

# Vendor Management System (VMS) PEAK Matrix® Assessment with Technology Vendor Landscape 2022

May 2022



# Our research offerings

This report is included in the following research program(s):

## Contingent Workforce Management (CWM)

- |   |   |  |
|---|---|--|
| ▶ Application Services                                  | ▶ Finance and Accounting                              | ▶ Multi-country Payroll  |
| ▶ Banking and Financial Services Business Process       | ▶ Financial Services Technology (FinTech)             | ▶ Network Services and 5G  |
| ▶ Banking and Financial Services Information Technology | ▶ Global Business Services                            | ▶ Outsourcing Excellence   |
| ▶ Catalyst™   | ▶ Healthcare Business Process                         | ▶ Pricing-as-a-Service   |
| ▶ Clinical Development Technology                       | ▶ Healthcare Information Technology                   | ▶ Process Mining   |
| ▶ Cloud and Infrastructure                              | ▶ Human Resources Outsourcing                         | ▶ Procurement  |
| ▶ Contingent Staffing                                   | ▶ Insurance Business Process                          | ▶ Recruitment  |
| ▶ Contingent Workforce Management                       | ▶ Insurance Information Technology                    | ▶ Retirements Technologies                                       |
| ▶ Conversational AI                                     | ▶ Insurance Technology (InsurTech)                    | ▶ Rewards and Recognition  |
| ▶ Customer Experience Management Services               | ▶ Insurance Third-Party Administration (TPA) Services | ▶ Service Optimization Technologies                              |
| ▶ Cybersecurity   | ▶ Intelligent Document Processing (IDP)               | ▶ Software Product Engineering Services                          |
| ▶ Data and Analytics                                    | ▶ Interactive Experience (IX) Services                | ▶ Supply Chain Management (SCM) Services                         |
| ▶ Digital Adoption Platforms (DAP)                      | ▶ IT Services Executive Insights™                     | ▶ Sustainability Technology and Services                         |
| ▶ Digital Engineering Services                          | ▶ Life Sciences Business Process                      | ▶ Talent Excellence GBS  |
| ▶ Digital Services                                      | ▶ Life Sciences Information Technology                | ▶ Talent Excellence ITS  |
| ▶ Digital Workplace                                     | ▶ Locations Insider™                                  | ▶ Technology Skills and Talent                                   |
| ▶ Employee Experience Management (EXM) Platforms        | ▶ Marketing Services                                  | ▶ Trust and Safety   |
| ▶ Engineering Services                                  | ▶ Market Vista™                                       | ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM) |
| ▶ Enterprise Platform Services                          | ▶ Mortgage Operations                                 |  |

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Locations: costs, skills, sustainability, portfolios

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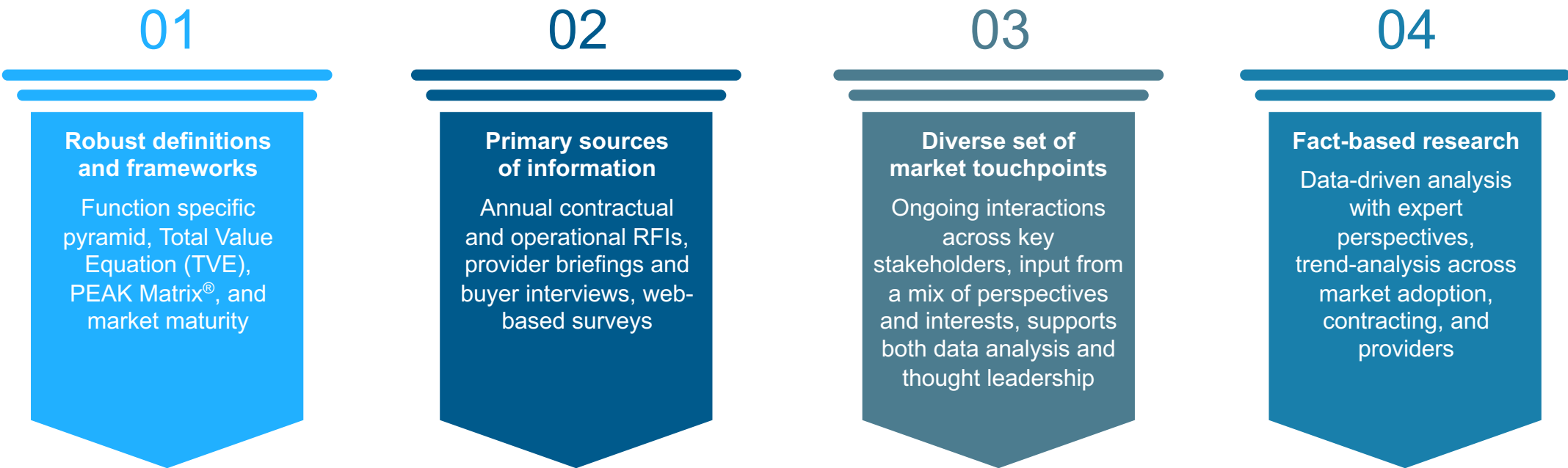
# 01

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## Introduction and overview

- Research Methodology
- Background and scope of the research
- Understanding Vendor Management System (VMS)
- Source of information

# Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry



Proprietary database on Vendor Management System (VMS) capabilities of 21 technology vendors

Repository of existing research in VMS

Dedicated team for VMS and Contingent Workforce Management (CWM) research

Executive-level relationships with buyers, service providers, technology providers, and industry associations



# Background of the research

## Background of the research

Vendor Management System (VMS) continues to be an important technology solution for enterprises across the globe. There is wide adoption across industries and geographies, as more enterprises are leveraging contingent workers as a part of their workforce and are highlighting the need for a technology solution to manage the entire contingent workforce management life cycle. In recent years, VMSs have not only enhanced the features and functionalities of core technology but have also expanded the scope of services delivered to other areas within Contingent Workforce Management (CWM). The increasing scope of services has led to an evolution in the vendor landscape, with many technology vendors building capabilities to cater to specialized client needs across geographies and industries.

The VMS technology landscape is evolving, with providers increasing the breadth and depth of their functionalities/offerings. They are investing to enhance the User Interface / User Experience (UI/UX) of the solution and providing a mobile-enabled solution for their clients. They are building additional capabilities to enhance compliance management, talent pool creation, and vendor and candidate sourcing. It is a burgeoning market, rapidly evolving in terms of product features, deployment options, product architecture, training & support, and a partner ecosystem.

## In this study, we analyze the VMS technology landscape across various dimensions:

- Everest Group’s PEAK Matrix® evaluation, a comparative assessment of 21 leading VMS technology vendors
- Competitive landscape in the VMS technology vendor market
- Remarks on key strengths and areas of improvement for each VMS technology vendor
- Assessment of VMS capabilities

## Scope of this report



**Products**  
Vendor Management  
System (VMS)



**Geography**  
Global

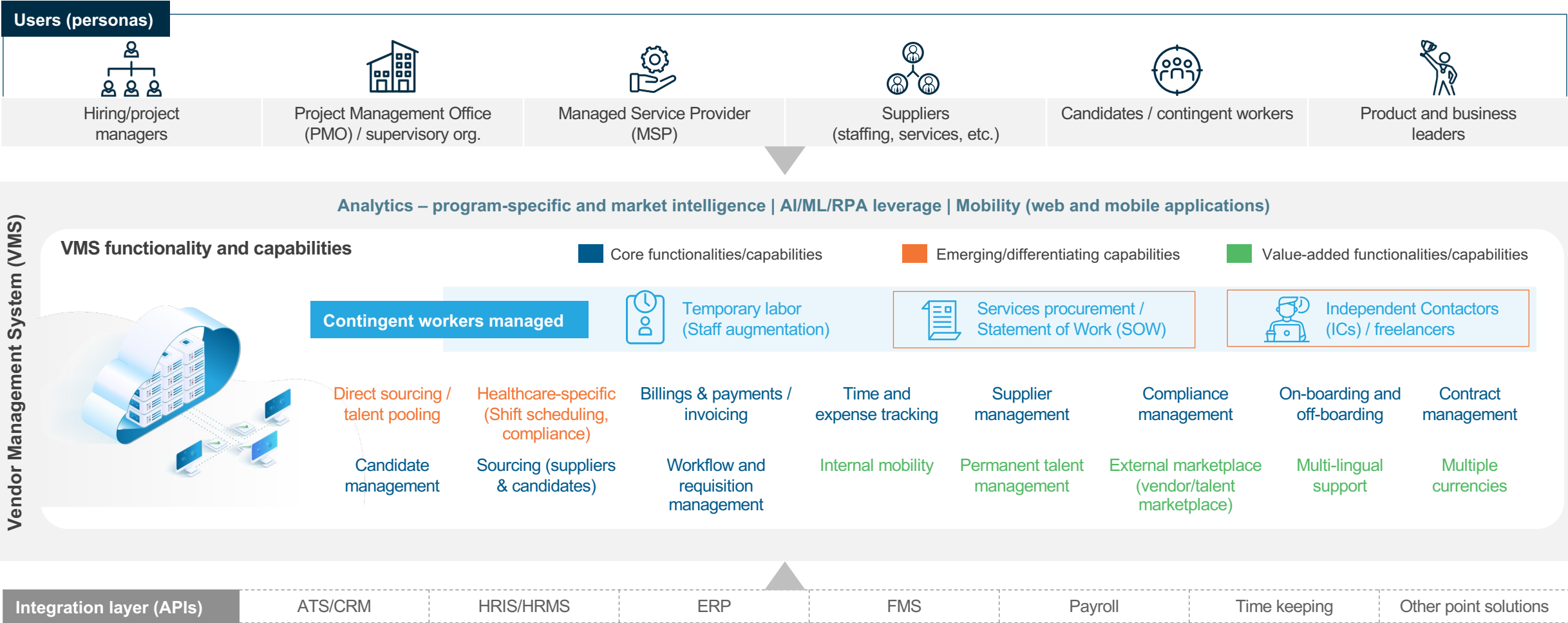


**Technology vendors**  
21 leading VMS  
technology vendors

# Understanding Vendor Management System (VMS)

Vendor Management System (VMS) is the core technology for procuring and managing contingent work

ILLUSTRATIVE



Note: The above is a schematic representation of all existing and emerging functionalities/capabilities of VMSs. It is important to note that the focus of VMSs can include all/specific elements within the above listed elements



# Everest Group’s VMS research is based on multiple sources of proprietary information

### Proprietary database of 21 VMS technology vendors

- The database tracks the following elements for each vendor:
  - Breadth and depth of the product functionalities
  - Core and emerging technology capabilities
  - Innovation and investments
  - Partnerships with service providers and other technology vendors
  - Deployment and hosting options
  - Product-related training and support services
  - Availability and adoption of commercial model(s)
  - Security and governance

### Proprietary operational information database of technology vendors (updated annually)

- The database tracks the following operational information for each vendor:
  - Spend Under Management (SUM) and revenue
  - Number of clients
  - Number of FTEs and FTE split by geography
  - Portfolio coverage in terms of industry, geography, process areas, and buyer size

### Demonstrations and interactions with technology vendors and other industry stakeholders

- Detailed demos for a comprehensive product view and executive-level discussions with VMS vendors that cover:
  - Current state of the market
  - Vision and strategy
  - Annual performance and outlook
  - Opportunities and challenges
  - Emerging areas of investment

### Buyer reference interviews, ongoing buyer surveys, and interactions

- Interviews with technology vendors’ reference clients and enterprise VMS buyers to get the buyer perspective around:
  - Drivers and objectives for adopting VMS
  - Apprehensions and challenges
  - Assessment of vendors’ performance
  - Emerging priorities / buying criteria
  - Outcomes achieved
  - Lessons learned and best practices adopted

### VMSs assessed<sup>1</sup>



<sup>1</sup> In this study, we have assessed vendors’ offerings / product capabilities as of 2021.

Note 1: Connecting-expertise was acquired by Pixid Group in December 2020; however, it continues to operate as a separate company / WorkSuite was formerly called Shortlist (the company has undergone rebranding recently).

Note 2: The source of all content is Everest Group unless otherwise specified.

Note 3: Workforce Logiq was acquired by PRO Unlimited in October 2021.

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion.

# 02

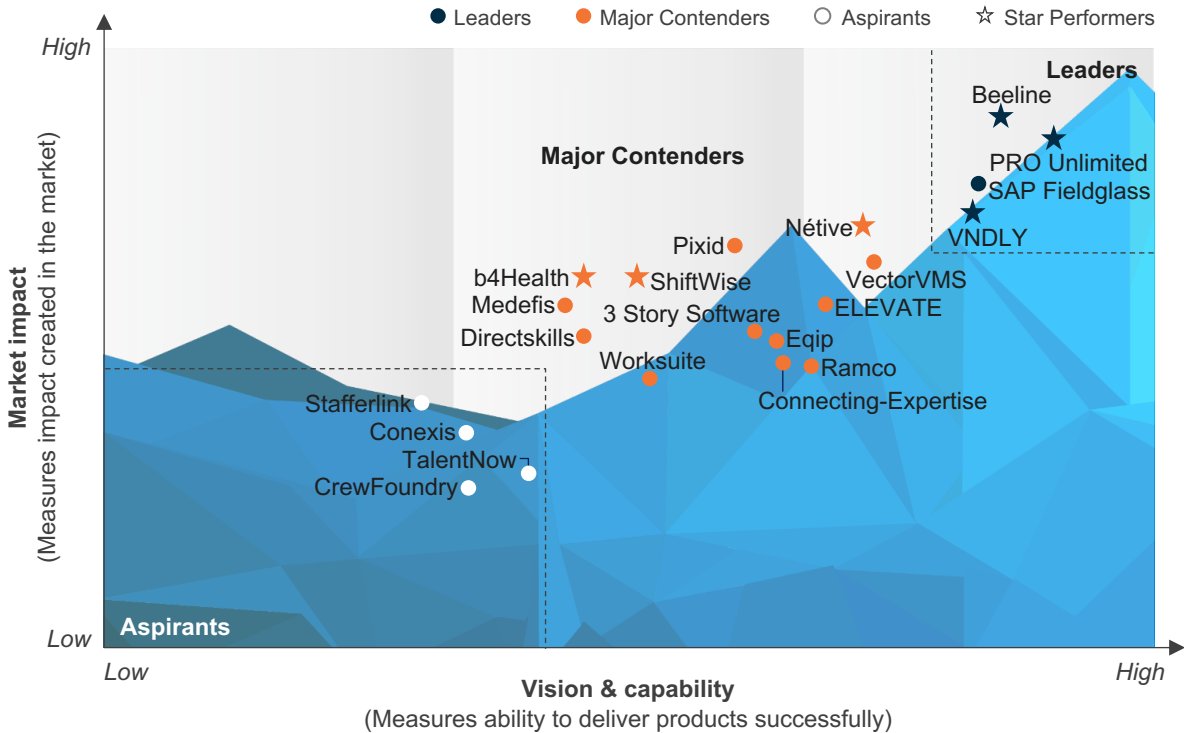
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## Summary of key messages

## Summary of key messages

- The Products PEAK Matrix® is a proprietary framework used to assess the market impact and overall vision & capability of technology vendors
- Everest Group classifies 21 VMS technology vendors on the Everest Group Products PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants (arranged alphabetically below):
  - **Leaders:** Beeline, PRO Unlimited, SAP Fieldglass, and VNDLY
  - **Major Contenders:** 3 Story Software (3SS), b4Health, Connecting-Expertise, Directskills, ELEVATE, Equip, Medefis, Nétive, Pixid, Ramco, ShiftWise, VectorVMS, and Worksuite
  - **Aspirants:** Conexis, CrewFoundry, Stafferlink, and TalentNow
  - Everest Group also identified the following VMS providers as Star Performers based on their YOY movement on the PEAK Matrix® (in alphabetical order): b4Health, Beeline, Nétive, PRO Unlimited, ShiftWise, and VNDLY

Everest Group Vendor Management System (VMS) Products PEAK Matrix® Assessment 2022<sup>1,2,3</sup>



1 Assessment for WorkSuite among Major Contenders and all Aspirants (except Conexis) excludes provider inputs. The analysis for these providers is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with VMS buyers. For these companies, Everest Group's data for assessment may be less complete.

2 Connecting-Expertise was acquired by Pixid Group in December 2020; however, it continues to operate as a separate company / WorkSuite was formerly called Shortlist (the company has undergone rebranding recently).

3 Some of the other major VMS players such as Coupa, SimplifyVMS, and SmartERP are not positioned on the PEAK due to lack of tangible data on them.

Source: Everest Group (2022)

# 03

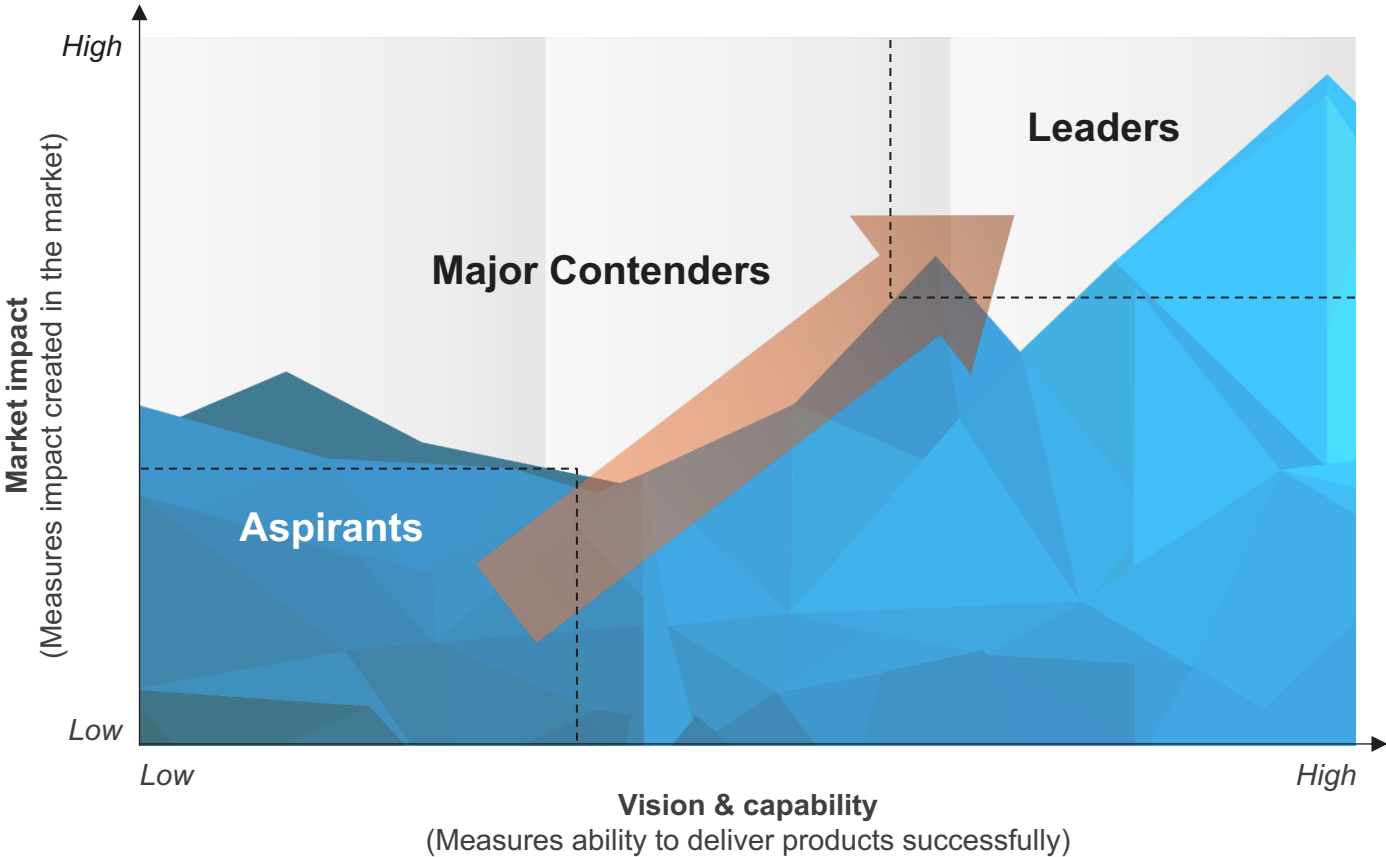
## VMS PEAK Matrix® characteristics

- PEAK Matrix framework
- Everest Group PEAK Matrix for VMS
- Star performers capability overview
- VMS provider capability summary dashboard

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



Everest Group PEAK Matrix



# Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

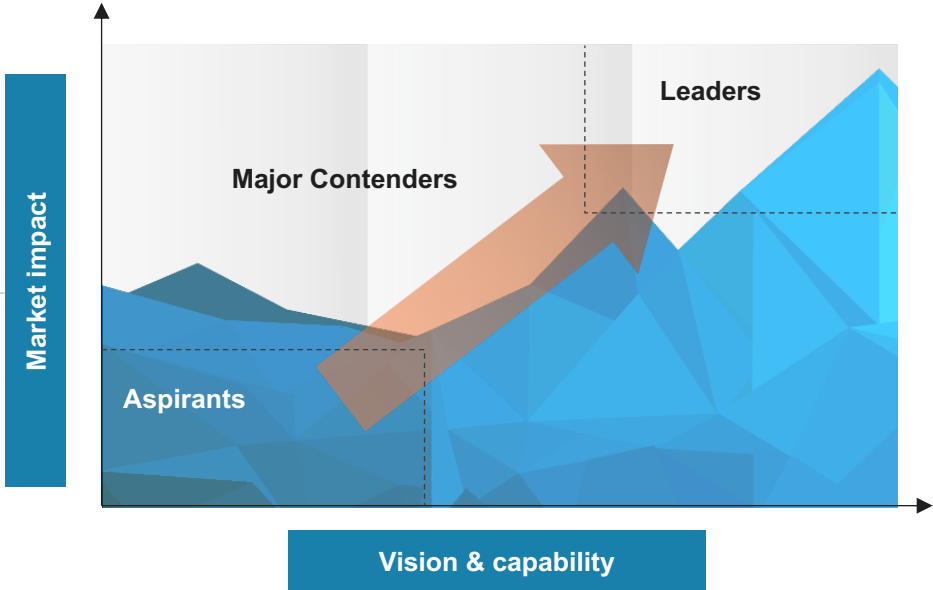
Number of clients, revenue base, and YOY growth

Portfolio mix

Diversity of client base across industries, geographies, environments, enterprise size class

Value delivered

Value delivered to the client based on customer feedback and other measures



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

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Core technology capability

Technical sophistication and breadth/depth across the technology suite

Emerging/differentiating capability

Capabilities related to emerging categories such as services procurement, independent contractor management, and healthcare

Implementation, UI/UX, and support

Configurability/customize-ability, hosting and tenancy, integration, training, and security; user interface, and user experience

Engagement and commercial model

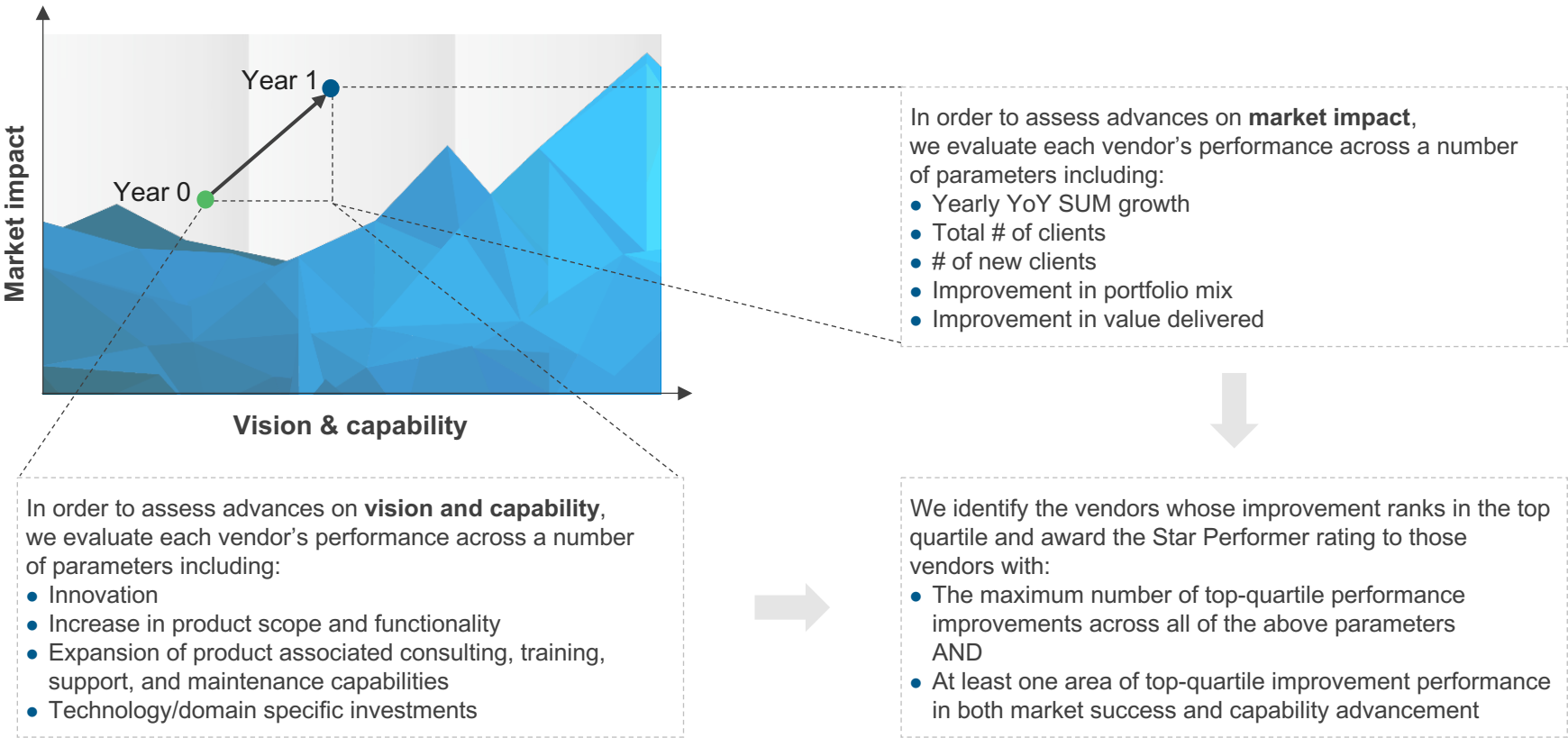
Progressiveness, effectiveness, and flexibility of engagement and commercial models



# 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



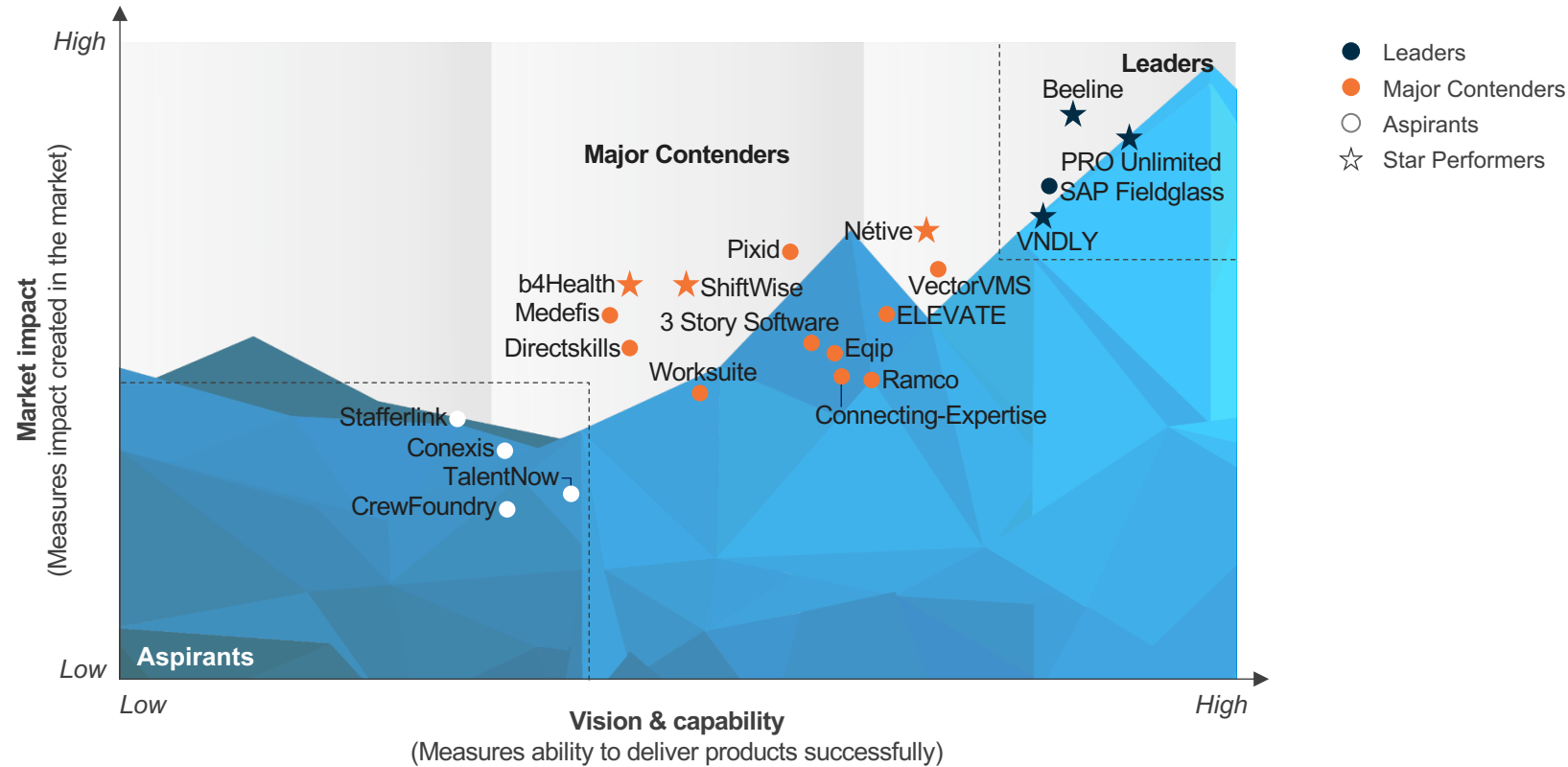
The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

# Everest Group PEAK Matrix®

## Vendor Management System (VMS) Products PEAK Matrix® Assessment 2022



Everest Group Vendor Management System (VMS) Products PEAK Matrix® Assessment 2022<sup>1,2,3</sup>






1 Assessment for WorkSuite among Major Contenders and all Aspirants (except Conexis) excludes provider inputs. The analysis for these providers is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with VMS buyers. For these companies, Everest Group's data for assessment may be less complete.

2 Connecting-Expertise was acquired by Pixid Group in December 2020; however, it continues to operate as a separate company / WorkSuite was formerly called Shortlist (the company has undergone rebranding recently).

3 Some of the other major VMS players such as Coupa, SimplifyVMS, and SmartERP are not positioned on the PEAK due to lack of tangible data on them.


Source: Everest Group (2022)

## Everest Group has identified six providers as the 2022 Star Performers (page 1 of 2)

VMS Star Performers	Distinguishing features of market impact in 2021	Distinguishing features of capability advancements in 2021	Change in PEAK Matrix® positioning for VMS
	<ul style="list-style-type: none"> <li>Displayed strong double-digit growth in spend under management (SUM) and number of new clients in 2021</li> <li>Displayed ability to deliver good value to clients, validated by positive buyer feedback</li> </ul>	<ul style="list-style-type: none"> <li>Made significant enhancements related to rate and order management</li> <li>Enhanced integration capabilities in the platform</li> </ul>	<b>Improved its positioning from Aspirants to Major Contenders</b>
	<ul style="list-style-type: none"> <li>Experienced strong double-digit growth in SUM in 2021</li> <li>Almost doubled the number of clients in the UK and Rest of EMEA regions</li> </ul>	<ul style="list-style-type: none"> <li>Acquired JoinedUp to cater to high volume as well as healthcare-specific job roles</li> <li>Developed a mobile-optimized user interface that supports features such as an AI-based resume visualizer</li> </ul>	<b>Strengthened its Leaders positioning</b>
	<ul style="list-style-type: none"> <li>Displayed good growth in SUM in 2021</li> <li>Achieved geographic expansion and secured new clients in regions beyond EMEA</li> <li>Improved client portfolio in industries such as retail and hi-tech &amp; telecom</li> </ul>	<ul style="list-style-type: none"> <li>Launched a new data exchange and integration platform called Nétive Connect</li> <li>Made major capability enhancements in candidate management process to focus on “skill-based hiring”</li> <li>Developed a two-way integration with a partner tool for blue collar planning and shift job requisition management</li> </ul>	<b>Strengthened its Major Contenders positioning</b>

Source: Everest Group (2022)

## Everest Group has identified six providers as the 2022 Star Performers (page 2 of 2)









































VMS Star Performers	Distinguishing features of market impact in 2021	Distinguishing features of capability advancements in 2021	Change in PEAK Matrix® positioning for VMS
	<ul style="list-style-type: none"> <li>Displayed strong double-digit growth in SUM and number of new clients in 2021</li> <li>Improved geographic diversification and gained significant number of clients in the EMEA region through the inorganic M&amp;A route</li> </ul>	<ul style="list-style-type: none"> <li>Strengthened its core offering and expanded its geographic presence by acquiring Workforce Logiq</li> <li>Improved its direct sourcing capabilities via acquisition of Willhire and partnership with Eightfold.ai</li> <li>Strengthened its advanced analytics capabilities through proprietary tools, Discovery and RatePoint</li> </ul>	<b>Strengthened its Leaders positioning</b>
	<ul style="list-style-type: none"> <li>Experienced strong double-digit growth in SUM in 2021</li> <li>Displayed success in larger deals with relatively more dynamic and complex requirements of healthcare providers</li> <li>Displayed ability to deliver good value to clients validated by positive buyer feedback</li> </ul>	<ul style="list-style-type: none"> <li>Introduced a dedicated mobile application, AMN Passport, especially designed for workers</li> <li>Developed a strong workforce planning and analytics dashboard to provide clients with total visibility and insights into their workforce</li> </ul>	<b>Strengthened its Major Contenders positioning</b>
	<ul style="list-style-type: none"> <li>Displayed strong double-digit growth in SUM and number of new clients in 2021</li> <li>Improved geographic diversification and gained new clients in the EMEA region</li> <li>Improved client portfolio in industries such as government &amp; public sector and professional services</li> </ul>	<ul style="list-style-type: none"> <li>Further deepened integrations with Workday and other suites to strengthen provisioning capabilities</li> <li>Made major improvements in its billing and payments functionalities</li> <li>Developed integrations with third-party direct sourcing platforms</li> </ul>	<b>Strengthened its Leaders positioning</b>

Source: Everest Group (2022)

# Summary dashboard | market impact and vision & capability assessment of providers for VMS 2022

## Leaders

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
Beeline										
PRO Unlimited										
SAP Fieldglass										
VNDLY										

Note 1: Service providers scored using Everest Group's proprietary scoring methodology given on page 14.

















































































Note 2: For a detailed VMS provider profile, please refer to the forthcoming VMS – Technology Vendor Profile Compendium 2022 report.

Note 2: Value delivered score impacted for service providers that did not provide adequate number of buyer references.

# Summary dashboard | market impact and vision & capability assessment of providers for VMS 2022

## Major Contenders (page 1 of 2)

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
3 Story Software (3SS)										
b4Health										
Connecting-Expertise										
Directskills										
ELEVATE										
Equip										
Medefis										
Nétive										

Note 1: Service providers scored using Everest Group's proprietary scoring methodology given on page 14.

Note 2: For a detailed VMS provider profile, please refer to the forthcoming VMS – Technology Vendor Profile Compendium 2022 report.



















































Note 2: Value delivered score impacted for service providers that did not provide adequate number of buyer references.



# Summary dashboard | market impact and vision & capability assessment of providers for VMS 2022

## Major Contenders (page 2 of 2)

Measure of capability:  Low  High









































Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
Pixid										
Ramco										
ShiftWise										
Vector VMS										
Worksuite										

Note 1: Service providers scored using Everest Group's proprietary scoring methodology given on page 14.  
Note 2: For a detailed VMS provider profile, please refer to the forthcoming VMS – Technology Vendor Profile Compendium 2022 report.  
Note 3: Value delivered score impacted for service providers that did not provide adequate number of buyer references.

# Summary dashboard | market impact and vision & capability assessment of providers for VMS 2022

## Aspirants

Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
Conexis										
CrewFoundry										
Stafferlink										
Talent Now										

Note 1: Service providers scored using Everest Group's proprietary scoring methodology given on page 14.  
Note 2: For a detailed VMS provider profile, please refer to the forthcoming VMS – Technology Vendor Profile Compendium 2022 report.  
Note 3: Value delivered score impacted for service providers that did not provide adequate number of buyer references.

# 04

## Competitor overview

- VMS provider landscape
- VMS landscape by geography
- Major VMS providers in key countries
- VMS capability overview
- VMS market share by Spend Under Management (SUM)
- VMS market share by industry
- VMS vendor capability by job type

## VMS provider landscape

A rapidly evolving provider landscape with varying provider value propositions and backgrounds is disrupting the VMS market

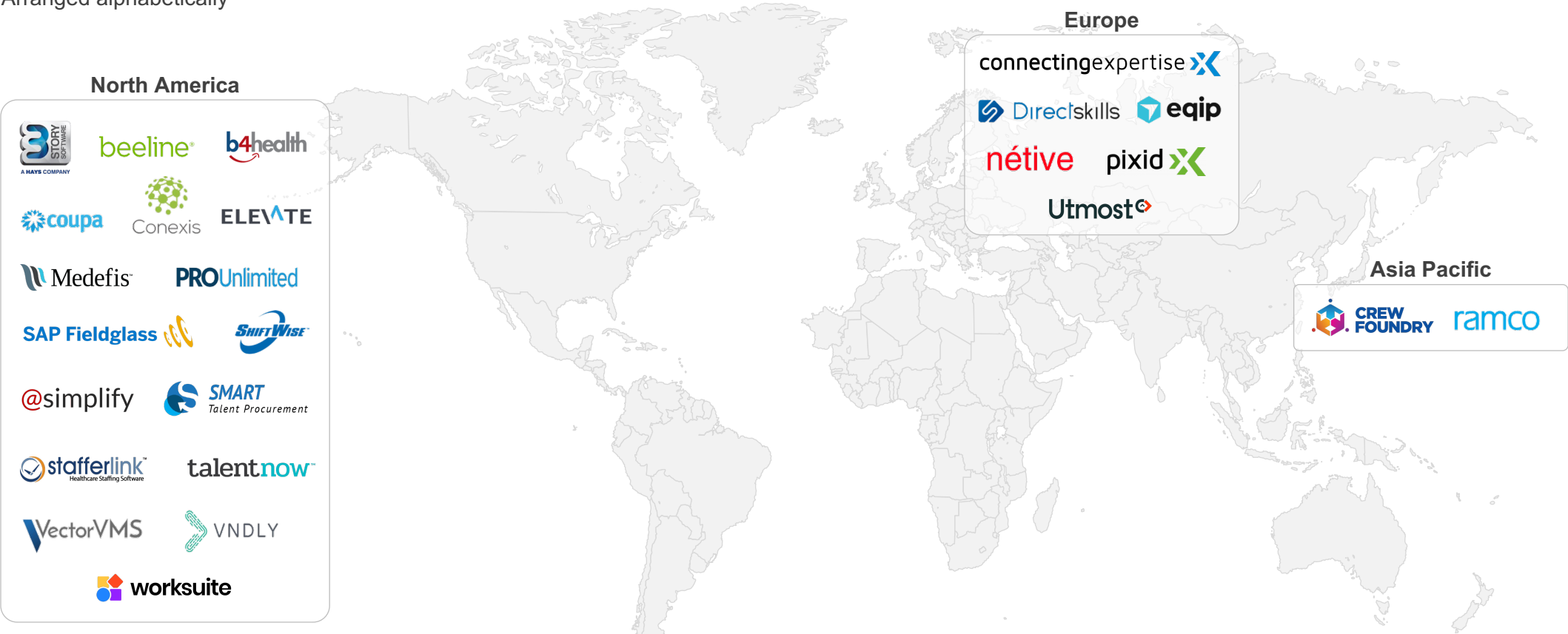
	Pure-play VMS	Staffing/MSP affiliation	Enterprise software provider affiliation (ERP, HR, etc.)
	<div>beeline®</div> <div>Conexis</div> <div>connectingexpertise X</div> <div>Directskills</div> <div>nétive</div> <div>pixid X</div> <div>Utmost</div> <div>worksuite</div>	<div>3 STORY SOFTWARE A HAYS COMPANY</div> <div>ELEVATE</div> <div>PROUnlimited</div> <div>@simplify</div>	<div>coupa</div> <div>ramco</div> <div>SAP Fieldglass</div> <div>SMART Talent Procurement</div> <div>VectorVMS</div> <div>VNDLY</div>
Evolved from a marketplace background	<div>CREW FOUNDRY</div> <div>equip</div> <div>talentnow™</div>		
		<div>Medefis</div>	
Exclusively healthcare-focused	<div>stafferlink™ Healthcare Staffing Software</div>	<div>b4health</div> <div>SHIFTWISE™</div>	

Note: Some of the other major VMS players such as Coupa, SimplifyVMS, and SmartERP are not positioned on the PEAK due to lack of tangible data on them.  
Source: Everest Group (2022)

## VMS landscape by geography

The VMS provider landscape is evolving rapidly across the three major regions...

VMS providers by geography (based on headquarter region)  
Arranged alphabetically




























































Note Some of the other major VMS players such as Coupa, SimplifyVMS, and SmartERP are not positioned on the PEAK due to lack of tangible data on them.  
Source: Everest Group (2022)

# Major VMS providers in key countries

... and several of them have a regional (multiple countries in a region) and global (multi-regional) presence

Major VMS providers in key countries  
Arranged alphabetically

Australia	Belgium	Canada	France	Germany	US
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India	Sweden	Switzerland	The Netherlands	UK	
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## VMS capability overview (page 1 of 2)

VMSs are evolving beyond traditional temporary labor management (staff augmentation) into other contingent workforce areas; however, the focus and maturity of VMSs vary significantly

Breadth and depth of functionality/capability: 

Low

High

Technology vendor (in alphabetical order)	Contingent workers managed			Clinical healthcare-specific functionality	Marketplace capability (vendor/supplier/talent)
	Temporary labor management	Services procurement / Statement of Work (SOW) management	Independent contractor management / Direct sourcing		
3 Story Software (3SS)	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Beeline	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
b4Health	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Connecting-Expertise	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Conexis	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
CrewFoundry	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Directskills	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
ELEVATE	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Equip	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Medefis	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Nétive	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Note: The above analysis is based on providers' relative functionalities/capabilities across different modules. However, enterprises need to evaluate the breadth and depth of capabilities against their specific set of requirements when selecting a VMS

VMS capability overview (page 2 of 2)

VMSs are evolving beyond traditional temporary labor management (staff augmentation) into other contingent workforce areas; however, the focus and maturity of VMSs vary significantly

Breadth and depth of functionality/capability: 

Low

High

Technology vendor (in alphabetical order)	Contingent workers managed			Clinical healthcare-specific functionality	Marketplace capability (vendor/supplier/talent)
	Temporary labor management	Services procurement / Statement of Work (SOW) management	Independent contractor management / Direct sourcing		
Pixid	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
PRO Unlimited (Wand VMS)	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Ramco	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
SAP Fieldglass	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
ShiftWise	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Stafferlink	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
TalentNow	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
VectorVMS	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
VNDLY	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Worksuite	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Note: The above analysis is based on providers' relative functionalities/capabilities across different modules. However, enterprises need to evaluate the breadth and depth of capabilities against their specific set of requirements when selecting a VMS

## VMS market share by Spend Under Management (SUM)

The VMS market bounced back in 2021 following strong growth momentum across regions, as vendors expanded their market presence, service offerings, and client portfolios

Vendors’ VMS market share by Spend Under managed (SUM); 2021  
(Vendors are listed in alphabetical order within each category)

>20%	beeline® SAP Fieldglass
1-10%	<div>3 STORY SOFTWARE A HAYS COMPANY</div> Directskills nétive pixid x x PROUnlimited SHIFTWISE VNDLY VectorVMS
<1%	<div>b4health Conexis CREW FOUNDRY connectingexpertise x x</div> <div>equip ELEVATE Medefis ramco stafferlink™ Healthcare Staffing Software</div> <div>talentnow™ worksuite</div>












Vendors’ YoY growth in VMS SUM; 2021  
(Vendors are listed in alphabetical order within each category)

>30%	<div>b4health beeline® Conexis ELEVATE equip</div> <div>Medefis™ PROUnlimited SHIFTWISE VNDLY</div>
20-30%	<div>connectingexpertise x x nétive pixid x x</div> <div>stafferlink™ Healthcare Staffing Software</div>
<20%	<div>3 STORY SOFTWARE A HAYS COMPANY CREW FOUNDRY Directskills ramco</div> <div>SAP Fieldglass talentnow™ worksuite</div> <div>VectorVMS</div>

## VMS market share by industry

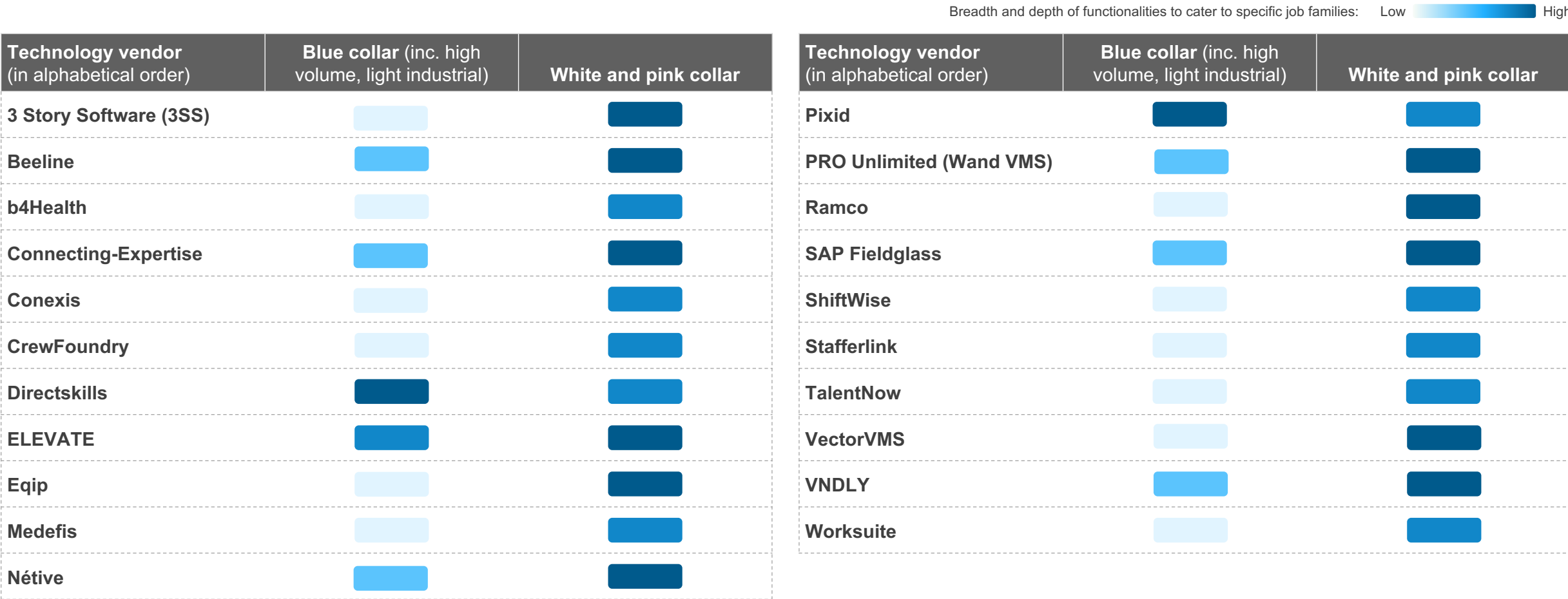
VMS providers continue to expand their industry coverage, including in high-volume, shift-based verticals, such as light industrials, and relatively untapped industries, such as government / public sector

Top service providers across industries by number of active clients  
Top service providers (arranged alphabetically)

 BFSI	 Energy & utilities	 Government / public sector	 Healthcare
 A HAYS COMPANY beeline® connectingexpertise X pixid X PROUnlimited SAP Fieldglass worksuite	beeline® connectingexpertise X equip pixid X PROUnlimited SAP Fieldglass	 A HAYS COMPANY beeline® nétive PROUnlimited SAP Fieldglass VectorVMS	b4health Medefis SHIFTWISE PROUnlimited SAP Fieldglass stafferlink™ Healthcare Staffing Software VectorVMS
 Hi-tech & telecom	 Manufacturing	 Pharmaceutical & life sciences	 Retail
 A HAYS COMPANY beeline® ramco PROUnlimited SAP Fieldglass worksuite	beeline® Directskills ELEVATE nétive PROUnlimited pixid X SAP Fieldglass worksuite	beeline® connectingexpertise X pixid X PROUnlimited SAP Fieldglass VNDLY worksuite	beeline® Conexis Directskills pixid X PROUnlimited SAP Fieldglass worksuite

## VMS vendor capability by job types

Most VMSs focus on white-collar job roles; however, with increased demand, they are adding blue-collar job-specific functionalities to their platforms



Note 1: Blue collar includes operations, production, mining, construction, maintenance, technical installation, facilities, janitorial, security, soldiers etc.  
Note 2: White and pink collar includes engineers / IT professionals / Research / Scientist, accounting, finance, legal professionals, life sciences, call-center professionals, etc.

# 05

## Enterprise sourcing considerations

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- Leaders
  - Beeline
  - PRO Unlimited
  - SAP Fieldglass
  - VNDLY



# Beeline (page 1 of 2)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Beeline is a US-based extended workforce platform for sourcing and managing contingent workforce for enterprises. Its VMS solution supports the management of temporary workers, services procurement / SOW, and Independent Contractors (ICs) / freelancers
- It is one of the largest VMSs in the market in terms of SUM and client base. It has experience in catering to clients across all the major industries, geographies, and deal sizes. Referenced clients also highlighted its subject matter expertise and global reach as key strengths
- It has developed an end-to-end services procurement management module by building capabilities across both the source-to-contract and procure-to-pay processes, including RFx for vendor sourcing and negotiation and SOW creation
- To evolve as an extended workforce platform, Beeline continues to invest in developing new features and improve its user/stakeholder experience
  - It has recently developed a new mobile-optimized user interface that supports features such as an AI-based resume visualizer and quick approvals to enhance the hiring manager experience. Referenced clients lauded its user interface as an area of strength
  - It is also making significant investments in innovative, next-generation technologies such as AI/ML for talent profiling and ranking and NLP for virtual assistants/bots to assist hiring managers











### Limitations

- While Beeline has a global solution with experience across geographies, enterprises need to evaluate its capabilities to address local/country-specific requirements
- Though it is trying to enter the small and mid-market segments, Beeline’s offerings have traditionally been more attractive to the large market clients. Hence, the extent of tailoring of features and functionalities for the mid-market is still unclear
- With the recent acquisition of Joined-Up, Beeline can cater to high volume and healthcare-specific job roles. However, since this is a new offering, its ability to offer a full-fledged solution and its market traction in this space remains untested
- While Beeline is investing in a cloud modernization strategy, it currently does not offer its clients a complete multi-tenant SaaS offering. Clients need to consider their specific requirements in terms of the configuration and integrations required

# Beeline (page 2 of 2)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Beeline follows a strong partnership approach to provide enhanced functionalities for its clients. Although not completely integrated with it yet, it has recently acquired Joined-up, and with this it has added new functionalities such as shift planning and scheduling to its suite to cater to high-volume as well as healthcare-specific job roles
- It also has strong capabilities to support direct sourcing and talent pool creation and management
  - It has strategic partnerships with providers of talent pooling technologies, which help clients attract, create, and manage private talent pools
  - It automatically calculates the bill rate for all directly sourced candidates (considering pay rate, partners’ service fee, etc.) to help clients know the total cost of talent from different channels
- It has a robust compliance management system. It supports vetting and payments for ICs through its seamless integration with a partner IC solutions provider
- Beeline offers advanced analytics with visualization options to build comprehensive and interactive dashboards for different stakeholders
  - It offers a guided workflow / decision tree capability and provides real-time Did You Know pop-ups throughout the process flow providing recommendations/insights to help with decision-making
  - It leverages its strategic partnership with Brightfield and incorporates its market data, in addition to Beeline’s client data, to offer market and peer benchmarking analytics











### Limitations

- While Beeline has invested in its reporting and analytics functionalities, it currently does not offer advanced capabilities such as predictive analytics
- Referenced clients expect Beeline to get quicker at the implementation of product ideas and at resolution of fixes
- Referenced clients also expect Beeline to improve its customization and self-service capabilities

# PRO Unlimited (page 1 of 2)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- PRO Unlimited is a US-based provider of solutions for the procurement and management of contingent labor to clients globally. Apart from its proprietary VMS solution, Wand, it also offers MSP, direct sourcing, market intelligence, and payrolling solutions to its clients
- Wand has good experience in catering to clients of all sizes. It also has a well-established presence across all major industries. It has significant experience and expertise in managing all contingent categories including temporary labor, services procurement / Statement of Work (SOW), and Independent Contractors (ICs)
- It is continuously adding several technologies to its suite through both organic and inorganic investments to meet the end-to-end talent management needs of its clients
  - It acquired Workforce Logiq, a VMS, MSP, RPO, direct sourcing, payrolling, and talent analytics provider, to strengthen its core offerings, and expand its geographic presence
  - It has also been able to achieve significant expansion into the direct sourcing space with its clients, backed by its recent acquisition of WillHire and strategic partnership with eightfold.ai
- Wand also has strong capabilities on the healthcare side backed by its sister company Right Sourcing, which has significant experience in the healthcare MSP space. It supports the entire gamut of workflow and requirements for the healthcare industry











### Limitations

- While PRO Unlimited has strengthened its global capabilities and supports multiple currencies and languages, its current client base is the strongest in North America. Clients beyond North America, looking for a completely localized solution, need to evaluate its capabilities vis-à-vis their requirements
- PRO Unlimited now offers Wand as a stand-alone product. Considering that it was traditionally offered as a bundled solution along with its MSP, clients need to carefully evaluate the access to features and functionalities available to them, particularly if a third-party MSP is involved
- While PRO Unlimited has been making significant capability enhancements in areas such as direct sourcing and analytics, clients should evaluate the extent of integration vis-a-vis their needs to benefit from these solutions and have an integrated experience
- While it is making investments to enhance its shift scheduling functionalities to manage a blue-collar workforce, enterprises should carefully evaluate the depth and breadth of these capabilities vis-à-vis their requirements

# PRO Unlimited (page 2 of 2)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Wand is an advanced multi-tenant omnichannel VMS with a good UI/UX and is supported across web, mobile, tablet, and wearables
  - It is one of the few VMSs in the market with dedicated mobile applications for managers, workers, and suppliers
  - Referenced clients were particularly appreciative of the ease of use and intuitiveness of the platform
- It has a strong analytics portal, Wand Discovery, which provides workforce analytics and actionable insights
  - It offers rate benchmarking through its agile RatePoint platform. It continuously incorporates features and dashboards to provide the most relevant insights to its clients
  - With the acquisition of Workforce Logiq, it now has access to IQ Analytics Center<sup>SM</sup> and ENGAGE Talent, which provides it with market data and AI-driven models for discovering, acquiring, and retaining talent
- Referenced clients further highlighted relationship management and accountability as its key strengths











### Limitations

- While appreciating its ease of use, referenced clients highlighted lack of an automated interview scheduling functionality as a limitation
- Referenced clients also highlighted the scope for PRO Unlimited to be more proactive in sharing its product features and developments to help clients take advantage and leverage the entire suite of functionalities in the VMS

# SAP Fieldglass (page 1 of 2)

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- SAP is a multinational software corporation that develops enterprise software to manage business operations and customer relations. SAP Fieldglass, its VMS solution, has significant experience and expertise in managing all contingent categories including temporary labor, services procurement / SOW, and Independent Contractors (ICs) / freelancers
- SAP Fieldglass is one of the largest and most experienced VMS providers with significant SUM and client base. Its expertise spans all major industries and geographies. Referenced clients also highlight its domain expertise and global capabilities as key strengths
- It has robust capabilities to manage services procurement with functionality to support the entire source-to-pay cycle, including RFx for vendor sourcing and negotiation, and SOW creation
- It continues to make investments to enhance direct sourcing and talent pool creation and management capabilities
  - It has partnerships with Freelancer Management Systems (FMSs), talent pool curation tools, and compliance experts to cater to the direct sourcing requirements of its clients
  - It has also developed a talent network module that allows hiring managers to source, maintain, and manage a central repository of contingent workers. This allows enterprises to leverage a common talent pool comprising workers including ex-contractors











### Limitations

- SAP Fieldglass is a global platform and has deployed instances in more countries than any other VMS. However, prospective clients need to evaluate the extent of localization with their country’s regulations and requirements in case it is a consideration
- Its offerings are more suited for the large market. Small- and mid-market clients with relatively simpler requirements may not find its offering compelling in terms of the configuration to meet their needs as well as pricing requirements
- SAP Fieldglass has features available to manage independent contractors / freelancers. However, referenced clients opined that there is further scope to improve functionalities to specifically address this space
- While SAP is investing in use cases of next-generation technologies such as AI-driven chatbots, there is still more ground to cover. A similar sentiment was shared by referenced buyers as well where buyers felt the need for further innovation to build next-generation capabilities

# SAP Fieldglass (page 2 of 2)

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- SAP Fieldglass recently released a new module to manage blue-collar job roles in asset-intensive industries such as oil & gas, chemicals, mining, and utilities
  - It allows organizations to quickly onboard large volumes of external workers, integrate with gate pass systems, and process complex time rules on a daily basis
  - It is expanding its ecosystem network through partnerships and integrations to enhance transparency and enable asset and access management
- SAP Fieldglass also uses analytics to support decision-making across the entire application
  - It offers advanced capabilities such as guided workflow / decision tree and peer benchmarking for managing the entire contingent workforce hiring process effectively
  - It provides real-time rate benchmarks through its rate guidance tool that helps users compare with the Fieldglass community
- It has a dedicated mobile application for hiring managers and workers. The application supports various features from requisition management to timesheet filling
- It has a strong partnership network accessible to clients through its digital app store covering the entire spectrum of the contingent life cycle. Its integrations with other core SAP applications such as SAP S/4 HANA, SAP Ariba, and SAP SuccessFactors provide additional benefits for clients











### Limitations

- Lack of advanced analytics, including trend and predictive capabilities, was highlighted as a limitation by enterprises. They further indicated that SAP Fieldglass could work on its dashboards and operational reporting capabilities
- Considering its legacy evolution, it has further scope to improve its UI/UX. Referenced clients also highlighted its dated UI/UX as compared to that of its peers as one of the major limitations of the platform
- Referenced clients opined that SAP Fieldglass needs to be more proactive in discussing its innovations and future roadmap

# VNDLY (page 1 of 2)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- VNDLY is a US-based provider of end-to-end contingent workforce management technology. Its VMS solution supports the management of temporary workers, services procurement / SOW, and independent contractors (ICs) / freelancers
- It has been recently acquired by Workday, one of the leading enterprise management systems, and has achieved Workday-certified integration status
  - It provides customers with a seamless integration that connects Workday Human Capital Management (HCM) with VNDLY’s Workforce Connector making total talent acquisition and management a possibility for its clients
  - It enables contingent workforce provisioning for badging, email, and network access
- VNDLY continues to build on its partnership network with various other ERPs, provisioning, and identity management systems as well to cater to varying requirements of clients
- It has robust capabilities to manage services procurement with functionality to support the entire source-to-pay cycle, including RFx for vendor sourcing and negotiation and SOW creation
- It has a strong data migration capability for clients looking to shift to VNDLY from other systems. It additionally provides bulk upload and bulk edit capabilities to reduce the manual intervention needed to execute these tasks. Referenced clients were particularly appreciative of its ease of deployment and implementation











### Limitations

- While VNDLY has global capabilities, its current client base is the strongest in North America. Clients beyond North America, looking for a completely localized solution, need to evaluate its capabilities vis-à-vis their specific requirements
- Its platform is fully optimized for mobile; however, it does not have native mobile applications for different stakeholder personas such as hiring managers, workers, and suppliers
- VNDLY supports the entire gamut of workflow and requirements for the healthcare industry. However, considering the complex shift and credential management in clinical healthcare, clients should carefully evaluate the product’s suitability in the healthcare context
- Enterprises looking for robust direct sourcing and talent pooling-related functionalities should carefully evaluate the breadth and depth of VNDLY’s current capabilities

# VNDLY (page 2 of 2)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- VNDLY has built an interactive and customizable solution with an intuitive UI/UX and a multi-tenant SaaS offering. It has also been making significant investments to utilize next-generation technologies such as automation, AI/ML, and NLP
  - The platform has an automated virtual assistant, AVA, which helps stakeholders make decisions and reduces support-related questions to the program team
  - It additionally leverages ML algorithms to score and rank candidates based on skills against the requirements of a particular job description
- Over the past year, VNDLY has made key improvements in its billing and payments functionalities to make its process more efficient and improve the user experience
  - It has developed an invoice builder feature to provide its users the ability to tailor the different invoice fields to meet their specific needs and their country’s regulations
  - It has also developed a rate calculator feature to provide visibility and customization options for bill rate calculations
- It has capabilities to support talent pool creation and management on its platform. It recently developed integrations with third party platforms for direct sourcing
- Referenced clients lauded its customer-centric approach and responsiveness to suggestions related to the program. Clients also highlighted its ease of use and customization as an area of strength

### Limitations

- While VNDLY offers a custom report builder functionality that allows users to generate reports by accessing and combining different available datasets, there is further scope to expand its advanced analytics features such as predictive dashboards and rate/peer benchmarking
- While clients were appreciative of its customization capabilities, they opined that certain elements of the platform such as job templates and invoicing can incorporate more customization options



# 05

## Enterprise sourcing considerations











- Major Contenders

- 
- |                          |             |
|--------------------------|-------------|
| – 3 Story Software (3SS) | – Shiftwise |
| – b4Health               | – Nétive    |
| – Connecting-Expertise   | – PIXID     |
| – Directskills           | – Ramco     |
| – ELEVATE                | – VectorVMS |
| – Equip                  | – Worksuite |
| – Medefis                |             |

### 3 Story Software (3SS) (page 1 of 2)

#### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

#### Strengths

- 3 Story Software (3SS) is a US-headquartered VMS provider owned by Hays Plc, a specialist recruitment and human resource services firm. 3SS helps clients manage traditional temporary workers, services procurement / SOW, and independent contractors (ICs) / freelancers
- While its origin is in North America, it has been able to gain significant traction in EMEA and APAC (primarily in ANZ) on the back of Hays’ MSP business. It is one of the few VMS providers that have capabilities and proven expertise across multiple regions
- It is also one of the few VMS providers with experience in catering to buyers of all types – across industries and client sizes (small, mid, and large)
- Over the years, 3SS has developed significant capabilities by leveraging the experience of its sister talent solutions outsourcing arm, Hays Talent Solutions (HTS). It also has a strong network of other MSP partnerships through which it serves multiple clients
- 3SS provides a customizable workflow creation capability enabling tailor-made configurations at granular levels such as workflow creation based on organization structure, and site- and client-level customization capability











#### Limitations

- 3SS generally engages with MSPs. Considering the limited number of direct clients in its portfolio, enterprises looking for a direct partnership with the VMS provider should carefully evaluate its features and engagement model
- While 3SS is highly configurable and allows clients to manage shift and compliance requirements, there is scope to improve these functionalities, particularly in the context of the healthcare industry
- It has functionalities to manage transactional and administrative services procurement activities such as headcount tracking and billing and payments. However, it lacks advanced functionalities such as RFx (RFI/RFP) management and contract negotiation
- 3SS offers web applications and its platform is optimized for mobile. Clients looking for a VMS provider with native mobile capabilities currently may find its offerings limited
- While it has experience catering to all kinds of hire types, it has limited experience in managing blue-collar job roles. As the shift management requirements for blue-collar job roles can be complex, clients need to evaluate its capabilities carefully

### 3 Story Software (3SS) (page 2 of 2)

#### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

#### Strengths

- It is continuously making investments to improve the product, mainly by improving its UI/UX. Referenced clients also lauded its simple interface and ease of use
  - It invested in rewriting of its timesheets and expense module for efficient approval and management processes
  - It further implemented a digital adoption platform to provide immediate and context-sensitive help to its users
- It has pre-built integrations with various enterprise systems
  - It has a VMS as a hub strategy with partner connectors/APIs to link direct sourcing, FMS, ATS, and talent pool solutions to the VMS ecosystem
  - It has a pre-built integration with Boomi, a Dell integration middleware product to connect custom and purchased applications. Connections include Oracle HCM, SAP, NetSuite, SuccessFactors, Salesforce, and Workday
- It is continuously investing in developing functionalities to help its clients achieve their DE&I goals. It has functionalities for candidate surveys, analytical reporting, and blind recruiting. It provides a Web Content Accessibility Guidelines (WCAG) 2.1 compliant interface. The platform automatically recognizes users with disabilities by employing an assistive reading technology











#### Limitations

- While it has made advances in its reporting and analytics capabilities, it currently does not offer predictive analytics and the ability to benchmark different metrics such as rate and salary data against other similar enterprise talent management programs
- Its MSP sister company has plans to integrate direct sourcing technologies/capabilities with 3SS in the future. However, clients need to carefully evaluate their requirements and the extent of integration needed with respect to direct sourcing

# b4Health (page 1 of 2)

## Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- b4Health is a US-based VMS provider, owned by AMN Healthcare, that services MSPs. It helps healthcare entities manage their staffing relationships and internal resource pool. It manages the temporary labor and independent contractors / freelancers
- It has strategic partnerships with multiple MSPs. MSPs looking to partner with a VMS provider with healthcare-specific functionalities will find b4Health’s offering compelling
- It has comprehensive shift management, credentialing, and time capture capabilities to meet the complex healthcare-specific requirements. It can manage shifts for different healthcare roles (per diems, locums, travel nurses, etc.).
  - Apart from integrating with external timekeeping systems, its web-based and mobile time capture functionality also allows for paper timecard uploading
  - It has an automatic shift creation capability that is based on provider time capture incorporating rate assignment, placement rules, and contract terms
  - It has a dedicated mobile application for hiring managers and workers that enables time capture agility. The application is additionally geo-enabled and can automatically identify the location of the worker
- It can manage both internal resources and agency pools. As part of the system, orders and assignments can be first made available to the internal labor pool and then as per business rules to external contingent labor pools











### Limitations

- It is yet to expand the geographical reach of its capabilities in catering to healthcare clients outside North America
- So far, it only has experience in managing small healthcare providers and lacks the experience of managing midsize and large clients. Enterprises with large spends and requirements need to evaluate its capabilities carefully
- Buyers looking for a VMS solution with services procurement / SOW may find its capabilities inadequate
- It has further scope to improve its UI/UX. Buyers looking for a VMS provider with an intuitive UI/UX may not find its user interface appealing. Referenced clients also highlighted its user interface as an area of improvement
- It currently does not offer many innovative solutions such as chatbots, automated interview scheduling, or guided workflows

# b4Health (page 2 of 2)

## Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- As b4Health is an AMN Healthcare-owned VMS provider, enterprises also have access to the domain expertise and additional offerings of the broader group, including MSP and RPO as well as its suite of other healthcare-specific technologies such as a marketplace and complementary VMS technologies (Medefis and ShiftWise)
- b4Health is constantly investing in developing new features to improve its VMS user experience
  - It has developed the functionality to provide automated updates to clients on documents upload or expiration
  - It has made custom rate configuration enhancements for better rate management for clients
- Referenced clients lauded b4Health platform for its ease of use and flexibility. Clients also highlighted its API integration capability with other enterprise technologies as a key strength











### Limitations

- While b4Health supports basic reporting and analytics capabilities, it does not yet offer advanced analytics capabilities such as predictive analytics and the ability to benchmark different metrics such as rate and salary data against other similar enterprise talent management programs
- Referenced clients opine that b4Health can introduce more functionalities in its mobile application to improve user experience

# Connecting-Expertise (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Connecting-Expertise, a Pixid Group company, is a Belgium-based contingent workforce management solutions provider. Its VMS supports temporary labor management, services procurement / SOW, and independent contractor (ICs) / freelancer management
- Following its acquisition by Pixid, it now has access to the products of the wider Pixid Group such as ATS and screening tools through the application connector, Pixid hub. Small- and mid-market clients looking for a one-stop total talent technology provider will find this a compelling proposition
- It has a vendor marketplace with over 5,000 registered suppliers and is used by a significant proportion of its clients
  - The marketplace provides access to both suppliers and freelancers with clear categorization
  - One of its differentiators is its ability to match the specialization requirements of clients with the type of talent they are looking for, which includes both freelancers and suppliers
- Connecting-Expertise continues to invest in its services procurement capabilities to expand its coverage across the SOW management spectrum, including RFx for vendor sourcing and negotiation and SOW creation











### Limitations

- Connecting-Expertise has the strongest presence in Belgium and has limited presence beyond the Continental European market, which could be a deterrent for enterprises looking for global VMS deployments
- So far, it only has experience in managing small clients and lacks experience in managing midsize and large clients
- Its marketplace provides access to white-collar workers, particularly engineers / IT professionals; clients from industries such as manufacturing and retail with a blue-collar heavy workforce may find its experience in managing blue-collar roles to be limited

# Connecting-Expertise (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- It has enhanced its capabilities to manage requirements for the healthcare industry:
  - It recently launched C-Cares, a separate healthcare application to facilitate efficient requisition of medical employees
  - It also has partnerships with dibbs, a students and young professionals requisition platform, and Lancr, a mobile talent pool platform
- Connecting-Expertise is further enhancing its AI/ML and automation capabilities and has developed use cases such as recommending suppliers on which requisitions to work on, sourcing the right suppliers for clients, and predicting the number of candidates to expect for a particular role
- It has also been making investments in its analytics and reporting capabilities and has made several improvements in it
  - It now offers pre-configured reports in multiple languages
  - It also supports interactive dashboards and customizable drill-down capabilities with features to export data as well











### Limitations

- Lack of native mobile applications for hiring managers, workers, and suppliers is a limitation for clients looking for a VMS provider with native mobile capabilities
- While Connecting-Expertise currently offers functionalities to track and report program and supplier performance, providers looking for comprehensive analytics capabilities such as salary/rate benchmarking may find its functionalities to be limited

# Directskills (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Directskills is a French VMS provider that primarily caters to the French market and manages temporary labor procurement for its clients
- Its strength is in managing blue-collar workers across industries such as manufacturing, retail, construction, and transport & logistics
- It is the one of the few providers in France that has self-billing and contracting functionality to reduce errors, achieve cost savings, and increase productivity. Referenced clients also acknowledged Directskills' self-invoicing functionality as one of its key strengths
- It offers clients compliance management capabilities with a focus on adherence to all local laws of France. Its expertise in the French market is a differentiator given the complexity of laws governing temporary labor in the country
- It recently developed multilingual, multicurrency, and multiformat dates functionality with the vision to support its client's geographic expansion plans outside France
- It has comprehensive shift management capabilities. Its functionalities include one-day shift management, shift management on specific days, and workers swapping assignments. Clients looking for strong shift management will find its offering compelling

### Limitations











- While Directskills is developing multi-lingual capabilities and expanding its presence in the European market, it currently has limited experience in serving markets beyond France. Referenced clients also highlighted its limited global coverage as a constraint
- It lacks experience in catering to skilled industries such as hi-tech and telecom, and healthcare and pharmaceuticals. Clients looking to manage skilled workers with complex requirements should carefully evaluate its capabilities
- Directskills is yet to expand its capabilities to manage services procurement and independent contractors / freelancers, which can be a limitation for clients looking to manage these specific categories through the VMS
- While it has invested in its reporting and analytics functionalities, providers looking for advanced analytics may find its capabilities limited. Referenced clients also expect Directskills to provide better user training to its clients to have enhanced reporting experience



# Directskills (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- It is investing in enhancing its existing temporary workforce management functionalities to make the platform agile and flexible. It aims to develop a comprehensive solution that can cater to an agile workforce by developing in-depth talent pooling, internal mobility, and compliance capabilities
- Referenced clients highlighted the solution’s strong security and flexibility as its key strengths. They were further impressed with its temporary workforce management functionalities including subsidies calculation for contractors that helped clients with better supplier rate negotiation











### Limitations

- As enterprises are moving from single technologies to best-of-breed technologies, lack of integration capabilities with next-generation point solutions can be an area of concern for enterprises

# ELEVATE (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- ELEVATE is a proprietary VMS solution of Elevated Resources, a US-based talent acquisition services and technology provider. It supports the management of all contingent categories including temporary labor, services procurement / SOW, and Independent Contractors (ICs) / freelancers
- It predominantly focuses on meeting the requirements of mid-market clients looking for an end-to-end contingent workforce management solution. Referenced clients highlighted its ease of use and flexibility as its strengths
- Its strength is in managing light industrial workers across manufacturing, distribution, logistics, and food processing industries. The platform has several features including dynamic rate cards and shift management capabilities, which facilitate high-volume, mass-action tasks
- While ELEVATE has the backing of its MSP arm, it has also established strategic partnerships with multiple other MSPs and staffing players, through which it serves many clients. MSPs looking to partner with a VMS provider to approach the mid-market may find ELEVATE’s offering compelling
- It has strong capabilities and functionalities to support direct sourcing and talent pool creation and management. It has a dedicated mobile platform, which in partnership with Clowder, a third-party engagement management solution, allows for community building and content management for direct sourcing and talent pool creation











### Limitations

- While ELEVATE has presence in the UK and India, its current client base is the strongest in the US. Clients within the US, looking to expand to other regions, need to evaluate its capabilities vis-à-vis their specific requirements
- So far, it only has experience in managing small- and mid-market clients and lacks experience in managing large clients. Enterprises with large spends and complex requirements need to evaluate its capabilities carefully
- It has functionalities to manage several services procurement activities such as vendor sourcing, headcount tracking, and billing and payments. However, it lacks a few of the advanced functionalities such as redlining capability, SOW creation, and negotiation
- It is yet to invest in use cases employing next-generation technologies such as chatbots and digital adoption platform (DAP) for self-service

# ELEVATE (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- It has built an effective SOW module capable of managing specific key processes within the SOW management life cycle, both on the source-to-contract and procure-to-pay sides
- It offers a robust in-app analytics capability called On-demand Workforce Analytics in partnership with GoodData, a data and analytics platform. It supports interactive widget-based dashboards featuring a fully configurable drag-and-drop interface that provides real-time insights into workforce and spend analytics
- It has developed innovative features to enhance its VMS user experience
  - It supports email channels to help hiring managers take action on approvals without signing into the system
  - Its dedicated mobile application supports all personas and provides functionalities ranging from requirement creation to timesheet and expense approvals
- Referenced clients lauded ELEVATE for its customer-centric approach and responsiveness to queries related to the program











### Limitations

- While ELEVATE has good reporting and analytics capabilities, it does not yet offer predictive analytics and built-in third-party integrations to benchmark different metrics such as rate and salary data against other similar enterprise talent management programs
- Referenced clients expect better user training and more comprehensive platform guidance for enhanced user experience

# Equip (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Equip is a Switzerland-based enterprise talent-tech solutions provider that focuses on the management of an external workforce. Its VMS supports management of temporary workers, services procurement / SOW, and independent contractors (ICs) / freelancers
- It has a marketplace for external workforce and services with over 8,000 suppliers, primarily focusing on IT and engineering talent. Through it, Equip offers access to high performing suppliers in the marketplace
- Equip has further built on its B2B marketplace and expanded its capabilities in the VMS space
  - It offers an interactive and customizable solution with a good UI/UX and multi-tenant SaaS offering
  - It also supports guided workflow / decision tree capability for selecting the right requisition option based on client requirements
- It recently developed a quick-to-deploy VMS light solution with easy to use and customizable interface, currently catering to only white-collar job roles. Small- and mid-market enterprises with simple requirements may find the offering compelling
- It has a self-service portal for hiring managers with validated candidate profiles for selection. It also has an AI-driven supplier selection, CV screening, and candidate matching feature, and ranks candidates based on the skills required against a particular job description











### Limitations

- While Equip is expanding its presence in other geographies, its current capabilities in regions apart from Continental Europe, primarily Switzerland and Sweden, are limited, which could be a deterrent for enterprises looking for global VMS deployments. Referenced clients also highlighted the need for a more scalable and global solution
- It has experience in managing small and midsize programs (in terms of spend managed) and lacks experience in managing large/complex programs. Thus, clients wishing to manage a large spend through the system should carefully evaluate the breadth and depth of its capabilities
- Though Equip offers basic shift scheduling and credentialing management, it has limited functionalities and experience in managing healthcare-specific programs and clinical workers such as per diems and locums
- While Equip continues to invest in its reporting and analytics functionality and has integrations with analytics portals of MSP partners, self-managed programs (without MSP partners) may find its capabilities to be limited. Referenced clients also highlighted the need for further enhancements and greater flexibility with regards to its reporting and analytics capabilities

# Eqip (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Despite its relatively recent evolution in the VMS space, Eqip has already made significant inroads into the services procurement management space by building capabilities across both the source-to-contract and procure-to-pay processes
  - It supports capabilities such as contract negotiation and SOW creation
  - It also supports hybrid SOW functionality for providing maximum flexibility of options with self-billing and invoicing capability
- It offers a dedicated module for supporting direct sourcing and internal skill management. The module is linked to its native marketplace with over two million candidates providing greater talent visibility
- Buyers looking for payrolling solutions in Switzerland will find Eqip’s solution compelling. It has all the required licenses on both the cantonal and federal levels (SECO and AWA), including permanent placement licenses and labor leasing licenses to assist its clients
- Referenced clients have lauded Eqip’s responsiveness and collaborative approach in managing its client relationships. They have also highlighted the ease of implementation as an area of strength for the provider











### Limitations

- While Eqip has contract negotiation and SOW creation capabilities, it does not support redline functionality between managers and vendors to track changes
- Eqip offers a web application for its VMS for all involved user groups, which is completely optimized for mobile as well. However, it does not have platform-specific mobile applications
- Referenced clients opined that Eqip needs to be more proactive in discussing innovations and its future roadmap

# Medefis (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Medefis is a US-based VMS provider owned by AMN healthcare. It exclusively focuses on the healthcare industry and supports the management of temporary labor and independent contractors (ICs) / freelancers
- It has an Open Talent Marketplace (OTM) comprising over 800 registered suppliers. OTM is an open, competitive bidding marketplace, to which clients can post their requisitions for both clinical and non-clinical hires
  - OTM offers real-time visibility of bill rates offered by suppliers, thereby ensuring that its clients pay fair market rates. Referenced clients also highlighted its analytics and benchmarking functionalities as an area of strength
  - It provides access to candidates open for permanent positions
  - It also offers credentialing management functionalities to pre-vet candidates before the start of the engagement
- One of the differentiators for Medefis is its TalentMatch system that can rank candidate submissions from best matched to the least matched based on the key areas of job requirements











### Limitations

- It is yet to expand the geographical reach of its capabilities to cater to healthcare clients based in regions outside North America
- The majority of the programs it currently caters to are small and midsize ones for healthcare providers. Enterprises with large spends and complex spend categories and requirements need to evaluate its capabilities carefully
- Given its origin from a B2B marketplace, its capabilities on the VMS side are still evolving
  - It still lacks capabilities to manage services procurement
  - It is yet to expand some of the key healthcare-specific capabilities such as shift scheduling, time entry, and approvals management
- Even though Medefis has investment plans to utilize next-generation technologies, it currently does not offer many solutions employing technologies such as chatbots and guided workflows
- Creating a native mobile application for different stakeholders is on its roadmap. Clients looking for a VMS provider with native mobile capabilities may find its offerings limited

# Medefis (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- As Medefis is an AMN Healthcare-owned VMS provider, enterprises also have access to the domain expertise and additional offerings of the broader group, including MSP and RPO and other complementary VMS technologies (ShiftWise and b4Health)
- Medefis focuses on constantly updating its features and functionalities for clients. Some of the most recent capability enhancements done by the VMS are:
  - Per diem capability improvements for better management of orders
  - Automated credential management feature











### Limitations

- Although Medefis has readily available dashboards to provide real-time analytical insights to its users, it does not yet offer advanced analytics capabilities such as predictive analytics. Referenced clients also highlighted reports customization capability as an area of improvement
- Referenced clients also expect Medefis to improve its IT support and be quicker at the resolution of technical glitches

# Nétive (page 1 of 2)

## Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Nétive is a Netherlands-based workforce management solutions provider. Its VMS solution has a component-based modular architecture built on Salesforce. It supports temporary labor (staff augmentation) and independent contractor (ICs) / freelancer management and is rapidly building capabilities to support services procurement / SOW as well
- In addition to managing contingent workers, it also has the capabilities to manage permanent workers for its clients. It also has a two-way integration with a partner tool for blue-collar job planning and to support shift job requisitions. Mid-market clients looking for a provider that can manage all labor types in a single platform may find Nétive’s solution appealing
- It has an enterprise-focused open marketplace comprising various vendors and ICs. The marketplace helps users create talent pools for direct sourcing; it has also gained significant traction with its client base
- It has a robust and comprehensive compliance management system. It manages compliance on various levels including GDPR, country-specific taxation and legislative rules, supplier terms & conditions, and employee and assignment-specific requirements
- It supports healthcare-specific capabilities such as healthcare-specific taxation rules, comprehensive shift management including worker ability to swap shifts on an assignment, and healthcare-specific compliance requirements

### Limitations











- Nétive is expanding its presence in the European market beyond its domestic market, the Netherlands. It has also gained good traction in Belgium and the UK. However, clients looking for global VMS deployments should carefully evaluate its capabilities
- Its offerings are currently focused on small and mid-market clients, its experience in executing large-scale complex implementations is limited
- While it has clients across several industries, its experience in catering to clients from industries such as retail and hi-tech & telecom is fairly limited. Clients from these industries need to evaluate its capabilities carefully
- Nétive currently only has capabilities to manage transactional and administrative services procurement processes such as headcount tracking and billing and payments. Advanced capabilities such as redlining, RFx (RFI/RFP) management, and contract negotiation are still in its roadmap



# Nétive (page 2 of 2)

## Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths











- Nétive is a highly flexible self-service application that allows customizable workflow creation throughout the platform. Referenced clients were also particularly appreciative of the ease of use and customization of the platform
- Over the last year, Nétive has made investments to enhance its integration capabilities. It has launched a data exchange and integration platform called Nétive Connect, which enables suppliers to directly use the VMS within their own front-/back-office systems through integration
- It provides its users with a Salesforce Einstein-based advanced workforce analytics module, which offers widget-based descriptive analytics with interactive dashboards and customizable drill-down features. It also provides predictive and descriptive analytics capabilities based on different conditions and parameters such as time-to-hire, cost control, and sourcing channel
- It has an AI-based CV parsing and matching software for quicker and more efficient matching of candidates with open requisitions. It also enables CV and job matching in different languages and has features to calculate rates, fulfillment time, as well as candidate market availability/retention

### Limitations

- It currently has a native mobile application for hiring managers. Mobile applications for workers and suppliers are in its roadmap
- While Nétive has invested in its reporting and analytics capability, it currently does not offer integrations with third-party market data sources to benchmark different metrics such as rate/salary with the external market
- Referenced clients opined that Nétive can be more proactive and consultative on an ongoing basis to identify clients’ pain points and resolve issues faster. Clients also highlighted the speed and configurability of the platform as areas of improvement

Pixid (page 1 of 2)  
Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Pixid Group is a France-based end-to-end recruitment solutions provider. Its Pixid VMS primarily supports staffing and recruitment supplier management for its clients. Apart from enterprise clients, Pixid also offers its platform directly to staffing suppliers to let them onboard and manage their clients
- Pixid VMS is one of the largest (in terms of SUM) in France, which is a complex market given the laws governing temporary labor. It has an international version of the VMS, primarily focused on the EMEA region. Referenced clients also lauded its multi-lingual capability
- Over the years, it has added several technologies to its suite through both organic and inorganic investments to meet the end-to-end talent management needs of its clients and to expand its geographic presence. Some investments include:
  - Acquisition of Connecting-Expertise, a cloud-based VMS platform focused on the Belgian market with automation capabilities across the hiring process
  - It also acquired Carerix for its ATS and CRM functionalities and The Internet Corporation for its Amris ATS and Zao social referral and background screening solutions. The acquisition of the latter is also to expand its presence in the UK market
- It has a native mobile application for hiring managers and workers. The application supports various features from contract signing to document management











Limitations

- Pixid VMS has made significant inroads beyond France into the European market. While it continues to build additional capabilities and has plans for expansion in the US as well, clients looking for a global solution should evaluate its capabilities vis-à-vis their regional/local requirements
- Pixid has significant experience and capabilities in managing blue-collar roles, and its client base is also skewed toward blue-collar industries such as manufacturing. Its experience in managing white-collar roles and clients in other industries is currently limited
- Though Pixid offers basic shift scheduling and credentialing management, it has limited functionalities and experience to manage healthcare-specific programs and workers such as per diems and locums
- While Pixid has rich experience in procuring and managing temporary labor from staffing suppliers, it lacks experience and functionalities to manage services procurement / Statement of Work (SOW) and Independent Contractors (ICs)

# Pixid (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- In addition to managing contingent workers, Pixid also has capabilities to manage the permanent recruitment process. Clients looking for a provider that can manage all labor types in a single platform will find its offering compelling
- It has Pixid hub, an integration hub for connecting multiple solutions such as ATS, VMS, and supplier technologies
  - It allows clients to integrate internal and external solutions under one ecosystem. These can be Pixid-owned/partner technologies, client-owned, or MSP-owned technology solutions
  - It has recently achieved a two-way integration with Bullhorn for its ATS functionalities
- Pixid has a strong partnership network to provide enhanced features and functionalities for its clients such as internal mobility, background verification, resume scoring, and reporting and analytics. It has built-in integrations and strategic partnerships with recruitment marketing providers such as Broadbean for direct sourcing
- Over the past year, Pixid has also invested in innovative features, such as customizable BI dashboards, interview scheduling, and CSV file integrations to enhance its user experience











### Limitations

- Even though Pixid has investment plans to utilize next-generation technologies such as AI/ML and NLP, it currently does not offer many use cases of its employing solutions such as chatbots and guided workflows
- Referenced clients highlighted customer support as an area of improvement

# Ramco (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths











- Ramco is an India-based enterprise software provider. Its suite of offerings includes ERP, payroll and HR, and logistics software. Its VMS supports the management of temporary workers, services procurement / SOW, and independent contractors (ICs) / freelancers
- It is one of the few providers that has strong experience in managing clients in the Southeast Asian and Middle Eastern regions
- Ramco’s VMS has built-in ATS capabilities in its system. In addition to supplier management, it allows its users to leverage other sourcing channels such as career pages and has integrations with Broadbean for direct sourcing
- While Ramco’s VMS has dedicated mobile applications for hiring managers and workers, it is currently moving toward Zero UI to enable stakeholders to act from anywhere without logging into the system or using a mobile application – through channels such as mail, chat, and voice
  - It provides clients with multiple timesheet channels including desktop, mobile, WhatsApp, Microsoft teams, browser extension / offline timesheet, Google Assistant / Smart Watch, and geolocation
  - It supports facial and voice recognition features for time and attendance
  - It recently introduced features such as offer letter management through Gmail adaptive cards and onboarding through WhatsApp

### Limitations

- While Ramco has global capabilities, its current client base is the strongest in APAC, followed by EMEA, particularly in the Middle East. Clients beyond these regions, looking for a completely localized solution, need to evaluate its capabilities vis-à-vis their specific requirements
- It has capabilities to manage transactional and administrative services procurement activities such as headcount tracking and billing and payments. However, it lacks advanced capabilities such as redlining, RFx (RFI/RFP) management, and contract negotiation
- It lacks experience in catering to the healthcare and pharmaceutical industries. Clients looking to manage healthcare workers with complex requirements should carefully evaluate its capabilities

Ramco (page 2 of 2)  
Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- It has developed several other innovative features to enhance its VMS user experience
  - It has deployed self-service bots to answer stakeholder queries and help perform tasks such as time and attendance, onboarding, and payrolling
  - It supports the DIY offer letter functionality, which allows users to configure multiple contract letter templates for different job and worker types
- Ramco can additionally assist its VMS clients with payrolling and invoicing services. It incorporates country-specific tax rules through its partnerships with various taxation providers and offers validation of taxation rules for its clients
- It offers insights into operational, financial, and performance metrics of contingent workforce programs through leveraging its analytics capabilities
  - It offers widget-based predictive analytics with interactive dashboards and customizable drill-down features
  - It also provides real-time rate benchmarks that help users compare rates with the current market rates
- Referenced clients lauded Ramco for the breadth and depth of its solution as well as its customer-centric approach while providing ongoing support to clients. They also highlighted the configurability and customization of the system as an area of strength











Limitations

- It continues to invest in its reporting and analytics capabilities. However, there is further scope to strengthen its analytics functionalities by integrating with third-party data sources to offer features such as peer benchmarking
- Referenced clients highlighted seamless integration with other systems as an area of improvement

# ShiftWise (page 1 of 2)

## Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- ShiftWise is a US-based talent management platform owned by AMN Healthcare. It is exclusively focused on large clients of the healthcare industry and supports management of temporary labor and independent contractors / freelancers
- It is one of the few healthcare-specific VMSs in the market that has the experience and capability to manage clinical (locums, per diems, travel nurses, etc.) as well as non-clinical roles. Its functionalities are highly tailored toward healthcare providers
- Considering its dedicated focus on the healthcare industry, it has strong shift management capabilities. It allows for a quick shift selection and creation as well as a float pool management
- ShiftWise has recently introduced a dedicated mobile application, AMN Passport, especially designed for workers. It has features such as job-matching, onboarding, credentialing, and timekeeping
- It supports a feature that allows for automated requirement checks while agencies are submitting candidates to help ensure that only qualified candidates are submitted
- Over the past year, it has invested heavily in business intelligence and reporting capabilities. It has developed advanced analytics dashboards with customizable drill-down capabilities and exportable reports to provide clients total visibility and insights into their workforce quality, process efficiency, vendor performance, compliance, and financial management











### Limitations

- Its current focus is exclusively on the US market and is yet to expand its geographical outreach to cater to healthcare clients beyond the US
- It is yet to expand its capabilities to manage services procurement. Buyers looking for a provider to manage services procurement using the VMS may find this a limitation
- While it allows for management of non-clinical roles and workflows through the system, its existing capabilities may be limited considering that it is built primarily to manage clinical hires
- While it has a dedicated mobile application for candidates/workers, it is yet to develop applications for other stakeholder personas

# ShiftWise (page 2 of 2)

## Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- ShiftWise has a robust credentialing and compliance management capability to meet stringent healthcare compliance requirements
  - It provides automated tracking of pending and expired eligibility requirements. It further helps monitor worker credentials and keeps them compliant with federal, state, and local laws
  - It drives clinical compliance with the Joint Commission by providing an audit trail in real-time
- It can manage both internal resources and agency pools. As part of the system, orders and assignments can be first made available to the internal labor pool and then as per business rules to external contingent labor pools
- In addition to ShiftWise’s VMS capabilities, AMN Healthcare’s MSP and RPO offerings as well as its suite of other healthcare-specific technologies such as a marketplace and complementary VMS technologies (Medefis and b4Health) provide an attractive opportunity for healthcare enterprises looking for a digital Total Talent Acquisition (TTA) solution
  - AMN Healthcare’s partnership with Randstad US also strengthens its TTA capability, which brings technology and a fulfillment experience on the non-clinical hiring side
- Referenced clients highlighted the intuitive workflow and ease of use as key strengths for the platform











### Limitations

- While ShiftWise has investment plans to utilize next-generation technologies, it currently does not offer many use cases for employing these, such as chatbots, RPA, AI-based candidate matching and ranking, and guided workflows
- Few of the referenced clients highlight the learning resources of the platform as an area of improvement

# VectorVMS (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- VectorVMS, a Learning Technologies Group (LTG) company, is a US-based provider of contingent workforce management technology. Its VMS solution supports the management of temporary workers, services procurement / SOW, and independent contractors / freelancers
- Being part of LTG, VectorVMS can offer an attractive proposition for clients looking for a provider with total talent-related technology, particularly in the areas of ATS and learning
- It has proven experience in managing government / public sector and healthcare enterprises
  - It has shift management, credentialing, and time capture capabilities to meet complex healthcare-specific requirements
  - It supports WCAG 2.0 capability for meeting government / public sector compliance standards
- VectorVMS offers a shared managed services (SMS) program to its clients that allows them to directly manage their contingent workforce program while still receiving specialized services of their choice. First-generation and self-managed clients with simpler requirements may find this offering compelling
- It has developed an end-to-end services procurement management module by building capabilities across both the source-to-contract and procure-to-pay processes, including RFx for vendor sourcing and negotiation and SOW creation

### Limitations











- While VectorVMS has presence in the UK, Europe, and APAC as well, its current client base is the strongest in North America. Clients beyond North America, looking for a completely localized solution, need to evaluate its capabilities vis-à-vis their specific requirements
- It has expertise in managing small and midsize programs (less than US\$100 million spend). Thus, clients wishing to manage a large spend through the system should carefully evaluate the breadth and depth of its capabilities
- While it has a fully functional SOW module, its experience in managing end-to-end SOW for clients is unproven
- Even though VectorVMS has some AI-driven features such as candidate compare and NLP, it is yet to augment itself with other next-generation technologies such as chatbots and RPA/automation
- While it has clients across industries, its presence is the strongest in the healthcare and public sectors, which constitute over 50% of its portfolio. Clients across industries such as energy & utilities, retail, and logistics should evaluate its offerings carefully vis-a-vis their requirements



# VectorVMS (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- It has robust reporting and analytics capabilities to support decision-making across the entire application. Referenced clients also lauded its business intelligence capabilities
  - It offers 120+ standard reports as well as the ability to create custom reports for its clients to obtain real-time insights on parameters such as supplier performance and KPI/SLAs
  - It provides real-time rate benchmarks through updated rate cards to help its users compare with current market rates
  - It supports a highly customizable productivity dashboard through its sister company, PeopleFluent, which acts as a one-stop-shop for all total talent management needs
  - It also supports advanced analytics capabilities such as peer benchmarking and predictive analytics
- It offers a dedicated mobile application for hiring managers, through which they can manage all the approval processes from timesheets to expenses
- Referenced clients lauded VectorVMS for its trusted partnership and customer-centric approach. Clients also highlighted its ease of use and flexibility as areas of strength











### Limitations

- Even though VectorVMS offers direct sourcing and talent pooling capabilities to its clients through partner companies, its experience in catering to the end-to-end direct sourcing needs of its clients is still limited
- Referenced clients further highlighted a dated UI/UX as compared to that of its peers as one of the limitations of the platform

# Worksuite

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Worksuite is a US-based provider of technology solutions for external workforce management. While it started out as a Freelancer Management System (FMS), its VMS solution is evolving to support the procurement and management of temporary workers and services procurement / SOW
- While its origin is in North America, it has been able to gain traction in EMEA and APAC. It is one of the few providers that have capabilities across multiple regions
- It provides a flexible suite of solutions to manage the full life cycle of external workforce management, from sourcing through onboarding and payments
- Worksuite is building an interactive solution with a focus on intuitive functionalities such as candidate profiles and grouping and cataloging features
- It has good credentialing and compliance management capabilities to meet the complex compliance requirements for contingent workers. Its clients can access its talent qualification service as a value-add
- It has been making significant investments in improving its offerings. It continues to invest in its services procurement capabilities to expand its coverage across the SOW management spectrum, including RFx for vendor sourcing and negotiation and SOW creation
- It has an integrated payments/payroll processing module. Clients have the option to track payments and automatically pay contingent workers through its Worksuite Pay module based on the payment frequency (weekly/bi-weekly/monthly)

### Limitations

- Considering that its origin is from an FMS, its capabilities on the VMS side are still evolving. Enterprises looking for a sophisticated VMS offering should carefully evaluate its depth and breadth of capabilities
- As it is still evolving in its VMS capabilities, enterprises across industries and geographies need to evaluate its existing capabilities against the extent of localization with their country’s regulations and requirements
- It lacks experience in catering to the healthcare and pharmaceutical industries. Clients looking to manage healthcare workers with complex requirements should carefully evaluate its capabilities
- While Worksuite offers a fully mobile-optimized interface, it lacks native mobile applications for different stakeholder personas

# 05











## Enterprise sourcing considerations

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- Aspirant
  - Conexis
  - CrewFoundry
  - Stafferlink
  - TalentNow

Conexis (page 1 of 2)  
Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

Strengths

- Conexis is a Canada-based contingent workforce technology provider. Its VMS solution supports the management of temporary labor as well as independent contractors / freelancers
- It provides its clients with an easy-to-implement solution with a user-friendly interface and high-touch services. First-generation and small/mid-market buyers that are generally price-sensitive and looking for a simple solution will find it compelling
- It has experience in managing both white-collar job roles such as engineering/IT as well as blue-collar job roles pertaining to the light industrial sector
- While Conexis does not have full-fledged direct sourcing capabilities, it does support a basic functionality to create repositories of pre-identified candidates in the system
- It offers basic analytics and reporting capabilities to its clients to provide them with real-time insights on key parameters of their contingent workforce program











Limitations

- Conexis is focused exclusively on the North American market and is yet to expand its outreach to other regions
- So far, it only has experience in managing small clients and lacks experience in managing midsize and large clients
- Its experience is limited to only certain industries such as retail, pharma, and business services. Clients beyond these industries need to evaluate its capabilities carefully vis-à-vis their specific requirements
- It lacks capabilities to manage services procurement / SOW processes
- While Conexis supports basic reporting and analytics, clients looking for advanced features such as peer/rate benchmarking and descriptive and predictive analytics will find its capabilities limited
- While Conexis is mobile adaptable, it does not offer dedicated mobile applications for hiring managers and workers

# Conexis (page 2 of 2)

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Conexis offers its clients-several time and expense management-related features and functionalities to improve time tracking, billing, and invoicing processes
  - It provides the capability to both manually update as well as import time and expense items into the system
  - It allows for time and expense tracking across different business units, GL codes, and cost centers to its clients
- It also provides its MSP clients with an application center functionality, which supports them in the sourcing of new suppliers











### Limitations

- It lacks experience in integrating with broad-based enterprise applications/platforms such as ERP and HRIS as well as any next-generation point solutions. It also does not offer integrations with any external sources to facilitate direct sourcing in the system

# CrewFoundry

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- CrewFoundry is an India-based contingent workforce technology provider. Its VMS solution supports temporary labor management and is building capabilities to support services procurement / SOW and independent contractor / freelancer management as well
- It is one of the very few VMS providers that focuses on the Indian market. It has a strong understanding of the Indian market including Indian labor laws and regulations
- It started out as a vendor marketplace, and currently has over 200 staffing partners that can be accessed directly from the platform
  - Its VMS clients can access the marketplace as an additional value-added service to supplement their supplier base in the program
  - The marketplace also enables suppliers to create their own talent pools of qualified and pre-screened talent
- CrewFoundry continues to build on its partnership network with various providers to provide enhanced features and functionalities such as background verification, compliance tracking, and video interviewing to its clients
- It offers insights into operational, financial, and performance metrics by leveraging its analytics capabilities. It offers widget-based descriptive analytics with interactive dashboards and customizable drill-down features











### Limitations

- CrewFoundry currently serves clients only in the Indian market, and hence, clients from other regions should evaluate its capabilities carefully
- CrewFoundry's programs are currently small pilot projects in the hi-tech & telecom and retail industries. Prospective clients need to evaluate its capabilities carefully vis-à-vis their specific requirements
- Considering its recent expansion into the VMS space, its VMS capabilities are still evolving albeit at a rapid pace. It is in the process of expanding its capabilities to manage services procurement and ICs / freelancers
- It currently does not have the capabilities to support management of clinical healthcare roles. It may not be a VMS provider of choice for healthcare providers, as the shift management requirements of healthcare facilities can be complex
- The enabling of native mobile applications for different stakeholder personas is in its roadmap
- It is yet to invest in innovative next-generation technologies such as AI/ML, automation, and in-app virtual assistant bots
- Advanced analytics capabilities such as predictive analytics and rate/peer benchmarking are also currently lacking in the system

# Stafferlink

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- Stafferlink is a US-based healthcare staffing software provider. It has two main solutions – Stafferlink FSM™, a talent procurement and management solution, and Stafferlink ASM™, a staffing agency management solution. Its VMS solution, Stafferlink FSM™, manages temporary labor for its clients
- It also offers features that support the management of permanent hires. Healthcare providers looking for a single solution to manage both temporary and permanent workers will find its offering compelling
- It can manage both internal resources and agency pools. Orders and assignments can be made available to internal and external talent pools based on client requirements. It additionally provides self-service capabilities and notifications for candidates to support internal pool management
- It is a flexible application that allows customizable workflow creation in the platform. Clients can set up different workflows, job classes, and approval workflows for different departments within the same organization
- It has robust shift management and credentialing management capabilities to meet complex healthcare requirements. Clients can tailor the required credential list from a pre-defined list based on their needs











### Limitations

- Its focus is exclusively on the US market and is yet to expand its geographical outreach to cater to healthcare clients abroad
- Buyers looking for a provider to manage services procurement and independent contractors / freelancers using the VMS may find this as a limitation, as it is yet to expand its capabilities in these areas
- Enabling a native mobile application for different stakeholders is on its roadmap. Clients looking for a VMS provider with native mobile capabilities may find this a limitation
- While it has basic tracking and reporting capabilities, there is further scope to develop advanced analytics capabilities with interactive dashboards and customizable drill-down capabilities

# TalentNow (page 1 of 2)

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- TalentNow is a US-based workforce technology provider. Its VMS solution supports the management of contingent/temporary workers, SOW / services procurement, and independent contractors / freelancers
- It also offers a SaaS-based ATS solution to its clients. Small and mid-market buyers looking for a one-stop total talent technology provider may find this a compelling proposition
- One of the differentiators for TalentNow is its unified marketplace connecting employers to contingent candidates across different talent sources. Apart from their own private vendor pool, it gives recruiters access to other global talent pools through seamless integration with multiple talent sources such as direct sourcing platforms, public marketplaces, or other reputable vendor pools
  - It offers real-time visibility of bill rates prevalent in the market, ensuring that its clients pay fair market rates
  - It uses an AI-driven approach to pre-identify the most suitable and available candidates for common job roles before the start of their engagements for efficient hiring
  - It also provides functionalities to assist enterprises in the rehiring of specific candidates of their choice
- It follows a partnership approach with various technology partners to provide enhanced features and functionalities such as interview assessments and video interviewing for its clients

### Limitations











- TalentNow focuses exclusively on the North American market and has limited outreach to other regions
- Although TalentNow supports an SOW module, its experience in managing end-to-end complex SOW project situations is limited
- While TalentNow does support SMS-based functionalities, it does not have a dedicated mobile application for hiring managers and workers
- Considering that it is from a marketplace background, its capabilities on the VMS side are still evolving. Enterprises looking for a sophisticated VMS technology should carefully evaluate its depth and breadth of capabilities



# TalentNow (page 2 of 2)

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Core technology capability	Emerging/ differentiating capability	Implementation, UI/UX, and support	Engagement and commercial model	Overall
									

### Strengths

- TalentNow provides reporting and analytics capabilities with customizable dashboards to support clients in their data-driven decision-making process
  - It offers 90+ standard reports to its clients to obtain real-time insights on parameters such as supplier performance and KPI/SLAs
  - Through its partnership with multiple data cultivation partners, it also enables its clients to have real-time insights into workforce demographics, job posting analytics, compensation data, and overall employment data
- It offers an easy to use and intuitive platform with various other features and functionalities to improve user experience such as white labeling of the platform, SMS, and email-based capabilities to complete daily tasks and processes

### Limitations

- While TalentNow has invested in reporting and analytics functionalities, it does not offer other advanced capabilities such as predictive analytics to its clients
- Even though TalentNow has some AI-driven features such as candidate matching and NLP, it is yet to augment itself with other next-generation technologies such as chatbots and RPA/automation

# 06

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## Appendix

- Glossary
  - Research calendar
-

## Glossary of key terms used in this report

<b>ACV</b>	Annualized Contract Value is calculated by dividing the Total Contract Value (TCV) by the term of the contract
<b>ATS</b>	An Applicant Tracking System is a software application that enables the electronic handling of recruitment needs. An ATS system can be implemented on an enterprise or small business level, depending on the needs of the company
<b>Best-of-breed</b>	Best-of-breed solutions are point solutions for specific processes or subprocesses
<b>Blended talent acquisition model</b>	The blended talent acquisition model is an inclusion of both permanent and contingent hiring within a single service provider contract
<b>Buyer</b>	The company/entity that purchases outsourcing services from a provider of such services
<b>Global deal</b>	Global deal refers to a deal where delivery occurs in multiple continents
<b>Global sourcing</b>	Global sourcing refers to a strategy wherein services are sourced from a country (or countries), different from the country (or countries), where the company receiving the services is located. It includes both offshoring and nearshoring
<b>Managed spend / Spend Under Management (SUM)</b>	Managed spend refers to the expenditure incurred by a company to procure services (and goods), and is actively managed by the MSP or PO provider
<b>MSP</b>	Managed Service Provider (MSP) is the transfer of ownership of all or a part of the management of an organization's contingent/temporary staffing activities on an ongoing basis
<b>PO</b>	Procurement Outsourcing (PO) is the transfer of ownership of all or a part of procurement processes or activities on an ongoing basis
<b>RPO</b>	Recruitment Process Outsourcing (RPO) is the transfer of ownership of all or a part of recruitment processes or activities on an ongoing basis, and must include permanent hires
<b>SaaS</b>	Software-as-a-Service is a software that is deployed on the internet and/or is run behind a firewall in the local area network or personal computer
<b>TCO</b>	Total Cost of Ownership
<b>TCV</b>	Total Contract Value is the potential revenue associated with the transaction and estimated at the commencement of the contract (e.g., sum total of revenue accrued to the service provider from the transaction over the entire transaction term, usually measured in millions of dollars)
<b>VMS</b>	Vendor Management System is a software application that helps manage and procure contingent labor through staffing agencies

# Research calendar

## Contingent Workforce Management (CWM)

Published Planned Current release

Reports title	Release date
The Evolution of Vendor Management Systems (VMSs) for Contingent Workforce Management: What Will Differentiate the VMSs in the Future?	December 2020
A Practical Approach to Total Talent Acquisition	February 2021
Vendor Management System (VMS) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021	March 2021
Disruption in IT Staffing	May 2021
MSP 4.0: From Contingent Workforce Management to Contingent Talent Empowerment	July 2021
Vendor Management System (VMS) – Technology Vendor Compendium 2021	July 2021
Vendor Management System (VMS) State of the Market Report 2021 – Keeping Pace with Rapidly Evolving Buyer Expectations	September 2021
Contingent Workforce Management (CWM) State of the Market Report 2022 – The Next Frontier to Address Unprecedented Talent Challenges	October 2021
The Next Era in Talent Management: Leveraging a Once-in-a-Lifetime Strategic Shift	November 2021
Workday Acquires VNDLY: Enabling an Integrated Platform-Driven Approach for Total Talent Management (TTM)	December 2021
Direct Sourcing for Contingent Workforce: a Talent-Centric Approach to Address Today’s Unprecedented Workforce Challenges	March 2022
<b>Vendor Management System (VMS) PEAK Matrix® Assessment with Technology Vendor Landscape 2022</b>	<b>May 2022</b>
Vendor Management Systems (VMS) – Vendor Profile Compendium 2022	Q2 2022
CWM – Service Provider Landscape with PEAK Matrix® Assessment 2022	Q2 2022
VMS State of the Market Report 2022	Q3 2022

Note: [Click](#) to see a list of all of our published CWM reports



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