



Navigating innovation: Trends and takeaways from HR Tech

Host: Kyle Forrest, Human Capital US Chief Marketing Officer

Guests: Franz Gilbert, Human Capital Ecosystems and Alliances Global Leader
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Kyle Forrest:

Hi there to our Capital H listeners. I am thrilled to kick off our inaugural episode of the HR Market Insight Series with our Deloitte [Human Capital] Ecosystem and Alliance leaders, Franz Gilbert and Matt Shannon. This will be a regular series as part of our Capital H podcast, where we'll explore the latest trends, challenges and innovations from vendors and technology providers which are shaping the HR landscape.

As a reminder, I'm Kyle Forrest, and as David Mallon and I shared on the episode zero launching our refreshed approach to Capital H, I'll be co-hosting with David going forward and bringing client stories, vendor stories, stories for the market about what's going on

in the human capital space. I'm really excited about today's episode because Deloitte had the opportunity to be a Diamond Sponsor at the 2024 HR Tech Conference and Expo that took place last week [September 24–26, 2024] in Las Vegas.

And in addition to sharing some of what Franz and Matt have been doing with Deloitte and the human capital provider ecosystem over the last decade plus, we're also gonna talk about our experience at the conference last week. With that, Franz and Matt, let's start with introducing yourselves to our listeners. Franz, why don't I turn it over to you for an introduction?

Franz Gilbert:

Oh, fantastic. Thank you, Kyle. And I am really excited about this and I appreciate the opportunity to talk with everyone on a regular basis. I've been in the HR technology space for an incredibly long time, both on the provider side, on the client side, on the developer side. So this is an incredibly fun community for me. So if it sounds like I get really excited about HR technology, it just really is one of my passion areas. For Deloitte, I have the sincere pleasure of leading our ecosystems and alliances on behalf of the US member firm and globally.

What that means is 50% of the time we spend with our internal consulting leaders learning how are they serving our clients,

what are they doing for them, where do partnerships fit in. 'Cause we track 55 categories, but we only partner in 18. So we track a large part of the market where it makes sense for us, and only partner in the ones where we really add value. And that gets to the other 50% of our time, where we spend time with the providers, understanding what are they doing? Where do system integrators fit in? What does this look like from a partnership?

So really, I get to spend my professional career now with two sets of amazing people, those who are serving Deloitte clients and also with the providers.

Kyle Forrest:

Thanks, Franz. And, maybe two or three takeaways for folks from Franz's insight from his intro. One, he's lived and breathed the space at a provider company itself, right? So he knows what it's like to be in the provider ecosystem, not only just tracking it. Number two, the fact, Franz, that you mentioned Deloitte tracks over 55 categories. Right? So we track categories to make sure that our clients and other players in the ecosystem know the breadth and depth of what's going on.

And then number three, Franz, I think your emphasis on global, right? For those of you who are familiar with Deloitte as a member firm construct, we are coming to you live from the Deloitte US member firm, but we're tracking providers from a global category. Matt, let's kick it over to you for an intro.

Matt Shannon:

Thank you, Kyle, and I appreciate the full team of having us on today to talk about the rapid developments and conversations that occurred at the HR Technology Conference. My name is Matthew Shannon. I have the distinct pleasure as well of serving as our US capability lead around ecosystems and alliances. Double-clicking on what Franz had already shared around that 50% of time that we get to spend in the provider ecosystem, I'll share more about the two things that our team specializes particularly in that space.

The first one is sensing the market. So in many ways, and particularly as part of my last role as an analyst, both pre and at Deloitte, I actually led solution provider

market research studies, multimonth efforts, understanding who are the top providers in the talent acquisition sourcing space, performance management space, talent market space from a capability and feature perspective. Part of our role is understanding who are the players in the market. If any client of Deloitte's or consulting team brings us a question on provider A, B or C, we want to know who they are and have a point of contact with that provider.

The second thing that our team does is build relationships with the provider ecosystem. So as I mentioned, having those points of contacts within the provider organization is key to that for any time they want to bring them into a client opportunity to provide a demo or talk about their capabilities or what it is that they can do from a client perspective. We also help to support the mechanisms behind building out go-to-market relationships with providers. So understanding all of the compliance considerations, business considerations, and the strategy considerations that go along with setting up a new marketplace business relationship.

So it's a combination of those two factors, the very objective view of who are the players in the market, what do they do, and the very subjective view of which providers make most sense to bring to our clients as part of engagements of what they are looking for, gives us a really unique perspective in market that may be different than a traditional analyst form or a corporate development team.

Kyle Forrest:

Awesome, Matt. I appreciate it. And, and folks, there's a couple of things I want to call from Matt's intro as well, right? Just like Franz has a background in the provider ecosystem prior to coming to Deloitte, Matt has an analyst background. Which is a different way of engaging and assessing the market. And Franz and Matt will share a moment, in context of the team that they have who engages with the market. But Deloitte does have our own analysts. So we'll talk about that in a moment. I think the second thing to call out from Matt's intro is really the way in which we sense the market and determine deliberately where does Deloitte engage

versus where does Deloitte provide context, insights and information to just the broader set of practitioners who are interested in the HR ecosystem market.

So let's ground the audience a little bit more on your journeys and Deloitte's journey in having this Human Capital ecosystem and alliance team, because it's not something we've always had, right? Over the last 16-plus years that I've been at Deloitte, this team has not always been in existence.

So, Franz, maybe let's start with you a little bit. Like, how did the team get started, and what's kind of the full scope and remit beyond just what you and Matt shared, in terms of providing that breadth and depth of ecosystem, and alliance, expertise to the firm and to our clients.

Franz Gilbert:

Kyle I appreciate the question. It was an amazing journey. So, the program started about six years ago. And the reality was, for the most part, our view of alliances from a Deloitte perspective was kind of the big alliances that you would expect, right? You know, we have the sincere pleasure of serving, the Workdays, the SAPs, the Oracles, the ServiceNows, right? The big ones that are very complicated, typically need a system integrator. Well beyond that, there was not as much in terms of one, who do we have alliance with? Who do we work with? Who do we have as partnerships?

And so the last six years has been an amazing journey on both sides of this, which was within Deloitte, really helping leadership understand and working across our offering leaders that with our clients, we know there's always this best-of-breed versus platform conversation. Well, we obviously had the platform taken care of with the HCM providers that we work with. Well, the question then is, who's the best of breeds to work with?

And those companies initially, those are smaller companies. Typically, the way it works is, if they're in one category, they're in kind of that 30 million to maybe 200 million in ARR. You know, if they're multicategory, they can be in 200 million to 500, but they're not the billion-dollar firms that the firms we're used to dealing with. So we really

spend a lot of time educating internally how we work with those providers, what to expect from those providers, and what that regards.

The second side was also working with the provider community, and we learned a lot of lessons, as well. And in this circumstance, what we really focus on is where can we serve the provider well. Cause when we look to do alliances they're not, "Let's go do a quick deal," right? These really are multiyear, five-year deal pluses in terms of what we want to be success at. And so that's why I mentioned we only partner in 18 categories because there's a lot of categories that are amazing. So things like assessments, an amazing category.

Yeah, Matt actually has done some of the seminal research in terms of what that category looks like, who the major players are. Now to that regard, what that allows us to do for our clients is helping them understand we will talk to you about all the right answers across all 55 categories because who we partner with is really just under that system integrator lens. It has no reflection on who we will tell you that's out there that's doing amazing things. And it really frees up us from a Deloitte perspective to make sure that we're always giving you an informed answer for all the categories. So it's been a real privilege to kind of help build the team and the perspective. Matt, what would you add to that? 'Cause you've been on this journey a long time with me too.

Matt Shannon:

It's been a fun few years, Franz, and I certainly appreciate what the firm's allowed us to do and what our exposure to the provider market has enabled us to do. So as a, as a quick statistic, one of the things that I look to highlight on our exposure in the market is we get to engage with at least 300 unique providers per calendar year. So it's almost one per day, which allows us a vast view into the broad space of the HR technology space, not just those that are able to serve enterprise or midmarket clients, but even brand-new startups that've just launched. We looked at 70 startups at the HR Technology Conference itself, so it's one where we're constantly sensing what's

going on in the market and who are variety of players.

Now, from what our team does internally at Deloitte, my favorite thing to do is, is provide that advisory perspective. Who are the players and why are they meaningful to know? We do a lot of programming both within Deloitte and in the community to be able to understand who are providers and how we can maybe bring them together in service of our end and mutual clients? Specific examples of that, we have a phenomenal internal community of practice, over 1,000 attendees, practitioners across Deloitte member firms and geographies. We recurrently do demo series, collect intelligence and collateral from providers so that it is readily accessible for the client engagements that ask about those specific providers by name.

The second thing in the community that we do is we bring together providers for events both virtual and in person at our Deloitte University, our corporate learning center, for sessions on how can we be more strategic in our support of our end clients, both from the way that we show up in market together with our true alliances as well as the way that we reinforce our eminence and marketing and messaging, and everything that matters most to the clients that we serve.

Kyle Forrest:

Awesome. So Franz and Matt, I appreciate you just grounding our audience on who you both are, the history of Deloitte's Human Capital ecosystems and alliances team so that as we continue on this market insides journey not only on this episode but in future episodes, people really understand the background in which how we engage with the collective providers in the ecosystem, both those that are big players, startups, everything in between, you know, companies that don't even exist yet, right, that you all will engage in the months and years ahead. And so let's use that as the opportunity to pivot a, a little bit and talk very specifically about the HR Technology Conference and Expo so... that took place in Las Vegas last week. Deloitte had the pleasure of being a Diamond Sponsor, also an experienced sponsor where we actually brought to life a number of sessions at our Boundaryless HR Experience Theater, really

showcasing the depth and breadth of our expertise across a variety of sessions where we had seven different speakers, a number of client speakers really dig into practical topics across an array of sessions and really bringing things to life.

Franz, I'll start with you and then we'll go with Matt. Franz, what were some of the standout themes or trends that you noticed at the HR Tech Conference this year?

Franz Gilbert:

The first one, I mean, I think everyone's talked about it, so I'll talk about it briefly and then quickly move on, but, everyone launched their AI agent, at this conference. AI was everywhere. What resonated is we had the sincere pleasure of talking about it at our demo, which was, the question's not going to be the agent, the question is really going to be, how do you put them all together? So the fact that we want AI agents across the industry, interesting, I think that was to be expected. I think, it's gonna be more the next 12 months figuring out how we put it together.

There's probably two other things that jumped out at me. The second one was kind of behind the scenes, or you kind of had to know it was going on. I was really excited to see the investor conference that was running in parallel.

That was phenomenal. And, the reason being is we know out of the sectors, with the exception of AI, one of the higher-end sectors in terms of where VC money is going, where PEs are, where the valuations are, human capital continues to be one of those driving sectors. And what this conference really did is, we talked to some of the attendees, it was bringing a lot of new investors into the space saying, "Here's how you think about the space. Here's what talent acquisition looks like. Here's what talent management looks like. Here's what the valuations look like. Here's the number of providers that are A, B, C and D and what the backlog looks like." 'Cause there's a lot of amazing investment opportunity. And the way I look at this is, as we continue to get more long-term and well-informed money, it just allows us to continue to attract amazing data scientists, amazing executives, amazing product managers to the space.

And it just continues to grow and evolve how... the quality of the products that, that we work with.

And then the last one, this was the one that I just loved, 'cause there were some firms floating around HR tech that were kind of payroll centric, but, you know, they weren't getting the buzz. Well, what was fun for us, and I will tell you, Kyle, I was really worried about this, you know, we had Brian Proctor do, the last session in our experience theater was doing payroll. And I was like, okay, it's Thursday, you know, people have to leave a little early, we were all kinda figuring out East Coast travel, and so I didn't know what that session would look like. And it turns out I think it was one of our most well-attended sessions across the two days.

Kyle Forrest:

It was.

Matt Shannon:

Agreed.

Franz Gilbert:

And what it told me was in light of everything else, there's still absolutely a lot of buzz in the industry on the really core delivery things like payroll, ben admin, where they know we still have to continue to improve that product category. And seeing that level of attendance listening to Brian talk about, you know, self-healing payroll and what we're seeing in AI/ML, that was pretty fantastic for me.

Kyle Forrest:

Yeah. I think Franz, knowing that... (laughs) when that session ended at 3:45 on Thursday, every single booth started their breakdown process, it was a phenomenal audience, and I think, to your point, it's very easy to take the high-level themes of AI and then really see the practitioners who are like, "I'm focused on core," or, "I'm focused on, certain topics that are still the fundamental things that have to be done right within any organization." So I appreciate you sharing those insights. Matt, let me kick it over to you. What were some of the standout themes or trends that, that you saw?

Matt Shannon:

Yeah. I'll continue on some of the thoughts that Franz had already shared with a little

bit of a different flavor, and then share some additional perspective on representation of what it looked like and felt like on the expo floor. I know we were getting some snapshots, of takeaways in virtual sessions last week, but to really get the flavor of the event.

On that investor note, I think Franz hit the note that the Investor Summit, new in the last few years, offers a separate track on the event program agenda for the variety of, whether it be angel investors, venture capital funds, investment bankers, that all attended; they have always been a presence at the HR Technology Conference, but I can say that, from our team's perspective, easily have tripled the number of engagements that we had just networking with various investor teams on the conference floor, whether that's in planned meetings or walking amongst and between the variety of the 400 exhibiting provider booths or engaging in some of the provider hosted events in the mornings and afternoons.

I think the takeaway from these conversations and why I value them so particularly at this event is because it gives a different time horizon to the nature of the, the buyer perceptions, at the HR Technology Conference. When you talk to buyers, they're really grappling with, well, what are the challenges that they have today? Understanding the sentiment of their workforce or rewarding production within worker groups by giving them the right meaningful benefits. I think to transition that answer and get to talk about questions on how do we think categories, the 55 that our team tracks, will continue to evolve and change, where the market leaders will continue to invest in innovation or invest in acquisition, and how that will continue to reinforce either the consolidation in markets or the opportunity for new entrants to continue to, to disrupt the status quo.

Kyle Forrest:

Yeah.

Matt Shannon:

I think the other interesting thing, again, to give the perspective of who's at the HR Technology Conference is representation. So prior to attending, our team always does an analysis of who are the exhibiting providers.

Now, this by no means represents all the providers at the conference, but those that have invested in a presence on the expo floor space. Talent acquisition far and away tend to, used to be the most-represented category at the conference. In many regards, it is the first experience that most workers have with HR teams and, and experience that hiring managers and recruiters will continue to, to grapple with, with the high volume of, of candidates in an increasingly tight labor market. I think it's one where the plethora of approaches, technologies, visions for how to make that process more seamless, more candidate-centric, more connected will continue to be an area of investment and, and reflection to be able to sift through all that noise in market.

Equally so, some of the bigger sections of the, of the expo floor will be represented by benefits providers, and in that I'm also gonna include financial services, because we think about that as an aspect of benefits for the workforce. How are we providing the right financial education to support financial well-being alongside the other types of physical-, emotional- and health-centered well-being. I think those are important elements for making our workforces valuable and value—feel valued, but also element of, of engaging in their retention abilities of, of the ability that HR technology has in driving workforce experiences.

The last thing I wanna talk about is, just a point on, on messaging. When you're talking to those 400 providers in market, one of the biggest challenges that you get is navigating the hype of, "Oh, we have the best artificial intelligence. We have the best cognitive agent. Our solution is the most representative and bias free." I think those are challenges in market that are great to show up in marketing decks, and talk through in sales pitches, but sifting through that hype is something that I'd like to advise on when you're talking, you're to the buyer teams. So look at what are the underlying accolades or the awards that have been distinguished to specific products? And the HR Technology Conference provides that mechanism. There's a Pitchfest that looks at, of the 70 startups that are there, which 30 have the most compelling products and ability to share their value to

organizations? As well, there's a selection of HR technology's top products of the year.

Franz Gilbert:

Yeah. Matt, just to go off of this, I mean, one of the things that we track year over year, I mean, just to give you an idea of one out of five, you know, roughly, providers, they don't come back, they're not at the next show. And I think that's reflective of, if you think about talent acquisition, you know, one of the challenges that product companies have in our space is if you think about TA, they're like, "Well, what do you do?" Well, I mean, for seven years, well, shoot, probably longer than that, I mean, we're probably talking 15 years, you know, it's like, "Well, I use machine learning to help you find better candidates." Well, okay, that, that's not very differentiated. And so I think a, a challenge in this conference, especially for the TA providers, is how are they really differentiating themselves?

Matt Shannon:

Yep.

Franz Gilbert:

And if they don't do it well, it, you know, this is kind of a make-or-break conference, and we see that a lot. And so one of the things that, Kyle, we do a lot behind the scenes, I know we'll have both, clients but we'll also have providers on this, we spend a lot of time with providers really helping them on their product and market fit, 'cause that can be tricky. I mean, there's some amazing providers out there that may be coming in new from outside the industry.

We kinda have to help them with, "Yeah, finding a candidate, that's, that's not new, right? Well, what are you really doing? Okay, you've got automated nurturing. Okay, now that's interesting, right? Or, maybe you're looking at a specific segment, like you can find candidates among manufacturer workers. Okay, now that's interesting, right?" And it's kind of helping them evolve that.

Kyle Forrest:

Yeah. Well, I think a couple things that I'd like to dig into based on what you two have shared. Right? The fact that a big element of this conference is not only practitioners who are there looking for potential providers, but also venture capital, private equity, you

know, companies essentially looking for investments or, or acquisitions. And so Franz, I think if I was a person at an organization going through, uh, a vendor selection or looking at the market and thinking, "Which technology should I invest in?" I'd have some questions to think, How do I tackle this knowing that there's been a lotta change in the space and there might be more change ahead. And Franz, I, I know you actually led a session with one of our colleagues, Greg Burke, about how should organizations kinda navigate the maze so to speak to, to make a technology selection decision? Can you share a couple highlights for the key messages you delivered during that session?

Franz Gilbert:

Yeah. And, and I'll add a little bit to it. Selecting a provider has always been tricky, right? And, we kinda look at it also the way we select partnerships. Because I'm gonna segment off a group but then, kind of ignore it. I'm a huge fan of watching what's happening in the startup space. Because they're the leading indicators of what's coming next. Now, often what they're doing is they're kinda helping us find what are the new features, right? You know, they're very narrowly focused, they're pointing out the next stuff. It's gonna get absorbed, right? They're either gonna grow themselves or gonna get absorbed into the pure plays and eventually in the HCMs. There's kinda this progression that occurs. So a, I always encourage companies if they have the change support and the budget, to kinda allocate a little bit of their fund to playing, right? Find a business unit that wants to work and play with some new technology, allow them to work with the startup. So... But I know, for most our-size clients, they're not gonna be able to use, nor are the providers ready from a startup standpoint to be enterprisewide. But just that, that startup piece is really important.

On the large enterprise, whether if you're looking for like a learning management system or alpha contracting system or HCM or, or any of those, realize two things. A, you know, too often we get caught really thinking hard about the product. Does it do this? Does it do this? What's the features, right? Do ... You know, and it's the 300-tab, you know, Excel spreadsheet of, you know, does it do all this? And the reality is, that's a

very temporary conversation. What features the product has today often, it's kind of a table stakes thing. If you're in performance management, do you do baseball cards? You know, do you have the capability to do a calibration round? Can you do weekly and regular calibration, right? There's just those normal features that all of us expect. The real question is, 'cause most of us wanna sign three-year deals or five-year deals, right? We don't wanna be flipping our learning management system every three years.

So it's also stepping back and saying, "What's the strategy of the provider I'm working with," right? Where are they going, right? I'll give you a great example. So we were kind of on learning. There's two amazing providers out there that we have the pleasure of working with, that are in the pure play side, right? The, HCMs have amazing learning solutions too, so I'm not ignoring them, but I just wanna kind of paint the picture. But you've got like a Cornerstone and a Docebo, right? Cornerstone has, you know, really focused on how do I broaden their capabilities, right? They're focused on learning agility. You know, so they've added my guide, you know, they bought Talespin, they bought SkyHive, right, they've really said, "We really think we're gonna go in more learning in the flow of work, right, more contextual agility."

Whereas if you look at Docebo, what they've done is they've really focused their development on the core learning pieces, saying, "How do we continue to expand on proctored learning, training? What are we doing on the consumer side," right? And they're doubling down on, "Let's make sure we're really focused on learning." Two very different corporate strategies, both very successful. And so as a result, this is that longer-term strategy of saying, "What are you looking for in a provider?" And every company's piece is gonna be different. At that regard, I would never ask a Docebo or Cornerstone, "Are you SCORM compliant?" Right? That's kind of a table stakes thing. But that's also the fun of this. And then I'd encourage folks to meet with the providers' leadership teams and really go, you know, how do they culturally fit with your company?

Well there's some of the highlights. Here's the one good thing to know, is any provider

that's a pure play at the enterprise level, and this is kind of the way we always think about, they're all good. I mean, you don't get to that level without having good products. You got a great product team, you got a great tech stack, you've got a good marketing, delivery. You know, the reality is what's your strategic differentiation?

Kyle Forrest:

Sure.

Franz Gilbert:

From a marketing perspective, you get to see a lot of stuff.

You've joined this as CMO over the, you know- the last eight months. What's your view?

Kyle Forrest:

I think that a lot of providers right now are really emphasizing on, AI capabilities, one. Two, time to value, time to productivity. And then three, what is the business outcome that is delivered via the solution. I think it's very easy for providers to focus on the capabilities of the product or solution set delivered when what any organization wants to understand is, "How do you help me with this problem that I have? How do you help me solve this business challenge?" Right?

Because it might take a mix of capabilities. It might take a mix of providers. Right? I think that's something that when, I engage with my clients, there's always going to be multiple providers, hands down. It's important to understand what's the business outcome and business, you know, problem you're helping an organization solve. And it's also, I think, good to be self-aware and and talk about how does your product or your solution fit in with other providers in the ecosystem. So you just make it that much easier to play in the ecosystem than any individual organization has. Which I think is just a critical part of expressing your capability or your willingness to solve business problems and challenges.

Matt Shannon:

To that point, Kyle, you'd shared on the third one that business outcome. And we were joking a little bit earlier about the enthusiasm that we saw for some of the seven sessions that we hosted at the Boundaryless HR

Experience Theater, and a payroll session being one that, it despite being at the end of the event was very popular. One of the sessions we knew was gonna be popular because it's such a complex and challenging event to navigate is the section on technology selection. So I just do wanna call out two of the specific statistics from that session that, in watching the crowd of over 100 attendees that was there, crowded around our small booth. Looking about, the eyes really lit up when hearing about it. And the first one to your point, Kyle, in the mix of solutions is that there's over 200 applications in use today on average in large enterprise organizations. It's a pain and the same. We know that there's a complexity in terms of the number of tools that are being deployed in organizations today. That statistic is actually up over 20 applications from the year prior, so it doesn't seem like it's gonna be getting any easier.

And the second piece, and I think this is a constant reminder when working with buyer teams, is that truly the best HR technology is the one that people actually use. So I think that takeaway directly applies to the equation of talking about balancing functionality, systems architecture, how they play in that vendor ecosystem. The third part that I want to pull in too that—and Franz, you mentioned in terms of compliance being a leading feature in some of the pitches from provider teams, that's an expectation. I don't think it should be a leading feature. So it's at least table stakes for the usage of new technologies.

Kyle Forrest:

Franz, Matt, I think with that, we'll conclude the inaugural episode of our HR Market Insights episode. Thank you both for joining. As I mentioned in the intro, this is going to be the first of many times that Franz and Matt or members of their team join to share insights from what we're seeing and hearing at the various events that we attend throughout the year and from the various provider community sessions that Deloitte hosts, as a means for the provider team to engage.

So two or three kind of asks and calls-to-action for the community, one, give us your feedback. We're here to bring these insights to you so that you have an understanding of

what's going on in the ecosystem. Second, for the providers, feel free to reach out to Franz, Matt and team. Bring us to the conversations with you. We can help ground where your products, where your solution fits in the broader ecosystem and give feedback on your product set. And lastly, number three, to the organizations who are listening, don't hesitate to reach out and ask for insights, ask for an understanding of what's going in the HR technology, HR provider ecosystem because we're here to ultimately help you all make the best decisions that help drive business outcomes for you.

Thanks for listening, everyone. And stay tuned for more insights in the near future.

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