Human Resource Information Systems
HRIS Market workshop session 4
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Introduction
Introduction
What do we want to achieve?

01 Review the particularities of HR in Luxembourg

02 Review key solutions in the global vs. local market

03 Discuss the key HRIS Market trends
Local particularities
Our local particularities
Luxembourg: in the heart of Europe

Population: 0.576 million

Languages: Luxembourgish, English, German, French

More than 40 nationalities

Workforce: approx. 50% are foreigners 170,000 commute from Germany, Belgium and France

Impacting HRIS

- Multi-cultural
- HRIS Maturity level
- Data privacy
- Local market size

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Local particularities
Key challenges HR professionals are facing with HR technology

- Flexibility
- Integration
- User Experience
- Payroll
- Cloud strategy
- Data privacy
- Regulations
- Reporting

For discussion: what are the key challenges you are facing with HR technology?
Local particularities

Key challenges solution vendors are facing in the local market

**Market size**
- Solution vendors are not willing to invest in marketing and localising their solutions in Luxembourg, as the local market is small.

**Current HRIS landscape**
- Companies in Luxembourg developed complex, heavy and expensive HRIS solutions to meet their specific requirements.

**Maturity level**
- Fewer companies implemented a cloud solution for their HR needs. The willingness to embrace the cloud is still weak.
The HRIS Market
Overall HRIS market
The solution vendors are following one of three strategies

**Power of ONE**

The solution is made up using a unique platform, expanding its capabilities.

*Example: Workday*

**Power of MANY**

The solution is made up using multiple acquired platforms + integrated.

*Example: SuccessFactors*

**Niche players**

The solution is a unique platform and is covering one specific HR area.

*Example: BetterWorks*

For discussion: what is your preferred strategy?
An overall picture

Overall HRIS market

* This list is not exhaustive and is for guidance purposes only.
Overall HRIS market

Leading market solutions insights

Cloud solutions

- Workday
- SuccessFactors
- Oracle (Human Capital Management)
- Cornerstone
- TalentSoft
- SAP
- PeopleSoft

On-premise solutions

- See next slide – disruptive new vendors
Overall HRIS market

Disruptive new vendors*

* This list is not exhaustive and is for guidance purposes only.
## Overall HRIS market

### Leading market solutions insights

<table>
<thead>
<tr>
<th>Solution</th>
<th>Overview</th>
<th>“Signature” System Functionality / Features</th>
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| SuccessFactors HCM is a **global cloud solution** | • The product has functional breadth for B2B manufacturers, with good integration capabilities and knowledge of end-to-end B2B processes  
• The solution offers intuitive user interface with simple navigation, that gives organization’s ability to adapt to HR service delivery that is distributed, immediate and shared  
• Additional Features: collaboration tools to manage communication, sophisticated workforce analytics to leverage linking HR data to unrelated real-time data, flexibility to unify various layers of cloud-based applications with on premise applications allowing hybrid model to exist, new meta data framework  
• New release intervals every **three months** |                                                                                                          |
| Global solution, single multi-tenant instance | • The product uses modern, standards-based technologies to provide a level of agility, ease-of-use and integration capability  
• The solution supports multiple HR service delivery models – basic, shared services, mixed, outsourcing. mobile is also a major strategic focus.  
• Additional features: strong embedded analytics, pre-built and delivered business process and framework, localisation possibilities (data, formats, currencies, languages)  
• New release intervals every **six months** |                                                                                                          |
| Oracle HCM offers availability as a stand-alone solution and/or as part of a broader Oracle solution | • The solution, delivered as a subscription service in a cloud model, is straightforward to set up and configure, and it does not require deep IT involvement  
• The product provides cross-channel customer service functionality in the CEC, including case management, knowledge base, customer portal design tools, customer self-service and feedback management  
• Additional features: embedded analytics, best-of-bread enterprise information security, extensive international support representing solid localisations worldwide  
• New release intervals every **six months** |                                                                                                          |

*Information quoted from Gartner research (Magic Quadrant for the CRM Customer Engagement Centre, April 2014)*
Overall HRIS market
Magic Quadrant - 2017

Across all of the major Cloud HRIS solutions, SAP SuccessFactors, Workday, Cornerstone OnDemand and Oracle Cloud have successfully delivered some of the largest and most complex HR SaaS implementations.
Options for the local market
Options for the local market
It mainly depends on your requirements

Looking for innovation / digitalisation
Your HR technology coverage is good. You are aiming to better serve your employees.

Looking for automation
Your HR technology coverage is weak. You are aiming to automate some manual HR processes.

Looking for integration
Your HR technology coverage is good, with multiple data entries in your HR systems.

Looking for simplification
Your HR technology coverage is good, but the solution in place is difficult to use/maintain.

Looking for new usages
Your HR technology coverage is good, you are aiming to enhance its capabilities.

Looking to embrace the Cloud
Your HR technology coverage is good, but you see the future being in the cloud.

For discussion: what are you key priorities?
Options for the local market
Options heavily depend on your key priorities

- **Service Management**
  - [ServiceNow](https://www.servicenow.com)
    - A service management solution for every business function
  - [NeoCase](https://www.neocase.com)
    - A service management solution for HR and Finance.

- **Core HR**
  - [Educos](https://www.educos.com)
    - HR and Payroll software solutions

- **Payroll**
  - [IBDO Global](https://www.ibdo.com)
    - Global payroll solution
  - [SDworx](https://www.sdworx.com)
    - Global payroll solution
  - [Apsal](https://www.apsal.com)
    - Local payroll solution
HRIS Market trends
HRIS Market trends

2017 Deloitte Global Human Capital Trends

* The full "2017 Deloitte Human Capital Trends" report is available
HRIS Market Trends
The evolution of HR Technology
HRIS market trends

Local Market trends

1. Continuous Expansion of cloud solutions
2. Enhancing user experience
3. Continuous and Video-based learning
4. More collaboration solutions
5. Mobile apps for managing HR on the go
6. Building of “Employee experience platforms”
7. Focus on employee engagement solutions
8. Optimized Analytics and Data Use
9. Simplification of payroll solutions
10. Focus on “enablement” to help employees be more effective
Deloitte HCAS

A large range of Human Capital Advisory Services

- We provide services to manage **strategic change** and **technology adoption**, develop leaders and design organisations.
- We help our clients aligning people with business strategy, determining critical workforce, identifying **innovative talent solutions** and addressing **talent needs** in order to face business challenges.

- By focusing on specific business requirements, we help business leaders make informed decisions to **grow revenue**, **reduce operational costs**, and design compensation & reward programs and **remuneration policies** to attract and retain top talent.

- We define, structure and implement HR solutions to improve the efficiency of HR functions to drive business results through process and organisation.
- We address people issues associated with large-scale **system implementations** and leverage technology to support the HR strategy and maximize performance.
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A detailed article discussing further today’s topic will be published in LinkedIn in the coming days.
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