



Everest Group PEAK Matrix[®] for RPO in North America Service Providers 2020

Focus on PeopleScout
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Background and methodology of the research

Background of the research

The RPO market in North America witnessed a double-digit growth rate in 2019. It is one of the most mature and intensely competitive RPO markets globally, with significant presence of all major global and regional service providers. Service providers are constantly differentiating themselves by investing in upgrading technology capabilities, expanding value-added and consulting offering, providing a customized value proposition to buyers of all sizes, and catering to clients from upcoming industries. This report examines the dynamics of the RPO service provider landscape in North America and its impact on the North American RPO market. It gives an overview of the market and analyzes the areas where service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, all the 30 RPO service providers in North America are segmented into Leaders, Major Contenders, and Aspirants.

In this research, we focus on:

- Everest Group's Services PEAK Matrix® evaluation, a comprehensive assessment of 30 RPO service providers in North America
 - 2020 North America RPO PEAK Matrix® and Star Performers
 - Service provider delivery capability assessment in North America
- Remarks on key strengths and areas of improvement for each RPO service provider
- Service provider landscape in North America

The scope and methodology of this report includes:



Services: Recruitment
Process Outsourcing



Geography scope:
North America



Coverage¹: Across 30 RPO service providers in North America with multi-process capability including ACA Talent, ADP RPO, Advantage xPO, AgileOne, Alexander Mann Solutions, Allegis Global Solutions, AMN Healthcare, Cielo, Endevis, Engage2Excel, Hire Velocity, Hudson RPO, Hueman RPO, IBM TAO, KellyOCG, KinetixHR, Korn Ferry RPO, LevelUP, Newton Talent, Orion Novotus, PeopleScout, Personify, Pierpoint, Pontoon, PrincetonOne, Randstad Sourceright, Sevenstep, Talent Solutions RPO (ManpowerGroup), WilsonHCG, and Yoh

¹ While we considered a much bigger list of RPO providers, these 30 RPO providers are shortlisted based on their presence and meaningful play in the North America RPO space

Introduction and scope

Everest Group recently released its report titled “[Recruitment Process Outsourcing \(RPO\) in North America – Service Provider Landscape with Services PEAK Matrix® Assessment 2020.](#)” This report analyzes the changing dynamics of the RPO landscape in North America and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 30 service providers on the Everest Group PEAK Matrix™ for RPO in North America into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of RPO in North America service providers based on their absolute market success and delivery capability.

Based on the analysis, **PeopleScout emerged as a Leader**. This document focuses on **PeopleScout’s** RPO experience and capabilities in North America and includes:

- PeopleScout’s position on the RPO in North America PEAK Matrix
- PeopleScout’s year-on-year movement on the RPO in North America PEAK Matrix
- Detailed RPO in North America profile of PeopleScout

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers’ relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

RPO in North America PEAK Matrix® 2020 – summary

- Everest Group's PEAK Matrix® categorizes RPO service providers in North America into Leaders, Major Contenders, and Aspirants, based on their market success and overall RPO delivery capability
- Based on Everest Group's 2020 North America RPO PEAK Matrix®, the 30 established RPO service providers evaluated in North America are segmented into three categories (in alphabetical order within each category):

Leaders:

ADP RPO, Allegis Global Solutions, Cielo, PeopleScout, Randstad Sourceright, Talent Solutions RPO (ManpowerGroup), and WilsonHCG

Major Contenders:

AgileOne, Alexander Mann Solutions, AMN Healthcare, Engage2Excel, Hire Velocity, IBM Talent Acquisition Optimization (IBM TAO), KellyOCG, Korn Ferry RPO, LevelUP HCS, Orion Novotus, Pierpoint, Pontoon Solutions, Sevenstep, and Yoh

Aspirants:

ACA Talent, Advantage xPO, Endevis, Hueman RPO, Hudson RPO, KinetixHR, Newton Talent, Personify, and PrincetonOne

Star Performers¹:

IBM Talent Acquisition Optimization (IBM TAO), Orion Novotus, Sevenstep, and WilsonHCG

¹ Everest Group selected RPO Star Performers based on the relative year-over-year movement of each service provider on the PEAK Matrix®. The "Star Performer" title relates to the strongest performance in a calendar year and does not reflect the overall market leadership position. Those identified as Star Performers may include Leaders, Major Contenders, or Aspirants

Everest Group PEAK Matrix®

Recruitment Process Outsourcing (RPO) in North America with Services PEAK Matrix® Assessment 2020 | PeopleScout positioned as Leader



Everest Group Recruitment Process Outsourcing (RPO) in North America with Services PEAK Matrix® Assessment 2020



Note 1: Service providers scored using Everest Group's proprietary scoring methodology given on page 24

Note 2: Assessment for AgileOne, Hire Velocity, LevelUP HCS, Pierpoint, and Orion Novotus among Major Contenders and all Aspirants excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with RPO buyers. For these companies, Everest Group's data for assessment may be less complete

Source: Inputs from market players, recruitment firms, and investment agencies

PeopleScout | RPO in North America profile (page 1 of 3)

Service capability and strategy

Company profile: PeopleScout is a global RPO provider, managing talent solutions that span the global economy, with end-to-end MSP and talent advisory capabilities supporting total workforce needs. Affinix™, PeopleScout's proprietary talent acquisition platform, empowers faster engagement with the best talent through an AI-driven, consumer-like candidate experience, with one-point ATS and VMS integration and a single sign-on. The company enhances talent intelligence for clients across 70+ countries with headquarters in Chicago, Sydney, and London, and global delivery centers in Charlotte, Toronto, Montreal, Bristol, Krakow, Gurgaon, and Bangalore.

Headquarters: Chicago, Illinois, United States

Leadership: Chip Holmes, Interim President

Website: www.peoplescout.com

Partnership

- RPO service provider: None
- HRO service provider: None
- MSP service provider: None

Recent RPO-related developments/announcements

- 2019: Expanded India delivery center with a capacity of 1,000 employees
- 2019: Introduced Affinix™ Talent Technology as part of its solution offering in Europe, to empower faster and more consumer-like candidate connections
- 2019: Launched Beyond the Expected™ Managed Service Provider (MSP) service approach that provides specialization, faster response times, an improved technology stack, and enhanced supplier engagement
- 2018: Acquired TMP Holdings Ltd. to expand global RPO delivery capabilities as well as Europe, Middle East, and Africa client base, team, and operations
- 2018: Expanded talent advisory offering with enhanced capabilities in employer branding, assessment services, recruitment marketing, and talent acquisition strategy

	Reporting	Descriptive	Predictive	Prescriptive
Analytics	✓	✓	✓	✓

	Robotic Process Automation	Artificial Intelligence / Machine Learning	Natural Language Processing
Automation	✓	✓	✓

North America	EMEA	Asia Pacific	South America
Not disclosed			
Total RPO delivery FTEs = 2,500+			
Total RPO technology FTEs = Not disclosed			

Technology capabilities within key RPO areas

Key RPO areas	Proprietary/partnership	Details
Employer branding	Both	Supported by proprietary platform Affinix, which deploys technology inclusive of a third-party CRM, in addition to an in-house talent advisory practice based in the UK
Talent communities	Both	Leverages Affinix ecosystem for candidate pipelining, mobile optimization, social media and job site distribution, search engine optimization, data and analytics, customized talent folders, automated email functionality, and online activity management
Workforce planning	Both	Supported by Affinix to deploy workforce planning projects and development of models for ongoing use
Sourcing	Both	Offers CRM, automated web sourcing via AI, video interviewing, automated email campaigns and assessments, and chatbot services through Affinix
Screening	Both	Supported by Affinix, which offers video interviewing, web assessments, text assessments, automated scoring functionality, and chatbot technology
Interview scheduling and coordination	Both	Uses proprietary platform Affinix and other (ATS) technology that is supported by various partners. Offers automated interview scheduling for clients
Assessment	Both	Affinix integrates with major assessment providers
Background checking	Both	Affinix integrates with background check providers
Onboarding	Both	Affinix leverages various technologies to deploy onboarding processes
Outplacement	Partnership	Supported by various outplacement partners










Key delivery locations



PeopleScout | RPO in North America profile (page 3 of 3)

Everest Group assessment – Leader

Measure of capability:  High  Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- PeopleScout, a TrueBlue company, is a global provider of specialized workforce solutions. PeopleScout acquired the RPO business of Aon Hewitt in 2016, which resulted in it becoming one of the largest entities (by hires managed) in the global RPO market and the largest entity in the North American RPO market
- Its recent acquisition of TMP Holdings LTD (TMP) strengthened its European (particularly UK) presence and has helped grow its share in multi-country RPO deals covering North America and the UK / rest of EMEA, giving it a chance to expand with its existing North American client base to the UK along with other countries where it has good presence
- PeopleScout has been very proactively strengthening its presence in fast-growing industry verticals in North America such as retail and healthcare, along with developing capacities in serving clients from new industries such as government/public sector, media, and energy & utilities
- It has its own end-to-end talent technology platform “Affinix™” integrated with many third-party technologies
 - It supports a host of features, some of which are video interviews, text-to-interview, candidate self-scheduling, talent community management, and stakeholder experience measurement
 - Its “Talent Mapping” feature utilizes AI sourcing, enabling hiring managers to find profiles of candidates available on the web for a particular job title or role
 - It also has predictive and prescriptive analytics capabilities embedded in its Affinix™ platform, with automated generation of actionable insights for the recruiting team manager
- Referenced clients pointed out responsiveness, access to resources, and technology & reporting as the key strengths of PeopleScout

Areas of improvement

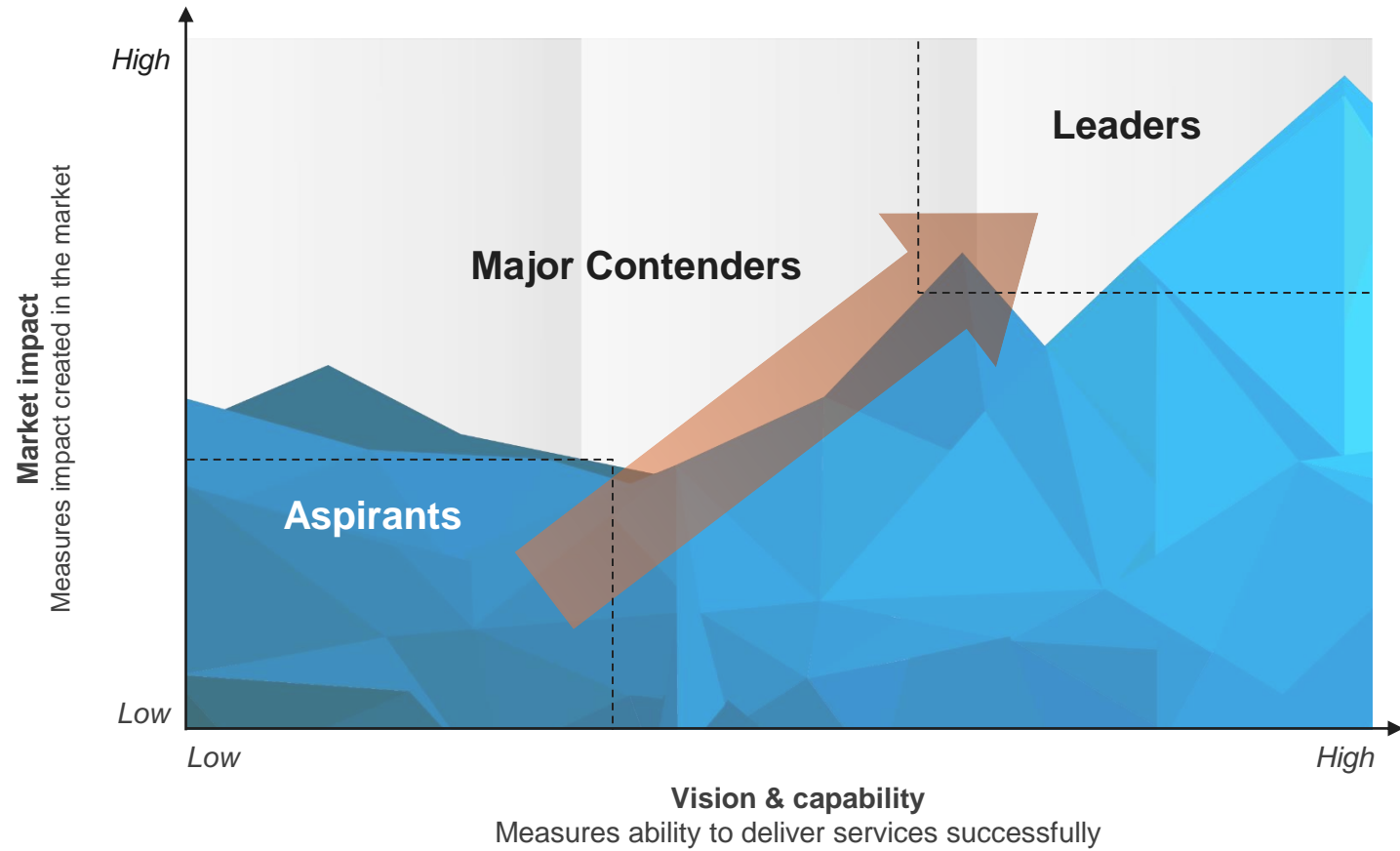
- It recently merged the MSP services arm of its sister company with itself, granting it the requisite capability to offer Total Talent Acquisition (TTA) solutions, and realigned its organizational structure for better delivery of TTA solutions; however, it is still gaining experience in terms of offering holistic TTA solutions to its clients
- PeopleScout excels when it comes to delivering core RPO services across geographies. Its recent acquisition of TMP Holdings LTD (TMP) provides it access to value-added services such as employer branding; however, its capabilities are the strongest in the UK while it is still building on these capabilities in other regions including North America
- Referenced clients felt that PeopleScout has scope to bring in additional strategic aspects (such as value-added and consulting services) into the arrangement above and beyond the transactional aspects
- Referenced clients also felt that the company can further improve the consistency of the quality and delivery of its services

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



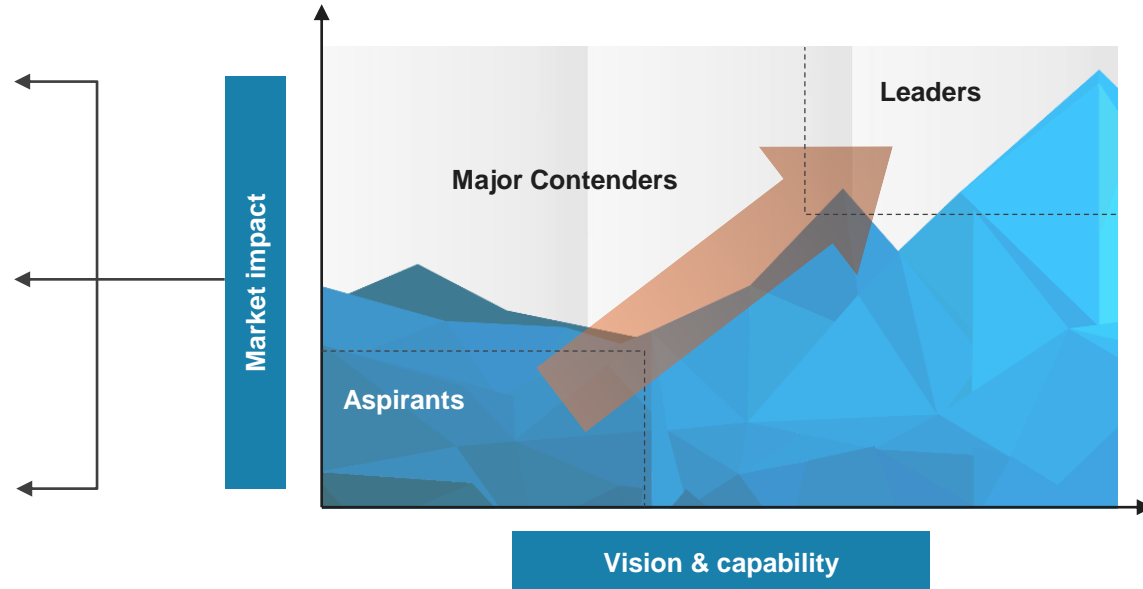
Everest Group PEAK Matrix®



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
No. of clients, revenue base, and YOY growth, deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geos and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



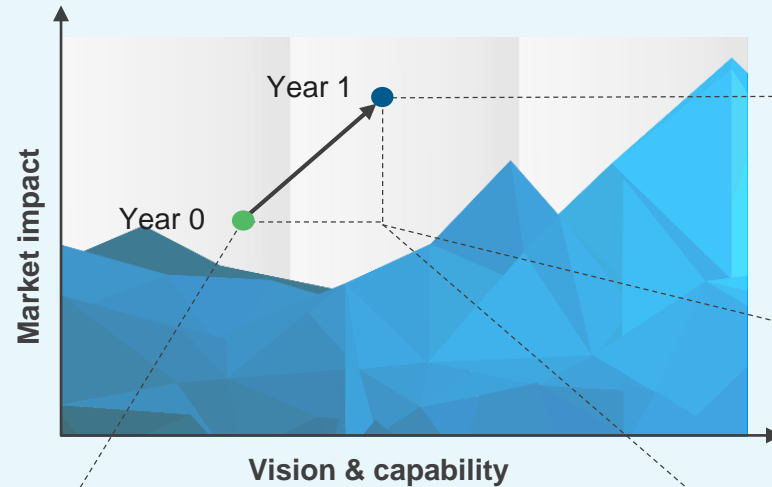
Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service sub-segments / processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YOY improvement on the PEAK Matrix®



In order to assess advances on **market impact**, we evaluate each service provider's performance across a number of parameters including:

- Yearly ACV/YOY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each service provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain-specific investments

We identify the service providers whose improvement ranks in the top quartile and award the Star Performer rating to those service providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

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