



Multi-country Payroll Platform (MCP) Assessment

Human Resources Outsourcing (HRO)
Market Report: June 2016

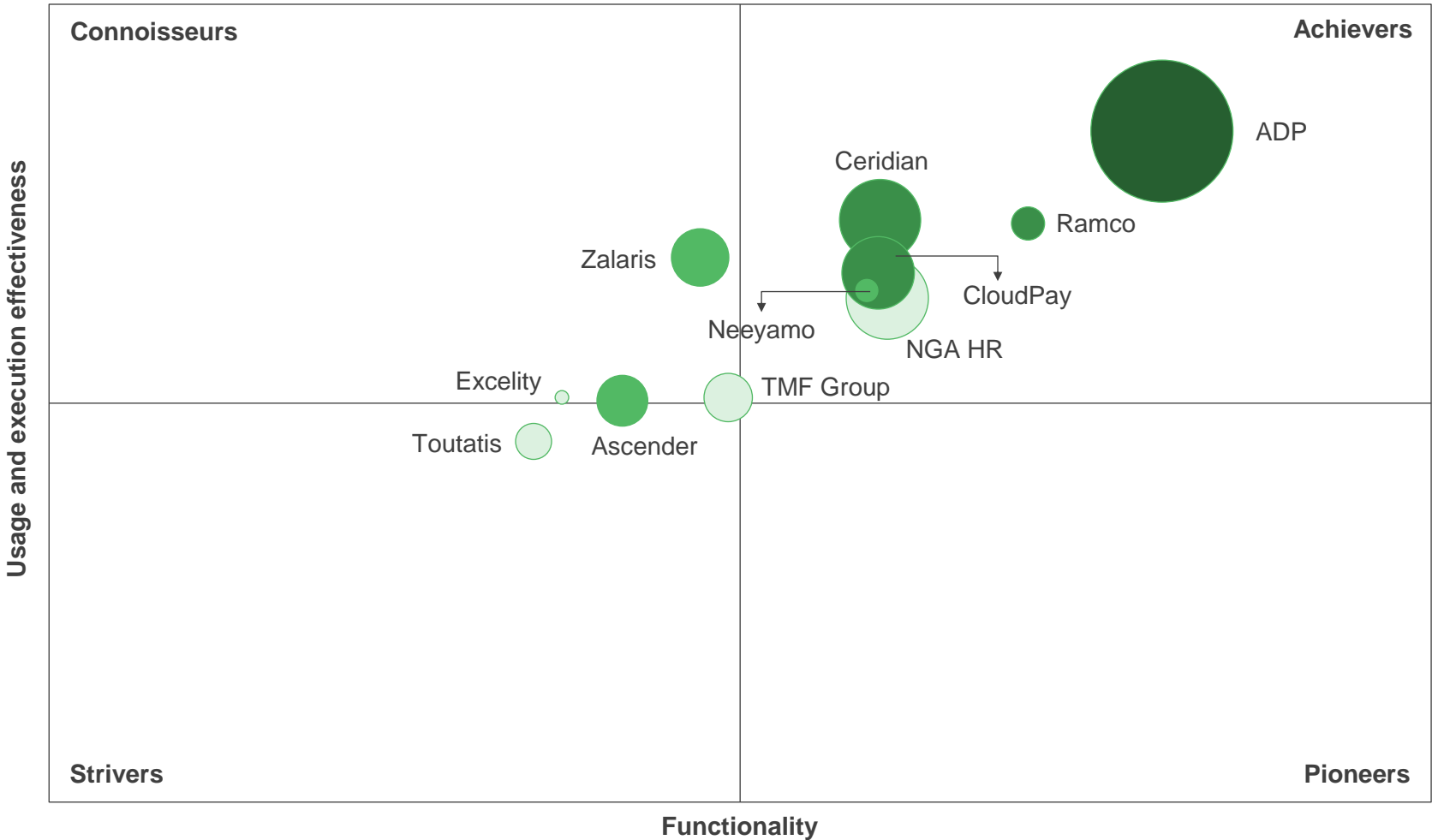
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Everest Group's Multi-country Payroll Platform assessment

Bubble size: Revenue from MCPP

Vision: Conventional  Progressive



Multi-country Payroll Platform assessment (page 1 of 2)



Service provider	Functionality					Usage and execution effectiveness
	Core payroll capability	Additional HR capability	Reporting and analytics	Employee support	Overall	
ADP	Medium-high	High	High	High	High	High
Ascender	Low	Medium	Medium	Medium	Medium	Medium
Ceridian	Low	Medium-high	High	Medium-high	Medium-high	Medium-high
CloudPay	Medium	Low	High	Medium	Medium-high	Medium-high
Excelity	Low	Medium	Medium	Low	Low	Medium
Neeyamo	Medium-high	Medium	Medium	Medium-high	Medium	Medium-high
NGA Human Resources	Medium-high	High	Medium	Medium-high	Medium-high	Medium-high

Service provider: ADP

Platform: ADP Globalview

 High
  Medium-high
  Medium
  Low

Service provider	Functionality					Usage and execution effectiveness
	Core payroll capability	Additional HR capability	Reporting and analytics	Employee support	Overall	
ADP						

Strengths

- ADP is the largest MCPO player in the world and has invested in creating robust multi-country payroll platforms – Globalview (based on SAP targeted towards large employee population) and Streamline (a combination of proprietary in-country and partner-based solution targeted towards smaller employee population). Combination of these two makes ADP’s solution applicable across multiple scenarios (various types of employee population)
- In the Globalview platform, ADP has introduced multiple features and functionalities to enhance the user experience – both for employees and managers:
 - Option to modify the landing page according to individual preferences as well as adding social media plug-ins
 - Strong reporting and analytics capabilities both for employees and managers which includes
 - ◆ Interactive and dynamic dashboards for managers to get insights into the payroll data both from country as well as global level
 - ◆ Payslip analytics for employees customized based on the type of pay arrangement
 - An effective workflow control tool which provides real-time view into payroll activities through a calendar interface
 - In-built case management¹ functionality to handle employee queries
- It provides pre-payroll processing¹ audit functionality which helps in identification of any anomalies in the payroll calculation and their subsequent correction
- It has official integration with leading HRIS providers - SAP, SuccessFactors, and Workday. It is also moving forward to integrate Globalview with its proprietary advanced HR analytics platform, ADP DataCloud
- It has mobile app interface for its payroll platform which facilitates on-the-go access to all the employee support features
- ADP’s philosophy of providing B2C experience to employees in what is actually a B2B (payroll outsourcing) environment places them ahead of competition

Areas of improvement

- While ADP has a very broad country coverage through the two platforms which includes most countries critical for a majority of MNCs, it still depends on the partner network for some countries, mostly in Latin America and Middle East
- Since, ADP has multiple, sometimes overlapping payroll service offerings to serve various segments of the entire market, it needs to advise clients on the most suitable solution based on their specific requirements
- While ADP has strong compliance capability with a team providing regular updates to any changes in rules and regulations, it can have compliance features built into the platform providing real time visibility into any issues or concerns affecting the client

¹ Please refer to glossary for explanation

Reporting & analytics: To improve differentiation, service providers are increasing investment in reporting & analytics to provide actionable insights that have a direct business impact

Top performers by reporting and analytics



Existing and emerging features

While all the payroll platforms have basic reporting and static dashboard capability, the real differentiator is the dynamic dashboard capability that offers insights in a really intuitive and interactive manner

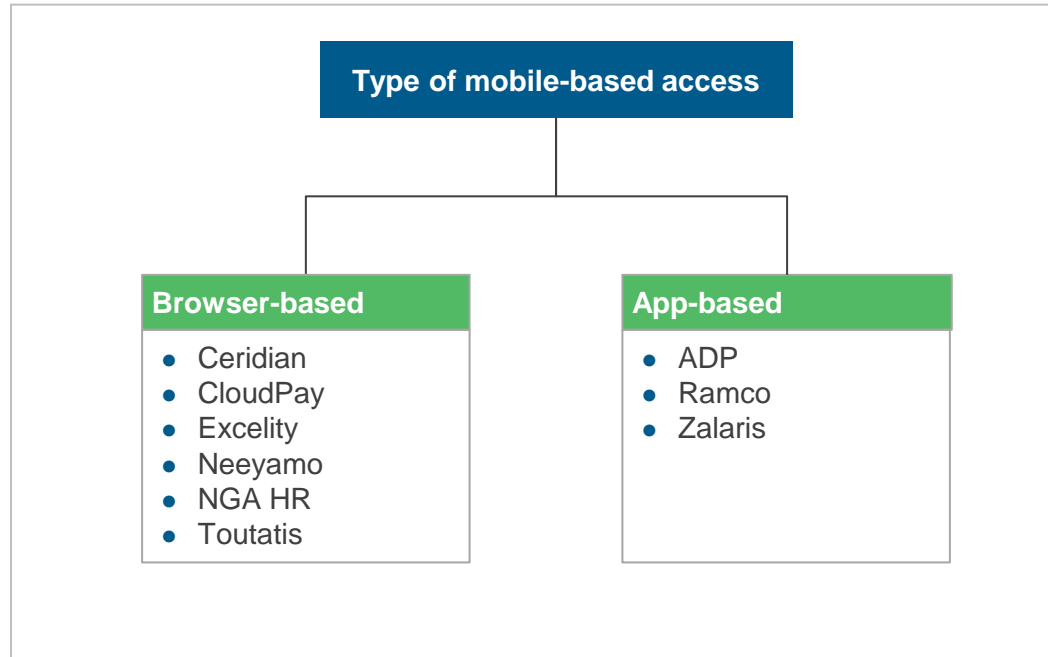
- **Basic reporting:** This includes providing access to the client to predetermined and predefined set of reports at specific time periods
 - **Ad hoc reporting:** This functionality enables the client to generate reports based on custom parameters on an ad hoc basis
 - **Static dashboards:** These are basic dashboards where data is shown either in tabular or Excel-like format, and data update cannot be done in real-time
 - **Dynamic dashboards:** Dynamic dashboards are graphical and interactive in nature and can show updated data in real-time
- Some vendors have or are investing in advanced analytics not just for managers but also for employees**
- ADP has gone one step further than other service providers and developed an analytics dashboard for employees, which help in payslip comparison and understanding the payroll elements better. The type of analytics is customized based on the type of employee (e.g., salaried vs. hourly) and designed to answer the most common payslip-related questions that employees tend to have
 - CloudPay is investing in developing an analytics dashboard which will help predict any error that can occur in payroll processing

Service provider reporting and analytics capabilities

Service provider	Basic reporting	Ad-hoc reporting	Static dashboard	Dynamic dashboard
ADP	✓	✓	✓	✓
Ascender	✓	✓	✓	✗
Ceridian	✓	✓	✓	✓
CloudPay	✓	✓	✓	✓
Excelity	✓	✓	✓	✗
Neeyamo	✓	✓	✓	✗
NGA HR	✓	✗	✓	✓
Ramco	✓	✓	✓	✓
TMF Group	✓	✓	✓	✗
Toutatis	✓	✗	✓	✗
Zalaris	✓	✓	✓	✓

Mobility: Mobile app-based access to payroll features is coming up as a significant differentiating factor among service providers

Top performers by reporting and analytics



- Features commonly offered through mobile apps**
- Key employee features**
- View payslips
 - Track time & attendance
 - Punch in/out
 - Create timesheets
 - Update, edit, and approve time cards
 - Contact colleagues
 - Leave and expense management
- Key manager features**
- Approve time-offs
 - Approve and edit timesheets
 - Approve and edit payslips
 - View team calendars

Current trends and future plans

- Majority of these mobile applications are available on Android and iOS
- Providers are investing in improving their mobile capability in multiple ways:
 - Multiple players such as Neeyamo and Ascender are planning to develop mobile app capability for payroll functionality
 - Other players are trying to make their browser-based systems more responsive to mobile devices using HTML5 and UI enhancing tools