

Market Guide for Talent Acquisition Applications

Published 18 December 2018 - ID G00367606 - 44 min read

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The market for talent acquisition is going through a period of substantial transformation. This document guides application leaders seeking talent acquisition applications through the dynamic landscape of functionality, and the evolving packages of offerings that make up the market.

Overview

Key Findings

- Talent acquisition (TA) applications are available in the market in a wide variety of packaged solutions and combinations, each offering either depth or breadth in terms of TA process support.
- Talent attraction, engagement and recruitment marketing have become essential components of the candidate experience. This outward focus has coincided with organizations taking a more comprehensive approach to the internal TA process.
- TA applications do not just cover the applicant and prehire processes. They have expanded into the precandidate (plan) and candidate (source) processes for employees and contingent workers.
- As some buyers seek hybrid or point solutions to address critical processes within their infrastructure, other TA and talent management (TM) suite providers have decided to offer specific modules on a stand-alone basis to compete in the market.

Recommendations

For application leaders transforming HCM and talent acquisition within their organization:

- Review and modernize your TA solutions holistically by looking at your process flow end to end and incorporating this project into broader HR transformation initiatives. The TA function touches broad internal and external audiences, and has numerous stakeholders, requiring technology plans to be viewed holistically to avoid risk for downstream processes.

- Develop a strategy to transform TA that is suitable for your organization given your geographic footprint, the volume of workers and existing/planned HR application investments.
- Evaluate how your TA strategy connects with your HCM, talent, digital business and other critical application strategies. Use caution when selecting appropriate vendors, as the TA market will continue to evolve rapidly over the next two to three years.

Strategic Planning Assumptions

By 2020, more than 20 million job seekers will look for automated advice on how to improve their ranking in job-matching algorithms.

By 2020, more than 50% of large enterprises based in North America and Western Europe will include diversity and inclusion enablement criteria in their HCM technology selection processes.

By 2020, over 50% of TA applications will include some artificial intelligence and machine learning components.

Market Definition

TA applications have traditionally focused on applicant tracking systems (ATSs) to track, post and automate the requisition-to-hire process. However, as the TA function in organizations has expanded to compete for talent, TA solutions have evolved to cover a broader set of activities such as recruitment marketing, candidate relationship management and onboarding. As a result, TA applications are on the market today in a variety of packaged suites that offer combinations of functions beyond applicant tracking. These combined platforms are called talent acquisition (TA), talent management (TM) and human capital management (HCM) suites.

Market Description

TA applications encompass the software applications that sit at the core of the planning, posting, selection, hiring and tracking processes.

For core functionality, TA systems are primarily focused on applicant tracking systems (ATSs) to document, post and automate the requisition-to-hire process. Considering the recruitment workflow, TA applications can also include employee onboarding, and are increasingly including recruitment marketing and candidate relationship management (CRM). TA systems are available on the market today in a variety of combinations and packages. Options are available based on what customers' requirements are, or what other processes or systems they are building around.

Solutions can come in the form of a stand-alone ATS, or a combined TA suite, which is often an ATS, but with some front-end recruitment marketing capability and back-end onboarding and data analytics tools. Additional customer options are available in the form of talent management suites, which often add learning management capability to the equation. TA modules can be found embedded within a HCM suite, offering the capability to combine TA data with other HR workstreams along the employee life cycle for broader views on

talent.

The landscape of recruitment technology is best described as a continuously evolving ecosystem of technology and service providers. Application leaders must support a dynamic flow of processes and data across multiple systems, whether these are incumbent systems or the new specialist applications that arrive in the market with great frequency. In a competitive talent market, application leaders must strategically keep pace with innovation, and with new uses of AI and machine learning across TA technologies, to enhance talent outcomes and support operational efficiency.

Market Direction

Gartner views TA solutions as a subsegment within the broader HCM market. Gartner estimates that the HCM market will reach close to \$15.35 billion in total software revenue by year-end 2020, with software as a service (SaaS) being the dominant revenue component by this time. TA was one of the first HCM areas to adopt SaaS, so the majority of solutions in this market are deployed in that fashion.

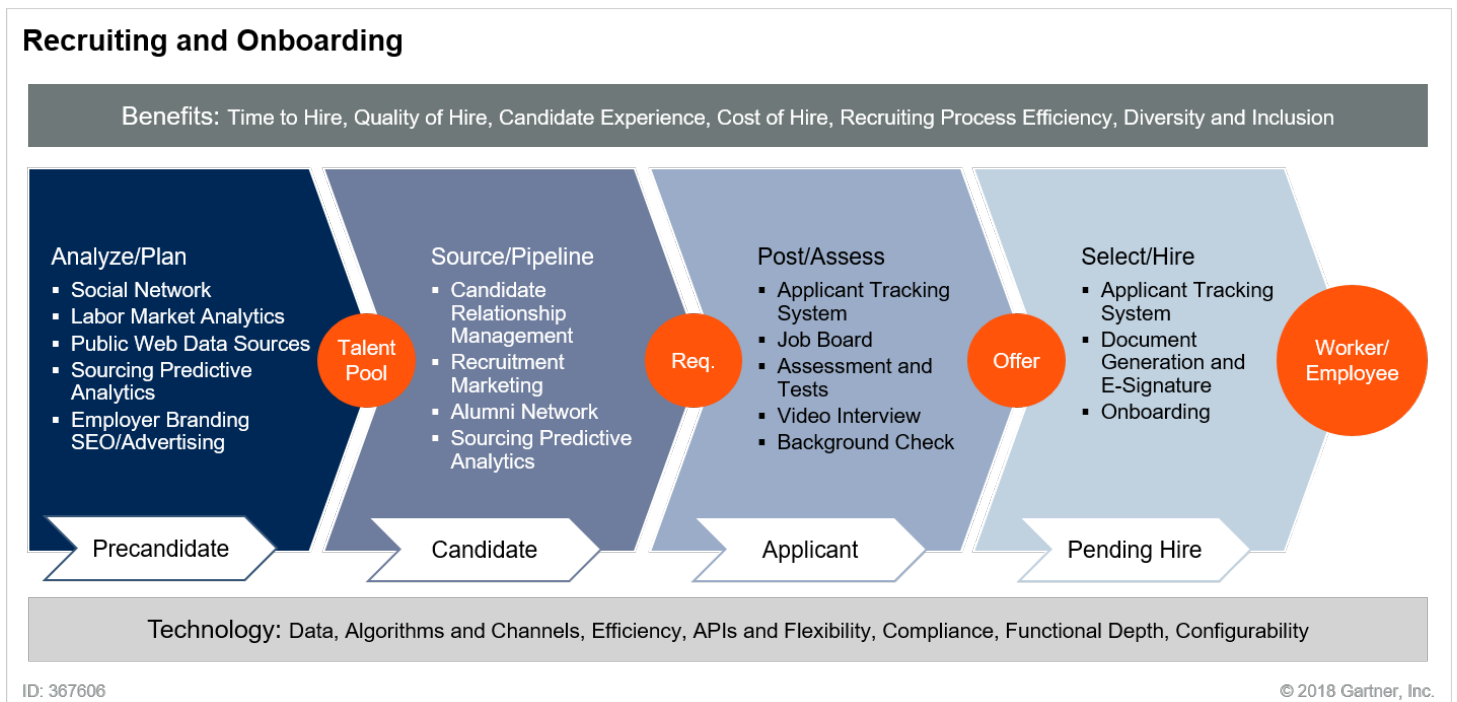
Also, based on client inquiry and vendor inputs, we see the global TA solution market continuing to grow through 2020. From a geographic perspective, we see the most demand and adoption from within the Americas, followed by EMEA and the APAC regions. On a percentage basis, we expect net new business growth from the EMEA market and APAC region to outpace that of America through 2020.

Market Analysis

TA solutions can come in the form of stand-alone ATS offerings, or combined TA suites that offer an ATS, and combinations of recruitment marketing capability and onboarding or data analytics tools. Additional customer options are available in the form of TM suites, which often add learning management capability to the equation, connecting TA and training, and adding depth to onboarding. TA modules are also found embedded within HCM suites, offering the capability to combine TA data with other HR workstreams along the employee life cycle for broader views on talent.

TA technologies span the following high-level process steps (outlined in Figure 1):

Figure 1. Span of Talent Acquisition Technologies



Source: Gartner (December 2018)

Packaged Solutions

The essential components (from Figure 1) that form the backbone of an organization's TA strategy reside in their core investments. One of the key decisions for application leaders focused on selecting TA technologies is about which type of packaged offering makes the most sense for their organization. Choices include:

ATS

Strengths: ATS solutions are well-established in the market. They have a long history of driving efficiencies in TA processes and have often been built to support recruiters in managing the requisition-to-hire process. (Several ATS solutions are sold as stand-alone solutions or as part of a suite.)

Weaknesses: With a focus on candidate experience, additional tools (CRM, onboarding, data analytics) are recommended, if not required. Selecting a stand-alone ATS will require robust integrations and partnerships, and a holistic view system to system.

Talent Acquisition Suites

Strengths: These more recent solutions support candidate engagement and marketing, applicant tracking and onboarding within a dedicated suite. They are often built per today's application standards, and contain embedded insights, mobile interfaces, social and collaborative processes, etc.

Weaknesses: These solutions are less proven to effectively support extensive and complex multinational deployments with detailed administrative/compliance requirements and widely varying recruitment activities.

Talent Management Suites

Strengths: Connected to other talent processes (for example, learning, succession management and career development). Also, some of the TM suites started as a stand-alone TA solution and added other modules to be able to support TM more broadly. Offer strength in combining cross-referenced HR workstreams and data.

Weaknesses: TM suites frequently do not include robust candidate engagement and marketing. Some providers added TA capabilities after having established themselves as performance management or learning management applications. Their TA functionality, while competitive, is often one or two updates behind more dedicated TA solutions.

Talent Acquisition Module in an HCM Suite

Strengths: Helps companies consolidate functionality into fewer applications and integrations. Allows for TA processes to connect to position management, compensation data, learning, onboarding and other talent processes. HCMs offer additional capabilities for accounting for internal hires and promotions on the same slate. Easier reporting and analytics for workforce planning activities. Provides the ability to extend the view of the process into the overall employee life cycle.

Weaknesses: HCM TA modules take a broad (life cycle rather than talent-funnel) approach by combining HR workstream capability, meaning that they often do not go as deep into targeted areas of depth of the TA process. HCM systems handle a variety of internal-facing HR processes, whereas TA is external-facing, which increases the number of functions, users and operations in the system.

CRM and Recruitment Marketing Tools

Strengths: For organizations wishing to take advantage of the TA module in their HCM suite, or relying on established applicant tracking systems, specialist CRM providers allow them to improve their candidate experience. They do so without needing to switch out their ATS (system of record).

Weaknesses: Because these solutions only cover candidate engagement and marketing, there may be a gap in experience when candidates transition to being applicants and need to record their information and receive updates from the applicant tracking system.

Key Criteria for Choosing Talent Acquisition Applications

Candidate Experience: Candidate experience has become a key talent metric and an industry benchmark. That's why today's applications are continuing to build on the evolution of TA technology: marketing functionality, e-commerce functionality, advancing to personalization, customization, responsiveness and user experience (see "Build the Candidate Experience Equation Into Your Talent Acquisition Processes").

Process Efficiency: Automation and productivity tools have been benefiting organizations for some time. For organizations, in addition to improving the experience for candidates, process efficiency creates workflows that reduce timelines and incorporate technology for processes that can now get done without being driven by

a recruiter. This frees up recruiters from researching prospects and monitoring systems all day, and enables them to spend time engaging with the right candidates at the right time.

Technology and Innovation: Focusing on recent updates and capabilities through technology, the latest wave of innovation that is transforming TA technology is the application of AI and machine learning. These technologies are poised to alter how the TA function achieves targeted outcomes regarding overall process efficiency, time, cost and quality of hire, candidate experience, and diversity and inclusion (see “Transform Talent Acquisition With Artificial Intelligence and Machine Learning”).

TA Functional Categories

Engagement Functionality: Features in this area of the system workflow address processes to support recruitment marketing, employer branding, candidate experience and sourcing effectiveness. Based on the nature of the solution (ATS/suite/CRM) functionality in this area can be present, but have varying levels of capability and robustness.

Process Functionality: Features in this area of the system workflow include features for either the recruiting team or the candidates to help aid in the application process or the requisition process. Functions for candidates can consist of chatbots that act as a candidate assistant, candidate portals and self-scheduling capability. For recruiters, these features include requisition approval tools, employee referral tools, and position management tools that can aid in the creation and management of requisitions.

Operational Functionality: Features in this area of the system aid recruitment teams in gaining operational efficiency. Functionality can include screening and assessment technology, vendor management portals, virtual assistants, and embedded third-party solution marketplaces.

Onboarding Functionality: Features at this end of the workflow address processes to build the bridge from candidate to offer to hire. Based on the nature of the solution (ATS or suite), functionality in this area can be present, but it will have varying levels of capability and robustness. Standard onboarding capability focuses on transactional processing and paperwork for day-one readiness. Enhanced onboarding includes additional features such as multimedia messaging, learning curriculum, key contacts and cultural acclimatization components.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Market Introduction

This report will include TA software made up of ATS, TA suites, TM suites, HCM suites and CRM solutions, as defined in the Market Definition section. The vendors included (see Table 1) cover a cross-section of packaged offerings, delivery methods, customer size and global scale. Data gathering was done via an electronic survey. Coverage of each market segment was done based on fact review, Gartner customer inquiry data and vendors’

responses.

Table 1: Representative Vendors in Talent Acquisition Applications

Vendor ↓	Product, Service or Solution Name ↓	Category ↓	HQ ↓	Founded/Solution Launched ↓
Beamery	Beamery: Talent Engagement Platform	CRM/Rec Marketing	U.K.	2013/2015
Clinch	Clinch	CRM/Rec Marketing	Ireland	2013/2015
ENGAGE	ENGAGE	CRM/Rec Marketing	U.S.	2015/2016
Entelo	Entelo	TA Suite	U.S.	2011/2011
Phenom People	Phenom People TRM Platform	CRM/Rec Marketing	U.S.	2011/2014
SmashFly	SmashFly	CRM/Rec Marketing	U.S.	2007/2007
Talemetry	Talemetry	CRM/Rec Marketing	Canada	2000/2010
TMP Worldwide	TalentBrew	CRM/Rec Marketing	U.S.	1967/2009
Yello	Yello TRM Platform	CRM/Rec Marketing	U.S.	2008/2008
ADP	ADP Talent Acquisition	TA Suite	U.S.	1949/2012
Avature	Avature	TA Suite	U.S.	2005/2008
Greenhouse	Greenhouse Talent Acquisition Suite	TA Suite	U.S.	2012/2012
IBM	IBM Kenexa Talent Acquisition	TA Suite	U.S.	1911/1999

	Suite			
iCIMS	iCIMS Talent Platform	TA Suite	U.S.	2000/2000
Jobvite	Jobvite Platform	TA Suite	U.S.	2006/2007
Oracle	Oracle Talent Acquisition Cloud	TA Suite	U.S.	1977/1996
SmartRecruiters	SmartRecruiters	TA Suite	U.S.	2010/2014
Workable	Workable	TA Suite	U.S.	2012/2013
Cornerstone OnDemand	Cornerstone Recruiting Suite	TM Suite	U.S.	1999/2012
PageUp	PageUp Unified Talent Management	TM Suite	AUS	1997/1997
PeopleFluent	PeopleFluent Recruiting	TM Suite	U.S.	1997/1997
SilkRoad	SilkRoad onboarding	TM Suite	U.S.	2003/2006
Ceridian	Dayforce	HCM Suite	U.S.	1992/2009
Oracle	Oracle Recruiting Cloud	HCM Suite	U.S.	1977/2017
SAP SuccessFactors	SAP SuccessFactors Recruiting	HCM Suite	U.S.	1972/2009
Ultimate Software	UltiPro	HCM Suite	U.S.	1990/1993
Workday	Workday Recruiting	HCM Suite	U.S.	2005/2014

Source: Gartner (December 2018)

Vendor Profiles – CRM Recruitment Marketing

Beamery

Solution Name: Beamery: Talent Engagement Platform

Delivery Mode: Public cloud (IaaS such as Amazon Web Services [AWS], Microsoft Cloud, etc.)

Industries Served: Cross-industry

Customer Description: Most customers have more than 5,000 employees, and are headquartered in North America and Western Europe.

Solution Overview: Beamery offers connected solutions addressing talent attraction and sourcing, recruiting for campus and events, and supporting internal mobility and diversity.

Beamery's Talent CRM leverages cross-platform search, sourcing, talent pooling, data enrichment and sourcing effectiveness reporting. Beamery's CRM provides enterprises with a hub to recruit more proactively and build pipelines of qualified talent. Its talent marketing features allow for delivering personalized experiences to candidates across multiple recruitment channels.

Beamery offers functionality to develop persona-based recipes for automating processes and driving efficiency. It is also applying AI and machine learning within its tool with features named "Sherlock" and "Watson." Sherlock aggregates all relevant information into a single candidate record, which also removes duplicate profiles, and then can update the record with live data from social profiles and online interactions. Watson provides capabilities including a tool that illustrates the strength of relationships between users based on interaction analysis over time.

Beamery Connect helps organizations integrate additional applications and third-party tools to try and create a hub of recruitment "action" before the system of record.

Beamery's Comply feature offers automation and reporting functionality that allows for added layers of compliance and TA data management by rerouting candidates to complete required tasks.

Clinch

Solution Name: Clinch

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, retail, RPO/agency solution

Customer Description: Most customers have between 1,000 and 5,000 employees, and are headquartered in North America, Western Europe and Asia.

Solution Overview: Clinch Talent offers a front-end "preapply" solution designed to support the candidate journey. Its functionality is front-end loaded, and includes career sites and job descriptions, employer branding

blogs, chatbots, and AI-enabled search. Clinch's career sites and searches are powered by Google Cloud Job Discovery, with full analytics for improved discoverability. Additionally, Clinch offers advanced job distribution, which means that major job marketing aggregators are automated, thus minimizing the need for additional paid services.

Clinch Talent provides solutions for minimizing manual recruiter data entry. It offers automation capability by integrating with an ATS to autolaunch SEO-optimized job landing pages, and building workflows to send nurture campaigns based on activity. Clinch's automation functionality can run based on integrated status and disposition changes from an ATS workflow. Also, Clinch offers a pipelining module with assisted guidance recommending which leads and activities a recruiter should be prioritizing.

ENGAGE

Solution Name: ENGAGE

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, RPO/agency solution

Customer Description: Most customers have more than 10,000 employees and are headquartered in North America.

Solution Overview: ENGAGE automates the processes surrounding candidate and market research, so recruiters can shift from searching for candidates to connecting with candidates. As a tool focused on candidate research and sourcing, ENGAGE delivers AI for recruitment marketing purposes.

ENGAGE aggregates data from over 30,000 sources to create talent profiles on external talent pools. Its AI and machine learning engines analyze the likelihood of a prospect responding to being engaged about a potential job change. ENGAGE then recommends personalized messaging based on factors such as their career progression, skills, peer actions, and the news and events surrounding their company.

Using ENGAGE's application, each candidate is assigned an engagement score, which indicates how likely or unlikely they are to entertain a new job opportunity. ENGAGE then uses its contextual data to predict what each candidate is most likely to find attractive in new opportunities. It surfaces these recommendations to recruiters in the form of a five-point assessment, as well as personalized messaging recommendations and tips.

Entelo

Solution Name: Entelo recruiting automation platform

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, technology, financial services and healthcare

Customer Description: Most customers have 5,000 or fewer employees and are headquartered in North America.

Solution Overview: Entelo offers TA software focused on providing solutions to aid teams in finding, qualifying and engaging with talent. Entelo primarily seeks to help automate TA processes and support advanced sourcing efforts, and can both be utilized to partner with other CRM systems or stand on its own, offering basic CRM features.

Entelo offers a candidate database of more than half a billion profiles aggregated across 50 data sources, thus providing a consolidated view of candidates across all its online identities. In addition to using public and profile data to feed its software, Entelo also leverages its own proprietary data from across its ecosystem. Based on this dataset, Entelo can do deep analysis and data normalization (for example, normalizing titles or inferring skill sets) across candidate profiles.

Entelo applies modern technologies, including AI, deep learning and predictive models to deliver candidate insights. Entelo allows clients to personalize outbound communication using multitouch email campaigns, even optimizing messaging and timing to maximize response rates.

Entelo recently launched an unbiased sourcing mode with profile and process masking to help enhance diversity and inclusion recruitment efforts.

Phenom People

Solution Name: Phenom People TRM platform

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, RPO/agency solution

Customer Description: Most customers have 10,000 or more employees, and are headquartered in North America, Western Europe or Asia/Pacific.

Solution Overview: Phenom People refers to its solution as a talent relationship marketing (TRM) platform, and is known for using an AI-driven front end to deliver personalized experiences for candidates and TA organizations. Phenom People TRM automates the process of building awareness, interest and engagement on career sites and CRM systems by curating specific tailored experiences and content.

Its core product components include personalized career sites, a content management system, real-time CRM, talent analytics, conversational bots (chatbots), internal mobility and referral application. Phenom People also includes features such as passive candidate detection, smart search, mobile apply and candidate scoring.

To aid TA efficiency, Phenom People's Talent Analytics generates insights for the TA team on the talent funnel, sources of candidates and recruitment marketing campaign performance. Phenom People also offers a feature called Talent Signals. Talent Signals are bitesize insights, collected from talent activity, market

conditions, talent profiles and other sources, which provide actionable insights, showing which candidates to prioritize.

Phenom People has internal mobility and referral applications to help organizations encourage internal talent movement and increase retention rates. It also recently unveiled an Insight Dashboard on CRM to help TA teams understand candidate intent and applicant fit score, and enable them to rediscover past candidates.

SmashFly

Solution Name: SmashFly smart CRM & recruitment marketing platform

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, financial services, healthcare, retail, RPO/agency solution

Customer Description: Most customers have 5,000 or more employees, and are headquartered in North America.

Solution Overview: SmashFly's platform offers CRM, career sites, events and analytics in a single solution experience for candidates and the TA team. Its CRM has features such as candidate scoring and sourcing algorithms that can rank candidates, resurface talent, and identify top matches for the job from within your database or via external sources.

SmashFly's Talent Network Forms help shorten the data collection process and build talent pipelines, thus reducing the initial effort required by prospects to share information and ensuring that TA teams aren't losing traffic. Once the data is collected, recruiters can begin targeted email and text (SMS) campaigns from within SmashFly. Workflow capability also allows teams to program and automate basic tasks. SmashFly's Analytics Dashboards allow teams to review their strategy, and provides deep visibility into the performance of campaigns and recruiting channels.

SmashFly Career Sites allow for the creation of custom branded pages that can engage talent through personalization. Administration of the career site content management tool is done via a drag-and-drop interface.

SmashFly recently launched Emerson, an AI recruiting assistant, which is native to its platform and helps engage and prescreen candidates. Emerson can also add profiles to specific pipelines or automatically schedule interviews for prioritized candidates.

SmashFly Events provides the ability to create and manage recruiting events within the platform.

Talemetry

Solution Name: Talemetry

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, healthcare, retail, U.S. public sector, RPO/agency solution

Customer Description: Most customers have 5,000 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: Talemetry combines its recruitment marketing platform with advanced tools for candidate experience, and career site development and navigation. Talemetry's solutions are focused on easing the job search experience, helping candidates make sense of filtering and matching jobs, and taking steps to reduce applicant drop-off.

Its recruitment marketing platform features five products that can be used in any combination: Talemetry Source & CRM, Job Broadcast, Career Sites, Apply, and Agency solutions.

Talemetry features multilanguage capability and SMS texting, as well as candidate-persona-based pathing to deliver relevant and tailored content during the recruitment journey. It also offers an automated sourcing feature and source-to-hire analytics, and has a new integration with Google Cloud Job Discovery to aid candidate job searches.

Talemetry consolidates front-end functionality that may often be separated in other platforms. These functions include advertising, sourcing, CRM and career sites. This consolidation allows organizations to measure where outreach, career site visitor behavior and advertising combine to achieve optimal results.

TMP Worldwide

Solution Name: TalentBrew software platform

Delivery Mode: Private cloud, public cloud (managed by vendor), public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, healthcare, higher education, retail, U.S. public sector, RPO/agency solution

Customer Description: Most customers have 10,000 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: TMP's TalentBrew Software Platform is designed to provide the foundation for a company's recruitment strategy by providing a hub for their external branding, sourcing of candidates, managing of media assets and reporting. Key offerings include the TalentBrew career site, advanced job descriptions, Candidate HQ, and distribution of jobs and content. Advanced job description capability is designed to augment the information from the applicant tracking system and provide a more descriptive experience. Enhanced job descriptions can highlight success profiles, and incorporate templates that insert key decision-making criteria (such as total rewards and benefits, featured stories, and career content) to increase engagement and attraction.

Another TalentBrew feature is integrated remarketing and prospecting technology, which re-engages job

seekers using candidate history, and follows internet browsing from site to site with job ads to attract new talent to the site. Candidate HQ offers a talent hub within the TalentBrew Platform that allows recruiters to search candidates, build talent communities, send one-off or group communications, and build/nurture talent pipelines.

TalentBrew's ability to distribute jobs and content allows for the automatic distribution of information, or for selecting and posting jobs manually from a source library. It also enables clients to manage inventory and track performance.

The TalentBrew platform incorporates machine learning into its data by analyzing aggregated candidate visits for market benchmarking, advising and behavioral analysis.

Yello

Solution Name: Yello TRM Platform

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry

Customer Description: Most customers have 5,000 or more employees, and are headquartered in North America.

Solution Overview: Originally a tool aimed at supporting the management of live in-person recruiting events, Yello has grown into a multifunction recruitment operations platform. Yello was founded in 2008 and was formerly known as Recsolu. Yello is a tool often used for high-volume recruiting and live interview events at large universities or national conferences, where companies have to deal with managing stacks of paper resumes. Yello offers operational and compliance solutions by taking the paper process at live events online through its mobile platform.

Recruitment teams can engage candidates using event landing pages, candidates can scan in or upload their information, and interview activity can be scheduled and managed through Yello's event management capabilities.

As recruitment teams get used to the interface and become comfortable with the platform, they can then leverage Yello's additional features and functionality, which further aid recruitment operations. For example, Yello's platform has also added CRM, texting and video interviewing capability.

All products within Yello's TA platform can be purchased individually. They include talent communities, event registration, job boards, mobile app, self-scheduling, communication templates, surveys and evaluations.

Vendor Profiles — Talent Acquisition Suites

ADP

Solution Name: ADP talent acquisition

Delivery Mode: Other

Industries Served: Cross-industry

Customer Description: Most customers have 1,000 or more employees, and are headquartered in North America.

Solution Overview: ADP is a TA suite vendor based in North America, and launched its talent acquisition offering in 2012. ADP Recruiting Management is an all-in-one recruiting automation platform that supports the entire talent acquisition life cycle, from CRM to ATS and onboarding. ADP has incorporated social and mobile tools to make the candidate experience more transparent and interactive, and to enable a consistent hiring experience. ADP delivers a number of recruiting metrics within the solution, delivered through ADP DataCloud, and is building a number of additional key indicators into the application. Also, ADP recently acquired WorkMarket, which is a freelance and contractor talent management system that can integrate with other ADP systems or other HR systems.

ADP also offers a set of services to support the screening and selection of hiring managers, as well as AIRS training and a fully dedicated RPO practice.

Avature

Solution Name: Avature

Delivery Mode: Private cloud, public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, healthcare, higher education, retail, U.S. public sector, RPO/agency solution

Customer Description: Most customers have 1,000 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: Avature is a TA suite vendor founded in 2005. Its recruiting solution was launched in 2008. Avature's software helps identify, attract, hire, develop and retain talent. Avature was one of the earlier platforms to introduce CRM concepts to recruiting processes. After launching its recruiting CRM application in 2008, Avature developed an enterprise ATS and a suite of supporting offerings. Its suite includes Onboarding, Employee Referral, Agency Management, Hiring Manager, Events Management, In-Store Recruiting, Performance Management, Internal Mobility, Succession Planning and DNA Social, and an employee engagement and company culture hub.

Avature has looked to differentiate by embedding machine learning to help parse resumes into profiles, and leverages natural language processing to analyze text. It has also built out predictive analytics capabilities and job-matching functionality.

The Avature platform is available by component or as a full suite, offering customers options in creating the capabilities they want. Its platform supports integration and communication between solutions in high-security environments, and meets stringent industry standards.

Greenhouse

Solution Name: Greenhouse Talent Acquisition Suite

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry

Customer Description: Serving small, midsize and enterprise customers; most customers have 1,000 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: Greenhouse's talent acquisition suite includes Recruiting, Onboarding, CRM, Events, and Inclusion. With an approach that is built around structured interviewing, its tool helps organizations streamline processes and work faster. Greenhouse's suite of TA technologies helps TA teams develop workflow(s) that have embedded predictive analytics, creating a guided hiring process that generates insights over time.

Greenhouse recently received funding to support the launch of its Inclusion product, with embedded training, process nudges and candidate information masking. Its Inclusion solution offers more than a dozen features to help operationalize inclusion with every search.

Greenhouse's application offers an embedded marketplace with strategic partnerships and third-party solutions to address additional functionality, including testing, e-signatures, expense reporting, compliance and collaboration. It also recently announced the ability for customers to integrate IBM Watson's AI features for recruitment.

IBM

Solution Name: IBM Kenexa Talent Acquisition Suite

Delivery Mode: Private cloud, public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry

Customer Description: Most customers have 10,000 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: The IBM Kenexa TA suite delivers a set of capabilities to source, attract, hire and onboard talent. IBM Kenexa has been in the TA space for over 15 years via its ATS and assessment business. Its platform offers a set of features and functions that can be configured and customized to support large, complex organizations.

The IBM suite offers end-to-end CRM, ATS and onboarding functionality. The suite can automate many transactional tasks through a feature called rules automation management, which automates data reviews and candidate management, and reduces time spent on transactional activities. IBM's AI capabilities add additional TA efficiency and experience features. For example, IBM's Watson Candidate Assistant is an AI and TM solution that engages job seekers in personalized discussions, and recommends positions that fit their skills and experiences.

For recruiters, IBM's AI capabilities can aid in talent matching and identification, and also help prioritize requisitions, based on their complexity and the type of activity, to better guide recruiter activity.

iCIMS

Solution Name: iCIMS Talent Platform

Delivery Mode: Private cloud, public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Financial services, healthcare, manufacturing, retail

Customer Description: Most customers have 2,500 or more employees, and are headquartered in North America.

Solution Overview: iCIMS is a provider of TA applications that assist teams in managing the entire hiring cycle within a single platform. Its focus is on delivering a dedicated TA software suite. iCIMS offers a PaaS framework that expands its core capabilities and eases the process of integrations through an embedded ecosystem of more than 230 third-party TA solutions.

iCIMS was one of the first recruitment software providers to partner with Google for an improved experience, enabling candidates to leverage better search technology. With this feature, iCIMS jobs are now easily identified directly within Google search results by job seekers who can refine their search with specific criteria from within the search engine.

In addition to its recent acquisition of TextRecruit, iCIMS is in the process of expanding its product offerings outside of the core solution, Recruit. For example, its CRM module, Connect, front-end career site tools, Attract, and a multifunction offer tool, Offer, will be packaged and sold independently, allowing organizations to integrate those products with other HCM software solutions as needed.

Jobvite

Solution Name: Jobvite Platform

Delivery Mode: Public cloud (managed by the customer)

Industries Served: Cross-industry

Customer Description: Most customers have 1,000 or more employees and are headquartered in North

America or Western Europe.

Solution Overview: Jobvite is an end-to-end TA solution aimed at helping recruiters manage candidate experiences to deliver a continuous candidate engagement strategy. Its solution is commonly associated with robust social recruiting capabilities and employee referral management through the process of broadcasting “jobvites.” Its social recruiting integrations offer over 300 social networks, online communities and blogging platforms. However, the Jobvite Platform provides additional capability throughout the recruitment funnel through a variety of modules and partnerships. The Jobvite Platform includes an ATS, recruitment marketing/CRM, onboarding, premium career sites, text recruiting, video interviewing and reporting and analytics.

Jobvite also offers a mobile hiring team app for iOS and Android that helps coordinate and collaborate across the hiring team. This tool helps track and receive interview evaluations, and other decisions to help monitor and drive efficiency. The addition of their Jobvite Text offering allows recruiters to text candidates with one-to-one messages or text campaigns and includes a chatbot that can automate candidate screening.

Oracle

Solution Name: Oracle Talent Acquisition Cloud (Formerly Taleo)

Delivery Mode: Public cloud (managed by the customer)

Industries Served: Cross-industry, healthcare, higher education, retail, U.S. public sector

Customer Description: Most customers have 5,000 or more employees, and are headquartered in North America or Western Europe. Oracle Talent Acquisition Cloud (OTAC) is a solution for those customers that are not using Oracle’s HCM Cloud.

Solution Overview: Oracle Talent Acquisition Cloud is the enterprise TA suite formerly known as Taleo. Starting as a traditional applicant tracking system almost two decades ago, OTAC is an end-to-end TA solution encompassing sourcing, recruiting and onboarding. In addition to these capabilities, OTAC also features reporting and dashboard capability, and has a rich ecosystem of partners. It is a solution that can be configured and customized to support complex global enterprises.

Oracle Talent Acquisition Cloud has a wide range of functional capabilities. Candidates can quick apply using their profile from third-party sources such as LinkedIn and Indeed. The system offers capability at the enterprise level for multibrand, multiorganization, multifunction, multilocation, multilanguage, and multiprocess hiring. These workflows are highly configurable and drive enhanced decision support for recruiters and hiring managers.

Oracle Talent Acquisition Cloud is highly scalable and offers deep administration and security controls, as well as advanced data management and integration capabilities.

SmartRecruiters

Solution Name: SmartRecruiters

Delivery Mode: Public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry

Customer Description: Most customers have 2,500 or more employees, and are headquartered in North America, Western Europe or the Asia/Pacific region.

Solution Overview: SmartRecruiters Talent Acquisition Suite is composed of a core ATS product offering, plus optional add-on functionality. The SmartRecruiters talent acquisition suite includes an ATS, recruitment marketing and CRM functionality, onboarding, matching capabilities, and job distribution. Also, SmartRecruiters recently unveiled its virtual recruiting assistant to screen and score candidates against openings, as well as a built-in hiring process scorecard to help measure recruitment operations.

Depending on needs, customers may purchase optional products embedded within the SmartRecruiters system marketplace that expands the capabilities of its core offering. The embedded marketplace and platform includes prebuilt integrations for third-party solutions, addressing sourcing, job boards, screening, reference and background, HRIS systems, analytics platforms etc.

Workable

Solution Name: Workable

Delivery Mode: Public cloud (managed by the customer)

Industries Served: Cross-industry

Customer Description: Most customers have 1,000 or fewer employees and are headquartered in North America and Western Europe.

Solution Overview: Workable's recruitment software includes a native sourcing tool, Auto-Suggest, which analyzes job descriptions and searches for suitable online candidates automatically. The system has email and calendar integrations for process efficiency, as well as an embedded job description library containing over 600 customizable job descriptions. Every Workable account also includes desktop and mobile native apps for iOS and Android. Workable's careers pages are optimized for desktop and are mobile by default. Applicants can easily apply using LinkedIn, Indeed and Monster.

To aid in efficiency, trackable communication on the candidate's timeline helps keep every team member up-to-date with the candidate's current status, avoiding duplication and delay. Personalization options for bulk emailing help recruiters with communications around common processes such as interview scheduling.

Workable recently announced partnerships with Jobs on Facebook for high-volume recruiting, and integrations with RightHire for pre-employment screening. Onboarding functionality is currently available through third-

party integrations from BambooHR, Namely and HiBob.

Vendor Profiles — Talent Management Suites

Cornerstone OnDemand

Solution Name: Cornerstone Recruiting Suite

Delivery Mode: Public cloud (managed by the customer)

Industries Served: Cross-industry

Customer Description: Most customers have up to 2,500 or more employees.

Solution Overview: Cornerstone Recruiting supports the TA process from attract and select through to hire and onboarding, and is part of the Cornerstone Talent Management Suite. With features such as talent pools and employee referral functionality, robust pre-employment screening integrations, and preboarding and forms management, its functionality covers process steps end to end.

Cornerstone Recruiting offers a streamlined candidate experience with front-end career sites, configurable applications, talent pools and employee referral management. Automation can be configured within the tool to remove manual, repetitive tasks, and to help support recruiter efficiency and allow for work to be done on more value-added tasks. Cornerstone offers Connect with Us forms, where candidates can drop off their resume or enter basic details if they aren't ready to apply. There are also mobile-responsive candidate portals where candidates can self-schedule interviews, launch assessments, sign offer letters and see their process status.

Cornerstone's Edge Marketplace allows customers to extend their TA solution through a variety of prebuilt integrations. Analytics and personalized dashboards for HR, recruiters and managers provide visibility across candidates, new hires and employees in the client organization.

Cornerstone OnDemand recently acquired Workpop, which provides robust mobile-based TA solutions for the service industry. Based on this acquisition, the company announced plans for a new, integrated recruiting product for companies seeking to hire "frontline" staff, including retail cashiers, seasonal warehouse employees and healthcare administrative staff.

PageUp

Solution Name: PageUp Unified Talent Management

Delivery Mode: public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, healthcare, higher education, retail, public sector, RPO/agency solution

Customer Description: Most customers have up to 5,000 employees, and are headquartered in the

Asia/Pacific region, North America or Western Europe.

Solution Overview: PageUp's recruitment platform works to streamline and automate the recruitment process. These features include proactive sourcing through its native CRM capability, and integration with complementary tools such as background checking, employment verification, assessments, video interviewing, etc. The solution also features agency management capability with contractor management and timesheets.

Their Talent Relationship Management (TRM) capability is standard functionality for all of their recruitment clients, including integrated social capability with sources such as LinkedIn. Candidate self-service includes the ability to update a profile and application information, answer additional forms, withdraw from an application, and accept an interview and offers, and all are optimized for any mobile device.

The PageUp Onboarding solution facilitates the new-hire process online, ensuring development activities, compliance checklists, events and invitations. Some key features include the ability to create employee and manager onboarding portal(s) that are branded by division or business line. The onboarding process can also be used to provision assets and systems for a new hire.

PageUp reported a security incident earlier this year, so existing and prospective customers should evaluate the uplift in controls and any changes to PageUp's data security policies. PageUp has been working with customers, and is proactively positioned on security measures, as a result.

PeopleFluent

Solution Name: PeopleFluent Recruiting

Delivery Mode: Private cloud, public cloud (managed by vendor), public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry, healthcare, retail, RPO/agency solution

Customer Description: Most customers have between 2,500 and 10,000 employees, and are headquartered in North America or Western Europe.

Solution Overview: PeopleFluent Recruiting is a module on its Talent Productivity Platform. Its software assists with sourcing, selecting and converting talent by delivering a candidate experience that can handle multiple divisions, audiences or employer brands. The PeopleFluent Talent Productivity Platform has features to drive participant engagement in the hiring process through social and collaborative capability across the hiring team. Engagement during the candidate application process is supported by curated and position-specific content (job, location, peer and company videos) that can complement candidate consideration.

PeopleFluent can also support customized workflows to manage distinct user experiences based on role/geography. For high-volume recruiting, PeopleFluent offers pooling and automatching functionality for continual sourcing by rerecruiting its customers' CRM and ATS databases.

Onboarding capabilities can include support for third-party services such as background checking and e-verify. PeopleFluent enables users to manage globally complex workflows by giving them the flexibility to configure workflows based on their local business requirements. PeopleFluent also offers an additional module to source and manage contingent and contract labor that can connect with ATS data through reporting.

SilkRoad

Solution Name: SilkRoad Onboarding

Delivery Mode: Public cloud (managed by vendor)

Industries Served: Cross-industry

Customer Description: Most customers have 2,500 or more employees, and are global enterprises headquartered in North America, or the Asia/Pacific region.

Solution Overview: SilkRoad Onboarding is a specialized talent platform to connect, engage and empower new hires, and ensure onboarding success. With specific focus on the onboarding process, SilkRoad integrates content and workflow for the entire new hire journey, from the offer letter through year one engagement. SilkRoad also helps companies engage new hires early, ensure they are ready on day one, accelerate their speed to productivity, and improve new hire attrition rates.

The foundation of SilkRoad Onboarding is robust forms management capability. Its solution includes a continuously updated library of State and Federal employment forms. Its e-forms include prepopulated data, digital signature, and routing and approval capabilities. SilkRoad also offers a custom e-form builder tool and consulting services to deliver any forms your organization requires.

SilkRoad Onboarding's workflows deliver personalized and contextual tasks and materials to the right people, in the right context based on configuration and data cues from the system. Workflows are fully configurable by employee categories, including business unit, location and job type, so every new hire has a highly personalized and engaging experience. SilkRoad connects new hires to mentors, buddies and cross-functional departments to drive engagement and acculturation.

SilkRoad recently announced enhanced functionality for offboarding employees, as well as for integrating mergers and acquisitions.

Vendor Profiles – HCM Suites

Ceridian

Solution Name: Dayforce

Delivery Mode: Public cloud (managed by the customer)

Industries Served: Cross-industry

Customer Description: Most customers have 1,000 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: Dayforce Talent acquisition is part of Ceridian's HCM suite solution for managing the employee life cycle. Dayforce addresses these HCM areas (HR, payroll, benefits, workforce management, TA and TM). Its platform provides customers with a complete view of their workforce, with native accessibility to allow users to connect on their preferred devices. Predictive analytics and dashboard visualizations embedded in Dayforce enable users at all levels to make real-time decisions with data on hand.

The system aims to create a simplified, user-friendly process for candidates, hiring managers and recruiters, enabling organizations to find and hire candidates. A configurable candidate portal integrating with over 750 job boards ensures the job search experience is seamless for employees and employers. Dayforce integrates with background screening services to enable recruiters to perform all candidate screening and management activities within Dayforce.

Dayforce emphasizes the cultural immersion and engagement of new hires and transfers, enabling them to establish a connection with the organization and become productive sooner – decreasing potential first-year attrition and enhancing speed to productivity.

Oracle

Solution Name: Oracle Recruiting Cloud

Delivery Mode: Public cloud (managed by the customer)

Industries Served: Cross-industry, healthcare, higher education, U.S. public sector, retail, RPO/agency solution

Customer Description: Most customers have 5,000 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: Oracle Recruiting Cloud was designed to be a comprehensive TA solution within the Oracle HCM Suite. The system leverages talent, core HR and compensation data in the TA process for enhanced engagement and decision support.

Oracle Recruiting Cloud offers comprehensive recruiting capabilities as part of the Oracle HCM Suite, in addition to recruitment marketing and CRM features. Leveraging internal knowledge gained from Taleo, the Oracle Recruiting Cloud's design enables deep TA capability and broad connections across functional areas that provide increased data analytics for TA leaders.

Its candidate experience has been based on consumer-based web experiences. For example, candidates can apply from social profiles rather than traditional profile creation. The candidate workflow is mobile-responsive, and can be branded and tailored throughout with TA content and media.

Oracle Recruiting Cloud incorporates chatbots, machine learning and predictive algorithms to enhance the

offering, and to deliver an engaging experience for candidates, hiring managers and recruiters. Within the Oracle HCM Cloud, the recruiting capabilities leverage suite data across the sourcing and hiring process, such as using compensation ranges and work locations to ensure offer accuracy. Internal employees can apply for positions with its HCM company talent profile using a natively mobile-responsive user experience for employee self-service.

Oracle also recently announced a series of new integrations between Oracle Recruiting Cloud and LinkedIn for identifying and attracting talent.

SAP SuccessFactors

Solution Name: SAP SuccessFactors Recruiting

Delivery Mode: Public cloud (managed by the customer), public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry

Customer Description: Most customers have 2,000 or more employees, and are headquartered in North America, Western Europe, EMEA and the Asia/Pacific region.

Solution Overview: SAP SuccessFactors Recruiting is available on the market as a stand-alone module or as part of broader SAP TM or HCM suites.

Candidate-facing features include a responsive candidate experience, targeted landing pages, responsive email marketing, SMS notifications, automated job alerts, interview self-scheduling, and electronic offer process. Recruiter features include:

- Embedded CRM
- Business rules to automate the hiring process
- A job analyzer that leverages machine learning to improve job requisitions with salary recommendations
- A tool to scan for gender-biased language
- Skills recognition
- End-to-end sourcing analytics to optimize recruitment process and spend

Manager features include mobile approvals of job requisites and offers, a centralized interview activity view and tailored hiring manager dashboard tile for easy access.

To help improve efficiency, SAP SuccessFactors has added features such as automated and ad hoc SMS notifications to alert candidates to where they are in the hiring process, as well as to notify them of interviews. For improved efficiency and experience, SAP added dynamic data capture forms so that candidates do not

have to fill out repeat information, as the system recognizes if data has already been collected or can be pulled from somewhere else.

SAP SuccessFactors has also recently announced a conversationally activated digital assistant for human resources (HR) processes, as well as an Android mobile app. SAP SuccessFactors has also continued to build out its consumer-grade experience to connect HR and SAP SuccessFactors mobile app users via a partnership with Google and Apple for iOS.

Ultimate Software

Solution Name: UltiPro

Delivery Mode: Public cloud (managed by the customer)

Industries Served: Cross-industry

Customer Description: Most customers have 2,500 or more employees, and are headquartered in North America.

Solution Overview: UltiPro is a full-suite HCM solution from Ultimate Software, servicing customers across various industries. It provides core HR, payroll, benefits management, workforce management, recruiting, onboarding, career and succession planning, performance management, learning, compensation management, and salary planning functionality. UltiPro also provides advanced reporting capabilities, predictive and prescriptive analytics, a configurable and extensible platform, and its own proprietary AI platform, Xander. Xander offers natural language processing, sentiment analysis and machine learning capabilities.

UltiPro Recruiting and Onboarding offer solutions that improve the candidate experience in the following way: The solution's design has a familiar feel to common social and consumer sites. Ultimate's tools are engaging, and include a gamified mobile solution, a personalized manager welcome feature for new hires, and a series of opportunities to encourage professional development for pre-hires and connect them with team members prior to arrival.

Ultimate has significantly extended its partners to enhance efficiency and productivity for processes, such as background checks, assessments, employment and income verification, and HR service delivery.

Via Xander, UltiPro Perception provides real-time insights for improving performance and employee retention strategies, but is also instrumental in improving the candidate and new hire experiences when used within the TA processes. By leveraging Xander's natural language processing and sentiment analysis tools, organizations can quickly learn and adjust their TA processes that could be having adverse effects.

UltiPro Recruiting and Onboarding solutions are sold as a part of the UltiPro HCM suite.

Workday

Solution Name: Workday Recruiting

Delivery Mode: Private cloud, public cloud (managed by the customer), public cloud (IaaS such as AWS, Microsoft Cloud, etc.)

Industries Served: Cross-industry

Customer Description: Most customers have 2,500 or more employees, and are headquartered in North America or Western Europe.

Solution Overview: Built within the Workday HCM, Workday Recruiting is an end-to-end TA application built to help find, share, engage and select internal and external candidates for your organization. Workday Recruiting is designed and optimized for mobile devices to help with engagement, user adoption and collaboration across the entire hiring team.

Workday provides the ability to manage the entire talent life cycle in one system, as the TA solution is designed to work in partnership with the TM suite. Additional capabilities within Workday Recruiting include workforce planning, sourcing and onboarding. Workday leverages advanced analytics around pipeline diversity and time to fill, and offers insights to make better hiring decisions. A few highlights of system functionality include:

- Multimedia career site experiences that make it easy for candidates to search and apply for jobs from any device.
- Separate internal and external career sites, so postings can be tailored by audience.
- The ability for internal candidates to express interest in certain roles and be notified when positions matching their criteria get posted.

Workday has acquired Rallyteam, which adds expertise in machine learning for solutions aimed at an organization's internal talent. This presents opportunities to foster internal mobility to drive retention and career development.

Market Recommendations

Application leaders supporting TA in selecting technologies should recognize that experienced TA leaders have been working with TA software for more than a decade now. They most likely have also worked at more than one company, or worked through more than one contract, in addition to seeing the waves of evolving capability in this space. Therefore, many TA leaders have gained experience with multiple systems, and have collected a list of likes and dislikes in what they would like to see in their next system and ideal process.

Many TA leaders, therefore, are asking for a process/solution that fits into a design schematic they have been sketching and documenting over time based on pain points, inefficiencies and friction in their processes. Moreover, as the competition for talent increases and strain on the function escalates, TA leaders' voices are

being heard.

As a result, vendors are being asked how they can help TA leaders achieve that vision – rather than merely accept a tool as delivered. Application leaders need to consider configuration, and consider the cooperative competition strategies occurring in the marketplace where some vendors are offering suite components, which are stand-alone, to allow customers to take a hybrid/modular approach to partner with other tools.

The goal of this report is to highlight the various offerings available in the market to help you address your requirements, align ideal processes, or consider the existing applications you are integrating with or building around.

As application leaders reviewing vendors in the market, you must:

- Define your expected TA outcomes and associated metric targets upfront, using them as criteria to evaluate vendor shortlists and selection. Include metrics around quality of hire, candidate experience, and diversity and inclusion.
- Factor depth of functionality, user experience and required integrations when deciding between HCM suites and TA suites/point solutions.
- Assess the financial viability, global scale and ecosystem depth of each provider, as well as functional and technical features, to meet the needs of the rapidly evolving TA market.
- Invest strategically and selectively, and plan for a high degree of experimentation by TA leaders who may be switching out front-end solutions every couple of years. Review your overall TA technology portfolio and strategy at least every 12 to 18 months.

Evidence

Data was collected via a vendor survey and fact review, combined with demo/briefings and Gartner client inquiries.

Note 1 Representative Vendor Selection

The vendors named in this Market Guide were selected to represent the types of solutions discussed in the Market Analysis section: ATS, TA suite, TM suite, HCM suite and CRM tools. For each of these categories, we included vendors based on data from Gartner clients' interest areas (via searches on gartner.com and inquiries), as well as small, midsize and enterprise market coverage.

Note 2 Gartner's Initial Market Coverage

This Market Guide provides Gartner's initial coverage of the market, and focuses on the market definition, rationale for the market and market dynamics.

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