for software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Blue Yonder, Paychex, Paycom, Quinyx and Zebra.



We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle workforce management, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on their requirements and use this research as supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise’s needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise’s life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise’s requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research based on the methodology of expertise identified the weighting of Product Experience to 80% or four-fifths of the overall rating. Importance was placed on the categories as follows: Usability (15%), Capability (20%), Reliability (15%), Adaptability (15%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. Dayforce, Oracle and UKG were designated Product Experience Leaders as a result of the top-ranked weighted performance. While not Leaders, ADP, SAP and Workday were found to meet a broad range of enterprise workforce management requirements.

Many enterprises will only evaluate capabilities for workers in IT or administration, but the research identified the criticality of Usability (15% weighting) across a broader set of usage personas that should participate in workforce management.

Workforce Management Basics
Product Experience

Vendors	Grade	Performance
Dayforce	A	Leader 71.3%
Oracle	A	Leader 70.9%
UKG	A	Leader 70.3%
ADP	A	70.2%
SAP	A-	69.7%
Workday	A-	69.3%
Infor	A-	68.2%
WorkForce Software	A-	68.1%
Blue Yonder	A-	65.8%
Zebra	A-	65.4%
Paychex	B++	63.9%
Quinyx	B++	63.7%
Replicon	B++	62.6%
Paycor	B++	60.2%
Paycom	B+	59.2%

Source: Ventana Research
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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

Our Value Index methodology weights Customer Experience at 20% of the overall rating, or one-fifth, as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are ADP, Replicon and UKG. These category leaders in Customer Experience best communicate commitment and dedication to customer needs. Software providers such as WorkForce Software, Infor and Oracle were not Overall Leaders, but demonstrate a high level of commitment to the customer experience.

Workforce Management Basics
Customer Experience

Vendors	Grade	Performance
ADP	A	Leader 18.4%
Replicon	A-	Leader 17.2%
UKG	A-	Leader 16.9%
WorkForce Software	A-	16.9%
Infor	A-	16.7%
Oracle	A-	16.6%
Dayforce	B++	15.8%
Paycor	B++	15.4%
SAP	B++	15.4%
Workday	B+	14.8%
Quinyx	B	13.4%
Zebra	B	13.0%
Blue Yonder	B	13.0%
Paycom	B-	11.8%
Paychex	B-	11.7%

Source: Ventana Research
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Many software providers we evaluated made sufficient information available through the website and presentations. While several have customer case studies to promote successful customer experience, others lack depth in articulating the commitment to customer experience and an enterprise’s workforce management journey. This makes it difficult for enterprises to evaluate providers on the merits of commitment to customer success. As the commitment to a software provider is a continuous investment, the importance of supporting customer experience in a holistic evaluation should be included and not underestimated.



Appendix: Software Provider Inclusion

For inclusion in the Ventana Research Workforce Management Buyers Guide for 2024, a software provider must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue, more than 50 employees, sell products and provide support on at least two continents and have 100 or more customers. The principal source of the relevant business unit’s revenue must be software-related, and there must have been at least one major software release in the last 18 months. The provider must be capable of providing a product that handles absence management, scheduling and time and attendance.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider’s website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant workforce management products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and rating, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
ADP	ADP® Workforce Manager	2023.R1	August 2023
Blue Yonder	Workforce Management	2023.2.0	December 2023
Dayforce	Dayforce Workforce Management	2024.1.0	February 2024
Infor	Infor Workforce Management	2023.10.00.0 MT	October 2023
Oracle	Oracle Human Capital Management (HCM)	23D	September 2023
Paychex	Paychex Flex®	February 2024	February 2024



Paycom	Time and Labor Management	3.2	November 2023
Paycor	Workforce Management Bundle	SaaS	March 2024
Quinyx	Workforce Management	0179	February 2024
Replicon	Workforce Management	3.0.35220	November 2023
SAP	SAP SuccessFactors	2H 2023	November 2023
UKG	UKG Pro Workforce Management™	R9 Update 4	November 2023
Workday	Workforce Management	2023R2	August 2023
WorkForce Software	The WorkForce Suite	SaaS	March 2023
Zebra	Workforce Optimization Suite	SaaS	March 2023



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in the Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	>\$50M Revenue	Absence Mgmt	Scheduling	Time & Attendance	Timeclock	Analytics	Activity & Task Mgmt
ATOSS	ATOSS	Yes	No	Yes	Yes	No	Yes	No
aTurnos	aTurnos	No	Yes	Yes	Yes	Yes	Yes	Yes
Crown Workforce Management	Workforce Management	No	Yes	Yes	Yes	Yes	Yes	Yes
Deputy	Deputy	No	Yes	Yes	Yes	Yes	Yes	Yes
EPAY Systems	Workforce Management	Yes	No	Yes	Yes	Yes	Yes	No
GDi Group	Workforce Management	Yes	No	Yes	Yes	Yes	Yes	Yes
Humanforce	Workforce Management	No	Yes	Yes	Yes	Yes	Yes	No
Interflex	Workforce Management	No	No	Yes	Yes	No	No	No
Paylocity	Time and Labor	Yes	Yes	Yes	Yes	Yes	No	No
ProMark	ProMark	No	Yes	Yes	Yes	Yes	Yes	Yes
Protime	Protime	No	Yes	Yes	Yes	No	No	Yes
Shiftboard	Shiftboard	No	Yes	Yes	Yes	No	Yes	No
SISQUAL	Workforce Management	No	No	Yes	Yes	Yes	Yes	Yes
Spica	All Hours Workforce Management	No	Yes	Yes	Yes	Yes	No	No
Synel	Workforce Management	No	Yes	Yes	Yes	Yes	Yes	No
tamigo	tamigo	No	No	Yes	Yes	Yes	Yes	No



TCP Software	TimeClock Plus	Yes	Yes	Yes	Yes	Yes	Yes	No
UniFocus	Workforce Management	No	No	Yes	Yes	Yes	Yes	Yes
WorkAxle	Workforce Management	No	Yes	Yes	Yes	Yes	Yes	No



About Ventana Research

Ventana Research, now part of Information Services Group, provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through the Ventana Research community, and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premiere service, Ventana On-Demand (VOD), provides structured education and advisory support with subject-matter expertise and experience in the software industry. Ventana Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored Assessment Services and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

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