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2024 Deloitte Global Workforce Management Survey

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Executive summary

Deloitte is first in the market with a Global Workforce Management (WFM) survey of this scope and scale. Conducted in collaboration with PayrollOrg, it was aimed to gather insights into demographics, governance, analytics, and technology.

With data points from more than 500 responses from organizations across North America; Latin America; Europe, the Middle East, Africa; and the Asia Pacific, the survey spanned six industry sectors from organizations ranging in headcount from a few hundred to over 500,000 employees.

The survey provides comprehensive benchmarking and insights for enhancing WFM processes and technology on a scale only Deloitte can provide.

Our findings emphasize the critical role of strategic governance in operations and technology and the effective use of analytics in achieving optimal workforce management outcomes.

Key themes from the Workforce Management survey:

Most organizations believe they are not optimizing the technology features available within their current WFM system.

Half of respondents are planning to implement new WFM technology in order to deploy new features.

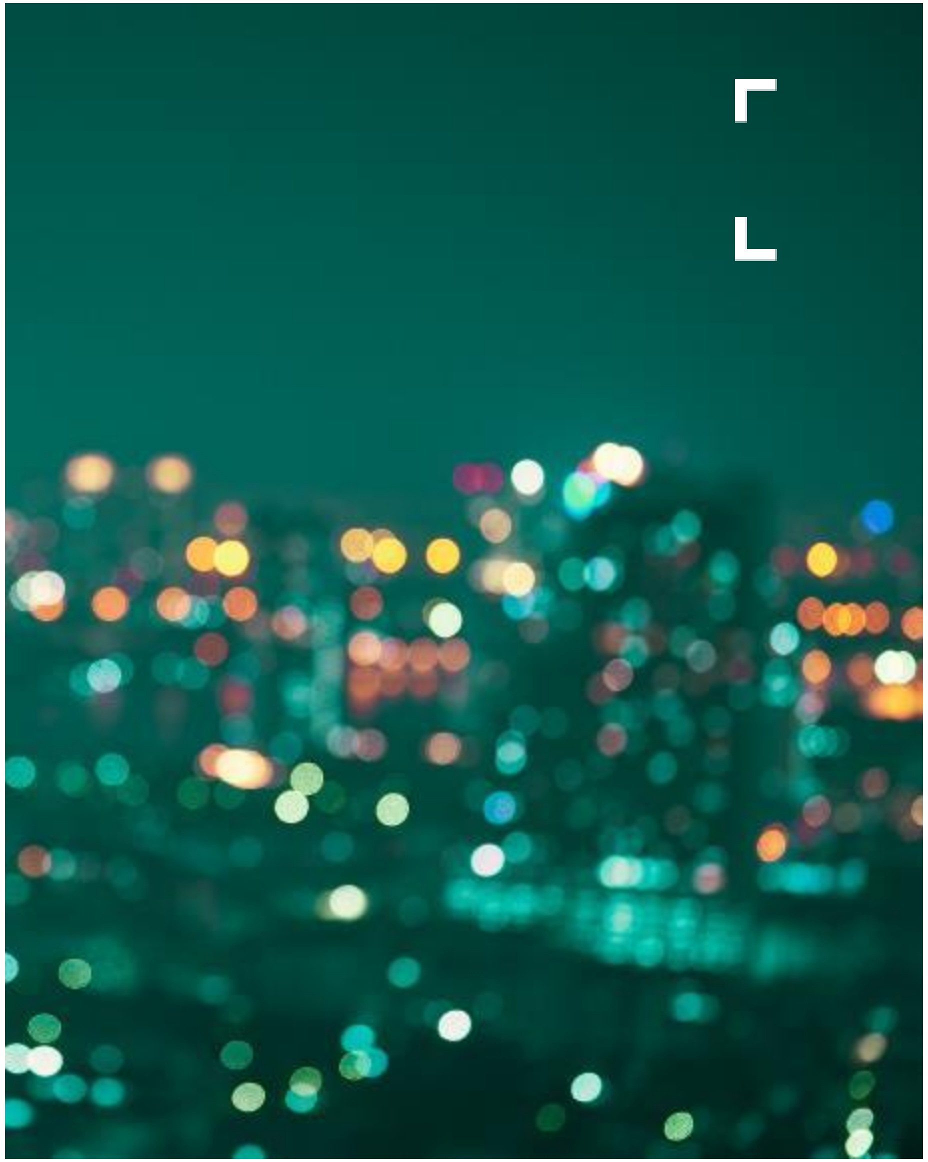
Nearly half of organizations cite process and policy improvement as an opportunity within their organization.

More than half of organizations do not have a strategic governance structure for WFM such as a Center of Excellence (CoE). Organizations that do have a COE are experiencing 13% greater satisfaction with their WFM system.

Most organizations indicate they are not using WFM data, KPIs, or analytics effectively.

SECTION 1

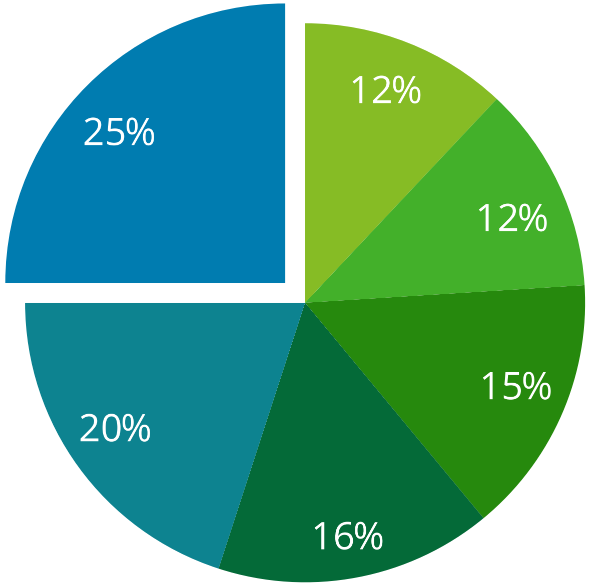
Demographics



This section provides an overview of the organizations that participated in the survey and the three primary dimensions (geography, industry, and employee headcount) which were used to analyze the responses.

Demographics

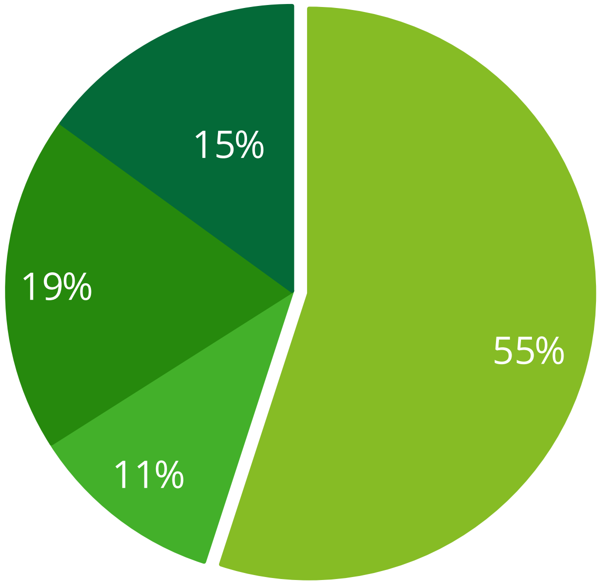
Representation across six industries, with the largest number of responses (25%) from the Consumer industry.



Industries represented in the survey

- Energy, Resources, & Industrials
- Life Sciences & Health care
- Technology, Media, and Telecommunications
- Government & Public Services
- Financial Services
- Consumer

More than half of respondents (55%) are headquartered in North America but have operations in other countries.



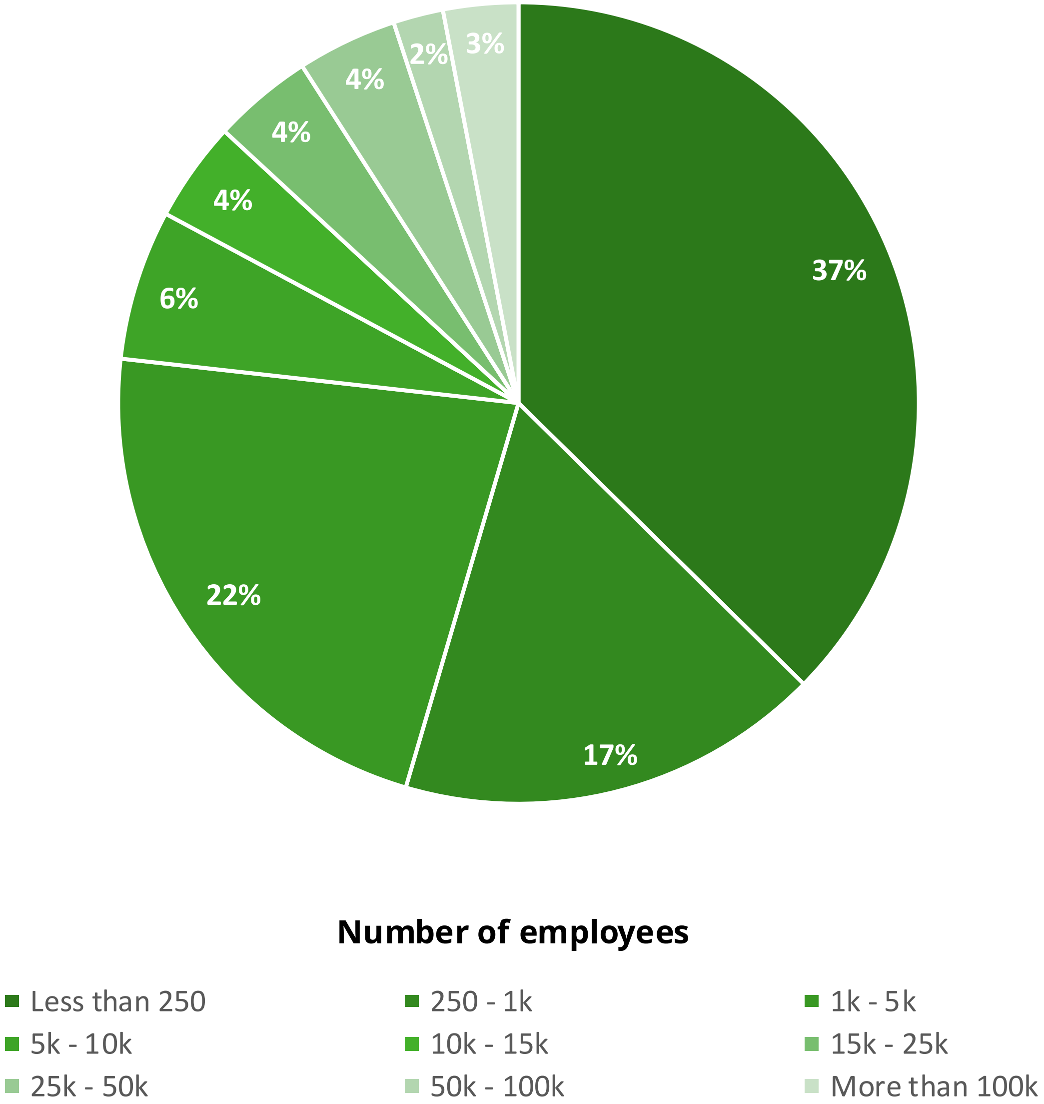
Organization headquarters location

- NA
- LATAM
- EMEA
- APAC

Response by organization size

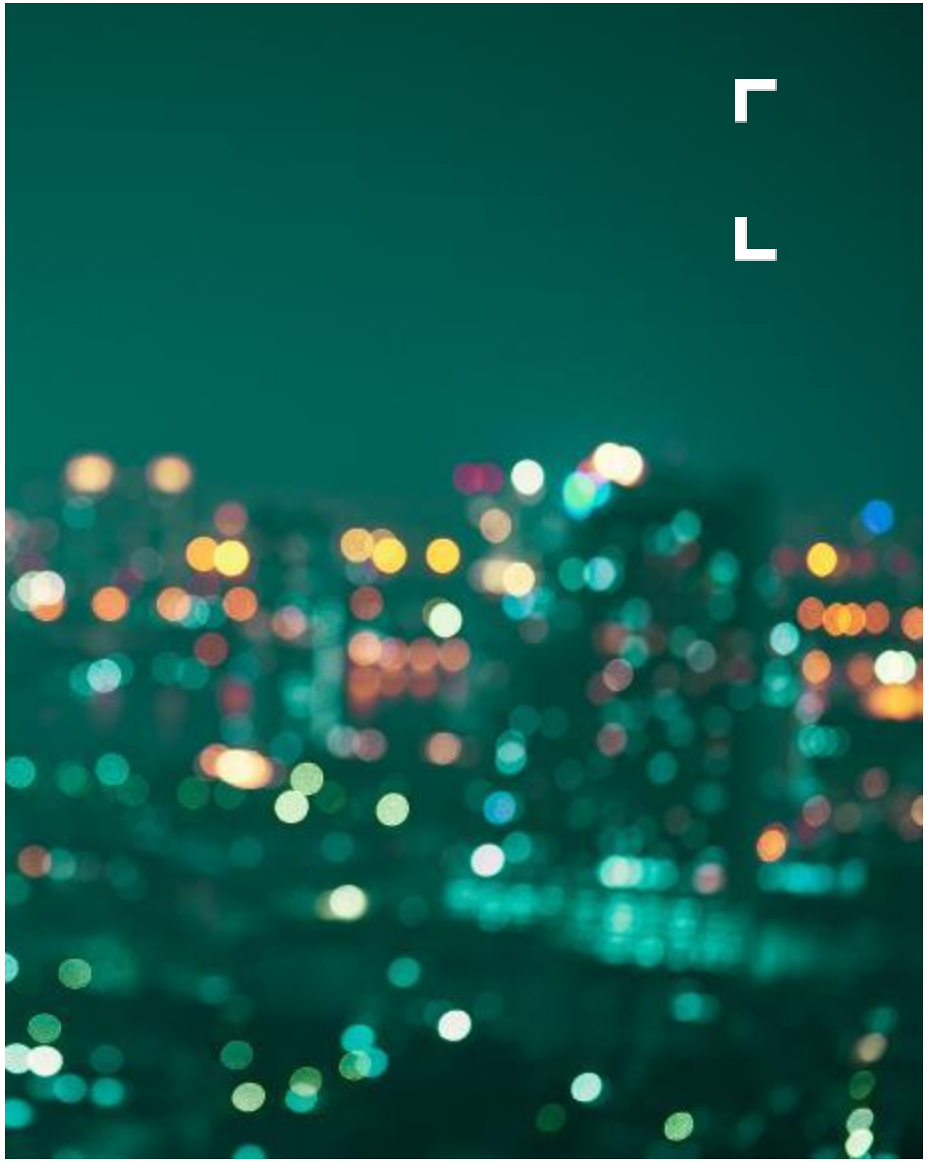
The largest of its kind

Deloitte’s inaugural Global Workforce Management survey spans hundreds of organizations of all sizes:



SECTION 2

Governance



Why it matters

Workforce management processes sit at the intersection of several business functions, including IT, operations, finance, payroll, and HR. Multi-department involvement is beneficial for holistic insights that can drive critical accountability and quality decision-making.

This data serves as validation that organizations that establish a WFM Center of Excellence (CoE) achieve superior workforce management outcomes, including higher employee satisfaction, more effective use of analytics, and greater likelihood for streamlined and centralized administration of WFM.

The relationship between governance and pain points

Governance serves to bring together leaders to solve problems across the enterprise by recognizing that WFM is highly integrated with operations, process, policy, and technology.

With no CoE in place, respondents report their top pain points across a broad spectrum of policy, process, and technology. Such far-reaching issues tend to be harder to solve for, making even "business as usual" functions difficult to deliver.

With a CoE in place, there are still pain points, but they are mainly concentrated in technology, enabling the organization to address daily operations more effectively and focus on tech improvements and ROI.

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'NO' CoE **Top pain points cover policy, processes, and payroll**

13% *HR policies*

12% *WFM processes not standardized*

13% *Payroll challenges*

'YES' CoE **Top pain points are limited to technology challenges**

14% *WFM tech – poor configuration*

12% *WFM tech – lacking features*

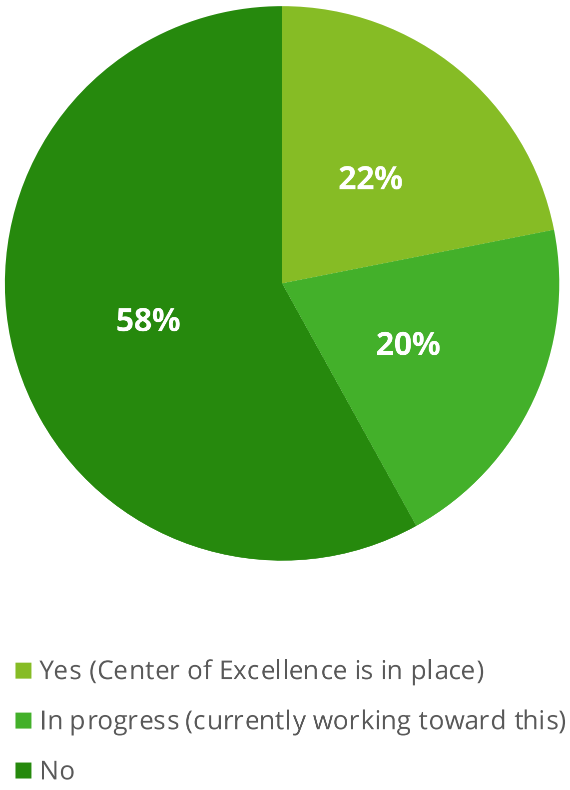
11% *WFM tech – difficult to use*

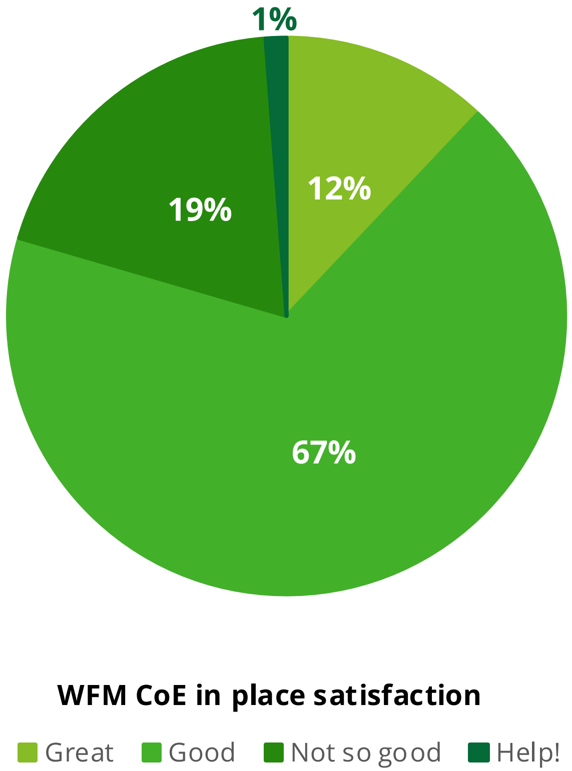
Governance drives satisfaction with workforce management

22%

of organizations surveyed

have a WFM governance model in place





79%

of organizations surveyed

with a WFM governance model in place (a CoE) have good or great satisfaction*

Defining satisfaction: Satisfaction is characterized by a seamless frontline worker experience, lower administrative burden, and light tech maintenance footprint. Organizations expressing dissatisfaction typically report a poor user experience with manual processes, workarounds, and a high technical debt/overhead, which impedes responsiveness in delivering new features and solutions.

Governance underpins strong WFM analytics programs

Organizations are **twice as likely** to have WFM data embedded in their data analytics landscape if they **have a CoE in place**.

Organizations that establish a CoE tend to achieve superior workforce management outcomes, including higher employee satisfaction with WFM and more effective use of analytics.

Additional benefits include enhanced decision-making capabilities, ensured operational transparency, and facilitated strategic alignment across the organization.

65%

of organizations surveyed

with a CoE *established have WFM data embedded in their analytics landscape*

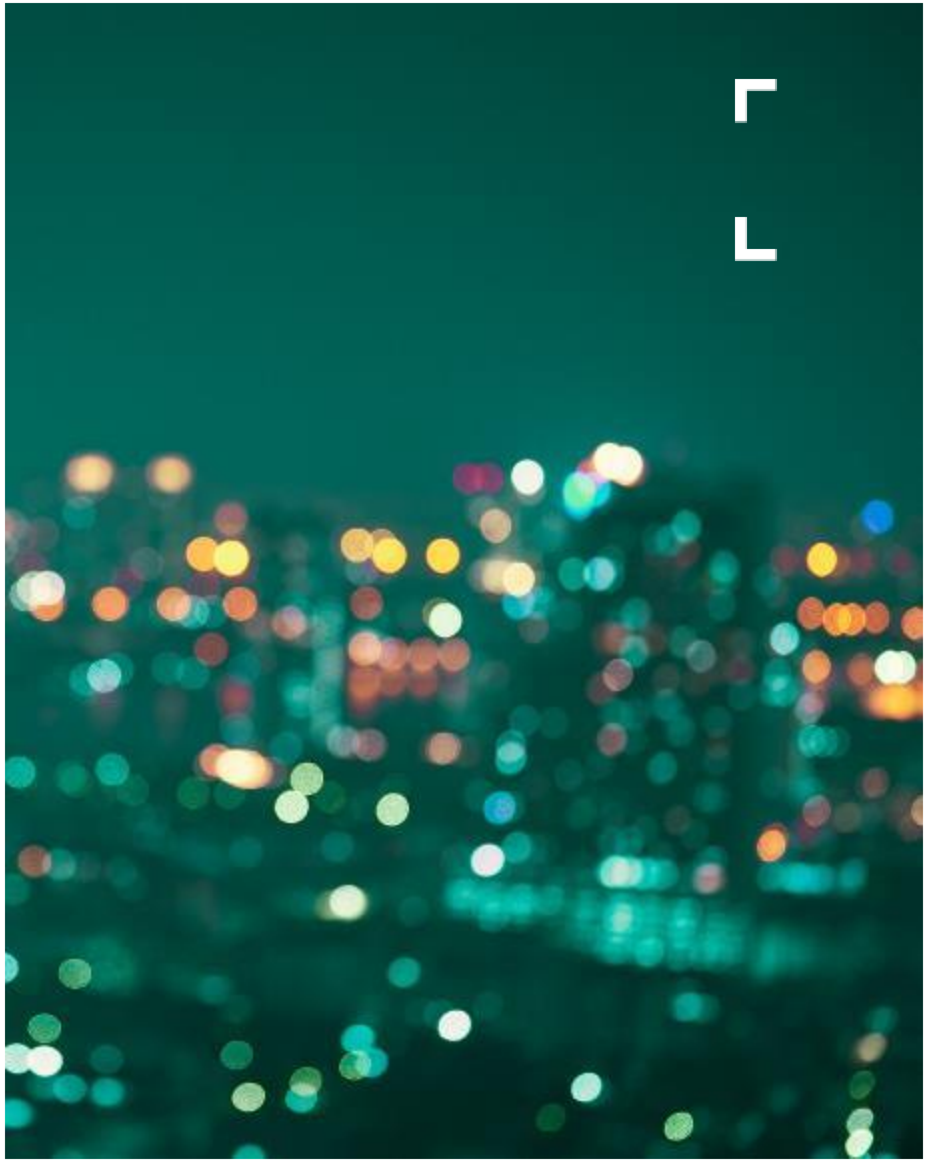
33%

of organizations surveyed

without a CoE *established have WFM data embedded in their analytics landscape*

SECTION 3

Analytics



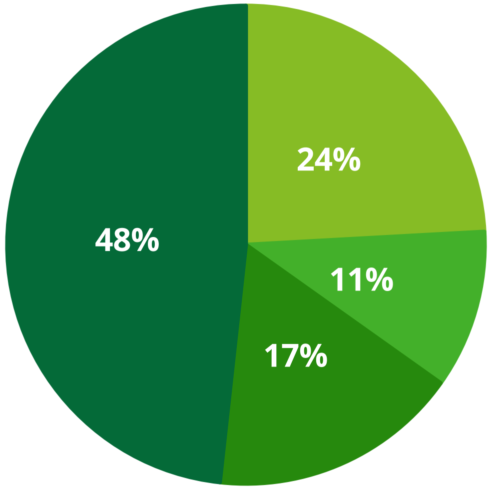
Why it matters

WFM systems are a source of abundant data on workforce efficiency and a guidepost for maintaining compliance. Leveraging WFM data within a WFM system or as part of the enterprise analytics landscape can help unlock year-over-year efficiencies and build a business case for transformation.

Analytics

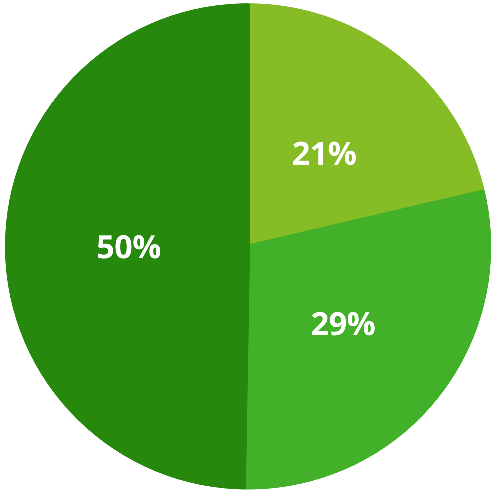
Almost half of the respondents do not have Workforce Management data incorporated in their analytics landscape (48%) or track KPIs around timekeeping and scheduling (50%). This creates data blind spots in an organization's ability to manage key KPIs in the workforce management landscape that increase operational costs, such as: overtime, missing punches, skipped meals; and increase risk in penalties for compliance with labor laws.

We've seen these issues resolved during modernization transformations with a holistic approach to WFM data and analytics. Implementing robust analytics provides insights into inefficiencies and compliance risks that can save up to 0.5-2.5% of an organization’s annual payroll spend.



Do you have WFM data incorporated in your enterprise analytics landscape?

- Yes, analytics is contained within the WFM application(s)
- Yes, analytics is contained within 3rd party applications utilizing the WFM data
- Yes, analytics is contained within a data lake that combines WFM data, HR data, finance data, etc.
- No



Do you have metrics and key performance indicators that track timekeeping and/or scheduling performance?

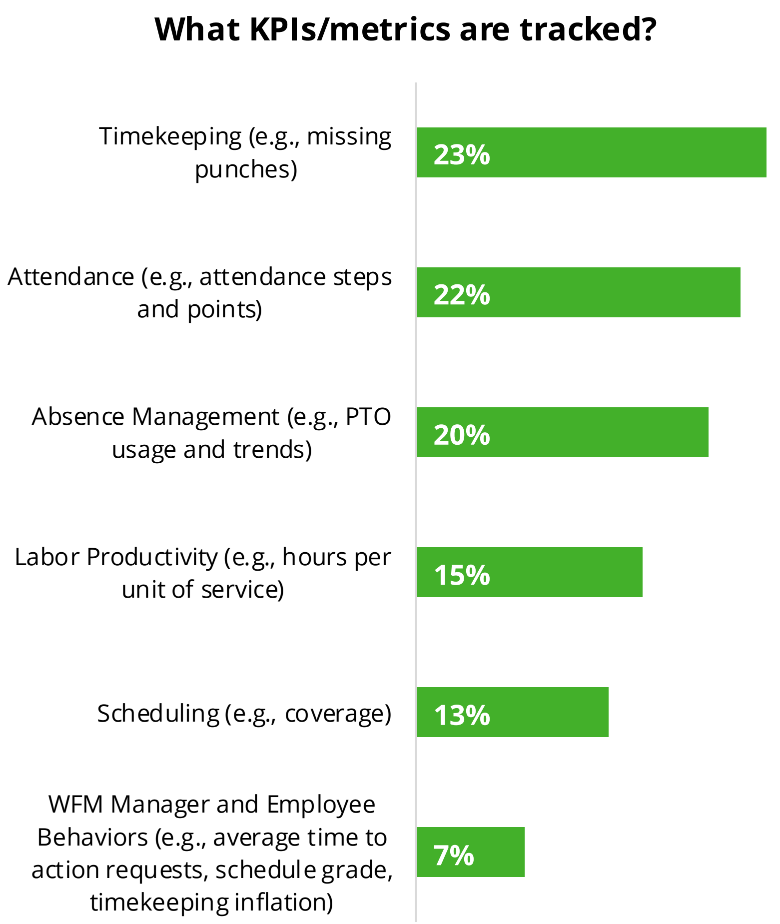
- Dashboards with metrics are available real-time or near real-time (e.g., 15 minute refresh)
- Metric reports are available on a regular schedule
- No, we do not track these types of metrics

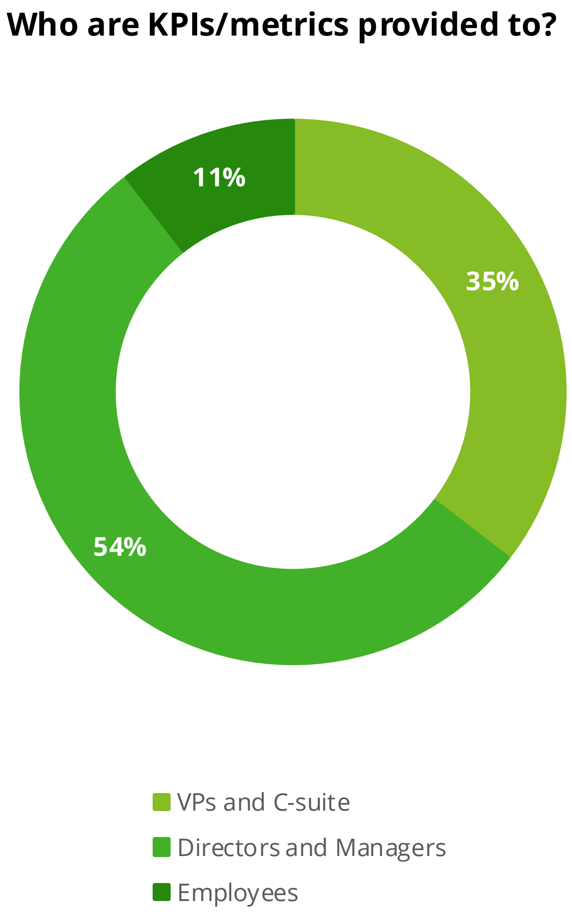
Analytics

Implementation of an analytics suite provided by WFM vendors can provide KPIs to be more efficient. Of respondents implementing WFM analytics, 65% leverage KPIs to track timekeeping, attendance and absence functions, and report the majority of consumers of this data (89%) are managers and above.

We typically see the most effective use of time/attendance/absence data delivered to frontline managers in the form of alerts and exceptions which drive users to dashboard reporting.

Empowering managers with easy, exception-based access to reporting is key to driving adoption of reporting and getting results.





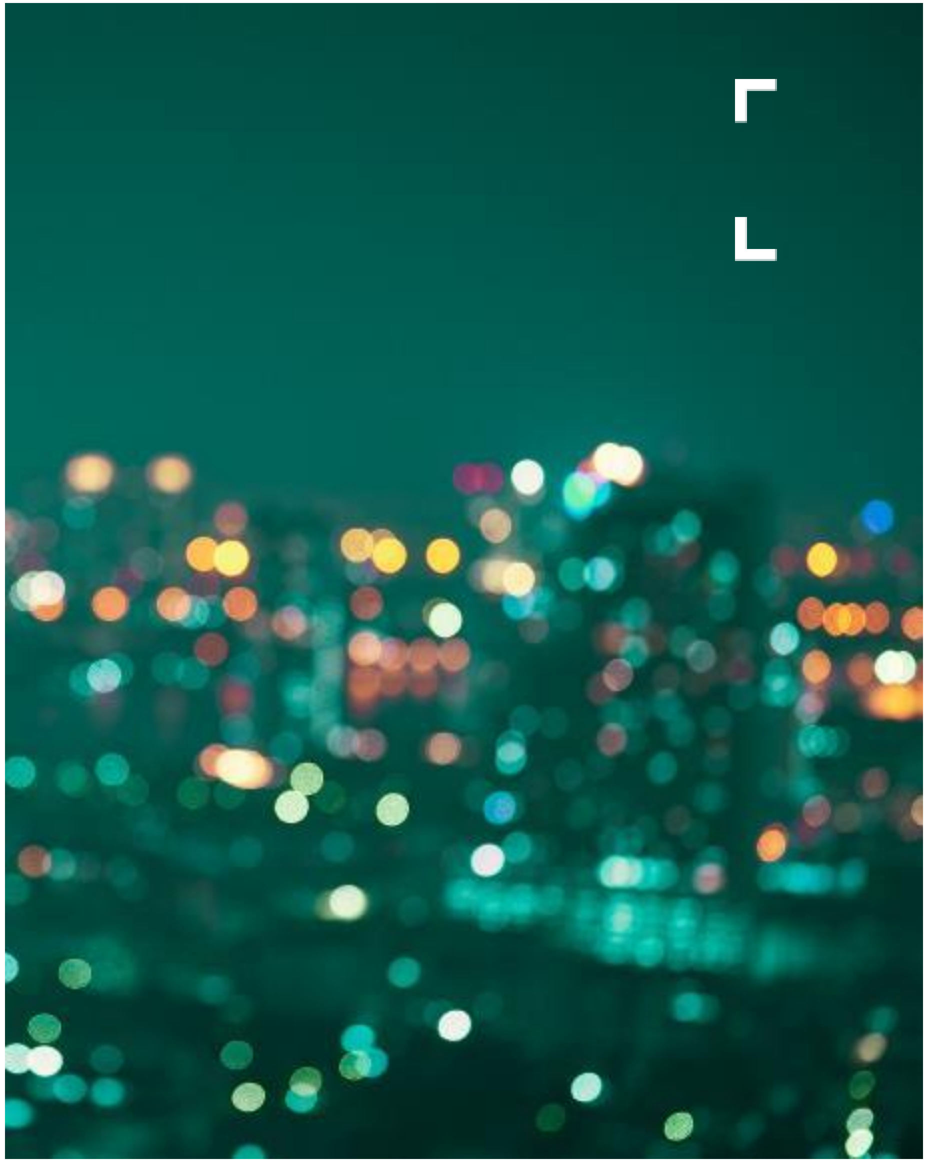
SECTION 4

Technology

This section provides an overview of the technologies respondents use, their plans and rationales for expansion, and the maturity of integrations landscape.

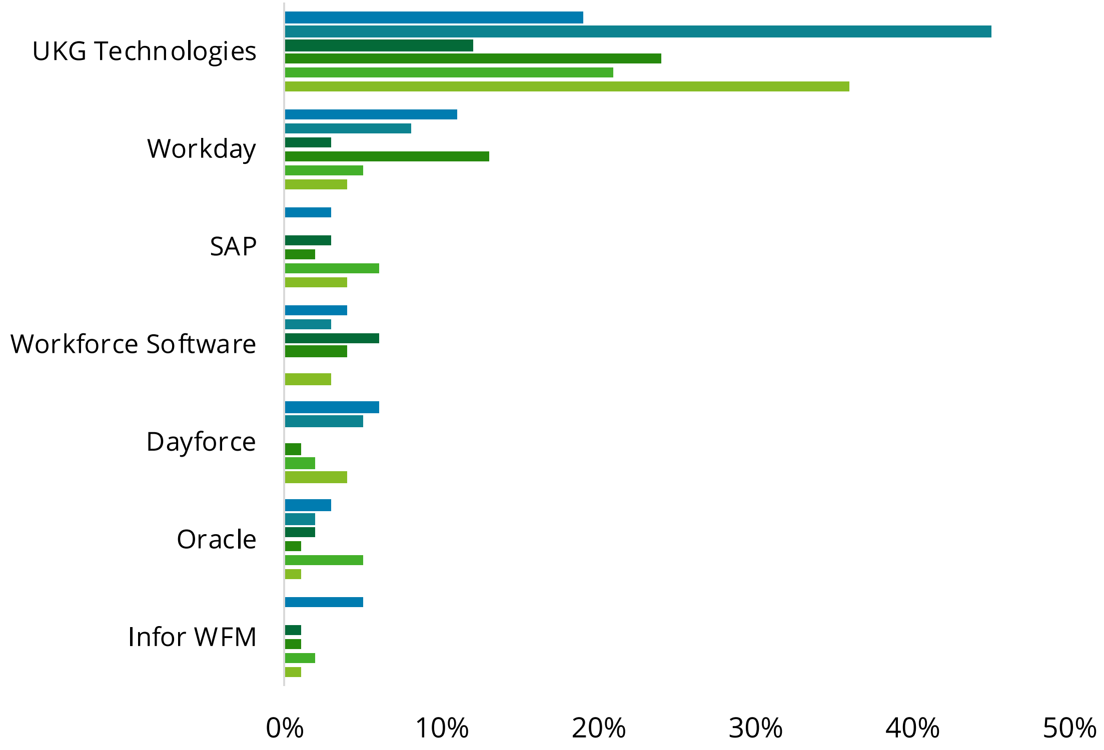
Why it matters:

Prioritizing an enterprise technology roadmap can be a complex negotiation of return on investment, competing cloud strategy, and business enablement trade-offs. Benchmarks for what other organizations are doing can help an organization frame their strategic roadmap, identify ROI opportunities with new technology, and validate a focus on enablement.

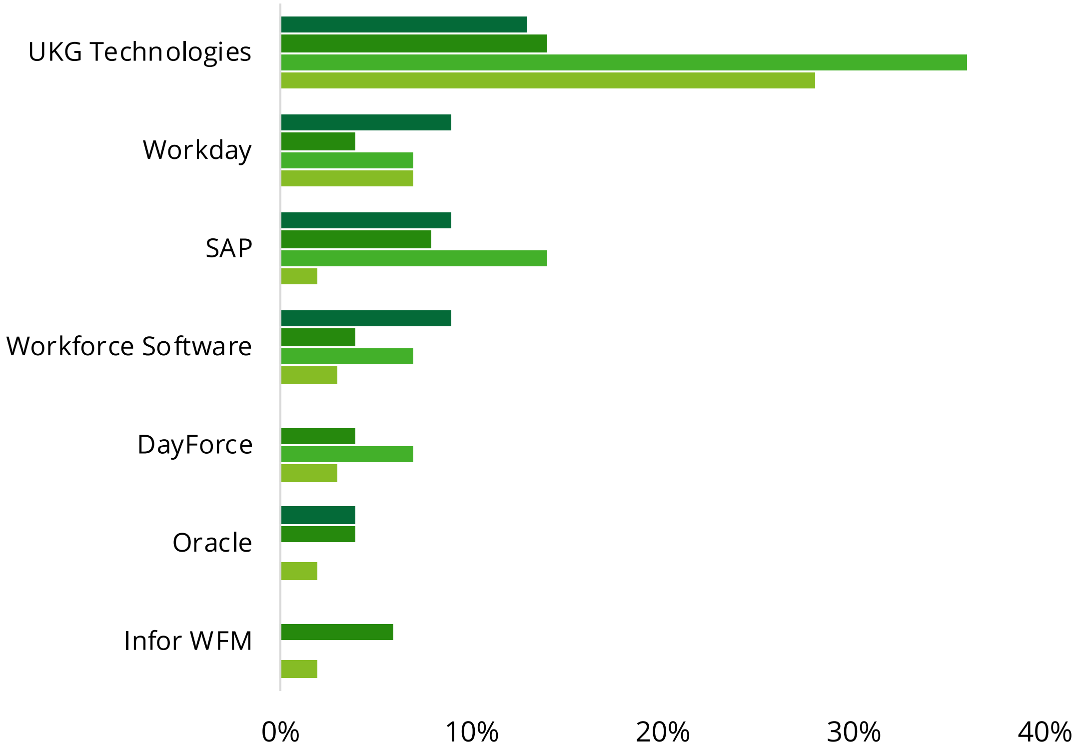


Technology – Current state

About 1/3 of respondents are using or evaluating UKG technologies for their WFM landscape. HCM Solutions combine for 1/3 and can offer advantages in a streamlined technology portfolio provided the key requirements can be met in time and scheduling. Infor, Workforce Software, and Dayforce also represent strong capabilities and market presence in Workforce Management.



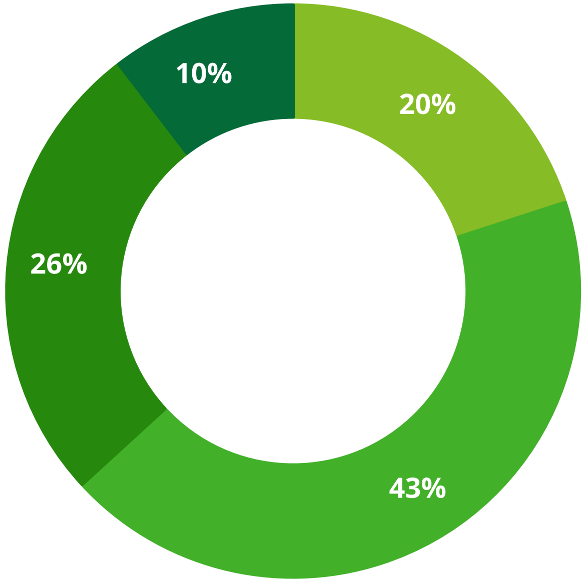
WFM solution(s) used by industry



WFM solution(s) used by region

*For the purposes of the graphs below, "UKG Technologies" is inclusive of UKG Pro WFM & Workforce Central, as well as ADP Enhanced Time and Workforce Manager

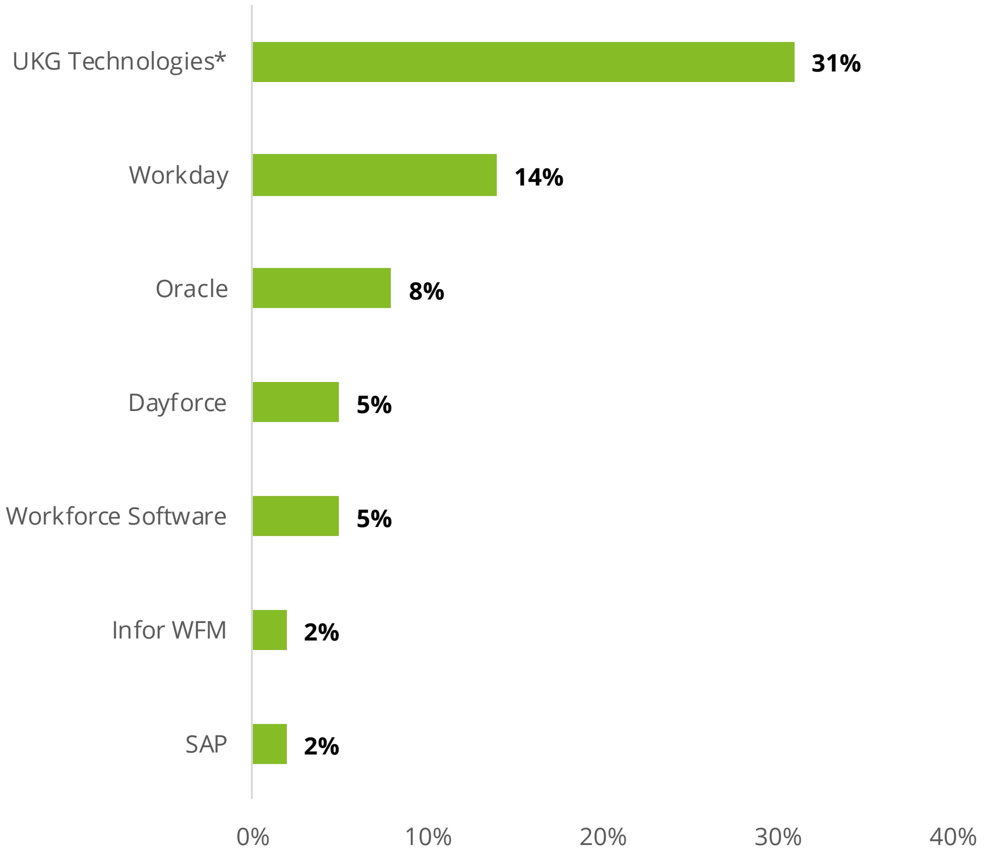
Technology – Most organizations are moving to a future state to deliver new features with leading WFM and HR solutions



Why are you changing your WFM technology?

- New WFM system is in the cloud
- Current system(s) do not have the features we need
- Our current system(s) are being sunsetted / end of life / end of engineering
- Other

What leading WFM system are you planning to move to?



*UKG Technology is inclusive of UKG Pro WFM (20%) & Workforce Central (3%), as well as ADP Enhanced Time (3%) and Workforce Manager (4%)

Technology – A future state targeting solutions for the front line with analytics and scheduling

44%

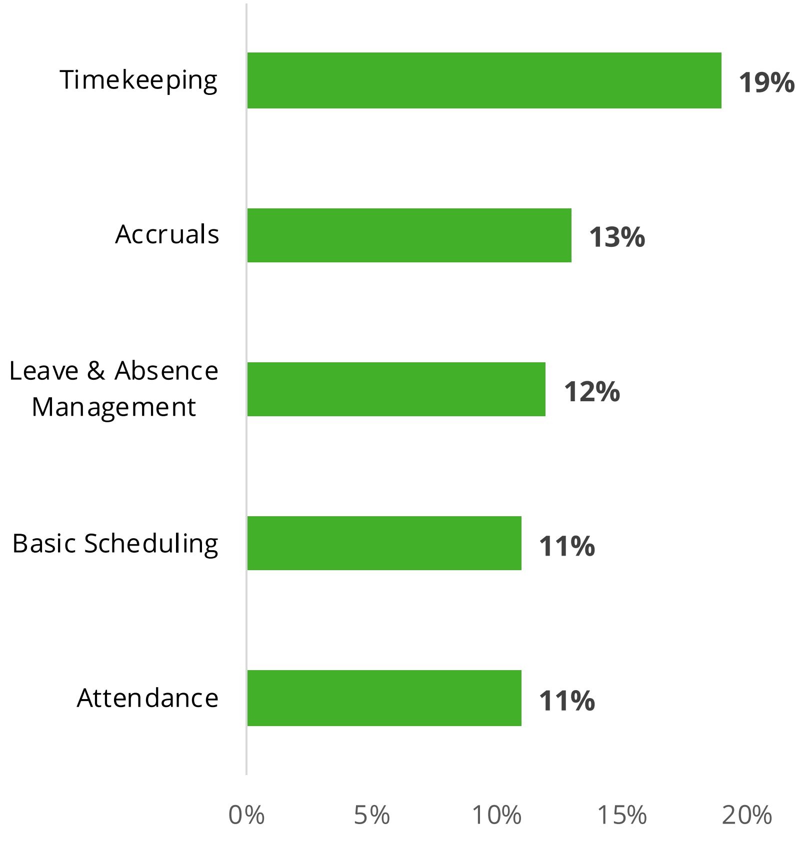
of respondents

plan to expand or change their WFM solution with 28% in the near term (within less than 5 years).

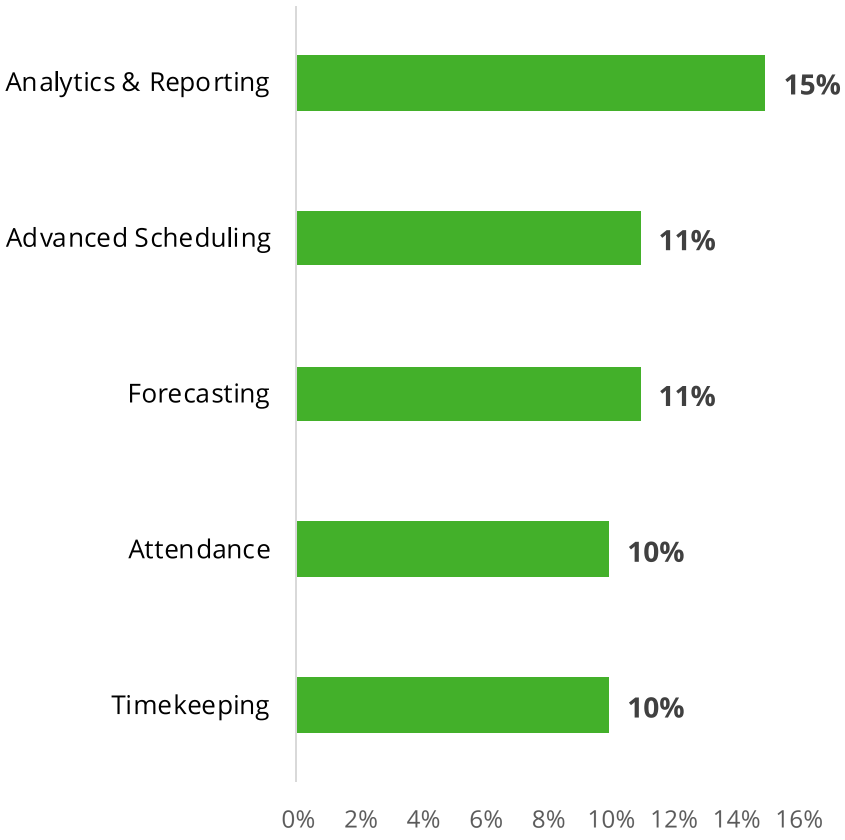
Respondents are focused on optimizing their workforce, including expansion into advanced scheduling, forecasting, and analytics and reporting modules.

Investing in features like analytics, scheduling, and forecasting can directly impact the frontline worker/leader experience and create a line of sight into ROI for management.

For organizations planning to expand their WFM solution, what features do they use now?



For organizations planning to expand their WFM solution, what features do they want to expand?



WFM is positioned to benefit from GenAI

To obtain a global view of how Generative AI is being adopted by organizations on the leading edge of AI, Deloitte surveyed 2800 AI-savvy business and technology leaders directly involved in piloting or implementing GenAI at major organizations around the world. The results, published quarterly as Deloitte's **State of AI in the Enterprise Report: Now Decides Next**, provide a forward-looking view of the future of GenAI in the workforce.

91%

of business leaders surveyed

expect their productivity to increase due to GenAI

79%

of business leaders surveyed

expect GenAI to drive substantial transformation within their organization and industry over the next three years

23%

of organizations

have made investments in GenAI for HR

WORKFORCE INSIGHTS

Almost all business leaders expect to increase productivity using GenAI, fewer than 10% currently use or have plans to use GenAI. This gap is particularly evident in the realm of workforce management (WFM), where AI can offer substantial benefits to productivity and efficiency in areas such as scheduling, labor forecasting, and other critical functions.

47%

of leaders surveyed

reported that they are sufficiently educating their workforce

22%

of leaders surveyed

reported talent being very highly or highly prepared to adopt GenAI

For further information

Deloitte Consulting LLP provides a broad range of human resource transformation services. These services are designed to accommodate both large and small employers across an array of industries and geographical markets. Our services are tailored to our client's specific needs, using established methodologies and strategies.

In addition, Deloitte provides services using a multidisciplinary coordinated approach with Human Capital, including HR transformation, allowing us to provide a dynamic perspective to our clients' workforce management issues through technical expertise, thoughtful leadership, and innovation around core business issues.

For more information on the survey or Deloitte's Global Payroll and Workforce Management Solutions Practice, please contact:

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For survey specific questions, please email our US Deloitte Global Workforce Management Survey mailbox at: wfmsurvey@deloitte.com
You can also visit our website at www.Deloitte.com

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On behalf of Deloitte and our sponsors, Payroll.Org, we would like to thank everyone who contributed their time, experience, and insights by participating in the survey.

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