



**\*ISG** Provider Lens™

2022

Payroll Solutions &  
Services - 2022

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Connecticut, ISG employs more than 1,300 professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.



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# Introduction

The ISG Provider Lens™ Payroll - Solutions and Services 2022 study focuses on technology and managed services providers offering modern digital solutions to enable payroll operational transformation globally. Firms of every size, across sectors and geographies, have recognized that payroll is a critical and foundational element in the employee experience and a key asset to the business. Thus, firms are now looking to modern digital capabilities and managed services to elevate this critical process for increased organizational value and to future-proof payroll operations for improved agility, resiliency, and continuity.

The ISG Provider Lens™ study offers the following to HR decision-makers:

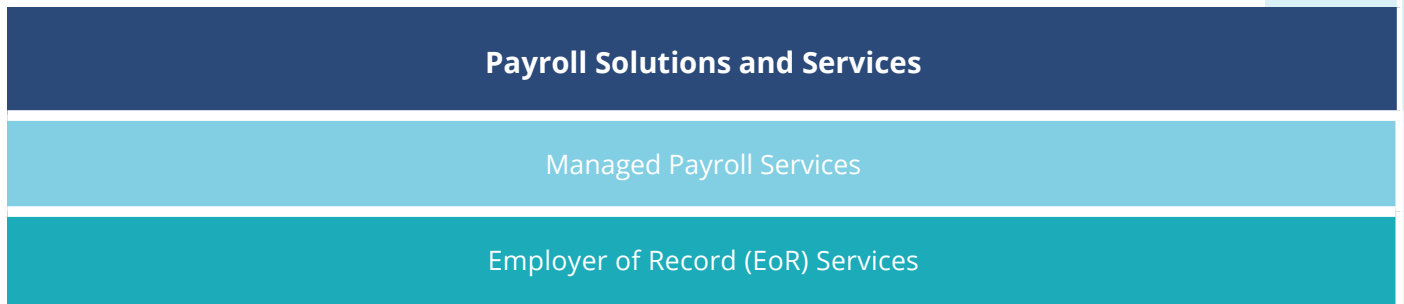
- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on different markets, including the U.S. and global (multi-country) solutions.

The study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

# Quadrant Research

As a part of this ISG Provider Lens™ Payroll Solutions and Services - 2022 study, we are introducing the following quadrants on payroll solutions and services:

Simplified illustration



Source: ISG 2022

## Managed Payroll Services: U.S.

This quadrant assesses service providers capable of deploying and supporting fully managed payroll service engagements. The providers should offer a range of U.S.-specific payroll solutions to digitalize and modernize critical processes, including solution design and consulting, deployment of enabling platform technology, automation, integrations and ongoing managed payroll services and support.

This quadrant is split into providers that address the small market (including firms with less than 1,000 employees) and mid/large market (including firms with more than 1,000 employees) and assesses the breadth, depth, and maturity of offerings in these key segments.

### Eligibility criteria

- Breadth of payroll services offered, with the ability to support fully managed payroll services
- Maturity of enabling platform technology and country calculation engines
- Delivery presence and capability to support clients in the regions in the scope
- Breadth, depth and maturity of digital enablers offered to transform payroll operations (for example, cloud platforms, analytic insights, integrations and application programming interfaces (APIs), cognitive technology and on-demand pay)
- Roadmap and supporting investments in payroll services and solutions.

## Managed Payroll Services (Global)

This quadrant assesses service providers capable of deploying and supporting fully managed payroll service engagements for multinational organizations. These providers should offer a range of payroll solutions to digitalize and modernize the critical process, across multiple countries, under a single governance model; this includes solution design and consulting, enabling platform technology deployment, automation, integrations, and ongoing managed payroll services.

The quadrant specifically focuses on global payroll solutions, and thus assesses the breadth, depth, and maturity of provider offerings to support multi-country, long-tail country populations.

### Eligibility criteria

- Breadth of payroll services offered, with the ability to support fully managed payroll services in multiple countries of operation
- Maturity of enabling platform technology and country calculation engines
- Delivery presence and capability to support all major geographies
- Breadth, depth, and maturity of digital enablers offered to transform payroll operations (for example, cloud platforms, analytic insights, integrations, and application programming interfaces (APIs), cognitive technology, and on-demand pay)
- Roadmap and supporting investments in multi-country payroll services and solutions.

## Employer of Record (EoR) Services

This quadrant assesses service providers capable of deploying and providing co-employment service arrangements and operating models to support multinational firms undertaking global expansion initiatives.

The providers should offer fully managed employer of record (EoR) services across multiple countries/regions under a single governance model, including solution design and consulting, contracting and onboarding of co-employed workers, deployment, automation, integrations and ongoing managed HR and payroll services in support of contracted workers.

The quadrant specifically focuses on global EoR solutions, and assesses the breadth, depth, and maturity of provider offerings to support employer of record services across multiple countries of operation.

### Eligibility criteria

- Scope of EoR services offered with the ability to support multiple countries of operation
- Breadth of established local legal entities and operations offered globally
- Maturity of global employment platform technology
- Delivery presence and capability to support all major geographies
- Breadth, depth, and maturity of digital enablers offered (for example, cloud platforms, analytic insights, integrations and application programming interfaces (APIs), cognitive technology and on-demand pay)
- Roadmap and supporting investments in global EoR services and solutions.



## Quadrants by Region

Quadrant	U.S.	Global
Managed Payroll Services: Small Market (<1,000 employees)	√	-
Managed Payroll Services: Mid/Large Market (>1,000 employees)	√	-
Managed Payroll Services	-	√
Employer of Record (EoR) Services	-	√

# Schedule

The research phase falls in the period between **March and April 2022**, during which surveying, evaluation, analysis and validation will take place. The results will be presented to the media in **June 2022**.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Launch	February 17th, 2022	
Survey phase	February 17th, 2022	March 11th, 2022
Sneak Preview	May 2022	June 2022
Press release	June 2022	

Please refer to this [link](#) to view/download the ISG Provider Lens™ 2022 research agenda.

## Access to Online Portal

You can view and download the questionnaire [here](#) using the credentials you have already created, or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

## ISG Star of Excellence™ – Call for Nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.



Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: [Star@isg-one.com](mailto:Star@isg-one.com)

### Research production disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

# Partial list of companies being invited for the survey

**Are you in the list or do you see your company as relevant provider that is missing in the list?** Then feel free to contact us to ensure your active participation in the research phase.

Accenture	Conduent	iiPay
activpayroll	CXC Global	Immediis
Acvian	DataAssist	Infosys
ADP	Deel	Innovative Employee Solutions
Africa HR Solutions	Definitiv	Innovative Employment Solutions
airswift	DXC	Inova
Alight Solutions	Elements Global	INS Global
Apex HCM	employ	Intercomp Global Services
Aquent	EuroDev	Intuit
AscentHR	Express Global Employment (Acumen)	IRIS FMP
Asure Software	EY Payroll Services	isolved
BDO	Global People Strategists	KMC
BizLatinHub	Globalization Partners	KMC Solutions
BlueBack Global	Go Global	Leap29
BlueMarble	Gusto	Links Intl
Capgemini	HCL	Mauve Group
Capita	Heartland Payroll Services	Mercans
Ceridian	IBM	Multiplier
CloudPay		Namely

# Partial list of companies being invited for the survey

**Are you in the list or do you see your company as relevant provider that is missing in the list?** Then feel free to contact us to ensure your active participation in the research phase.

Neyamo	Payslip	Square
Netchex	Payzaar	TargetCW
NH Global Partners	PEO Worldwide	TMF Group
NSquareIT Offshore	People 2.0	Topsource Worldwide
OmniPresent	PeopleStrategy	UKG
OneSource Virtual	Primepay	Unicorn HRO
Oyster	Procloz	Velocity Global
Papaya Global	Procorre Global	Visma/RAET
Paybix	Racepoint Global (RPG)	Vistra
Paychex	Ramco	Wagepoint
Paycom	Remote	WNS
Paycor	Rippling	Work Motion
Payfront	Safeguard Global	XML International
Paylocity (+ Blue Marble)	SD Worx	Zalaris
Payroll Software and Services Group	Skaud	Zelda
	Source IT HR	Zenefits

# Contacts for this study



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# ISG Provider Lens QCRT Program Description

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines and technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors that know the provider portfolios and offerings and the enterprise requirements and market trends. On average, three advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service providers inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

# Quality & Consistency Review Team for this study



Anoop Chawla  
Director, U.S.

## **Do you need any further information?**

If you have any questions, please do not hesitate to contact us at [isglens@isg-one.com](mailto:isglens@isg-one.com).