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SAPinsider Benchmark Report

State of the Market: How the Cloud Is Transforming HR

AJ Whalen

August 2019

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Executive Summary

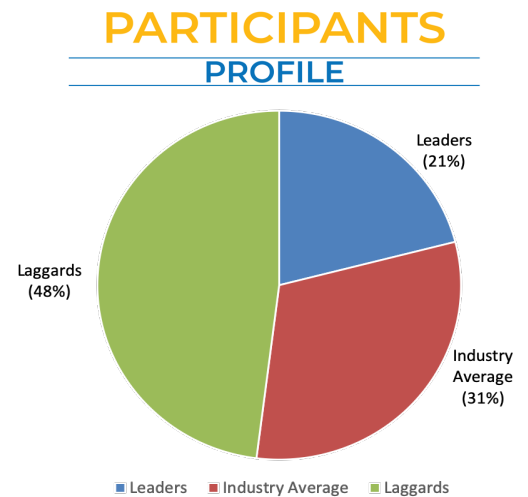
When SAP acquired SuccessFactors, it established a new cloud-based roadmap for the future direction of its human resources (HR) solutions. Other solution providers have followed suit, making cloud-based HR the new de-facto standard, particularly in the talent management area. The pressure to evaluate and move HR processes to the cloud is now increasing — exacerbated by SAP's 2025 deadline that ends support for most of SAP's on-premise human capital management (HCM) solutions.

Between March and April 2019, SAPinsider surveyed 278 members of our audience from 129 customer companies to understand where they are in their journey when it comes to migrating their HR processes to the cloud, and we found that a majority (59%) of respondents are already using some sort of cloud-based HR solution, but fewer have implemented purely cloud-based environments. This report takes an in-depth look at the data behind these findings along with the opportunities, challenges, and implications associated with migrating HR processes to the cloud.

Competitive Maturity Assessment

Based on the answers to our survey questions and our in-depth conversations with respondents, SAPinsider identified three distinct categories when it comes to the adoption of cloud-based HR solutions:

- **Leaders:** These respondents report that based on their current HR cloud strategies, they are achieving business results that are slightly better or significantly better than their competition. This group comprises 21% of our survey sample.
- **Industry average:** These respondents indicate that they are generating business results equal to their competition. This group represents 31% of respondents.



- **Laggards:** These respondents say that their results are somewhat behind or significantly behind the competition. This group makes up 48% of our sample.

The survey results show that leaders in the adoption of cloud-based HR share several common characteristics:

- Nearly half (48%) of leaders describe their HR solution landscape as a hybrid that includes a blend of on-premise and cloud-based applications. The data shows that investment in hybrid landscapes will continue as 59% of leaders expect to be running hybrid landscapes within the next 12 months.
- More than half (52%) of leaders cite adoption and integration of HR solutions that stretch beyond core HR and into talent management and analytics as their top challenge.
- Leaders' strategies and investments in HR are driven more by the demand for visibility into HR processes, with 48% rating this as important, and the demand for more tailored, user-friendly experiences, cited by 59% as a top priority.
- Core HR is a focus for leaders, with a sizable portion (41%) currently investing significant time and resources in this area. Only 26% of leaders are investing in payroll, however — this is far less than the other groups, which are investing more heavily in this area in addition to core HR.

Required Actions

In addition to the actions outlined in detail in Chapter Three of this report, to ensure a successful transition of HR processes to the cloud, SAP customers must:

- **Understand the business and technical effects of migrating specific HR workloads to the cloud.** The maturity level of cloud-based HR differs as you move from talent management to core HR and payroll

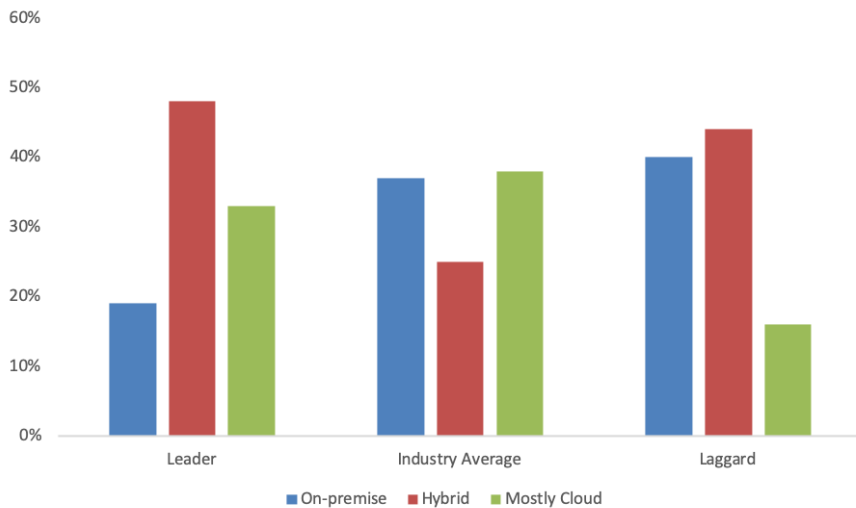
processes. Massive customization and complexity carry a cost — you need to carefully measure the work and pain of a migration against the business return on investment (ROI).

- **Expand your integration knowledge and skillset.** Integration becomes more complex with hybrid environments. You need to understand how middleware, web services, and newer integration solutions such as SAP Cloud Platform work to identify the correct platform and skillsets to meet your integration needs.
- **Prepare executive management to accept and lead the standardization of processes.** Over-customizing your cloud solution will dilute the benefits you are looking to achieve with this migration. Your executives and business users must keep an open mind when it comes to embracing industry-standard processes.
- **Understand how supporting a cloud-based HR deployment will be different from supporting an on-premise implementation.** Spend more time planning up front and be sure to consider your future deployment model (hybrid or pure cloud) in your support planning. In addition to integration skills, you will need to have strong user interface, process, and change management skillsets.

Chapter One: Where Are SAP Customers in Their HR Journey to the Cloud?

Based on the survey results, a majority of SAP customers have begun transitioning their HR processes to the cloud, but few have progressed to true, end-to-end cloud environments due to the limited maturity and ROI of cloud-based solutions in certain areas, including payroll, time management, and core HR. Of the survey respondents, 65% defined their current HR implementation as either mostly cloud-based or a hybrid deployment, with hybrid implementations accounting for the majority (see **Figure 1**).

Figure 1: Current and future use of cloud, on-premise, and hybrid HR technologies



Source: SAPinsider, August 2019

A large percentage of leaders described their current HR environment as some variation of a cloud-based landscape, with 81% of leaders reporting the use of cloud solutions versus 63% of industry average respondents and 60% of laggards. Looking deeper, it becomes clear that most are looking to a hybrid deployment model, particularly leader and laggard organizations.

SAP CUSTOMERS PERSPECTIVE



SAP SuccessFactors solutions and the cloud are a chance for us to think about how we interact with employees' time and attendance. With the number of employees [under 500], it hasn't been cost effective to do other ESS transactions, but cloud makes it affordable and cost effective.



~ HR Manager,
Medium-Sized
Utility Company

Nearly half (48%) of leaders described their HR solution landscape as currently hybrid while 33% said it is mostly comprised of cloud solutions. However, when asked to describe their HR solution landscape one year from now, the leaders' trend to hybrid accelerated, increasing from 48% to 59%. Many leaders will continue to modify their implementation approach based on the readiness and evolution of payroll, time, and benefits solutions.

A deeper look into the data behind the growth in cloud and hybrid deployments across the different maturity categories reveals certain patterns. These are summarized in **Figure 2** and will be examined in detail throughout the rest of this report.

Figure 2: DART model framework for HR in the cloud

Category	Drivers	Actions	Requirements	Technologies
Leaders	<ul style="list-style-type: none"> • Demand for visibility into HR processes and employee engagement • Higher employee expectations for more tailored experiences 	<ul style="list-style-type: none"> • This group is hyper-focused on strategies to increase employee engagement, satisfaction, and retention through consistent and engaging experiences • Leaders are selectively applying intelligence and automation to streamline HR processes 	<ul style="list-style-type: none"> • This group places high importance on consistent and integrated talent management strategies and processes • Leaders want a single point of truth for HR process-oriented and talent data • This group also prioritizes security and integration capabilities 	<ul style="list-style-type: none"> • This group focuses on hybrid landscapes and will continue to expand their use of hybrid deployments • Leaders run a wide variety of both on-premise and cloud HR solutions and will continue to expand their investment in onboarding, analytics, and cloud-based development solutions • Leaders also prioritize cloud security and adoption of end-to-end cloud solutions
Industry Average	<ul style="list-style-type: none"> • Pressure to lower the cost and increase the efficiency of HR processes • Higher employee expectations for more tailored and user-friendly HR experiences • Increased competition for talent and hiring 	<ul style="list-style-type: none"> • This group wants to increase visibility into end-to-end HR processes • Industry average respondents also are exploring smart ways to leverage cloud-based HR and talent management solutions • Like leaders, this group focuses on increasing employee engagement 	<ul style="list-style-type: none"> • Security is a top priority for this group, with a special focus on monitoring real-time updates of new threats related to cloud security and data and maintaining a security impact plan • Because visibility is a key strategy, this group also wants to ensure that they have a comprehensive HR reporting and analytics strategy 	<ul style="list-style-type: none"> • A good percentage of this group is currently operating in more of a pure cloud environment and that will grow to nearly 50% in a year • This group is also focused on integration technology • In the next year, industry average respondents will invest in time and attendance as well as cloud-based security and development tools

STATE OF THE MARKET: HOW THE CLOUD IS TRANSFORMING HR

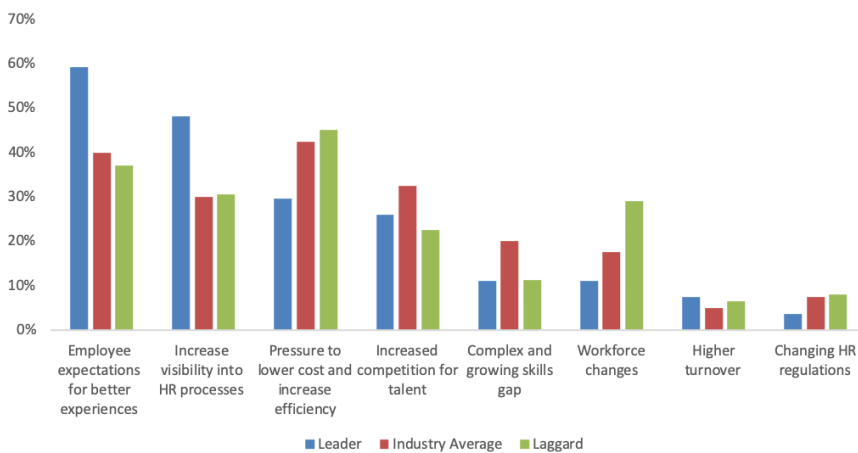
Category	Drivers	Actions	Requirements	Technologies
Laggards	<ul style="list-style-type: none"> • Pressure to lower the cost and increase the efficiency of HR processes • Higher employee expectations for more tailored and user-friendly HR experiences 	<ul style="list-style-type: none"> • Top strategy for this group is to increase employee engagement, satisfaction, and retention • Also interested in exploring smart ways to leverage cloud HR and talent management solutions 	<ul style="list-style-type: none"> • This group needs to build a single point of truth for HR process-oriented and talent data and strives for a comprehensive HR reporting and analytics strategy • Security is also a key focus 	<ul style="list-style-type: none"> • This group's largest current technology investments are in on-premise HR, payroll, and time management solutions • Moving into the next year, many are planning to adopt more workforce planning and analytics solutions, increasing the percentage of hybrid deployments

Source: SAPinsider, August 2019

What Is Driving HR to the Cloud?

Our research shows that HR organizations are continuing to balance the pressures of their traditional role as a cost center with the need to aggressively hire and retain top-notch talent. According to the survey results, the top three drivers overall for migrating HR to the cloud are employee expectations for more tailored and engaging experiences (43%), pressure to lower cost and increase efficiency of HR processes (41%), and demand for visibility into HR data and processes (34%). Looking at the top drivers by respondent group, however, revealed some differences among the groups (see **Figure 3**).

Figure 3: Business drivers for HR cloud deployments



Source: SAPinsider, August 2019

Based on the data, leaders are driven much more than their counterparts by employee expectations for more tailored and user-friendly HR experiences — 59% of leaders selected this as a top driver compared to 40% of the industry average group and 37% of laggards. The second-largest driver identified by leaders is the demand for visibility into HR processes (48%), which is far more of a priority for this respondent group than for industry average respondents (30%) and laggards (31%).



PERSPECTIVE



The challenge of delivering a modern, engaging employee experience with old software is very real. In most cases, organizations that are still holding on to on-premise software are finding that users don't like it. The employee experience is the ultimate voice of the customer here. There was a time when IT could deliver systems that were highly robust and better suited for technical users than consumer users. That era is behind us for all but the most technical jobs. The next-generation workforce expects GUIs that are more intuitive and more mobile native.

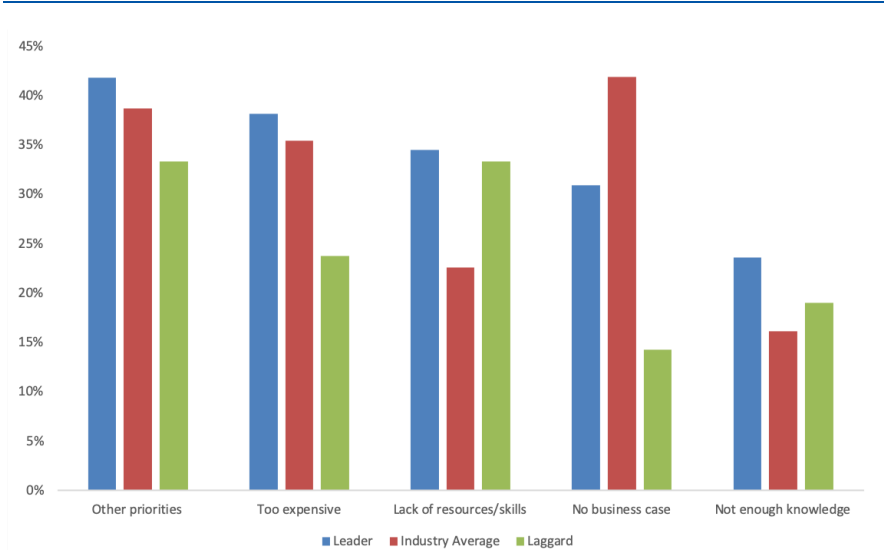


~ Steve Schnoll, Global Vice President, Strategy, SAP SuccessFactors

What Is Holding Back HR from the Cloud?

According to the survey results, the top reasons customers across all groups are holding off on moving HR to the cloud are the cost, lack of a business case, and competing priorities (see **Figure 4**).

Figure 4: Top challenges to running HR in the cloud



Source: SAPinsider, August 2019

Respondents in the industry average and laggard groups reported that they struggle to justify the expense and the business case when it comes to core HR processes — specifically time management, benefits, and payroll processes. While most respondents overall said they are comfortable adopting cloud-based talent management solutions, they are less certain about the readiness and simplicity of payroll, time, and core HR in the cloud.

SAP EXPERTS PERSPECTIVE

“

No one wants to be the person that broke payroll. It’s invisible, and yet is in many cases uniquely customized. It’s like a glove that fits your hand. You’ve invested a lot of money and time into your implementation, and there needs to be a very compelling reason why you would want to move it.

”

~ HR Expert and Partner
Marketing Executive

Key Takeaways

When it comes to where SAP customers are on their HR technology journey, our research reveals the following key takeaways:

- **Those that have not yet started to plan for transitioning their HR processes to the cloud are behind the competition.** Mainstream maintenance for SAP's on-premise HCM software is expected to end in 2025 — a scant six years away. More than 80% of the overall survey respondents have plans to move some or all HR applications to the cloud over the next 24 months.
- **All HR applications are not created equally for the cloud.** There are plenty of options for moving key processes — such as recruiting, performance management, and learning solutions — to the cloud. Payroll processes, on the other hand, carry more risk and complexity, so be aware of the implications this change can have for your entire HR landscape.
- **You can start your migration to the cloud slowly.** Many customers have dipped a toe into the cloud by first moving either less-critical functions or applications that have an immediate ROI.

SAP CUSTOMERS PERSPECTIVE



Our company has looked at moving everything into the cloud. But right now, it's a matter of money. If we don't move before maintenance ends [in 2025], well, the product still works, and we'll have to take that risk.



~ HR Manager, Large Oil and Gas Company

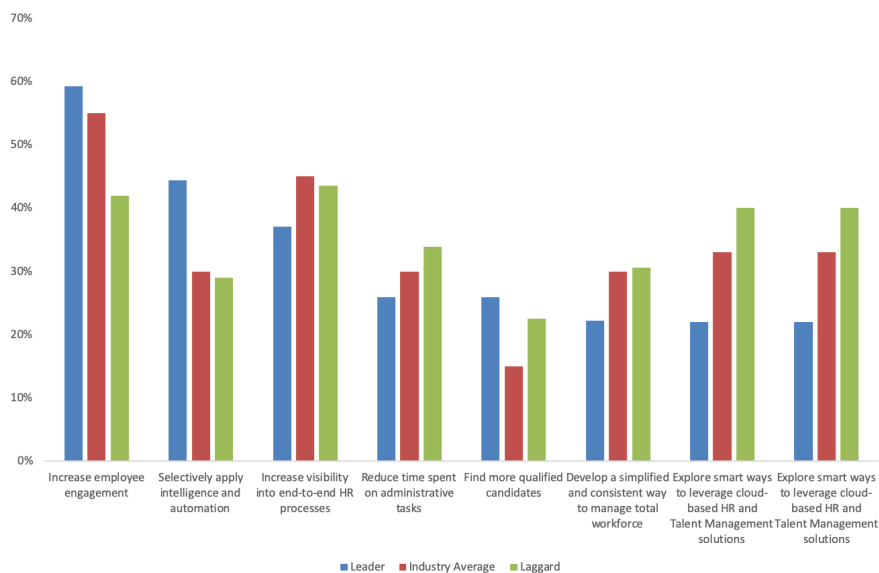
Chapter Two: How Are SAP Customers Approaching the HR Journey to the Cloud?

This chapter looks at the areas in which SAP customers are focusing when it comes to their business strategies around HR, and how leaders, industry average respondents, and laggards are addressing the technology requirements for supporting these strategies.

Business Strategies for HR Center on Employee Engagement and Visibility

Survey respondents overall identified increasing employee engagement and visibility into HR processes and data as their top business strategies (see **Figure 5**). The data indicates that enhancing the employee experience and improving visibility are driving cloud adoption and process improvements across all respondent groups.

Figure 5: HR strategies by respondent group



Source: SAPinsider, August 2019

SAP CUSTOMERS PERSPECTIVE



We're being driven to the cloud — we're an SAP company who has to make the change. I'm not convinced that cloud is better from a payroll perspective. But from the [SuccessFactors] modules we already have — where it relies on user experience — it's great being in the cloud. It takes away those repetitive tasks.

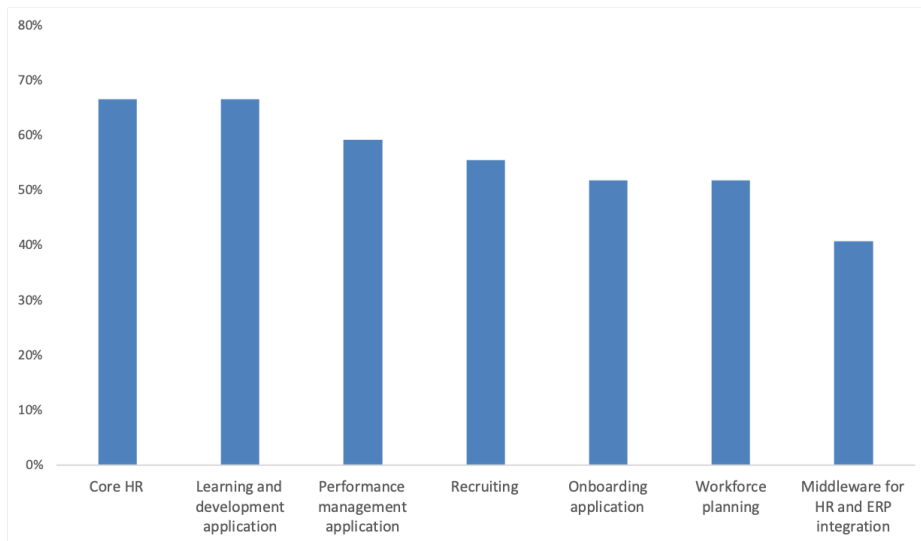


~ HRIT Manager, Large Manufacturing Enterprise

Leaders Are Adopting a Wider Range of HR Solutions

Our research shows that not only do a higher percentage of leaders use core HR solutions, including payroll and benefits, but they are also more significantly invested in solutions such as learning and development (67%), performance management (59%), workforce planning (52%), and onboarding (52%) applications (see **Figure 6**).

Figure 6: Leaders' technology adoption



Source: SAPinsider, August 2019

Based on the survey results, a majority of leaders put talent management workloads in the cloud — aligning with SAP SuccessFactors solutions — but keep payroll, time management, and other core HR processes on premise. For this reason, more than half (52%) of leaders cited integration as their top challenge, and 41% reported current investments in middleware solutions to integrate their cloud and on-premise solution landscapes.

Compared to the industry average group and laggards, leaders are also getting a head start in other areas of technology adoption — 37% are adopting end-to-end cloud

SAP CUSTOMERS PERSPECTIVE

“

We have a large blue-collar workforce who enter timesheets and are covered under 13 collective agreements... SAP ERP CATS and Payroll are configured well and work. There's no real benefit to moving to the cloud besides mobile timesheet entry.

”

~ HR Manager,
Large Industrial
Manufacturing Enterprise

solutions and 37% are adopting development/extension solutions. In comparison, only 10% of industry average and 11% of laggards share that focus on cloud development tools.

In addition, leaders are outpacing the other groups when it comes to using artificial intelligence (AI) and automation technologies with HR, with 22% of leaders reporting that they have started to use AI in their HR landscape compared to 10% of industry average respondents and 3% of laggards.

Over the next year, leaders plan to explore analytics (30%), onboarding (30%), compensation (26%), and recruiting (26%) solutions — in all of these categories, leaders are adopting technologies at a faster rate than the other groups.

Key Takeaways

Our findings reveal the following key takeaways when it comes to the different ways of approaching the migration of HR processes to the cloud:

- **When considering a move to a hybrid deployment, prioritize investment in integration tools and solutions.** Understand the different data models that you will be supporting so that you can select the right blend of middleware, web services, and other custom integration technologies that you will need to master.
- **Closely examine SAP SuccessFactors Employee Central as a way of bringing core HR to the cloud.** SAP SuccessFactors Employee Central has gained maturity, and both cloud-focused and on-premise organizations across all three respondent groups are starting to evaluate the solution in higher numbers.
- **Do not be afraid to reassess or modify your business processes.** Many on-premise solutions were designed to fit existing business processes, while cloud solutions tend to be more uniform and based

SAP EXPERTS PERSPECTIVE

“

The integration challenges that customers experience with cloud and on-premise environments lie in moving data between very different systems and applications. The syncing of the data, the meaning of the data between the different systems and processes, cause both disruption and latency. Basic definitions such as “leave of absence” could be interpreted very differently by different SAP and non-SAP solutions and reconciling these throughout a process can be very difficult and resource-intensive.

”

~ **Jeremy Masters, HR Expert
and Managing Partner,
Worklogix**

on best practices. Customers approaching a cloud migration project should be open to redesigning or simplifying their business processes to fit cloud-based solutions and reduce implementation time and maintenance going forward.

Chapter Three: Lessons Learned and Required Actions

Of the survey respondents that had recently completed a cloud HR project, 74% reported that the initiative met or exceeded expectations. Setting executive and business expectations — particularly when it comes to change management, integration, and the adoption of standard processes — were cited as some of the top factors that determine the overall success of this type of project. Those that were less prepared in these areas were more likely to report that their project did not meet the needs of the business.

Leaders: Steps to Success

Our findings revealed several lessons and trends that will help guide leaders to continued success:

- **Expand your user interface and user experience skillsets.** One of the most significant factors driving cloud adoption is the ability to create more meaningful and powerful engagement with employees. Get familiar with SAP Fiori and explore more advanced options and toolkits so that you can define a flexible user interface strategy that meets your organization's emerging needs.
- **Gain experience with SAP Cloud Platform.** SAP Cloud Platform is a key to tailoring both your existing and future cloud-based HR solutions. Many leaders (37%) in the survey sample have already started exploring this solution, compared to only 10% of industry average and 11% of laggards.
- **Start experimenting with cloud-based core HR and payroll technologies.** SAP SuccessFactors Employee Central will become the foundation for core HR processes in the cloud. Even if you are not planning

SAP CUSTOMERS PERSPECTIVE

“

The biggest thing on a customer's mind is the sunset date of 2025. One of the things that I'm a proponent of is to eventually move SAP to the cloud. SAP is becoming more and more complex ... and when you couple that with a disaster recovery plan, the technical skills needed to support the SAP back end, it's almost too big to handle on our own. We're already leveraging consultants. And every upgrade takes more time. [With the cloud] our team can focus more on adding value to the company.

”

~ HR IT Manager,
Medium-Sized
Utility Company

to make the transition to this solution in the short term, you and your team should understand how its features and functionality are evolving and continue to consider it as an option.

- **Elevate your focus on integration.** SAP is undertaking a strategy that goes beyond data integration to provide end-to-end process integration that crosses functional areas, whether it is core HR, payroll, or performance management. This strategy was announced at SAPPHIRE NOW in May 2019, and the first outcomes are expected before the end of the year. Keep an eye on these initiatives and stay up to date on your current solutions so that you will be able to test and implement this functionality as it becomes available.

Industry Average: Steps to Success

The industry average group faces the challenge of balancing a more aggressive move to a cloud environment with continuing to derive value from existing HR technology landscapes. Here are some tips to help ensure a successful outcome:

- **Continue your education and investment in integration.** Explore how middleware and integration is evolving within the SAP solution portfolio. In particular, keep an eye on SAP Cloud Platform as a critical option for supporting your long-term integration strategy.
- **Broaden your HR measures for success.** By uncovering close links between business value and migrating to the cloud, you can build a better understanding of the potential organizational benefits of further cloud investment.
- **Closely watch the evolution of time, payroll, and SAP SuccessFactors Employee Central.** Core HR and payroll are the workloads most industry average

SAP CUSTOMERS PERSPECTIVE

“

Understand your organization's KPIs and get executive buy-in.

”

~ HR Director,
High Tech Industry

respondents are avoiding taking to the cloud. Many industry average respondents indicate that they will more aggressively pursue end-to-end cloud solutions in the coming years and solutions such as SAP SuccessFactors Employee Central will play a vital role.

- **Engage the business on the important discussion of standardization versus customization.** One of the factors limiting cloud adoption and the success of overall cloud projects is the ability of businesses to adapt their outlook on customization and embrace more industry-standard cloud business processes. To continue your HR journey to the cloud, there must be close dialogue between IT and business on the attitudes and importance of custom environments.

Laggards: Steps to Success

Many laggards are contemplating the move to hybrid or pure cloud landscapes. Our data revealed some key strategies that will help with the planning for this journey:

- **You do not have to take a big-bang approach.** There are many paths to the cloud and many early adopters have started with talent management solutions. You do not have to do everything all at once, and while it may seem like a majority of your peers are going to the cloud quickly, most are choosing to take a hybrid approach first.
- **Do not underestimate the change management implications of your cloud project.** This was one of the most common lessons learned articulated by early cloud adopters from all three respondent groups. Cloud solutions can be quite different from on-premise solutions when it comes to user interfaces, process flows, integration, skillsets, and analytics.
- **Understand the regulatory and customization impact of moving specific processes and data to**

SAP CUSTOMERS PERSPECTIVE

“

Do not underestimate the amount of integration that you have to fix and optimize between modules and the data required to support them. You will need full-time dedicated resources during the implementation and for support of the system once implemented.

”

~ HR Manager,
Manufacturing Industry

the cloud. During our research, we found that one of the biggest determinants of whether laggards chose a hybrid or pure cloud approach was their industry and experience with SAP solutions. Understand the data privacy requirements and global regulations that are most important to your adoption of cloud HR solutions.

- **Make sure you are prepared for the integration requirements and challenges you will face.** Integration was the top challenge and technology investment reported by those that implemented a hybrid landscape. If you know you will be exploring a hybrid environment, start evaluating middleware options and make sure you know how SAP Cloud Platform can support your project.

Key Takeaways

Here are some final considerations to keep in mind as you move forward in your cloud journey:

- **Leaders need to continue to evolve their cloud strategy and skillsets.** These organizations need to strategically build on their investment by expanding their knowledge and experience with cloud security, integration, and user interface technology.
- **Industry average organizations need to leverage templates and best practices to systemize and scale cloud deployment efforts.** Supporting both cloud and on-premise HR applications brings unique challenges related to integration and visibility into your overall HR landscape. Build deployment and configuration templates so that you can shorten your design time as you move through further cloud projects. The use of templates helps to ensure consistency across future deployments.
- **Laggards need to begin planning and accelerate their journey.** There are several factors that offer solid

SAP CUSTOMERS PERSPECTIVE



Both the business and executive management really need to understand the impact of “standardization” of processes on the business and be willing to adapt them.



~ HR Manager,
Manufacturing Industry

reasons to move sooner rather than later. SAP's 2025 deadline ending maintenance for core SAP ERP and associated HR technology may seem like a long way off, but with planning and project timelines, it is not so far away. You also will be competing with your peers for valuable consulting, migration, and integration consulting resources, so plan accordingly.

Methodology

Between March and April 2019, SAPinsider surveyed our membership on their plans for moving their HR processes and data to the cloud. Our survey generated 278 responses from 129 customer organizations.

Responding professionals completed online surveys that covered topics such as:

- Strategies and plans for migrating HR to the cloud
- Drivers and obstacles for moving HR processes to the cloud
- Top challenges of managing cloud and hybrid environments

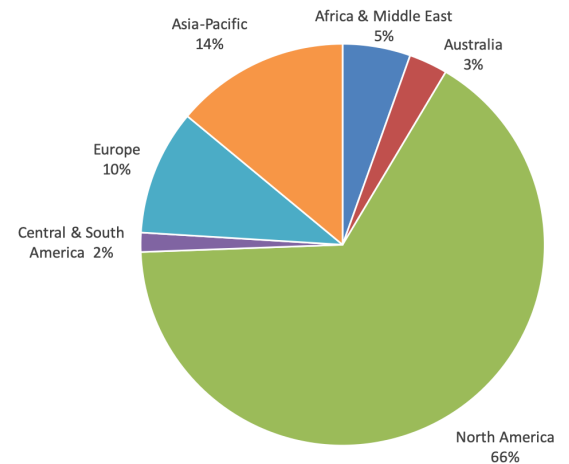
In order to better understand the context and reasoning behind the responses, SAPinsider supplemented the online surveys with in-depth phone and in-person conversations.

Demographic information on the respondents included the following:

- **Job title:** The job titles of the survey respondents included VPs and Directors (21%), Managers (26%), Architects (14%), Analysts (17%), Developers and Administrators (12%), Project Managers (4%), and Other (6%).
- **Company size:** From a revenue perspective, 23% of respondents represented large organizations with annual revenue of over \$10 billion. 21% stated revenue of \$1-\$10 billion, 12% between \$500 million and \$1 billion, 9% between \$200-\$500 million, and 14% stated revenue less than \$200 million. 21% did not know the previous year's revenue.
- **Geography:** Geographically, survey respondents were from North America (66%), Europe (10%), Asia-Pacific (14%), Central and South America (2%), Africa and the Middle East (5%), and Australia (3%).

PARTICIPANTS

PROFILE



Appendix A: The DART™ Methodology

SAPinsider has rewritten the rules of research to provide actionable deliverables from its fact-based approach. The DART methodology serves as the very foundation on which SAPinsider educates end users to act, creates market awareness, drives demand, empowers sales forces, and validates return on investments. It's no wonder that organizations worldwide turn to SAPinsider for research with results.

The DART methodology provides practical insights including:

- **Drivers:** These are macro-level events that are affecting an organization. They can be both external and internal and require the implementation of strategic plans, people, processes, and systems.
- **Actions:** These are strategies that companies can implement to address the effects of drivers on the business. These are the integration of people, processes, and technology. These should be business-based actions first, but they should fully leverage technology-enabled solutions to be relevant for our focus.
- **Requirements:** These are business and process-level requirements that support the strategies. These tend to be end-to-end for a business process.
- **Technology:** These are technology and systems-related requirements that enable the business requirements and support the company's overall strategies. The requirements must consider the current technology architecture and provide for the adoption of new and innovative technology-enabled capabilities.

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