



# **2008** Global HR Transformation Report

Conducted by HROA in association with ADP



# TABLE OF CONTENTS

Introduction.....	4
About the Survey .....	5
Executive Summary .....	6
Research Findings .....	9
Transformation Status.....	9
Transformation Scope.....	14
Transformation Outcomes to Date .....	17
Outsourcing and Shared Services.....	23
About the Survey Participants .....	30
Organisational Demographics .....	30
Respondent Demographics .....	32
About ADP.....	33
About HROA.....	35

## INTRODUCTION

### A World of Change – A Change of World



Marc Bruzzo

As a long-time partner of the HROA, I should probably begin by telling you how HR transformation has become part of everyday life and stress the fact that nearly two-thirds of organisations that are transforming HR are meeting or beating their cost savings goals.

But, does this really address your critical issues today? We know this publication is intended to provide food for thought to help us go in the right direction. Last year's report clearly highlighted chronic hurdles that impede the deployment of internal transformation. Has anything changed? Yes, but not enough, according to the answers you gave, and that you can read in this report.

I still believe that users, providers and advisors must improve change management to go forward and create new and better ways to enjoy the benefits of HR transformation. We are going in the right direction; the HROA is probably one of the most visible demonstrations of that change, but we have to ask ourselves, are buyers taking full advantage of resources that are available on the market? And, of critical importance for me, are vendors and advisors providing the resources buyers need?

Good news! Today, we are farther up the learning curve. We have learned our lessons well. However, we still have a way to go to reach our goal. New challenges lie ahead. It is up to us to leverage this report to find innovative ways to meet them.

Enjoy your reading,

Marc Bruzzo  
Vice President  
ADP Employer Services Europe



## ABOUT THE SURVEY

In this year's fifth annual human resources (HR) Transformation Survey we study trends in HR transformation practices (which we define as any concerted effort to change and improve HR operations, whether through outsourcing, shared services, internal reengineering, or a combination of these strategies) in organisations around the globe. The 2008 report offers perspective on global organisational leaders' HR transformation efforts, and their plans and expectations for the future.

In addition to discussing transformation status and strategy, our report addresses:

- Reasons organisations transform, and the barriers that limit their transformation
- Transformation timing, cost and satisfaction
- Engagement of external resources and experience
- Current and future transformation scope
- HR outsourcing and shared services strategy, budget and provider selection

The survey received responses from 129 executives around the globe in varying stages of HR transformation. For a full breakdown of respondent demographics, please visit the "About the Survey Participants" section of the report.



## EXECUTIVE SUMMARY

### **Transformation continues to pick up steam**

We said it last year, and we'll say it again this year: HR transformation is hot and getting hotter. We find a higher percentage of respondents engaged in HR transformation each year, from 75 percent in 2006 to 90 percent in 2008.

Further supporting the point, HR transformation programme scopes are at least stable, and often growing. Only 17 percent of respondents say they have reduced the scope of their HR transformation programmes since their introduction, and 64 percent intend to expand their scope in the coming years.

### **Organisations transform for strategic, cost, and service reasons**

Organisations transform HR primarily to focus HR staff on more strategic issues, to align the organisation around common objectives, to improve service, and to reduce or manage costs.

### **The hurdles are getting higher and transformation lessons don't appear to be filtering out**

Organisations that are transforming have perpetually identified the skills of existing HR staff as the number one impediment to HR transformation, and this year saw no change in that selection. In fact, transformation doesn't seem to be getting much easier, as nearly every hurdle is rising: 7 of the 10 identified hurdles received higher responses between 2006 and 2008. In particular, internal bureaucracy, lack of adequate technology, and change management issues seem to be increasingly problematic.

At the same time, either buyers aren't taking advantage of resources that are available in the market, or providers/advisors aren't providing the resources buyers need: 70 percent of respondents report that they develop their own processes for identifying and selecting a provider, and only 48 percent say they engage consultants or sourcing advisors.



## Executive Summary

### **HR transformation succeeds in driving organisational alignment**

Satisfaction with HR transformation is highest in areas impacting organisational alignment, an important area as it ranks among the top five reasons organisations transform HR. Keys to success in transformation include: access to better tools/resources; change management and education; management support at both the top and line levels; and, alignment, focus and standardisation.

### **HR transformation is challenged in meeting key expectations**

More than half of our respondents are failing to meet expectations in the essential areas of focusing HR on strategic issues and reducing/managing costs.

### **Transformation takes longer than expected but cost savings goals are often met**

Just over half of respondents underestimate the time required to transform HR, although usually only by about a year. (Transformation takes three to four years versus an expectation of one to two.) The primary reasons cited for the extended timeframes include: lack of senior leader/manager buy-in, change resistance, transformation complexity, and lack of resources.

Nearly two-thirds of organisations that are transforming HR are meeting or beating their cost savings goals of 16 percent to 25 percent cost savings.

### **HR outsourcing (HRO) is common, but not ubiquitous**

Just over two-thirds of respondents are outsourcing or plan to outsource some HR processes. The most commonly outsourced processes continue to be transactional in nature, including payroll, and pension and benefits administration. However, recruitment outsourcing, a “hot commodity” in the HRO arena in recent years, continues to grow.

### **Price rises to the top provider selection criterion**

Price is the most significant criterion in provider selection in our 2008 study, up from third and fourth place in 2007 and 2006 respectively. Multi-country capabilities and functional coverage and expertise round out the top three in 2008.



## Executive Summary

### **HRO budgets are rising ... or are they?**

More than half of respondents say they expect their HRO budgets, most commonly US\$10 million or less annually, to grow in the coming years. However, despite the same findings in years past – expectations of HRO budget growth – we have seen no significant increase in average HRO budgets in the time we've been conducting this research.

### **Are we trending away from shared services for HR?**

Although nearly one-third of our respondents said they are transforming mostly through shared services, we saw a decline in the use of shared services across all HR processes between 2007 and 2008. Coupled with the increase we found in the use of outsourcing, this result may indicate a trend from shared services to outsourcing. With only one year of data, it's too early to call that change yet, it's worthy of close attention in 2009.

# RESEARCH FINDINGS

HR transformation continues to gain in popularity

## Transformation Status

HR transformation remains very active, with 90 percent of respondents transforming HR or planning to transform: 3 percent have completed their projects, 70 percent are in the process, and 17 percent are planning to transform (Figure 1). Across the past three years we've seen HR transformation pick up steam, with more respondents each year indicating that they are engaged in transformation or considering it (Figure 2).

Figure 1: HR Transformation Status

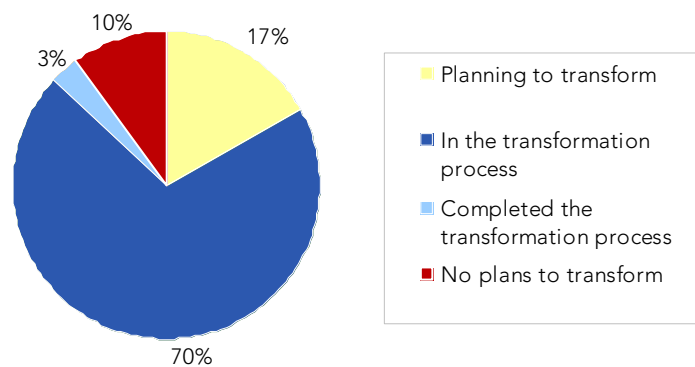
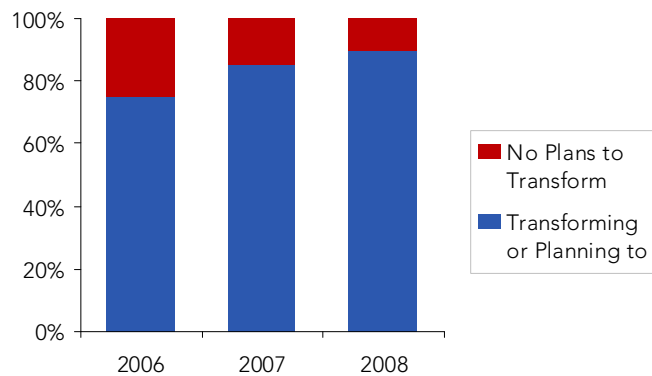


Figure 2: HR Transformation More Common Every Year



## Research Findings

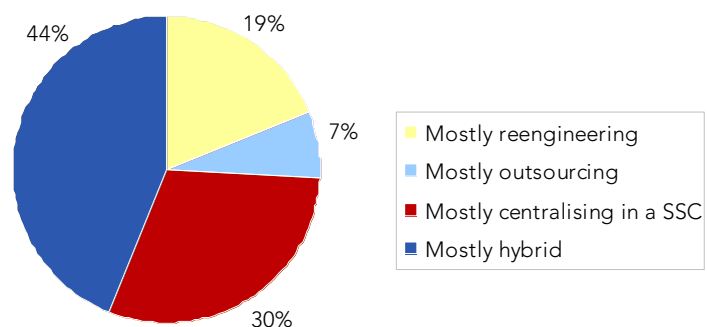
As we have found in past years, smaller organisations are less likely than their larger counterparts to be engaged in HR transformation; that said, still 79 percent of organisations with fewer than 5,000 employees are engaged in HR transformation.

Those organisations that are not engaged in HR transformation most often say they are pleased with their current solution; their lack of engagement in HR transformation is not typically due to HR not being a priority, company policy or cost constraints.

HR leaders are taking advantage of multiple transformation options

Whilst many respondents are taking advantage of several different strategies in their HR transformation effort, we asked them to tell us which is their *predominant* strategy. Across all respondents, the hybrid approach (some mix of internal reengineering, outsourcing and shared services) is the most common predominant transformation strategy, followed by centralisation in a shared services center, reengineering, and, last, outsourcing (Figure 3). Although a considerably higher percentage of respondents are engaged in HR outsourcing at some level, only 7 percent say that outsourcing is their predominant transformation strategy.

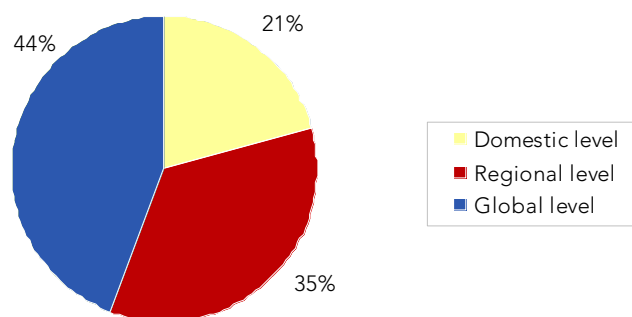
Figure 3: Hybrid Approach to HR Transformation Most Common



## Research Findings

The global nature of our respondent pool (74 percent operate in more than 10 countries) drives the decision of where HR is most often centralised. The highest percentage (44 percent) of respondents centralise HR processes at the global level (Figure 4).

Figure 4: HR Process Centralisation



There is virtually no difference in these findings based on the headquarters location of the responding organisation – results are similar whether the organisation is based in EMEA or the Americas.

Organisations transform HR for strategic, service and cost reasons

Over the years that we have been engaged in this research, the top reasons organisations transform have not changed (Figure 5), although rankings within the top 5 have changed. The major reasons respondents say they transform HR are:

- To free internal HR staff to focus on strategic issues (74%)
- To add and/or improve service for line management and employees (69%)
- To reduce cost or better manage the cost of internal processes (64%)
- To align the organisation on common objectives (61%)
- To respond to organisational changes (48%)

# Research Findings

Figure 5: Reasons Organisations Transform

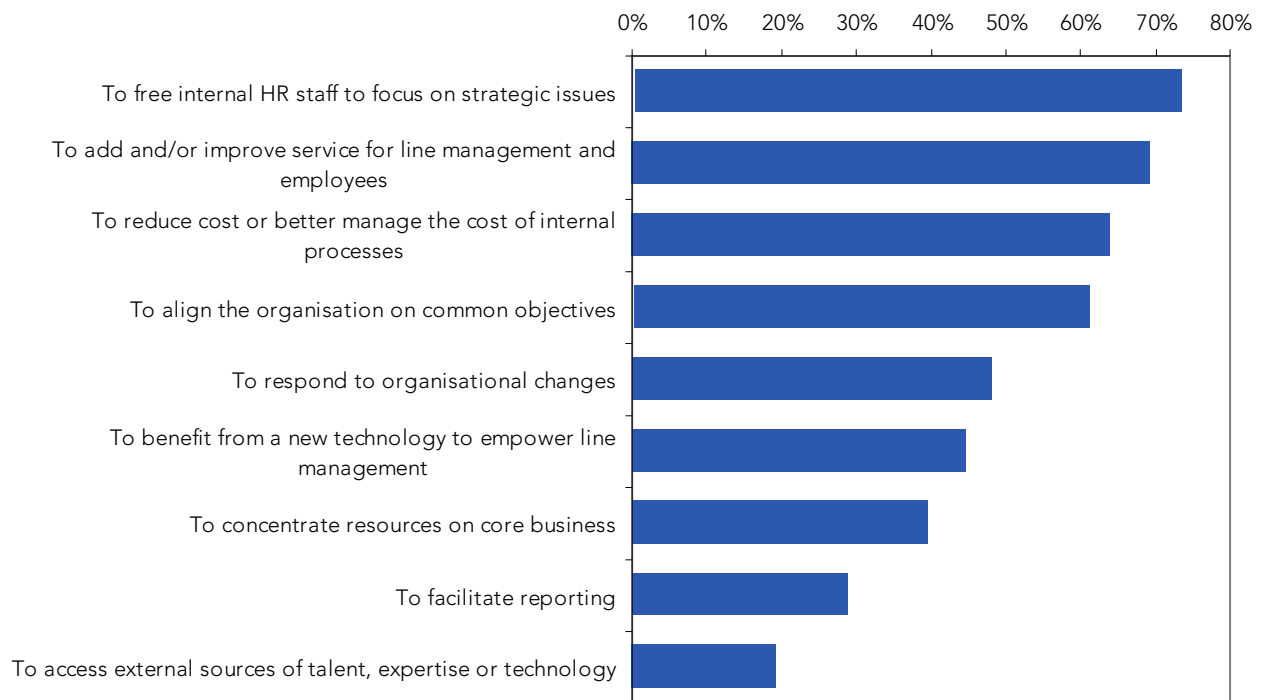
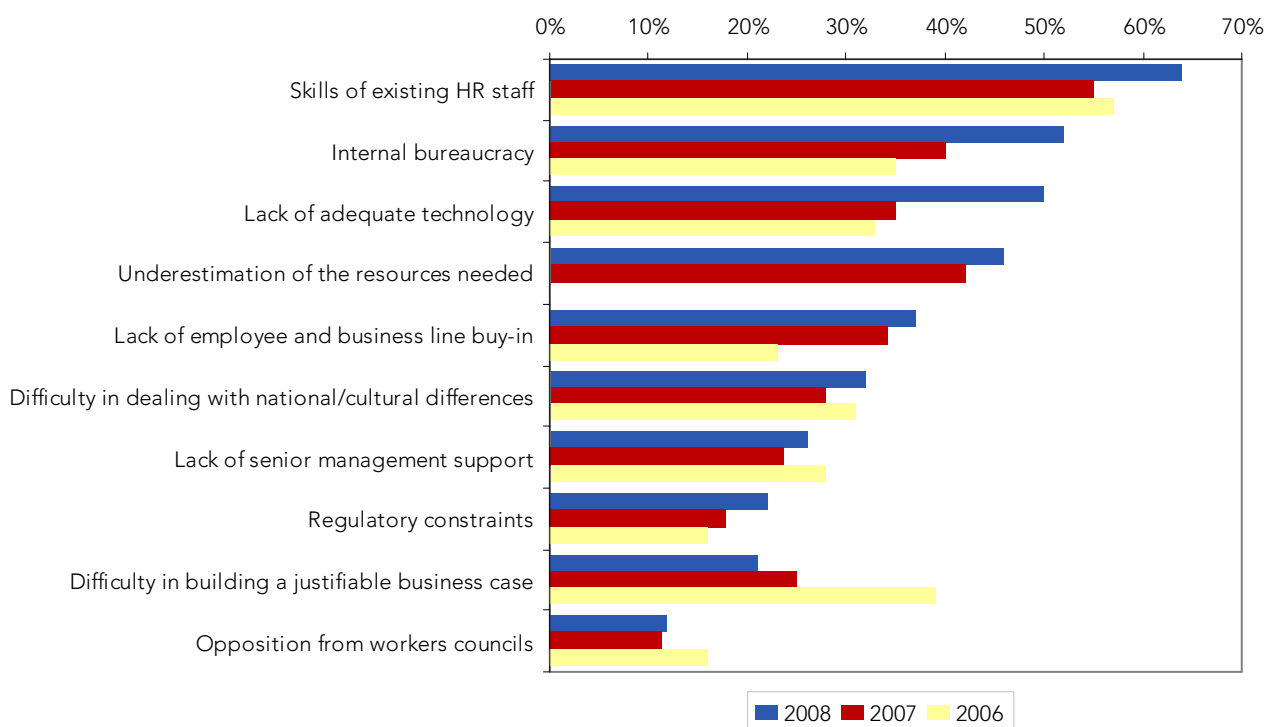


Figure 6: Hurdles to HR Transformation



## Research Findings

Skill gaps of existing HR staff is perpetually the top hurdle to HR transformation

Respondents have identified the skills of existing HR staff as the number one impediment to HR transformation each year over the last three years. Gaining in focus over the past two years, as well, are internal bureaucracy and lack of adequate technology.

It is interesting to note that over the last three years, the percentage of respondents selecting most hurdles is increasing. It appears that, despite widespread support for HR transformation, and in the face of many comparatively mature programmes, HR transformation is not getting much easier (Figure 6).

Internal bureaucracy and technology issues are much bigger hurdles for those organisations that are newer to HR transformation. Worker council opposition was clearly a much greater problem earlier in the transformation years, as organisations that have been transforming for more than five years cite it considerably more than more recent entrants.

Respondents cite two additional hurdles:

1. change management, in two forms: lack of change management planning and/or capability and resistance to change; and
2. the complexity of this kind of undertaking across diverse organisations and widespread geographies.

### Transformation Status Conclusions

- Across markets and geographies, organisations are seeking opportunities to control/lower cost and improve service of their HR programmes. A concerted HR transformation effort is clearly viewed as an effective strategy to attain those goals.
- To date, no one strategy is the clear “winner” in its use to transform HR. However, it appears that organisations are increasingly recognising that a more dedicated programme – one that goes beyond internal reengineering – is required to truly transform HR.
- The main reasons organisations transform HR – strategy, service, and cost control – are stable over time.
- HR transformation continues to be a challenging process for many, and it doesn’t appear to be getting much easier, as many of the same hurdles continue to haunt organisations year over year. That result, coupled with the finding that more respondents cite challenges with most hurdles each year, implies that lessons from those who have been engaged in HR transformation are not widely shared or absorbed.

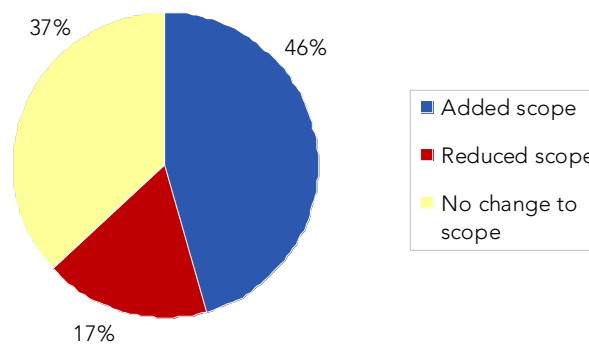
# Research Findings

## Transformation Scope

HR transformation programmes are mostly stable or growing

Nearly half (46 percent) of all respondents say their HR transformation programmes have added scope and another 37 percent say their transformation scopes have remained the same since their introduction, leaving only 17 percent reducing transformation programme scopes (Figure 7).

Figure 7: HR Transformation Programme Scope Change



Of those respondents whose HR transformation programme scopes have increased, more than half say they are growing their programmes through the addition of both processes and geographies (58 percent each). Just over one-third (36 percent) also are growing by adding new business lines/units.

Growth is triggered by a wide variety of factors, none of which is selected by more than half of respondents. The top reasons for HR transformation expansion include:

- The programme was designed to accommodate growth of scope (i.e., the growth is driven by the business plan (49%)
- Mergers/acquisition activity expanded the scope (42%)
- New technology implementation/technology change supported the addition of scope (32%)
- The business was realigned, driving more scope (28%)
- Cost cutting initiatives drove the consolidation of additional scope (23%)

## Research Findings

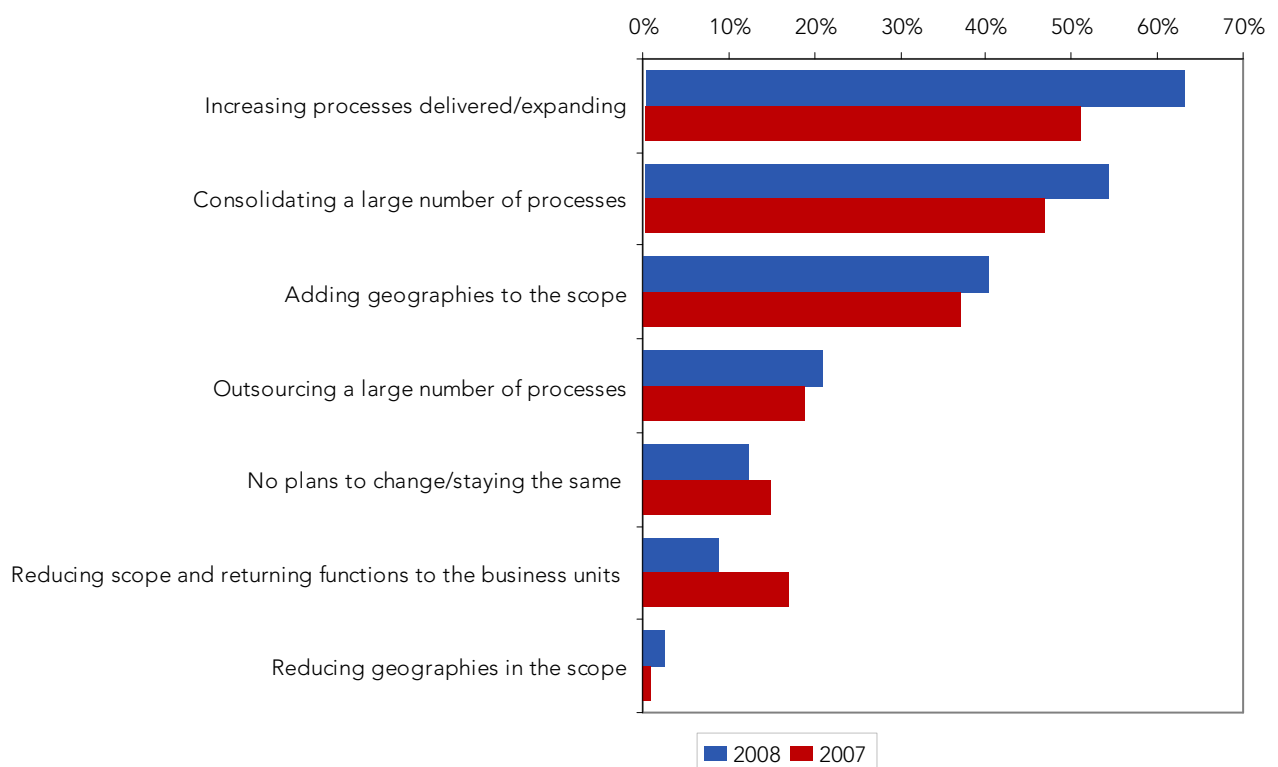
Those respondents who reduce programme scope do so for several reasons – and many for more than one reason. Among those respondents who have reduced scope, 50 percent reduced the number of HR processes they are transforming, 45 percent reduced the geography, and 35 percent reduced the number of business lines/units involved.

Programme reduction was triggered mainly by merger/acquisition activity, failure of the programme to meet expectations, and planned scope reduction, each of which was selected by 35 percent of respondents.

Transformation is expected to continue on its growth trajectory

Over the next two years, 63% of respondents plan to expand their HR transformation programmes by increasing the number of processes included in the programme, and more than half (54%) plan to consolidate the management of a large numbers of processes. Plans for the next couple of years largely match the plans respondents indicated in last year's study (Figure 8).

Figure 8: Future HR Transformation Plans, 2007 and 2008





## Research Findings

### Transformation Scope Conclusions

- HR transformation demonstrates its overall effectiveness through continued growth and expansion, encompassing processes, geographies and business units.
- Transformation programme growth is driven by a number of disparate factors, including business changes such as merger/acquisition activity, new technology, and business realignment.

## Research Findings

Satisfaction with transformation is highest in areas impacting organisational alignment, but lags in other important areas

### Transformation Outcomes to Date

HR transformation performs best in areas impacting organisational alignment – in the form of aligning (a) the organisation to respond to changes and (b) around common objectives – both of which rank in the top five reasons to transform. The main reason respondents cite for high satisfaction in these areas is that transformation enables HR to connect better to the business strategy.

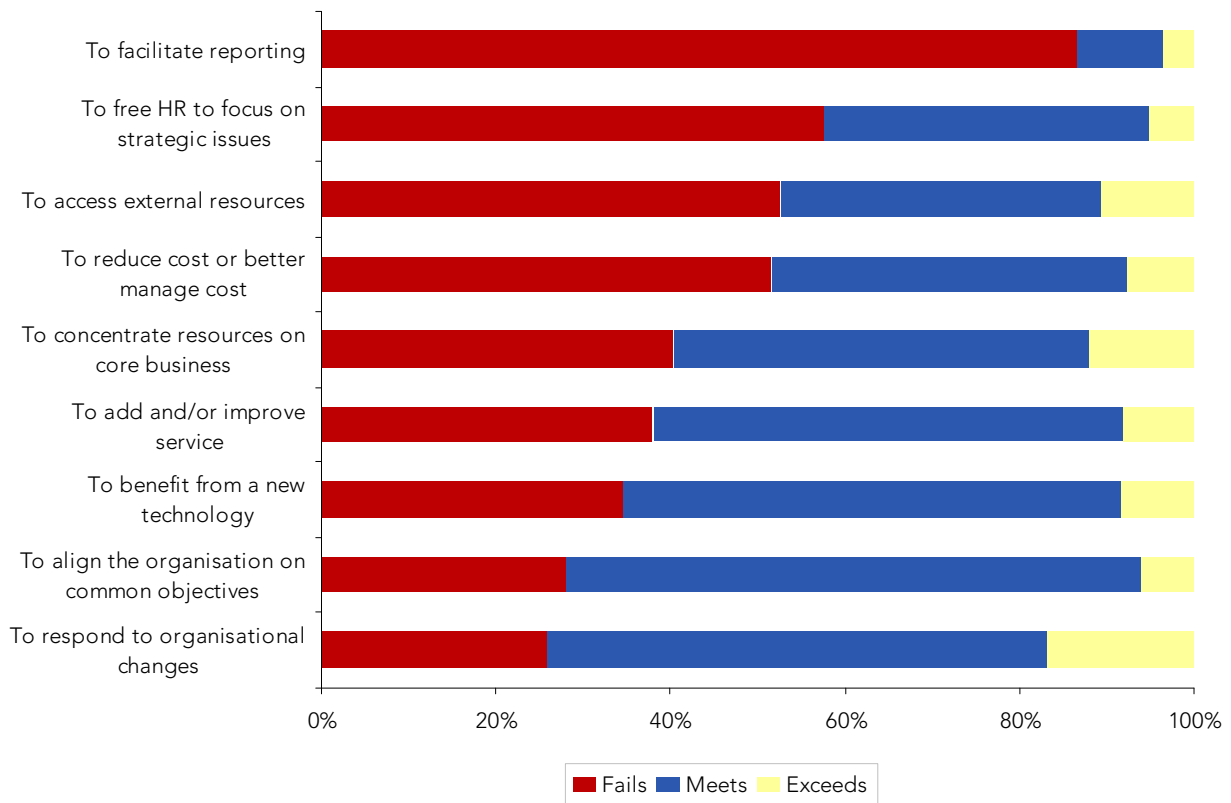
Among the keys to success in achieving HR transformation goals are:

- Access to better tools/resources: improved/new technology, use of online tools and services, and automation of processes;
- Change management and education: change management planning prior to implementing a transformation programme, cultural acceptance of change, training and motivation to encourage and engage staff in the transformation, and pre-transformation agreement on the programme goals;
- Management support at both the top and line levels: gaining top-level management support, and as much line-manager level buy-in as possible, prior to programme introduction; and, continually demonstrating the benefits of the programme to attempt to increase line-level buy-in over time;
- Alignment, focus and standardisation: alignment between HR and business units, harmonisation of processes, centralisation of services, standardised reporting;

At the same time, transformation is failing to achieve satisfaction in strategic and cost management objectives. Freeing HR to focus on strategic issues ranks as the number one reason organisations transform, but 58 percent of respondents say that transformation is failing to meet their expectations in that area. Similarly, respondents rank cost savings/management third most important, but again more than half (52 percent) say transformation has failed to meet their expectations (Figure 9).

# Research Findings

Figure 9: HR Transformation Performance Versus Expectations

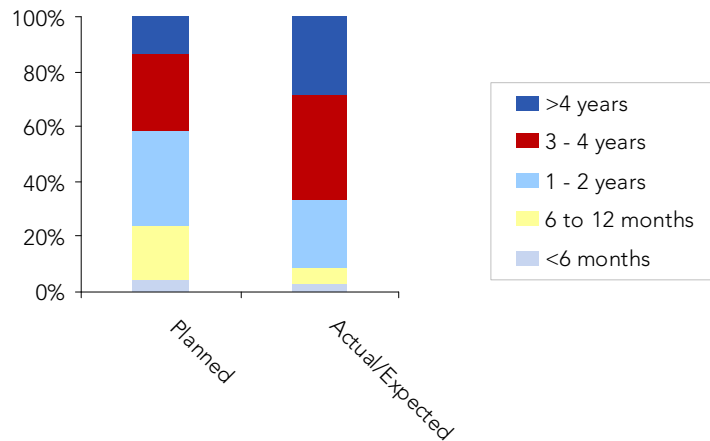


Transformation takes (slightly) longer than expected

Just over half of organisations (55 percent) take more time to transform HR than they originally anticipate. The good news is that they usually do not miss by much: the most common planned timing is one to two years, while the most common actual timing is three to four years. The greatest gap in planned versus actual timing is in the longest time frame – only 14 percent anticipate a longer than four-year transform project, but 29 percent actually experience it (Figure 10).

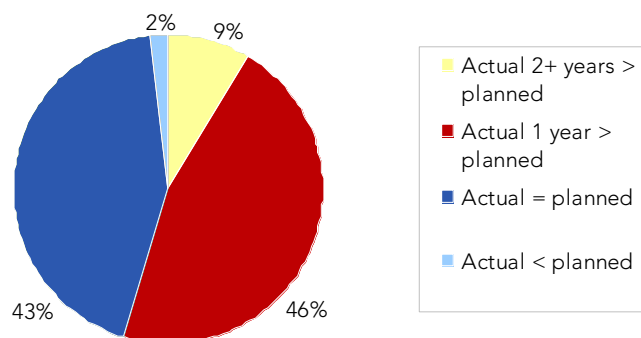
# Research Findings

Figure 10: Planned and Actual Time to Transform



Despite those gaps, on the whole transforming organisations are fairly accurate at estimating time to transform; 45 percent of respondents meet or beat their time expectations, and another 46 percent achieved or expect to achieve their transformation goals within one year of their planned completion (Figure 11).

Figure 11: Planned Versus Actual Time to Transform



## Research Findings

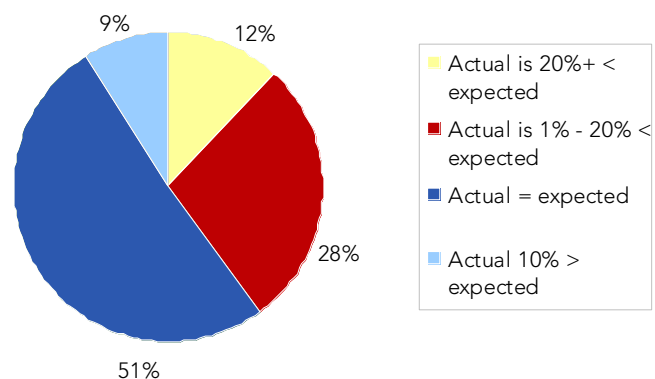
The most commonly cited reasons for HR transformation programmes taking longer than anticipated include:

- **Business leader and/or staff resistance:** lack of general buy-in, opposition/passive resistance from senior staff, absence of top-level management support;
- **Transformation complexity:** policy and rule complexity, difficulties with developing common policies across business units and geographies, language barriers, conflicting/changing requirements;
- **Resource constraints:** funding, IT, skilled staff, the availability of necessary components (such as pan-European payroll system);
- **Inadequate transformation management, including change management:** lack of appropriate delegation, limited or no change management capability, limited transformation vision.

Transformation often generates expected cost savings

HR transformers are apparently more accurate in estimating cost savings – 60 percent achieve or beat their cost savings expectations. The highest number of respondents both anticipate and achieve 16 percent to 25 percent cost savings (Figure 12).

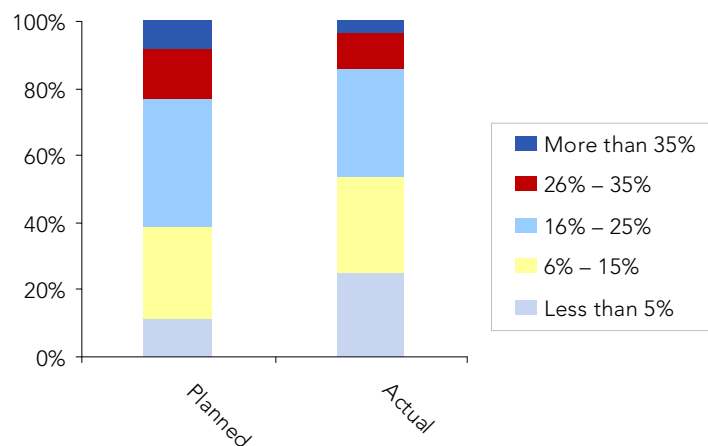
Figure 12: Planned Versus Actual Cost Savings



## Research Findings

But that does not mean everyone achieves their goals; although 60 percent achieve or beat their savings expectations, the remaining 40 percent fall short of their expectations. The greatest gap in planned versus actual savings is the lowest savings range – only 11 percent anticipate savings of less than 5 percent, but 25 percent realise savings in that range (Figure 13).

Figure 13: Planned and Actual Cost Savings



### Transformation Outcomes to Date Conclusions

- HR transformation achieves success in the key area of organisational alignment, including enabling the organisation to respond to changes and coalescing around common objectives.
- HR transformation is often failing to meet expectations in equally important areas, including strategic focus and cost management. This finding suggests that organisations transforming HR need either to establish different expectations at the outset or focus greater attention on achieving their most important goals.
- Supporting our contention that HR transformation continues to be more challenging than many expect, those transforming HR tend to take about a year longer to transform than they anticipate. The primary reason for the extended timeframes appears to be limited success in laying



## Research Findings

the groundwork in critical areas, including ensuring senior leader/manager buy-in, change management planning, recognition of and/or planning for the complexity of transformation, and ensuring resource availability.

- Those transforming HR generally appear to be realistic about costs savings, as 60 percent achieve or beat their cost savings goals.

# Research Findings

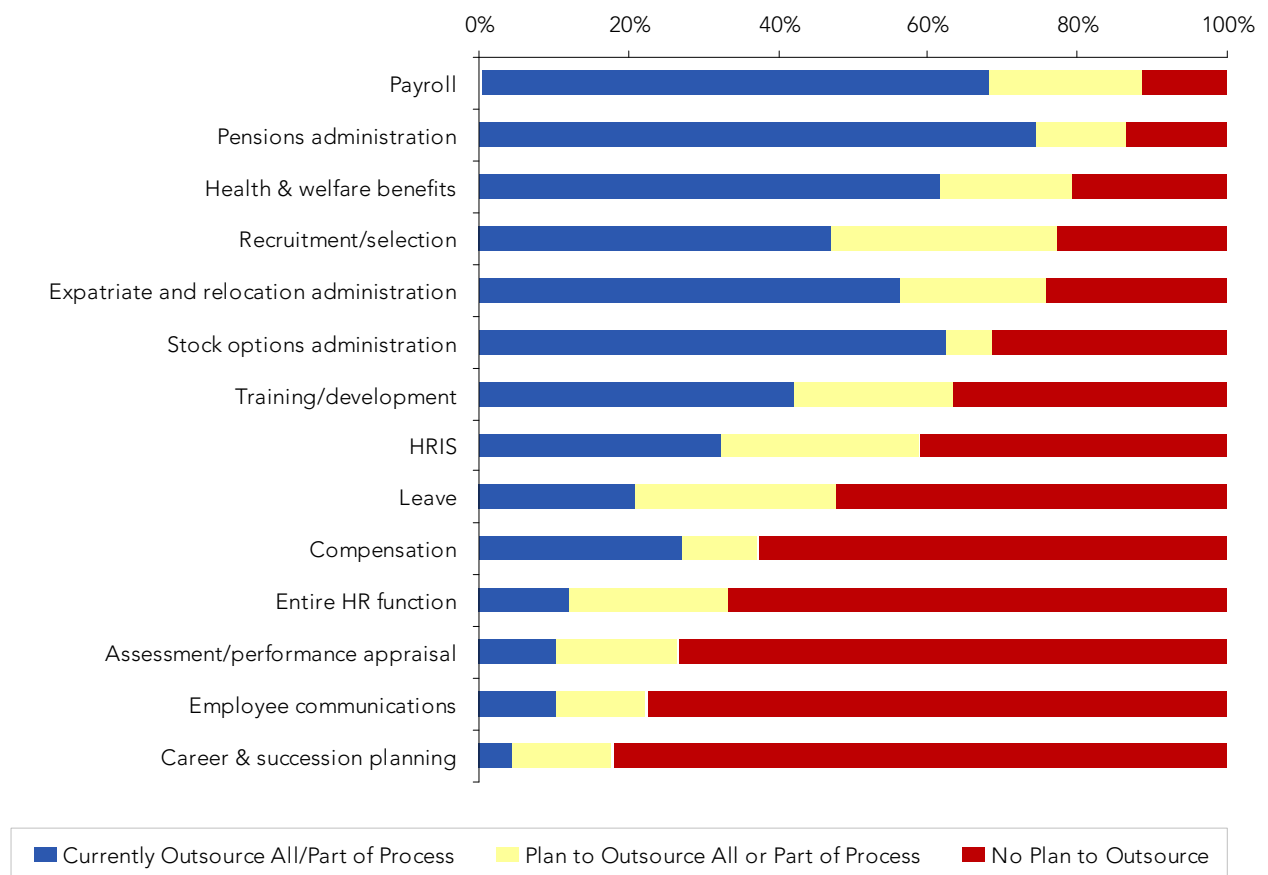
## Outsourcing and Shared Services

Outsourcing is common, but not ubiquitous, and continues to focus on transactional processes

Just over two-thirds of respondents (65 percent) report that they are currently outsourcing or planning to outsource one or more HR process(es).

Transactional processes, including payroll, and pension and benefits administration, continue to be the most commonly outsourced processes. However, recruitment – often considered among the most strategic of HR processes – has experienced explosive growth, and shows no sign of slowing (Figure 14).

Figure 14: HR Outsourcing Plans



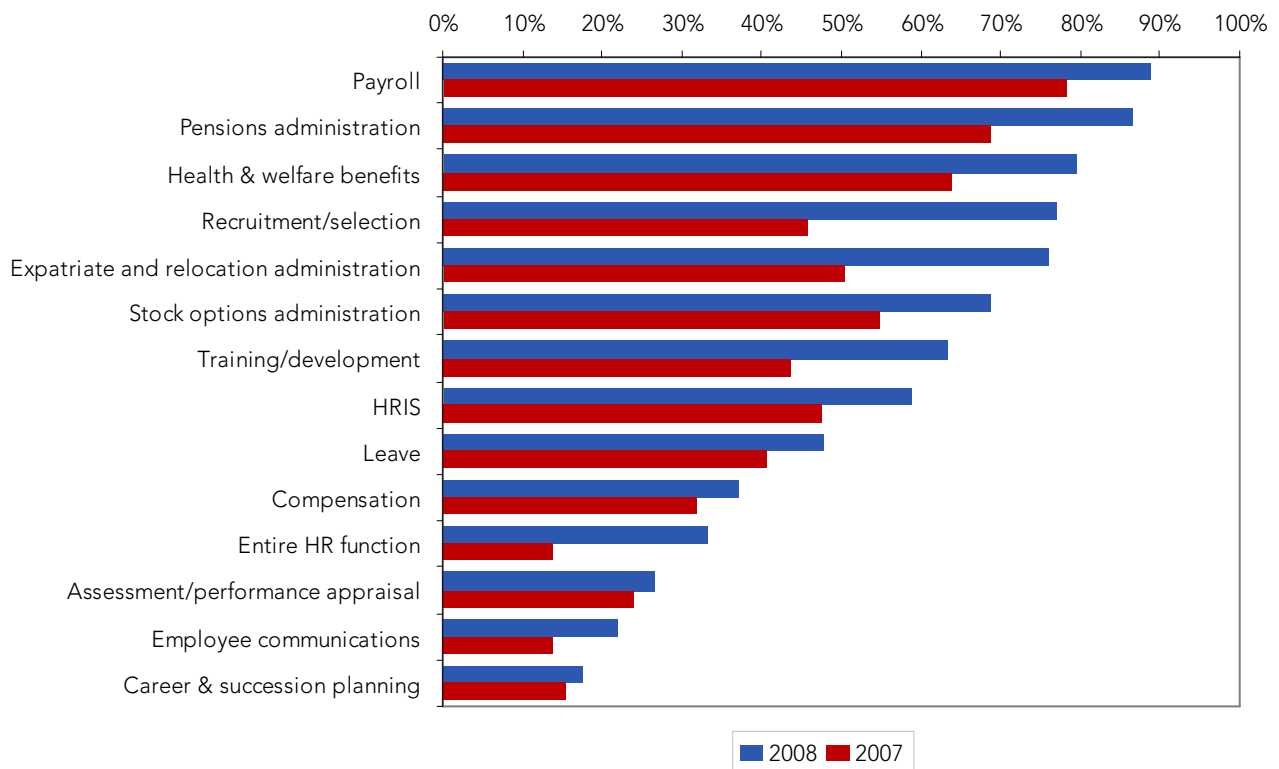
## Research Findings

There are few significant differences between respondents based in EMEA and the Americas with the exceptions that American respondents are more likely to outsource stock option administration, leave, employee communications, and the entire HR process.

**Outsourcing is increasing across all processes**

In a year-over-year comparison, outsourcing appears to be in growth mode; our findings indicate more respondents currently outsourcing or planning to outsource across all HR processes in 2008 versus 2007. As indicated above, recruitment shows the greatest growth in those outsourcing/planning to outsource (46 percent versus in 2007 versus 77 percent in 2008) followed by expatriate and relocation administration (from 50 percent in 2007 to 76 percent in 2008) (Figure 15).

Figure 15: Current and Future HR Outsourcing, 2007 and 2008



## Research Findings

Generally buyers can find the services they need in the outsourcing market; only 24 percent of respondents say there is a process that they would like to outsource, but do not due to the market's inability to provide it. Among those who find services lacking, payroll is the most commonly cited market absence, which we take to mean effective global (especially pan-European) payroll. Also occasionally cited are career and succession planning, compensation, health and welfare benefits, pensions, and stock options administration.

Price is most significant in provider selection

The four most important criteria that buyers cite in provider selection have remained unchanged over the past three years, although their order has changed. Price moved from the number four spot to number three between 2006 and 2007, and then leapt to number one in 2008. Multi-country capabilities moved from the fourth spot in 2007 to the second spot in 2008. Functional coverage and expertise and proven ability to meet service levels, both top criteria in years past, round out the top four in 2008 (Figure 16).

Figure 16: Provider Selection Criteria Ranking

Selection Criterion	Rank		
	2008	2007	2006
Price	1	3	4
Multi-country capabilities	2	4	3
Functional coverage and expertise	3	2	1
Proven ability to meet service levels	4	1	2
References/reputation	5	5	6
Financial viability	6	9	12
Guaranteed cost savings	7	6	5
Specialisation in the relevant functions	8	7	7
Flexible contract terms	9	10	8
Existing relationship	10	14	13
Size and market position	11	12	11
Cultural match	12	8	9
One stop shop (functions other than HR)	13	11	14
Unique provider (consulting)	14	13	10

## Research Findings

Although they order them slightly differently, EMEA and American respondents rank those same criteria in the top four. The only significant differences in rankings across all criteria are that American respondents rank flexible contract terms higher (number 6 to EMEA respondents' number 12) and EMEA respondents rank cultural match higher (number 8 to American respondents' number 12).

Buyers go their own way

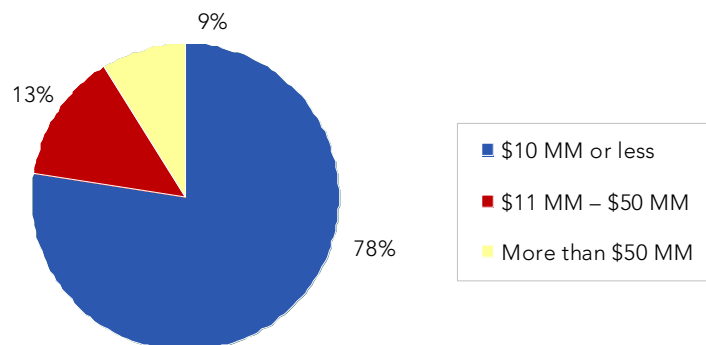
Buyers of outsourced HR services most often develop their own process to identify and select a provider (70 percent of the time). Less than half of respondents (48 percent) engage consultants or sourcing advisors during the provider selection process. While just over half (51 percent) make use of a request for information (RFI), 73 percent issue a request for proposals (RFP).

Smaller employers are no different from mid-sized or larger employers in this finding – there is no significant difference in these results based on organisation size. Similarly, geographic location has no appreciable impact on these results.

Outsourcing spending is expected to rise, but will it?

More than three-quarters of respondents (78 percent) budget US\$10 million or less for HR outsourcing annually. Another 13 percent budget between US\$11 million and US\$50 million, and the remaining 9 percent budget more than US\$50 million (Figure 17).

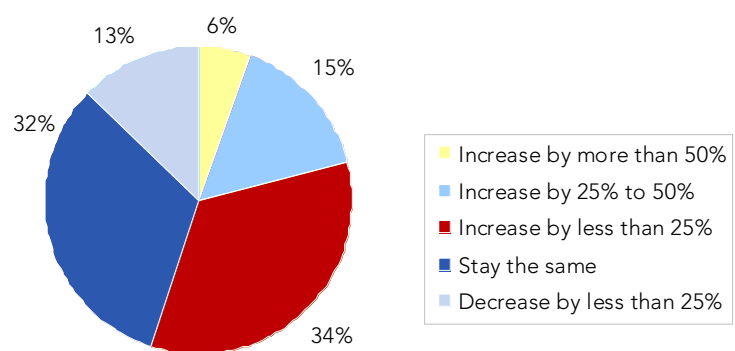
Figure 17: Annual HR Outsourcing Budget



## Research Findings

More than half of respondents (55 percent) say they intend to increase their HR outsourcing budget over the next two years (Figure 18).

Figure 18: Annual HR Outsourcing Budget Change



However, despite the fact that more than half of respondents have said each year for the past three years that they intend to increase their HR outsourcing budgets over the next two years, we have identified no significant difference in HR outsourcing budgets over the past three years of our research.

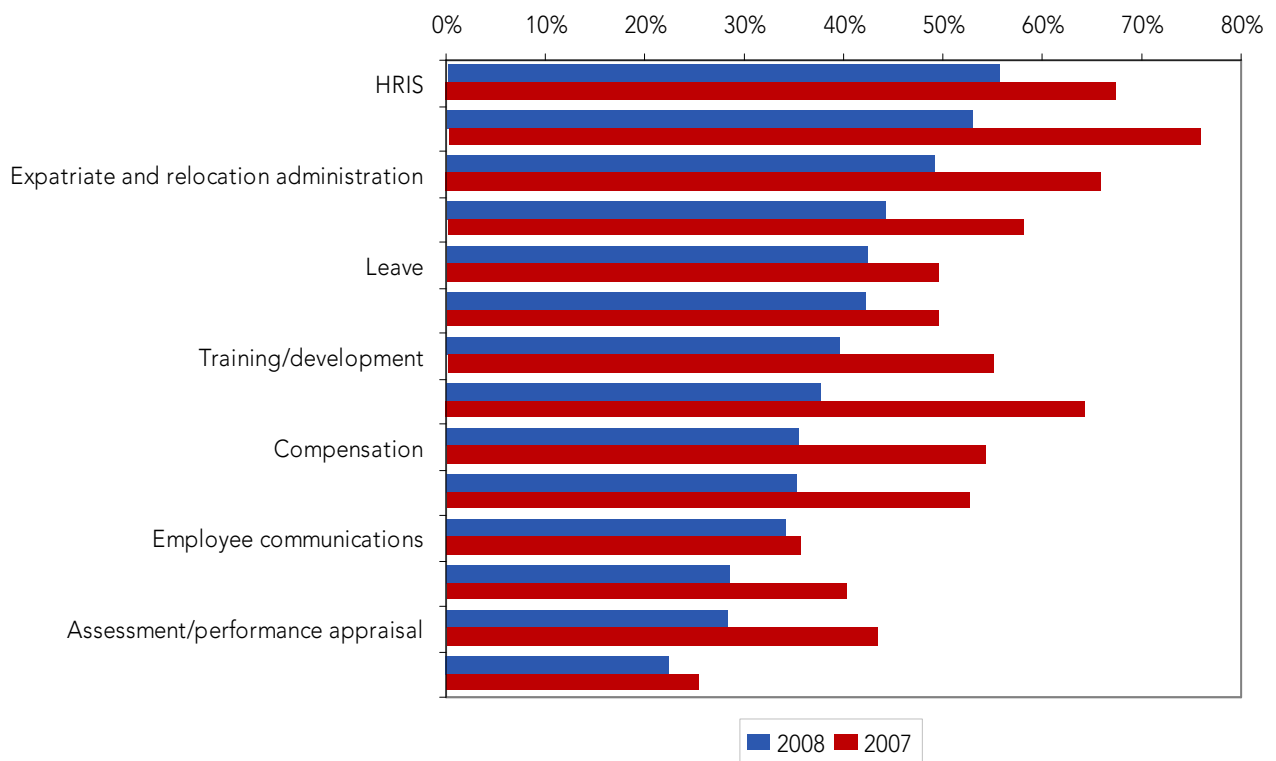
The use of shared services appears to be declining

The processes most commonly managed through shared services are HRIS, payroll, expatriate and relocation administration, pensions administration, leave, and stock options administration.

Of greatest interest as it relates to shared services is that the use of shared services appears to be declining. Across all HR processes, management within a shared services environment is down between 2007 and 2008. Coupled with the increase in the use of outsourcing across all processes, this change could indicate a trend from shared services to outsourcing, but more data will be required in future years will indicate if this is a trend, or simply an anomaly (Figure 19).

## Research Findings

Figure 19: HR Processes Managed in SSCs, 2007 and 2008



### Outsourcing and Shared Services Conclusions

- Outsourcing is common and growing. Although most outsourcing continues to be transactional in nature (payroll and benefits administration, for example), recruitment outsourcing showed the greatest growth of any single process between 2007 and 2008.
- Perhaps owing to the current global economic situation and/or the types of buyers currently entering the HRO space, price is cited as the top provider selection criterion for the first time in the history of this research.
- Buyers are generally not using outside resources in the identification and selection of their HR outsourcing provider, which may indicate that providers/advisors/other resources are not offering the kinds of information buyers need, or perhaps that buyers simply aren't aware of what is available on the market.



## Research Findings

- Respondents indicate that they expect to increase outsourcing budgets, and the anticipated increasing use of outsourcing would support that expectation. However, despite past indications that outsourcing budgets would increase, we have seen limited change in outsourcing budgets overall.
- Along with the increases in the use of outsourcing over the past year, we've seen a decline in the use of shared services in HR transformation. It remains to be seen whether this is the beginning of a trend or simply a data anomaly.

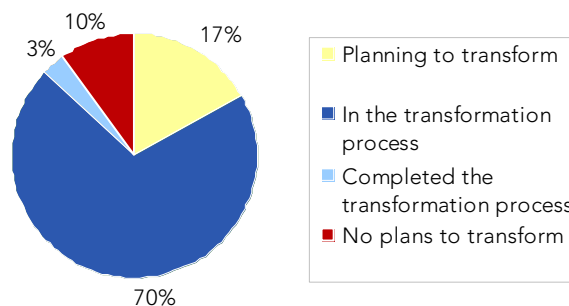
# ABOUT THE SURVEY PARTICIPANTS

## Organisational Demographics

### Transformation Status

A total of 129 respondents completed the 2008 HR transformation survey. Among our respondents, 17 percent are planning to transform, 70 percent are in the process of transforming, 3 percent have completed transformation, and the remaining 10 percent have no plans to transform HR (Figure 1).

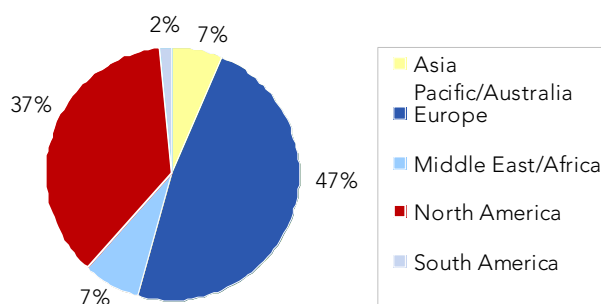
Figure 1: HR Transformation Status



### Location

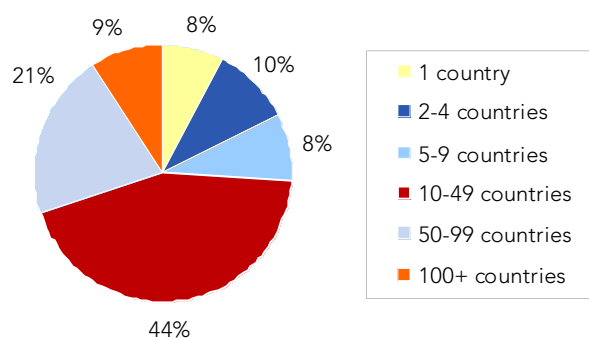
Just over half of all respondents (55 percent) are headquartered in EMEA – 48 percent in Europe and another 7 percent in the Middle East and Africa. Another 39 percent are headquartered in the Americas – 37 percent in North America and 2 percent in South America. The remaining 6 percent are headquartered in the Asia-Pacific/Australia region (Figure 20).

Figure 20: Headquarters Location



Our respondents tend to be multinational organisations; nearly three-quarters (74 percent) operate in 10 or more countries (Figure 21).

Figure 21: Number of Countries in Which Organisations Operate



## About the Survey Participants

### Revenues

More than three-quarters of respondent organisations ( 77 percent) have revenues of more than US\$1 billion; 36 percent have revenues of more than US\$10 billion (Figure 22).

### Number of Employees

Half of all respondent organisations employ more than 25,000 people globally (Figure 23).

### Industry

Survey respondents reflect a broad industry distribution:

Manufacturing .....	32%
Transportation & Communication .....	14%
Other Services .....	14%
Finance, Insurance & Real Estate.....	10%
Technology, IT, Electronics.....	8%
Construction .....	4%
Retail & Wholesale Trade.....	3%
Health Care / Pharmaceuticals .....	3%
Other.....	3%
Public Administration.....	3%
Food & Beverage.....	2%
Media .....	2%
Telecommunications.....	2%
Hotels, Restaurants, Catering.....	1%

Figure 22: Annual Revenues

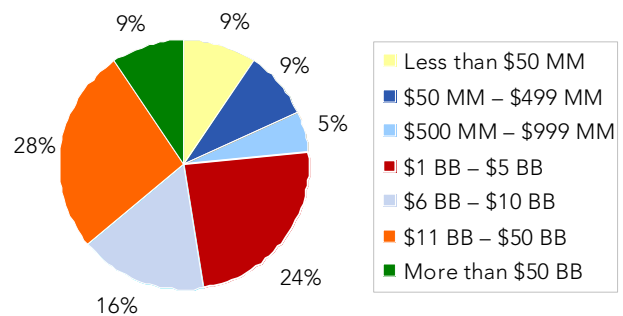
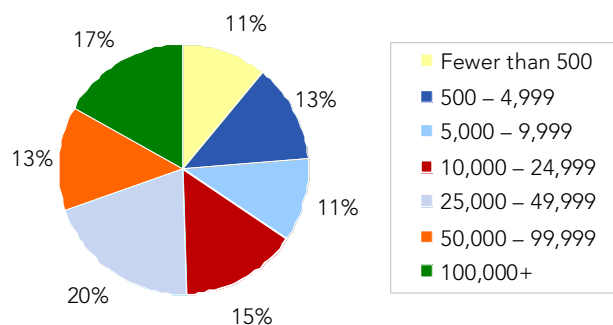


Figure 23: Number of Employees





# About the Survey Participants

## Respondent Demographics

### Function

Nearly three-quarters (73 percent) of all respondents hold HR functions. Another 11 percent are in strategic planning, and the remainder are spread among a variety of functions.

HR General.....	50%
HR Shared Services.....	23%
Strategic Planning.....	11%
Other.....	7%
Consultant.....	2%
Procurement/Strategic Sourcing.....	2%
HRIS.....	2%
General Management.....	2%
Manager.....	2%
Finance and Treasury.....	1%

### Title

Just over half of all respondents' (51 percent) job title is vice president or director, and another 31 percent operate at the manager level. The remainder are spread across different positions.

Vice President/Director.....	51%
Manager.....	31%
Other.....	7%
General Manager.....	3%
Owner/Principal/Partner.....	2%
CFO.....	2%
CHRO.....	2%
President/Managing Director.....	2%
COO.....	1%



## ABOUT THE SPONSORS

### ADP

#### Who We Are

Automatic Data Processing, Inc. (NYSE: ADP), with nearly \$9 billion in revenues and over 585,000 clients, is one of the world's largest providers of business outsourcing solutions. Leveraging nearly 60 years of experience, ADP offers the widest range of HR, payroll, tax and benefits administration solutions from a single source. ADP's easy-to-use solutions for employers provide superior value to organisations of all types and sizes. ADP is also a leading provider of integrated computing solutions to auto, truck, motorcycle, marine and recreational vehicle dealers throughout the world.

#### What We Do

ADP Employer Services, part of ADP, Inc., serves clients in more than 30 countries worldwide. As a leading provider of HR services, ADP Employer Services' offerings – from basic payroll processing to being your payroll and personnel administration department – are fully compliant with languages, currencies, social regulations, and adapt seamlessly to companies' structural and business needs.

With ADP® GlobalView®, the HR & Payroll service solution based on mySAP™ Enterprise Resource Planning (ERP) Human Capital Management (HCM) platform, ADP is well positioned to serve the needs of multi-national companies that are looking for an outsourced solution based on a common HRIS and common processes defined at a regional or global level.

GlobalView includes HR, Payroll, Time Management as well as Employee and Manager Self Service.

#### More Information

Additional information on ADP at: [www.adp.com](http://www.adp.com) and [www.europe.adp.com](http://www.europe.adp.com), or call +33 1 55 63 51 83

For further information on ADP® GlobalView®, go to: [www.globalview.adp.com](http://www.globalview.adp.com)

### HROA

#### Who We Are

The HROA is the definitive independent organization for those who purchase, provide, or participate in HR transformation, shared services, and outsourcing. Our membership encompasses over 7,500 HR executives, including the largest 50 buyers, the top 30 providers, the leading sourcing advisors and attorneys, and HR Transformation thought leaders.

#### What We Do

##### Events and Networking

The HROA produces a variety of strategic, highly interactive conferences and webinars for executives, managers and practitioners in the HR transformation, shared services and process outsourcing communities.

##### Research & Standards

As the only independent organization representing all participants in the industry, the HROA acts to improve the practice of HR Transformation by overseeing and accelerating the development and adoption of effective industry standards and practices. As part of this process, the HROA gathers broad-based input from across the industry and works to develop lasting industry consensus and to arrive at conclusions that balance the various commercial interests of all participants.

#### More Information

For additional information about the HROA or to join, visit [www.hroa.org](http://www.hroa.org) or contact Adam Bleifeld at [info@hroa.org](mailto:info@hroa.org) or at +1 202 905 0351.