

Magic Quadrant for E-Recruitment Software

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Despite the economy, the market for e-recruitment software continues to evolve. There are many rich solutions, and the market is crowded and competitive. Configuration flexibility, innovations, and support for specific geographies and industries continue to differentiate the solutions.

WHAT YOU NEED TO KNOW

This document was revised on 3 December 2009. For more information, see the [Corrections](#) page on gartner.com.

As the e-recruitment software market matures, there is more functional parity in recruitment automation. However, customers are starting to move beyond basic recruiting automation toward overall effectiveness. Solutions are evolving to meet the strategies of organizations looking to fulfill their talent acquisition needs. To be most effective, solutions must support industry and geographic needs, as well as handle the challenges facing corporate recruiting departments.

MAGIC QUADRANT

Market Overview

Despite a faltering economy, the e-recruitment software market continues to grow at a healthy pace. As solutions mature, customers face many hiring challenges.

Recruitment

As enterprises automate recruiting processes and improve recruiter effectiveness, many challenges remain, and solutions are evolving to meet these needs:

- **Increased number of applications.** More candidates are chasing fewer positions, so filtering candidates and effectively managing workflow has increased in importance during the past year. We have noticed increased interest in tools such as resume parsing. Many vendors integrate specialist applications, such as Burning Glass, Resume Mirror, Sovren and Hireability ALEX, for this purpose.
- **Stronger compliance challenges.** We have seen vendors in the U.S. and Europe improving their capabilities to cope with compliance demands, including data protection laws across Europe, and the OCCCPC search requirements in the U.S. However, compliance challenges are not just about features — they are increasingly driving vendors to set up data centers in Europe and to pursue standard certifications, such as ISO 270001. We have seen retailers earn as much as \$100 million annually from the Work Opportunity Tax Credits program through better automation.

- More demands on internal mobility.** Internal mobility has become more important during the past year, as many organizations face recruitment freezes and reorganizations. As recruiting internally becomes the most attractive, if not the only, option, the need for good integration with other HR and talent systems is growing.
- Finding high-quality candidates is challenging.** The first issue is defining quality. Recruiters need hiring managers to help them define job requirements. Candidates that meet those requirements are typically considered “quality” candidates; however, hiring managers may not be aware of what defines success in a job. Many companies leverage the performance and succession management data of high performers to help create “success profiles” that provide a more-data-driven definition of a quality candidate.

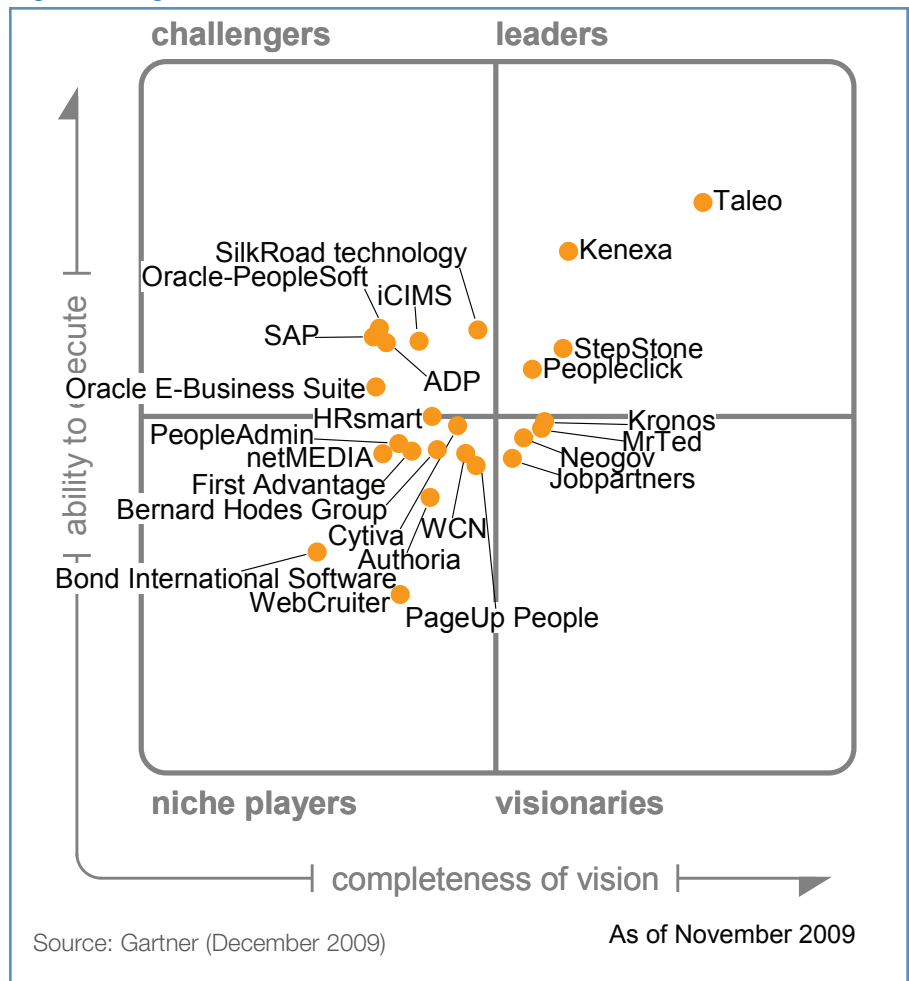
Using screening questions and assessments properly should enable you to focus on the most-qualified candidates. Most e-recruitment software solutions can define screening questions and ask assessment questions. Expertise is required to ask the right questions. Some vendors offer services to help with this. Others partner with third-party consultants to provide that assistance. Solutions are emerging that have built-in intelligence to better match candidates with job requirements (for example, Redmatch and OneWire). Some companies believe that job simulations give the most-effective view of future performance (for example, Real Estate Simulator and FurstPerson).

- Candidate sourcing is difficult.** There are many ways to source candidates. E-recruitment software (together with job board aggregator partners) can support postings to all kinds of job boards. The challenge is where to target the postings to get the best results. Solutions such as Bernard Hodes SmartPost and eQuest Prophecy provide that intelligence; however, job boards typically reach only active candidates (those looking for or interested in new jobs). Other sourcing strategies reach passive candidates (those not actively searching for

jobs). E-recruitment software vendors are offering candidate relationship management solutions that can be used to support sales and marketing efforts to attract these hard-to-reach individuals. In addition, social networks (for example, LinkedIn, Xing, Facebook and Viadeo) are used to leverage contacts to find qualified candidates.

Companies are using other ways to attract passive candidates, such as leveraging search engine optimization techniques to display links to job postings when a passive candidate searches the Internet. Once they attract passive candidates, companies are creating sophisticated employment sites (or microsites) that use pictures, video, blogs and other interactive capabilities (for

Figure 1. Magic Quadrant for E-Recruitment Software



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example, Standout Jobs, as well as social-networking sites, such as Ning) to better communicate their employment brands. Social software has grown since the last Magic Quadrant, but we saw a lack of innovation in leveraging social networking as a source of candidates from the major vendors. New vendors, such as Jobvite, Arbita and Jobs2web, are engineering their solutions around social recruitment. Innovation in candidate sourcing is happening largely with specialist vendors.

- **Hiring managers are still not responsive.** A continuing trend in e-recruitment is focusing on the hiring manager's user experience. Vendors have introduced wizards to make it easier for hiring managers to perform certain tasks, as well as exposing more functionality in Microsoft Outlook, so that they don't need to enter the system and can, instead, perform tasks in environments with which they are familiar. Many vendors have reworked user experience with Rich Internet Applications (RIAs), such as Silverlight, Flex or Ajax. However, technology can only do so much. Hiring managers must be accountable for achieving the desired recruiting results (for example, it should be part of their performance reviews). Better analytics also helps identify problem managers.
- **Convincing top candidates to join remains difficult.** Offers need to be created that are likely to be accepted by candidates within the constraints defined for that job. Most e-recruitment software supports a requisitioning process, which includes a budget defined for that open position (if not, one would be defined as part of the process). However, little intelligence is generally applied to determine that budget. Companies tend to overlook current market data because it is not integrated into the requisition process. Entry and exit interview data is not gathered and presented during the requisition process to determine whether compensation was a major factor in attracting and retaining people, or if it was too low to attract top candidates.

Most recruiters and hiring managers do not have good data about the impact of compensation; however, there is another side to this: It is important to know what motivates the person you want to hire. We have yet to see an offer management solution that captures data about what is important to the job candidate. It is a common technique in sales to ask what it will take to close a deal, but e-recruitment systems do not ask that question of job candidates. This has not significantly improved since the last Magic Quadrant.

Product Differentiators

In addition to gathering data about their experiences as customers, we asked customers about their key drivers for implementation: the most important are process standardization and improving quality of hire. We also learned what capabilities customers have implemented and what they plan to implement. Almost all customers have the basics in place. The solutions are similar for requisitioning, candidate self-service, job board posting and applicant tracking.

There are more similarities than differences in how solutions meet the needs of large, global organizations. Customers want to increase the value of their e-recruitment investments by dealing with major challenges already described in this research (see Note 1):

Note 1 Customer Survey

As part of the research for this Magic Quadrant, we surveyed customer references provided by the vendors. There were 202 customer responses to this survey. The customer breakout (shown as a percentage) by number of employees was:

- Fewer than 2,500 — 15.8%
- Between 2,500 and 10,000 — 36.1%
- Between 10,000 and 25,000 — 20.3%
- Between 25,000 and 75,000 — 17.3%
- More than 75,000 — 9.9%

These customers represented a wide range of industries:

- Financial Services — 22 (10.9%)
- Manufacturing — 26 (12.9%)
- Professional Services — 13 (6.4%)
- Public Sector (State/Local) — 17 (8.4%)
- Public Sector (Federal) — 4 (2.0%)
- Retail Hospitality — 34 (16.8%)
- Software/Technology — 10 (5.0%)
- Telecommunications — 7 (3.5%)
- Utilities — 5 (2.5%)
- Other — 64 (31.7%)

- **Onboarding.** Onboarding is well-established, and many customers recognize its importance for productivity and retention, and have focused more attention on it. Approximately 30% of the surveyed customers use onboarding, and 51% plan to use onboarding during the next two years. Most vendors offer some sort of solution, but functional differences are considerable. Niche providers, such as Enwisen and Knowledge Management Systems (KMS), offer onboarding solutions and are growing rigorously.
- **Social Software.** Twenty-two percent of respondents said that they were using social-software functionality from their e-recruiting vendor, whereas 34% had no plans to use social

software. During the past year, many vendors have added social-software capabilities, and almost all have it on their road maps. The functionality scope varies considerably among vendors. There is also a healthy market for niche social-software-focused vendors, such as Jobvite and Jobs2Web

- **Interview Management.** It is difficult to schedule interviews, especially when multiple interviews are required, and recruiters struggle to get consistent feedback from interviewers. Some vendors do a better job than others in providing interview guidelines and coaching hiring managers and other interviewers.
- **Assessments.** Assessments are used widely in hourly hiring (for example, the retail industry). Our customer survey results show that more than 80% of customers use assessments. Some vendors excel at providing assessment content — some vendors provide it themselves, while others have partnerships with domain expert partners.
- **Workforce Planning.** Understanding what demand will emerge for new hires, especially for critical roles in the organization, so that recruiters can proactively build talent pools, is the essence of workforce planning. However, only 16% of organizations have implemented it, and more than 50% had no plans to do so. Functionality is still emerging, and niche players, such as InfoHRM, Aruspex, Vemo and Orca Eyes, or business intelligence players, such as SAS, also play a significant role in workforce planning.

In addition to the differentiators identified in the customer survey, other differentiators are emerging:

- **Flexibility of Data and Workflow.** Vendors' levels of flexibility differ in terms of the data captured in a requisition and on a candidate/applicant record. Applications differ in terms of defining workflows for approval, candidate application and applicant tracking. These differences may come from hiring different types of people, supporting multiple business units or operating in more than one country. Some vendors require consultancies to modify workflows, others are more flexible.
- **User Experience.** Improving the hiring manager and candidate user experience is key to addressing many challenges. Social software is starting to affect this, and many vendors have renewed or redesigned their user experiences to take advantage of advances in user interface (UI) technologies, such as RIAs.
- **Multinational Support.** Support for multiple languages and currencies by recruiters and hiring managers, as well as for candidate self-service, is essential for global companies. Support for different brands and processes (which may be required for cultural or statutory reasons) for different countries/markets is a critical concern. Although many vendors offer several languages and flexible tools, few vendors provide out-of-the-box localization for multiple countries. In some countries, agencies play a significant role in recruiting, and not all vendors support agency integration effectively.

- **Reporting/Analytics.** Recruiting solutions deliver more-sophisticated information to different stakeholders. Reporting of time to hire and cost per hire are standard. Several solutions provide more-sophisticated sourcing data, as well as more focus on the quality-of-hire metrics. Some vendors build their own solutions, others rely on BI vendors.

Beyond functionality developments, other trends are influencing the direction of the e-recruitment software market.

The Impact of Software as a Service

The e-recruitment software market is unique in that software-as-a-service (SaaS) solutions dominate. We surveyed the vendors evaluated in this Magic Quadrant to understand how many of their customers use on-premises installed software versus hosted or SaaS solutions. We found that 77% use SaaS/hosted solutions, compared with 23% using on-premises installed solutions. Oracle and SAP make up almost all the on-premises use. Most of the other vendors are providing e-recruitment software exclusively as an external service. E-recruitment is well-suited to SaaS, because the systems are typically accessed from beyond the firewall, by unknown users, at times and via devices that are not always supported by internal IT.

Deeper Focus on Vertical Markets

Some vendors in this Magic Quadrant focus on specific vertical markets. They understand the recruiting challenges in those industries and build functionality to address those issues. For example, higher education in the U.S. is focused on avoiding claims of discrimination in the recruiting process. The leading vendor in this market, PeopleAdmin, has built specific workflows and reports to manage this. Other vendors, such as Kronos, have strengths in hourly recruitment. WCN has a strong campus/graduate recruitment offering.

The Potential Convergence of Contingent Workforce Management and E-Recruitment

The concept of talent acquisition, where a company has a holistic view about all the sources of talent (full-time employees, part-time employees and contingent workers), is offered by a few vendors, such as Peopleclick, but has not been broadly adopted to date. The current economic environment has put more pressure on organizations to optimize their staffing mixes. As companies institute hiring and salary freezes, managers are likely to use contingent labor to fill the gaps, although, ultimately, it may be more expensive.

It is easier for companies to let go of contingent workers in an economic downturn, especially outside the U.S., than it is to lay off full-time employees. This should increase the demand for contingent workforce management solutions, as well as put more of a premium on workforce planning (to understand the right mix) and integration with e-recruitment to streamline talent acquisition processes. One leading contingent workforce software provider, Fieldglass, has added permanent recruitment functionality, but we have not seen widespread integration between contingent and permanent recruitment. Gartner has not seen the growth in workforce planning that we expected in this area.

Consolidation Will Continue; However, Smaller Vendors Can Still Thrive

Significant consolidation of major vendors in this market has occurred. Last year, Taleo acquired Vurv Technology. PeopleFilter and HireDesk were acquired by Talent Technology. Trovix was acquired by Monster.

The market is likely to continue to consolidate, as leading vendors look to grow their customer bases. E-recruitment is part of a broader suite of talent management applications. We see an increasing number of customers selecting e-recruitment applications as part of a broader, integrated talent management strategy, but this is by no means a dominant trend. There is more vendor talk about a single talent platform than there is customer adoption, and no performance management or e-learning vendors have made a significant dent in the e-recruitment space. This will drive some talent management application suite vendors to acquire e-recruitment vendors for their portfolios.

At a national level, local providers continue to do well, and many have developed rich functional solutions. No global player dominates more than one market — local players tend to offer deeper country-specific functionality and services. For instance, we have seen vendors expand from Australia (PageUp People) and Switzerland (netMEDIA) to compete for and win global business.

New vendors continue to enter the e-recruitment space, and sometimes provide concepts and technologies that challenge incumbent thinking. At least 400 vendors offer some form of e-recruitment capability, and the market is far from consolidated.

Market Definition/Description

E-recruitment software helps automate the requisition-to-hire process. Until the late 1990s, these solutions were known as applicant-tracking systems. The Internet provided vendors with the opportunity to expand solution functionality for candidate acquisition and candidate self-service. The market is made up of recruitment specialists, ERP/human resource management system (HRMS) vendors and talent management suite vendors. The market shows a healthy growth of close to 10%. Comprehensive e-recruitment systems address the following major areas:

- Workforce planning:
 - Demand planning
 - Supply planning
- Requisitioning:
 - Job descriptions
 - Approval workflow
 - Job board and social software posting

- Candidate acquisition:
 - Referral management (including social software)
 - Candidate relationship management and sourcing
 - Candidate self-service
 - Candidate screening/assessment
 - Candidate scoring/search, including support for the Office of Federal Contract Compliance Programs guidelines for Internet applicants
- Applicant tracking:
 - Applicant workflow
 - Communications/correspondence management
 - Interview management
 - Background checking/drug screening
 - Onboarding
- Reporting/analytics:
 - Regulatory reporting
 - Standard reporting/analytics
 - Advanced analytics

Inclusion and Exclusion Criteria

We have used the same inclusion criteria as in the 2008 Magic Quadrant. We have included vendors with more than 100 e-recruitment software customers (with more than 1,000 employees); more than \$25 million in total revenue with e-recruitment (license, maintenance and services); or both. As in the last Magic Quadrant, we have included some industry-specific players. In this edition of the Magic Quadrant, we have broadened coverage to include more vendors from outside the U.S., and we have also strengthened our weighting for global features and support.

The following vendors did not meet the inclusion criteria for this Magic Quadrant; however, we list them here, because each has specific capabilities worth considering for e-recruitment:

- Ceridian offers a recruiting solution as part of its overall HRMS offerings, as well as an independent application.
- R-Flex holds a strong position in the French market and is expanding into other European countries.

- Umantis has grown strongly in the Swiss market, and has gained market share in Germany.
- HireDesk, now part of Talent Technologies, focuses on the recruiting needs for small or midsize businesses (SMBs).
- Ultimate offers e-recruitment as part of a broader human capital management (HCM) suite.
- Lawson has rewritten its e-recruitment solution as part of its Strategic HCM software.
- Main Sequence Technologies offers PCRecruiter, which targets SMBs and can be implemented as an on-premises or hosted solution.
- PeopleFilter, now also part of Talent Technologies, focuses on better profiling of candidates and jobs to find closer matches.
- Redmatch offers strong search and matching capabilities.

Added

WebCruiter, WCN, netMEDIA, PeopleAdmin and PageUp People

Dropped

Ultimate Software is focusing on selling an integrated HRMS suite; therefore, it doesn't focus on positioning recruitment functionality on a stand-alone basis. Workstream didn't meet all the inclusion criteria.

Evaluation Criteria

Ability to Execute

We evaluated vendors on the quality and efficacy of the products and services that enable their performance to be competitive, efficient and effective, and to have a positive impact on revenue, retention and reputation. Ultimately, vendors are judged on their ability and success in capitalizing on their vision.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	low
Market Responsiveness and Track Record	standard
Marketing Execution	standard
Customer Experience	high
Operations	standard
Source: Gartner (December 2009)	

Completeness of Vision

Gartner analysts evaluate vendors on their ability to articulate logical statements about market direction, innovation, customer needs and competitive forces. We also evaluate how well vendor vision maps to the market trends described above. Vendors are rated on how well they understand and leverage market forces.

Leaders

Leaders in the e-recruitment software market have products that can meet the challenges presented by large, complex global organizations. These vendors have strong track records, and demonstrate strong sales and marketing execution. Typically, they have well-articulated strategies that include an in-depth focus (for example, workforce planning, contingent workforce management, vertical markets and geographic expansion) on talent acquisition or a broader focus on talent management (for example, performance management, succession management and compensation management).

Challengers

Challengers have strong products that can meet the requirements of their target markets. These vendors demonstrate solid sales execution. Compared with vendors in the Leaders quadrant, challengers do not articulate as strong a vision for marketing, service/support or vertical markets. Challengers have not demonstrated leading-edge innovation in recruiting.

Visionaries

Visionaries have a well-articulated strategy that includes deeper focus on talent acquisition or a broader focus on talent management. Each vendor in the Visionaries quadrant is innovative in a significant way. Compared with leaders in the e-recruitment software market, these vendors do not have one area of execution where they distinguish themselves from other vendors in the market.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	standard
Innovation	standard
Geographic Strategy	standard
Source: Gartner (December 2009)	

Niche Players

Niche players have solid functionality for all the standard e-recruitment requirements. Typically, they lack flexibility in data and workflow functionality, compared with vendors in the Leaders quadrant. In addition, they do not have the maturity, in terms of customer experience, or the visibility in the market, compared with leaders and challengers. Vendors in the Niche Players quadrant have a reasonable overall vision, but not one area that was outstanding, compared with the visionaries. Moreover, some of the niche vendors may have financial challenges.

Vendor Strengths and Cautions

ADP

Founded in 1949, ADP is headquartered in Roseland, New Jersey. In October 2006, ADP acquired VirtualEdge (founded in 1998) and has primary support for this solution in Newtown, Pennsylvania. Within ADP's HR solutions, the e-recruiting suite is part of the pre-employment services offering, which also includes background screening, tax credit administration services and electronic I-9 processing services. Version 9.0 (released in May 2009) is built on Java Platform, Enterprise Edition (Java EE). ADP delivers its solution via a SaaS model only. ADP's e-recruitment solution is best-suited to midsize-to-large U.S.-based organizations (organizations with more than 1,000 employees) that want strong recruiting functionality, with the option for additional recruiting services (such as background screening) from a single vendor. Some large customers have deployed the solution multinationally, but that is the exception.

Strengths

- ADP provides depth of functionality, flexible workflow and data support.
- ADP is a large company with a strong track record built on its payroll outsourcing services. However, recruiting (and pre-employment services, in general) have been overshadowed, especially from a marketing perspective.
- Customers were impressed with the product's configurability, quality and ease of use, especially for candidates and HR users.
- Large customers have shown that ADP's multitenant architecture can scale.
- Customer feedback about implementation and support has improved from the previous Magic Quadrant. It is still important to ensure that you get the right implementation and account management resources.

Cautions

- We still do not see ADP in as many software selections as its key competitors. However, ADP has grown its customer base in the past 12 months.
- Its vertical market strategy is not as strong as other vendors.

- ADP has shown innovation in recruiting in the past. It was one of the first vendors to support different kinds of hiring (for example, salaried and hourly), onboarding and offboarding, and candidate relationship management. However, it has not shown as much innovation in emerging areas, such as social recruiting.

Authoria

Founded in 1997, Authoria is headquartered in Waltham, Massachusetts. The company is owned by Bedford Funding, a private-equity firm focused on the talent management market. In addition to solutions for e-recruitment, Authoria offers performance appraisal/assessment, career development, succession management, compensation management and knowledge base/communication solutions. Version 10.10 of Authoria's e-recruitment solution (released in April 2009) is built on a Java EE platform. Authoria delivers its solutions to new customers only via a SaaS model. Authoria's e-recruitment solution is best-suited for large, U.S.-based organizations that want good functionality, as well as a broader talent management. Although the underpinnings for global deployment exist (for example, multilingual and multicurrency support), few customers have deployed the 10.x solution globally, and Authoria is still building out its global service and support infrastructure.

Strengths

- Authoria focuses on hiring-manager usability and productivity.
- Authoria has candidate self-service and sourcing capabilities.
- Authoria offers breadth and depth of functionality across talent management applications, including recruiting, performance appraisal/assessment, career development, succession management and compensation management.

Cautions

- Its service and support are inconsistent. Authoria sells to large customers, and its service and support resources are sometimes stretched a little thin. In addition, it is growing its experience base in supporting global recruiting needs.
- Customer references indicate that product quality and training need improvement.
- An early focus on its full talent management suite affected the volume of recruiting-only deals in which Authoria participated. Compared to key competitors, it has won fewer deals in Recruitment during the past 12 months.

Bernard Hodes Group

Founded in 1970, Bernard Hodes Group is headquartered in New York. The company is a wholly owned subsidiary of Omnicom Group. In addition to Hodes iQ, its e-recruitment software, it also offers SmartPost for intelligent job posting and recruitment consulting services. Version 5.1 of Hodes iQ (released in August 2009) is built on an Active Server Pages (ASP)/.NET platform

(Hodes plans to be fully in the .NET platform by the end of 2009). Hodes iQ is delivered only via a SaaS model. Hodes iQ is best-suited for midsize-to-large U.S.-based organizations that want good functionality, especially for candidate sourcing. Although the underpinnings for global deployment exist (for example, multilingual and multicurrency support), few customers have deployed the v.5.1 solution globally, and Hodes is still building out its global service and support infrastructure

Strengths

- Hodes has considerable sourcing consulting expertise and strong strategies and solutions for leveraging social media.
- Its SmartPost product for intelligent job board posting differentiates it from competitors.
- Customer experiences with Hodes iQ have been positive.
- It is willing to customize products, if needed.

Cautions

- Hodes' product is not as well-suited as others for global implementation. Its global service and support infrastructure are limited.
- It is known more for its consulting services and SmartPost solution than it is for the Hodes iQ e-recruitment software.
- Although a solid number of new customers were added during the past year, we still do not see Hodes iQ considered in as many software selections as its competitors.

Bond International Software

Bond International, founded in 1973, is headquartered in West Sussex, U.K. (with its U.S. headquarters in Richmond, Virginia). It is publicly traded. It made its name selling recruiting solutions to third-party staffing firms. Based on its success there, Bond has expanded to the corporate recruiting market. Bond Talent v.9.4 (released in May 2008) is built on the Java EE platform. Bond is in the process of migrating Bond Talent to be on a common platform with its staffing firm solution (v.11). This platform will provide database independence and improved multilingual support. Bond Talent is purchased via a perpetual license and can be implemented on-premises or hosted by Bond. Bond Talent is best-suited to midsize-to-large U.K.-based multinationals that need standard functionality initially and can grow their implementations as Bond continues to develop the solution.

Strengths

- Bond is well-known as a software provider for third-party staffing firms. Its experience in this market provides it with credibility in corporate recruiting.

- It has financial viability.
- Bond has a solid global service and support infrastructure (for staffing companies), as well as a global product foundation.
- It has a good alliance strategy for consulting and recruitment process outsourcing.

Cautions

- Bond is newer to the corporate hiring market and is still ramping up its customer base. It has focused on providing the basics, and is not as visionary as other providers.
- It has low market awareness in the corporate hiring market, although it is improving in the U.K.
- Customer reference feedback was mixed. Some felt product quality and documentation needed improvement. Some customers had positive implementation experiences, whereas others said it did not meet their expectations.

Cytiva

Founded in 1995, Cytiva is headquartered in Emeryville, California, and is listed on the Canadian exchange. It has five offices in the U.S. and Canada, and more than 250 customers use its SonicRecruit product. This is a SaaS product, built on the Microsoft .NET platform. Cytiva has also expanded into performance management. The solution is well-suited to midmarket organizations headquartered in the U.S. or Canada.

Strengths

- It is focused on the midmarket — more than 95% of its customers have fewer than 10,000 employees.
- Cytiva provides solid functionality across the requisition to hire process.
- It is a strong solution for customers with a mix of hourly and salaried employees.
- Customer feedback was positive for product quality, implementation and post-implementation support.

Cautions

- It is not as well-suited as others for multinational implementations. Cytiva has a limited global service and support infrastructure.
- Cytiva is a relatively small vendor in terms of number of employees and revenue; however, it is growing rapidly.

First Advantage

Founded in 2003, First Advantage is headquartered in Poway, California. It is publicly traded. First American Corporation owns approximately 74% of First Advantage. First Advantage has a number of service businesses, ranging from Tax and Litigation Services to Data Recovery Services to Employer Services. Within its Employer Services sector, in addition to e-recruitment software, First Advantage provides a broad range of recruiting-related services including assessments, background checking, drug screening and I-9 verification. HRLogix, First Advantage's talent acquisition solution, was acquired in April 2006. First Advantage previously acquired RecruiterNet, but the HRLogix platform will be its solution going forward. First Advantage plans to move its North American customers from HMS (formerly Projectix from RecruiterNet) to HRLogix by mid-2010, and its European and Asia/Pacific (APAC) region customers by mid-2011. HRLogix is offered only as a SaaS solution from First Advantage. HRLogix is best-suited to midsize-to-large U.S. organizations that want "one-stop shopping" for e-recruitment software and related services.

Strengths

- First Advantage offers solid functionality for the requisition to hire process. Customer feedback about the product was positive.
- It has a good strategy for software and services on a global basis. It is one of the visionary vendors in terms of social-recruiting strategy.
- Financial viability is strong.
- Global service and support infrastructure are solid.

Cautions

- Few customer references have implemented e-recruitment software on a global basis.
- First Advantage is still known primarily as a service provider (especially background checking). It needs to improve its visibility as a software vendor and a full solution provider.
- It is going through a platform migration for HMS customers, but this is to a well-established solution, HRLogix.

HRsmart

Founded in 1999, HRsmart is a privately held vendor based in Richardson, Texas. The company has offices in Argentina, Brazil, the U.K., Canada, Lebanon, South Africa, Australia, France, the United Arab Emirates, Qatar, Singapore and the Philippines. HRsmart started in the e-recruitment market, and now offers solutions that encompass much of the talent management suite, including performance appraisal/assessment, career development, succession management, compensation management, learning management and offboarding. Version 11.1 leverages open-source technologies, including Linux, PHP and MySQL, and focuses on usability improvements, global configurability and an application

programming interface (API). The company offers its solution via a subscription license and a hosted model. HRsmart is best-suited to global, midsize-to-large enterprise customers — as many as 25,000 employees (although the company does have some larger customers) — that want strong e-recruitment functionality integrated with strong performance and succession management solutions.

Strengths

- HRsmart has a strong vision for and execution on building an integrated talent management application suite.
- Overall product functionality is strong. Customers consider HRsmart a cost-effective choice.
- It provides solid multinational support, especially for midsize-to-large enterprises.
- Customer feedback on overall product, service and support was positive.

Cautions

- Its vertical market strategy is not as strong as other vendors.
- Marketing remains a challenge. HRsmart needs to improve its visibility. It has done a good job of growing revenue, but we do not see it in as many deals as other vendors.

iCIMS

iCIMS was founded in 1999. It is privately held, and headquartered in Hazlet, New Jersey. It has other offices in the U.S., the U.K. and China, and more than 775 customers. It is now positioning a talent management platform, but its strengths are in recruitment. The solution is written in Java on the JEE Platform using JSP, Servlets and Ajax, and is delivered via SaaS. iCIMS is particularly strong in the U.S. midmarket, but it has also had good success with multinational organizations. The solution is well-suited to U.S.-headquartered organizations with local and multinational requirements.

Strengths

- Customers and Gartner analysis indicated that iCIMS' product was easy to use and implement, and that the iForms product offers excellent flexibility.
- It features good functionality at a competitive price.
- Financial growth is strong.

Cautions

- Although it has expanded internationally, its brand recognition remains weaker than several other vendors outside the U.S.
- It makes limited use of social software beyond simple job posting.

Jobpartners

Founded in 2000, Jobpartners is privately held and headquartered in London, U.K. It has offices in Paris, Heidelberg, Utrecht, Krakow, Edinburgh, Barcelona and Bethesda, Maryland. More than 140 customers use its ActiveRecruiter solution, which is deployed in more than 50 countries and 28 languages, and is delivered via SaaS. The solution is largely built using Java, XML open-source technologies. Jobpartners has also expanded into the broader talent management space, and has just launched a solution dedicated to the SMB market. ActiveRecruiter is well-suited to multinational organizations that have demanding compliance and workflow requirements.

Strengths

- It demonstrates flexible workflow and configurability of requisition and candidate data.
- It has a good vision for and execution on an integrated talent management application suite.
- It has strong multinational capabilities, and it's good at handling subsidiary differentiation.

Cautions

- Jobpartners is relatively well-known in Europe (especially in the U.K., the Netherlands, France and Germany), but it does not have a high degree of awareness globally.
- Its growth rate is slower than that of some leading vendors.
- It doesn't compete for public-sector business.

Kenexa

Founded in 1987, Kenexa is a publicly traded company headquartered in Wayne, Pennsylvania. Kenexa's multiple product lines encompass the full spectrum of talent management applications. Some of these product lines have come through acquisitions (BrassRing and Webhire in e-recruitment, as well as purchasing the code to a learning solution), and other product lines have been built directly by Kenexa (for example, its EPM solution, Kenexa CareerTracker). Kenexa is building a next-generation, integrated talent management application suite (called Kenexa 2x) that will encompass recruiting (based on the original Kenexa Recruiter solution), EPM (based on Kenexa CareerTracker) learning (based on the recently acquired code), onboarding and surveys. Recruiting was the first application released on Kenexa 2x platform. This evaluation focused on the Kenexa Recruiter BrassRing (KRB). Version 12 of KRB uses an ASP/.NET platform (as well as Ajax for some UI elements). KRB is delivered as a SaaS solution. KRB v.12 is best-suited for global organizations that want a full-featured e-recruitment solution, along with strategic consulting services.

Strengths

- KRB is a strong global recruiting solution. Kenexa has leveraged partners well to fill gaps (Vemo in workforce planning and KMS for onboarding).

- It has strong depth and breadth of strategy consulting, implementation, support services and assessment content. Customer feedback on the product and services was positive.
- It offers a full insource-to-outsourcing spectrum of recruitment solution options.
- It has a strong vision for a suite of talent management applications. An integrated set of solutions is still a work in progress.

Cautions

- Kenexa is splitting its investment across two main recruiting product lines (BrassRing and 2X). BrassRing is the stronger product, but the solutions will target a similar market. As the 2x Recruiting solution matures, Kenexa will be under pressure to rationalize its multiple recruiting solutions.
- Kenexa's diversification into recruitment process outsourcing was heavily affected by the recession, but the core software business remains strong.

Kronos

Founded in 1977, Kronos is headquartered in Chelmsford, Massachusetts. It was publicly traded until its acquisition by private equity firm Hellman & Friedman in March 2007. In addition to its e-recruitment solution, Kronos offers HR/payroll and workforce management (labor scheduling, time and attendance, and leave management). Kronos acquired Unicru in June 2006 to provide its initial e-recruitment solution called Workforce Acquisition. Workforce Acquisition versions through 7.0 were based on the Unicru platform. Kronos current solution, Workforce Acquisition version 8.0, is based on the Deploy Solutions acquisition in October 2007. The Deploy platform is more configurable and has better support for salaried hiring (along with hourly hiring). The strength of the Unicru platform was the assessment content. Kronos has merged the Deploy technology and Unicru assessments in v.8.0. Kronos estimates that approximately 25% of the installed base is now running v.8.0. Customer reference feedback on v.8.0 was somewhat limited, but positive. Kronos Workforce Acquisition is delivered as a hosted solution via subscription license. Kronos Workforce Acquisition is best-suited to U.S.-based organizations that have large, distributed hourly workforces (for example, retail and healthcare).

Strengths

- Kronos Workforce Acquisition offers best-in-class functionality for field/hourly hiring in industries such as retail and healthcare.
- It has a strong vision for how assessment content, strategic consulting services and analytics wrap around e-recruitment software to provide a more-comprehensive solution.
- It has a strong vertical market focus.
- It provides solid product functionality to support requisition and nonrequisition-based recruiting.

Cautions

- Its hourly solution is not as well-suited as others for global implementation; customer use is limited due primarily to the need to tailor assessment content by country and culture.
- Kronos needs to improve its sales execution. Compared with key competitors, it has won fewer net new e-recruitment software deals during the past 12 months. However, it has done well selling into its installed base.
- Kronos has strong functionality for hourly hiring, but it needs to improve its capabilities for salaried hiring. We are seeing more selections in target industries that include both hourly and salaried hiring.

MrTed

Founded in 1999, MrTed is privately held and headquartered in London, U.K., with offices in Rotterdam, Paris, Cologne, Krakow, Warsaw, Stamford and Shanghai. Its main data center is in Switzerland. It has two product lines — one aimed at smaller organizations and the other at enterprise organizations. The enterprise solution, MrTed TalentLink, is deployed at more than 200 large customers, mainly multinational organizations, and is delivered via SaaS. A new version of the solution, called Cloud9, will be delivered in December 2009. TalentLink is well-suited to complex, multinational organizations that have sophisticated compliance and workflow rules.

Strengths

- The company demonstrates strong compliance capabilities, especially for European Union data protection laws.
- It has deep and broad functionality, with a strong and innovative product vision, especially in the area of social software.
- It is profitable, and demonstrates healthy financial growth, including a strong presence in Asia.

Cautions

- It is strengthening marketing and sales in the U.S., but is challenged by the leading U.S. players to win U.S.-headquartered organizations.
- Because it only focuses on talent acquisitions, customers looking for a broader suite will need to look elsewhere.
- Customer feedback on implementation support was mixed — most customers were positive, while a few others were cautious. MrTed has invested in strengthening its support and consulting capabilities during the past two years.

netMEDIA

Founded in 1998, netMEDIA is privately held and headquartered in Zurich, Switzerland, with offices in Jersey City, New Jersey, and Shanghai, China. Focused on large, complex multinational corporations that seek rich customization capabilities, netMEDIA recently implemented one of the largest global recruitment deals to date. It has more than 20 large customers on its SaaS platform, and more than 200 customers use its hosted and on-premises e-recruitment solutions. The company also has other Web-related businesses. The SaaS solution is built on a Java and IBM WebSphere stack/Oracle WebLogic. Large, multinational organizations with complex, customized processes should assess netMEDIA.

Strengths

- Its solutions have strong workflow.
- The company has demonstrated good capability to handle complex organization structures and global requirements.
- Its deep ERP and core HRMS integration is a differentiator.
- It has rich internal mobility capability.

Cautions

- It is not well-known in the U.S., so marketing and sales capability lags that of other players; however, netMEDIA is moving its headquarters to New York, so this may change.
- It has limited references, although the references we surveyed were positive.
- It has limited social-software capabilities.
- It needs to balance its newer, SaaS-based offerings with the demands of traditional customized solutions.

Neogov

Founded in 1999, Neogov is headquartered in El Segundo, California. It is privately held and has 450 customers, all of which are in the U.S. public sector. It is growing rapidly. Its solution is delivered via SaaS and built with ASP/.NET (C#), ColdFusion, Microsoft SQL Server 2008 and Silverlight. Neogov is the dominant player in the U.S. public sector market, and has deep functionality and services focused on the needs of that sector. Neogov is expanding into federal government and higher education, and it has increased product scope to include broader talent management capabilities.

Strengths

- Neogov has an in-depth knowledge and focus on the U.S. public sector (especially state and local governments). Its product and service/support capabilities are geared toward customer needs in this vertical market.

- It has strong candidate assessment capabilities and workflow.
- Customer references gave positive scores to Neogov, continuing to score implementation and post-implementation support as best-in-class.

Cautions

- The product is not well-suited for implementation outside the U.S.
- The product is not designed for private sector deployment.

Oracle-PeopleSoft

Oracle completed its acquisition of PeopleSoft in January 2005. PeopleSoft's HCM suite includes core HRMS functionality, along with integrated talent management (including e-recruitment) applications. PeopleSoft 9.0 is built using PeopleTools, runs on several Java EE applications servers (Oracle WebLogic, IBM WebSphere and Oracle Fusion Middleware) and databases (Oracle, SQL Server and DB2). PeopleSoft applications are primarily offered by Oracle through a perpetual license, and can be implemented on-premises or hosted by Oracle (or a third-party partner). PeopleSoft 9.1 has just become generally available (for new customers), but was not evaluated for this Magic Quadrant. It includes additional flexibility for candidate screening, better Outlook integration for interview scheduling, and an improved recruiting dashboard and key performance indicators.

Strengths

- Oracle-PeopleSoft has a large installed base for HRMS solutions. Customers cite integration of PeopleSoft Recruiting Solutions with Oracle's PeopleSoft Enterprise HCM as a key reason for adoption.
- Built on the same technology foundation as the rest of the Oracle-PeopleSoft product line, PeopleSoft Enterprise has good scalability and support for multiple languages and currencies.
- Oracle-PeopleSoft has strong product and content alliances.
- PeopleSoft Recruiting Solutions v.9 has improved integration with other talent management applications through the Profile Manager functionality.
- PeopleSoft Recruiting Solutions v.9 has strong support for mass actions and improved functionality for candidate relationship management.

Cautions

- Customer feedback was mixed. Customers indicated that there are still UI challenges. In addition, they would like Oracle to deliver enhancements faster; several noted that they end up doing customizations to fill these gaps.

- PeopleSoft Recruiting Solutions has standard support for most functional requirements, but lacks depth, compared with other solutions, in such areas as candidate workflow and onboarding.

Oracle E-Business Suite

Founded in 1977, Oracle is publicly traded, with headquarters in Redwood Shores, California. Oracle offers a broad array of applications, as well as middleware and database technologies. Oracle E-Business Suite (EBS) is a comprehensive HCM suite that includes integrated talent management, including e-recruitment applications. Oracle EBS R12.1 is built using a combination of Oracle Forms, an HTML framework and Java EE architecture. Oracle offers EBS through a perpetual license. Customers can choose to implement on-premises, or have Oracle host the application (almost all customers have chosen the on-premises option). Multinational organizations that want to purchase a core HRMS with integrated recruitment functionality should consider Oracle EBS.

Strengths

- Oracle has a large installed base for HRMS solutions. Customers cite integration with EBS HRMS as a key reason for adoption.
- EBS HRMS is built on the same technology foundation as the rest of the Oracle EBS product, which has good scalability and support for multiple languages and currencies.
- It maintains strong product and content alliances.
- Oracle EBS iRecruitment has strong support for requisition functionality, especially its use of Flexfields to provide flexible definitions of requisition data.

Cautions

- References were mixed — some cited resource challenges and product complexity; others were happy with the solution.
- EBS iRecruitment 12.1 has significant improvements in functionality and usability, but because it is new, there are few references.

PageUp People

PageUp People, founded in 1997, is privately held, and headquartered in Melbourne, Australia. It also has offices in Sydney, London, Shanghai and New York. It has slightly more than 100 customers, most of which are Australian-based multinationals. PageUp People offers a talent management suite, but it began in the e-recruitment space, which is where it is strongest. Its solutions are delivered via SaaS, and built with Microsoft .NET technologies. PageUp People has begun to expand globally, targeting the U.K. and the U.S. It is well-suited to multinational organizations with a strong presence in the APAC region.

Strengths

- PageUp People has a strong position in the local Australian market, and with Australian-headquartered multinationals.
- It has excellent competency modeling and content.
- Its service offering is sophisticated, going beyond technical implementation into more-strategic HR services, such as job design.
- Although most customer feedback was positive, some customers expressed concern about the impact of the expansion on service capability.

Cautions

- It is a relatively small player, and it is looking to grow from its predominately Australian base to compete globally. This will not be easy, as it faces significant competition.
- Its brand has limited recognition outside Australian multinationals and the global mining industry.

PeopleAdmin

Founded in 2000, PeopleAdmin is privately held, and headquartered in Austin, Texas. It has more than 500 customers. PeopleAdmin works exclusively with public-sector institutions, including higher education, government agencies and nonprofit organizations in the U.S. PeopleAdmin also offers position management and performance management. PeopleAdmin is delivered via SaaS only. The latest version (v.5.8) is built with Java on a SQL Server database. The solution is especially well-suited to the higher education market in the U.S., where PeopleAdmin is the clear market leader.

Strengths

- It is the clear market leader for the higher education market in the U.S.
- PeopleAdmin offers deep vertical functionality, especially for tracking compliance with antidiscrimination policies and laws.
- The company has positive feedback from its core customer base, because of service and functionality coverage.

Cautions

- Its lack of global capabilities mean that the solution can only be deployed in the U.S., although the company has plans to globalize during the next two years.
- It is not as strong in the broader public sector as it is in higher education.
- It lacks functionality to support passive candidate recruiting and social-software integration.

Peopleclick

Peopleclick, founded in 1997, is privately held, and headquartered in Raleigh, North Carolina. It also has offices in London, Brussels and Japan, and a network of distributors. It has more than 200 customers using its e-recruitment product. Peopleclick has strong U.S. compliance capabilities, and good consulting services. Peopleclick RMS is currently on release v.4.9, and it is a SaaS solution, with a dual platform, using .NET for their corporate-facing applications and Java for candidate-facing applications. Peopleclick is well-suited for complex, multinational corporations.

Strengths

- It has strong overall functionality, and is well-suited for large, multinational deployments.
- It has leading social-software capabilities.
- It can handle hourly and salaried recruitment, and has especially strong references in retail.
- Peopleclick has good customer reference feedback. Customers cited strong implementation teams from Peopleclick as a key success factor.

Cautions

- Although it has strong global functionality, it has only recently expanded its global sales and support. It will open a European data center later this year.
- Because it only focuses on talent acquisition, customers looking for a broader suite will need to look elsewhere.

SAP

SAP was founded in 1972 and is headquartered in Walldorf, Germany. It is listed on the Frankfurt and New York exchanges. SAP ERP HCM 6.0, Enhancement Package 4, offers e-recruitment as part of a comprehensive HCM application suite. The solution is offered on-premises, but hosting options are available through third-party providers. The solution is best-suited to large, global companies that make extensive use of SAP ERP HCM functionality.

Strengths

- SAP has a large installed base for HRMS solutions. Customers cite integration of e-recruitment with the HRMS as a key reason for adoption.
- Process definition and tracking functionality are strong for requisitions and applicant tracking.
- The solution is built on the same technology foundation as the rest of SAP ERP, which has good scalability and support for multiple languages and currencies. It has good multinational capabilities, including support for multilingual job postings.

- Its talent warehouse provides a good foundation for managing candidate pools (internal and external to user companies).
- It provides integration with Adobe Forms — for example, for a hiring manager creating a requisition.

Cautions

- Customer feedback remains mixed, with the newer versions receiving better feedback.
- Some customers cite that configuration was complex, requiring strong partner skills to optimize the solution.
- Given SAP's size, the number of global rollouts is relatively limited.

SilkRoad technology

Founded in 2003, SilkRoad technology is a privately held vendor headquartered in Winston-Salem, North Carolina. The company has more than 200 employees and, in May 2008, raised more than \$54 million to fund global expansion. It has more than 600 customers for its OpenHire e-recruitment product. It began as a content management vendor, then grew into e-recruiting (via an acquisition). It has since expanded into the broader talent management space. It is a SaaS solution, built using the Microsoft .NET platform. Midsize-to-large, U.S.-based organizations should consider OpenHire for e-recruitment.

Strengths

- Customer feedback and our evaluation indicated that OpenHire is cost-effective and easy to set up and use.
- Its onboarding module, RedCarpet, has best-in-class functionality.
- Integrated job board posting can be done to more than 1,800 job boards with no additional fees.
- Strong sales momentum during the past year.

Cautions

- Customers like its ease of use; however, in some cases, they would like more configurability of the UI for recruiters and candidates.
- OpenHire is positioned as a cross-industry solution for midsize-to-large enterprises. It is not as well-suited as others for multinational implementations. SilkRoad has limited global service and support infrastructure, but is expanding its coverage and functionality.
- Its vertical market strategy is not as well-developed as those of other vendors.

StepStone

StepStone was founded in 1996 and is headquartered in Guildford, U.K. It is listed on the London and Oslo exchanges, and it has offices in 24 locations. The company has 1,200 e-recruitment customers, of which more than 300 are on the i-GRasp solution (evaluated in this research). StepStone also runs one of Europe's leading job boards. Its recruitment solutions are delivered via SaaS. The solution is built predominately with Microsoft ASP technologies. It is also one of leading vendors in the broader talent management space. StepStone is well-suited for organizations with complex global recruitment requirements, because it has flexible workflow, good configurability and global coverage.

Strengths

- StepStone's strong European presence leverages the job board and the broader talent management strengths.
- It has flexible workflow and candidate experience.
- The company offers excellent global functionality, as well as strong global support and sales network.
- Business continues to grow at more than 30% from a strong base.

Cautions

- StepStone has a presence in the U.S., but it is relatively limited, compared with its global competitors. StepStone has increased its investment in the U.S.
- Customer feedback was mixed, with some customers reporting support issues. However, StepStone has made significant investments in support, doubling its support organization by year-end 2009.

Taleo

Founded in 1999, Taleo is publicly traded and headquartered in Dublin, California. In July 2008, Taleo closed on its acquisition of Vurv Technology. Vurv had its own e-recruitment solution and a considerable customer base. Taleo is not selling the Vurv solution at this point (it is continuing to provide support to those customers and aggressively moving them to the Taleo platform). In addition, Taleo has a broader suite of talent management applications, including performance and succession management and compensation (through its WorldWide Compensation acquisition). All Taleo Enterprise solutions are built on the Java EE platform and available via a SaaS model. Taleo also offers its Business Edition as a separate solution that typically serves customers with fewer than 5,000 employees. Taleo Recruiting is best-suited to global organizations that require a flexible configuration and strong reporting/analytics.

Strengths

- Customers indicated that it has flexible workflow and strong configurability of requisition and candidate data. This was one of the main drivers for customer selection.
- Taleo Enterprise has strong functionality across the board, but is notable in its support for candidate sourcing (for example, events, career fairs, campus hiring and agencies), as well as analytics (role-based dashboards with configurable metrics).
- Customers provided positive feedback on ongoing efforts to help them leverage best practices after implementation.
- System performance and scalability are strong.

Cautions

- Customers gave Taleo high marks overall on service and support; however, as Taleo has grown, it has had difficulty scaling its account manager resources.
- Prospective customers should vet their proposed account manager to ensure that the company has appropriate experience and is not stretched too thin.

WCN

WCN was founded in 1995. It is headquartered in London and publicly traded. It has 200 customers, predominately based in the U.K. Its solutions are delivered via SaaS, and are focused on recruitment. The solution is built on open-source technologies (LAMP). WCN is well-suited to U.K.-based organizations, either with or without international operations, and its graduate recruitment capabilities are particularly strong.

Strengths

- Best-in-class campaign, campus/graduate recruitment and agency functionality.
- Solid U.K.-based private-sector and leading public-sector client base.
- Delivers high levels of service and customer focus.
- Modern architecture built on the open-source LAMP stack.

Cautions

- Relatively small, its limited sales presence outside of the U.K. means it is growing more slowly than the leading vendors.
- Although the product is “global ready,” outside of global campus/graduate solutions, it lacks the depth of global functionality of its leading global competitors.

WebCruiter

WebCruiter was founded in 2003. It is based in Oslo, Norway, and is privately funded. It has 250 customers, which are largely headquartered in the Nordic region. WebCruiter is focused on recruitment. The solution was developed using Microsoft .NET technology and is delivered via SaaS. The solution is well-suited to Nordic-based organizations that operate globally and locally.

Strengths

- The company has strong local knowledge in the private and public sector.
- Customers rate WebCruiter easy to use, with good local support and partners.
- WebCruiter is growing at more than 45% per year.
- It makes strong use of Web services for integration with core HR and competency management solutions.

Cautions

- Functionality breadth is not as deep as many vendors — for instance, it lacks referral and social software integration in this release.
- Because of its small size, it has limited development resources, compared with its competitors.

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services, and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.