The Navigo team are proud to deliver our 7th Australian HR Technology Survey. The purpose of this report is to provide organisations with information to plan, justify and execute HR technology projects. Since our first report in 2010, the Navigo team have continued to look for useful ways to report on the state of HR technology in Australia.

This year we’ve made the decision to split the survey into 2 segments, Small-Medium-Enterprise under 500 employees and large organisations with 500 or more employees. We have discovered interesting trends for not only organisations, but vendors as well. In the last year, it’s clear that vendors shifted their focus to improve satisfaction ratings across customer service and solution features.

With a ‘Cloud First’ HRIS strategy in place across many organisations, it’s becoming increasingly more important for vendors to deliver Cloud solutions locally. AWS and Microsoft Azure are firmly established in Australia and have achieved the highly regarded iRAP Australian Signals Directorate (ASD) approved security certification. With this comes a push for organisations to set up their own private Cloud and commence migration of systems.

While reviewing cloud migration, organisations are assessing their ageing, on-premise systems and often making the hard choice to switch HRIS platforms. Payroll is the exception, mostly left in its current state with one / two-way integrations to the user focused HRIS platform.

HR continues to grow its piece of the IT spend pie, with almost a third of all survey respondents focusing their investment on implementing new systems. Organisations are now adding new systems where previously, there was none. The tech adoption chart (page 15) is an interesting read and highlights that there’s plenty more change ahead.

We’ve also added a team collaboration section this year. While we’ve had Skype chat for years, this space is just starting to take off as organisations look for fully featured digital platforms to optimise team interactions.

With HR technology now pushing down to even the smallest businesses, we expect to see more change in the categories and vendors in the coming years.

As always, thank you for your participation and contribution in the 7th Australian HR Technology Survey!

We hope you enjoy the report.

Peter Forbes
Managing Director

Andrew Rees
General Manager
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PART 1
Management of HR Tech
As businesses edge toward a more sophisticated and tech savvy approach to HR, the Navigo team is excited to share the latest insights across Australian organisations.

This year, we received survey responses from 126 organisations representing over 103,000 employees. 53% of participants were under 500 employees, with the remaining 47% operating at the larger enterprise level.

In order to show a more diverse variety of information, we segmented responses based on organisation size in areas with interesting comparisons. The breakdown includes Small-Medium-Enterprise (SMEs) under 500 employees and larger sized organisations with 500+ employees.
Cloud hosting is the process of outsourcing computing and storage resources to a service provider to host data, services and/or solutions. The challenges of moving to the Cloud continue to be led by data security concerns and integration complexities, with only 1 in 5 organisations saying they had no barriers.

We have seen a significant increase in Cloud deployment over the past 12 months. In 2019, 55% of organisations have adopted Cloud hosted systems compared to 33% in 2018.

We anticipate this trend to continue considering 74% of respondents stated that they prefer a ‘Cloud first’ strategy. While we can see this flowing through in new system selection, on-premise deployment has held steady from last year (2018 - 40% v 2019 - 40%).
“Being in government, there are some procurement requirements that we must navigate when selecting & investing in HR tech. For example, data sovereignty is a priority, meaning that selected systems must house data in Australia & we require technology suppliers to subscribe to the government’s master services agreement.”

— Caroline Monzon, HR Director, Development Victoria
Management of HR Tech

In looking at the complexity of organisation’s HR tech stack, organisations under 500 employees tend to keep their integrations simple (91% had 0-5 integrations with their HRIS). The importance of integrations jump significantly for larger organisations (28% had 6 or more integrations). Of this group with 6 or more integrations, most had an on-premise Core HRIS (75%).

Consistent with previous years, HR Reporting and Analytics remains largely unsophisticated. 81% of respondents indicated HR reporting was based on limited metrics or in basic list type reports. We may see the dial move on reporting in coming years. Developing system integrations and reporting typically come after new system implementations.

### Nature of HR Reporting and Analytics

- Provides limited metrics based solely on HR data: 51%
- Provides basic list type reports: 30%
- Provides analytics linked to additional business data: 14%
- Models future scenarios to predict business outcomes: 2%
- Don’t know: 2%

---

**Number of Systems that Send/Receive Data from your HRIS**

- 1-5 Systems: 61%
- 6-15 Systems: 2%
- 15+ Systems: 30%
- None: 3%
- Don’t know: 5%

**Organisations <500 Employees**

- N = 56

**Organisations ≥500 Employees**

- N = 39
The HR department remains the key driver of HR technology leadership and strategy.

Since 2018, we have seen a reshuffle of priorities that are ‘Very Important to HR Tech Strategy’. Employee Feedback & Engagement (24%) took first place for 2019, closely followed by Process Automation (22%) and Self-Service (20%). The data suggests a more even spread of priorities, compared to last year that had a primary focus on Self-Service (44%).

This trend implies that organisations value the digital experience of their employees. These companies prefer to deliver this information directly to employees via self-serve, not through HR staff.

### Top Internal HR Tech Drivers

#### <500 Employees
- **1.** HR Department (76%)
- **2.** Combination of departments (11%)
- **3.** IT (5%)

#### ≥500 Employees
- **1.** HR Department (63%)
- **2.** Combination of departments (23%)
- **3.** We don't have anything in place / IT (5%)
In 2019, we continue to see HR tech spend spread across upgrading new systems, implementing new systems and adding functionality.

The leading spend area for SMEs is unsurprisingly Implementing New Systems (26%), with an increase of vendors targeting this space.

For the enterprise market, this is the first year where Implementing New Systems has risen to be on par with Performing Upgrades on Existing Systems (31%).

This trend will continue as the cost of upgrading Cloud platforms continues to drop. The increased priority of System Modernisation as a motivator for HR tech spend further indicates that organisations are ready to shift platforms.

As the vendor Cloud model matures, we expect that Adding Functionality in Existing Systems will move up the chart in the coming years.

### Effort Expenditure in HR Technology Over the Last 12 Months

#### Organisations < 500 Employees
- Implementing new systems: 26%
- Performing upgrades on existing systems: 22%
- Adding functionality in existing systems: 21%
- Replacing existing systems: 13%
- Don't know: 2%
- Other: 2%

#### Organisations ≥ 500 Employees
- Implementing new systems: 31%
- Performing upgrades on existing systems: 31%
- Adding functionality in existing systems: 20%
- Replacing existing systems: 12%
- Don't know: 6%
- Other: 0%
### Top 5 motivations for HR tech investment

1. Improve operational efficiency (28%)
2. Meeting business objectives/strategy (21%)
3. System modernisation (18%)
4. Compliance/legislative requirements (17%)
5. Reduce operational costs/headcount (11%)

**N = 117**

### Top roadblocks preventing HR tech investment

1. Cost & budget (29%)
2. Time & resources (23%)
3. Existing system & tech restrictions (14%)
4. Senior Management approval (11%)
5. Lack of HR technology strategy (8%)

**N = 116**
“The main obstacles faced by our organisation includes the volume of solutions available & the inability to see within the market what works & doesn’t (without significant vendor-by-vendor exploration). We have found it difficult to find an effective solution for a smaller sized business at reasonable cost.”

— Shaun Williams, People, Performance and Culture Manager, Health Insurance Fund of Australia (HIF)
PART 2

HR System Adoption
Adoption of Team Collaboration platforms has picked up pace over the last 12-18 months. Microsoft continues to leverage their extensive Windows install base and dominates with Teams, Yammer and Skype.

While Skype is not typically viewed as a full functioned collaboration platform, its chat, video and voice functions have been the de facto collaboration platform for organisations for the past 10 years.

Slack has made strong inroads into the SME market (15%) and Workplace by Facebook beginning to emerge as a contender (6%).

As organisations start to experiment with Team Collaboration tools, we expect to see usability, integration and functionality to play a big part in vendor selection.
The tech adoption charts are key to understanding the Australian HR tech landscape at a higher level. In particular, it shows the push and pull between Core HRIS and Best of Breed.

Across all organisation sizes, Succession Planning (14% Core HRIS) and Workforce Modelling (5% Core HRIS) are common areas with No Solution or a Best of Breed system implemented.

As large vendors increase the sophistication of sales and marketing, customers counter with smarter procurement to find the best solution.

Those with No Solution in key areas show there’s still plenty of greenfield opportunity - this includes Recruitment (24%), Onboarding (29%), Performance Management (34%) and Remuneration (39%).
Overall, organisations that adopt Recruitment tech continue to favour Best of Breed solutions (46%).

Reporting and Analytics has a growth story (88% of large organisations have a solution of some type), leveraging either data in their Core HRIS or an alternate system. This suggests a step up of analytics skills within the HR Department.

Best of Breed Learning & Development preferences is continuing to grow (60%), suggesting that companies are investing more time and budget for a customised L&D solution.

OH&S is the most common area where large organisations use a solution outside their Core HRIS (80%), closely followed by Learning & Development (73%). Smaller sized businesses tend to rely more heavily on their Core HRIS or No Solution.
This year we have some new vendors joining the top 5 most Common HRIS Systems. ELMO has taken the number 2 spot behind ichris/chris21, along with EmpowerHR (Fusion5) making their first appearance in 4th.

As Self-Service is in the top 3 most important strategic drivers for HR tech spend, the self-service usability chart informs us of which vendors have best developed this feature. The clear 2019 winners are ichris/chris21 and EmpowerHR, with SAP HCM still having some work to do in this area.

In addition to a significant 50% of respondents indicating they use less than half the functionality in their Core HRIS, we saw that only 25% of respondents believe they’re using 75% or more of their platform.
“In our experience, we found that the integrated all-in-one suite is the easiest and most engaging system for our organisation.”

— Trang Trinh, Head of Human Resources ANZ, Globus Family of Brands
When looking at Overall Vendor Satisfaction, it’s useful to look at the extremes of the results - who’s capable of achieving ‘Very Satisfied’ customers or has negative responses? This can be instructive when investigating prospective vendors, it helps to ask: “what do you do to get a ‘Very Satisfied’ rating from your customers?”. 

For Vendor Customer Service Satisfaction, we saw Very Satisfied responses more than double in the last year (13% vs 5%). System Feature Satisfaction continues to group around Neutral (24%) and Satisfied (43%), leaving the Best of Breed platforms the opportunity to wow their customers.
Payroll shows an interesting shift to Non-Core HRIS systems (32%), an increase from 20% in 2018. This highlights the decoupling of Payroll from Core HRIS. It appears that organisations don’t see the value in replacing their current payroll solution. They view payroll as a calculator - leaving the core HRIS to store employee master data.

The satisfaction ratings have slowly improved over previous years, Best of Breed achieved 50% of ratings as Satisfied or Very Satisfied. With just under half (47%) Cloud deployed, we expect to see Cloud migration continue to trend upwards in the next 2-3 years. Migration cost is the likely culprit for the 28% future spend increase reported.
“While our main HR system has modules across the areas we need, it is limited in the robustness of its functionality. Our Payroll system is the same, resulting in issues relating to consistent staff information and rigour around organisation structure and FTE management.”

— David Marshall, People Services Manager, Ermha Ltd
Payroll

HRIS Module

- Very Satisfied: 8%
- Satisfied: 38%
- Neutral: 30%
- Dissatisfied: 16%
- Very Dissatisfied: 8%

Best of Breed

- Very Satisfied: 13%
- Satisfied: 37%
- Neutral: 34%
- Dissatisfied: 13%
- Very Dissatisfied: 3%

Overall

- Very Satisfied: 9%
- Satisfied: 38%
- Neutral: 31%
- Dissatisfied: 16%
- Very Dissatisfied: 6%

User Satisfaction

N = 96

System Deployment

- Cloud: 47%
- On-Premise: 47%
- Don’t Know: 6%

N = 97

47% of respondents

Have had their Payroll system for 7+ years

N = 97

Organisations remain reluctant to implement a new Payroll system, with half of all respondents keeping their solution for 7+ years.
Though ELMO, ichris/chris21 and PageUp round out the top three Recruitment systems, a huge 61% of respondents are currently using a Best of Breed system. Though we have received feedback that organisations are looking to consolidate Recruitment into an all-in-one solution, there is still significant fragmentation in this space.

42% ranked their Recruitment system satisfaction levels as Neutral or lower (15% Dissatisfied or worse). There's plenty of opportunity for the better performing platforms, with 76% Cloud deployed and Increased Spend Intention high (33%).

---

**Most Common Systems**

1st: Big Red Sky (Thomas Reuters)  
2nd: Scout Talent  
3rd: Jobadder  
4th: Taleo (Oracle)/Mercury eRecruit

**Most Common Best of Breed**

1st: Scout Talent  
2nd: Big Red Sky (Thomas Reuters)  
3rd: Jobadder  
4th: Taleo (Oracle)/Mercury eRecruit
**Recruitment / Talent Acquisition**

**User Satisfaction**

N = 74

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<th>HRIS Module</th>
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<th>Satisfied</th>
<th>Neutral</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
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<table>
<thead>
<tr>
<th>Best of Breed</th>
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<th>Satisfied</th>
<th>Neutral</th>
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<table>
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<th>Overall</th>
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<th>Satisfied</th>
<th>Neutral</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
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<td>5%</td>
<td>53%</td>
<td>27%</td>
<td>12%</td>
<td>3%</td>
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</tbody>
</table>

**System Deployment**

N = 74

- Cloud: 76%
- On-Premise: 20%
- Don’t Know: 4%

**THOUGH ORGANISATIONS PREDOMINANTELY USE BEST OF BREED, SINCE 2018 THERE HAS BEEN A 17% INCREASE OF RESPONDENTS OPTING TO USE THEIR CORE HRIS**

**Have had their Recruitment System for <5 years**

N = 73

- Cloud: 98%
- On-Premise: 2%
- Don’t Know: 0%

**73% OF RESPONDENTS**
Onboarding continues to be a busy space with plenty of movement. Future System Expenditure is one of the highest at 33%. Customer Satisfaction remains strong amongst those who selected a platform, with 56% Satisfied or Very Satisfied.

When compared with previous years, there’s been a swing back towards Core HRIS (47% vs 33% in 2018) as the larger players develop their Onboarding capabilities. New to the top 4, ELMO has taken out first position. HROnboard has also improved its standing, moving up one place in the ranks.

With nearly 40% of respondents having replaced their system in the last 12 months, we’ve seen a lot of movement in the Onboarding space.
“Implementing our new onboarding module has been a game changer. Candidate & manager experience is vastly improved & it’s enabled targeted learning & induction content. The focus has shifted from logistics to employee experience.”

— Carrie Luzar, Remuneration & Operations Manager, People & Culture, Alinta Energy
Employee Onboarding

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**User Satisfaction**

- HRIS Module:
  - Very Satisfied: 6%
  - Satisfied: 50%
  - Neutral: 16%
  - Dissatisfied: 16%
  - Very Dissatisfied: 13%

- Best of Breed:
  - Very Satisfied: 14%
  - Satisfied: 43%
  - Neutral: 32%
  - Dissatisfied: 5%
  - Very Dissatisfied: 5%

- Overall:
  - Very Satisfied: 10%
  - Satisfied: 46%
  - Neutral: 25%
  - Dissatisfied: 10%
  - Very Dissatisfied: 9%

**System Deployment**

- Cloud: 74%
- On-Premise: 22%
- Don't Know: 4%

N = 69

**System Deployment**

- N = 69

**Replaced their Onboarding System in the last year**

- N = 69

**90% of organisations feel neutral, satisfied or very satisfied with their Best of Breed employee onboarding system.**
Most organisations have relatively new Performance Management systems implemented (80% have had their system for <5 years). Most of these systems are deploying to the Cloud (61%), though on-premise solutions have only reduced by 3% from last year. Satisfaction results were mostly split, with 55% approving of their solution, 27% feeling dissatisfied and the remainder neutral.

35% of organisations stated they are yet to assign a solution, suggesting plenty of opportunity in this space. This gap is tempered by only 26% of respondents looking to increase future system spend.
Performance Management

User Satisfaction

N = 62

THE PERFORMANCE MANAGEMENT SPACE IS GROWING, WITH OVER 10 BEST OF BREED SOLUTIONS MENTIONED

80% OF RESPONDENTS

System Deployment
N = 61

Don't Know 10%
On-Premise 29%
Cloud 61%

Have had their Performance Management system for <5 years
N = 60

14% Very Satisfied
43% Satisfied
14% Neutral
21% Dissatisfied
14% Very Dissatisfied

80% of respondents have had their Performance Management system for <5 years.
The Workforce Management (rostering, time and attendance) landscape remains highly fragmented, with Workforce Central (Kronos) leading a group of 36 different solutions. Most systems are still in their infancy, with 80% of organisations having implemented their system in the last 5 years.

Two-thirds (67%) of respondents are using a platform outside of their Core HRIS and most are underwhelmed by their solution (72% Neutral or Satisfied). Future Expenditure indicates a low priority of with 62% looking to spend the same or less than last year.
Workforce Management

User Satisfaction

N = 66

HRIS Module
Don't Know: 8%
Satisfied: 50%
Neutral: 21%
Dissatisfied: 17%
Very Dissatisfied: 4%

Best of Breed
Don't Know: 12%
Satisfied: 38%
Neutral: 36%
Dissatisfied: 7%
Very Dissatisfied: 7%

Overall
Don't Know: 11%
Satisfied: 42%
Neutral: 30%
Dissatisfied: 11%
Very Dissatisfied: 6%

System Deployment
N = 70

Most common age of Workforce Management systems
N = 69

WITH AN INCREASE OF 13% SINCE 2018, CLOUD DEPLOYMENT HAS OUTRANKED ON-PREMISE FOR THE FIRST TIME

2-5 YEARS

Very Satisfied
Satisfied
Neutral
Dissatisfied
Very Dissatisfied
ELMO leads the L&D space, with Core HRIS systems showing a clear customer satisfaction advantage (Core HRIS 69% Satisfied / Very Satisfied vs overall platforms 52%).

Best of Breed solutions remain competitive (70%) with strong positive satisfaction ratings (50%) and avoiding any 'Very Dissatisfied' responses. Those with an Internally Developed solution failed to move the needle (50% Neutral, 30% Satisfied, 0% Very Satisfied).

With 33% of respondents looking to increase spend in the L&D space this is a key area for growth, alongside Recruitment.
Learning & Development

User Satisfaction

N = 81

HRIS Module
- Very Satisfied: 12%
- Satisfied: 44%
- Neutral: 20%
- Dissatisfied: 12%
- Very Dissatisfied: 12%

Best of Breed
- Very Satisfied: 11%
- Satisfied: 39%
- Neutral: 41%
- Dissatisfied: 9%
- Very Dissatisfied: 9%

Overall
- Very Satisfied: 11%
- Satisfied: 41%
- Neutral: 32%
- Dissatisfied: 12%
- Very Dissatisfied: 4%

Cloud based deployments remain as the most popular option for learning and development systems (79%).

System Deployment
N = 77

80% of respondents

Have had their L&D system for <5 years
N = 69
A significant number of respondents use their Core HRIS or Internally Developed Spreadsheet / Non-Spreadsheet solutions. Power BI being the only standalone reporting tool to hit the top 4. 25 different platforms were recorded in this area, this suggests no clear winners likely due to users still determining platform selection.

The Reporting & Analytics category tells an interesting story of organisations searching for an alternative to their existing payroll reporting (45% using Non-HRIS systems). This is not an issue with adoption (only 22% of respondents had no solution).
**User Satisfaction**

- **HRIS Module**
  - Very Satisfied: 15%
  - Satisfied: 49%
  - Neutral: 27%
  - Dissatisfied: 6%
  - Very Dissatisfied: 3%

- **Best of Breed**
  - Very Satisfied: 12%
  - Satisfied: 30%
  - Neutral: 50%
  - Dissatisfied: 8%

- **Overall**
  - Very Satisfied: 13%
  - Satisfied: 39%
  - Neutral: 40%
  - Dissatisfied: 7%
  - Very Dissatisfied: 1%

**System Deployment**

- Don’t Know: 8%
- Cloud: 44%
- On-Premise: 48%

**Most common age of Reporting & Analytics systems**

- N = 72

**Reporting & Analytics**

**Report & Analytics**

- N = 73

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- Reporting & Analytics is #1 for on-premise deployment, suggesting that organisations prefer to keep this data local and onsite.
OrgPlus (disclaimer: this is a Navigo product) leads the pack for Workforce Modelling, with 65% of respondents using the on-premise or the Cloud alternative. The top three spots remain consistent with last year, Core HRIS and Internally developed systems taking 2nd and 3rd.

Investment in this space is significantly lower than other functionality areas, with only 15% of organisations planning to increase their spend. Though a Core HRIS system is in the top 2, nearly 90% of respondents have elected to implement other technology to meet their Workforce Modelling / Planning needs.
WORKFORCE MODELLING PLATFORMS ARE PRIMARILY ON-PREMISE (36%), WITH CLOUD HOSTING HOLDING STEADY (28%).
Employee Feedback is an interesting area of HR tech, with high take up (only 26% of respondents had no solution). More than 25 different platforms were listed among vendors. Clearly an area where HR and IT have been finding low cost, easy to implement solutions away from the main players (with 72% Cloud deployed).

20% of organisations currently have Survey Monkey implemented. Competitors still have a long way to go if they want to move up the chain. The top 4 systems reflect the changing face of Employee Feedback as we start to see more Best of Breed platforms make the list.
**Employee Feedback**

**System Deployment**
- N = 68
  - Cloud: 72%
  - On-Premise: 12%
  - Don’t Know: 16%

**Most common age of Employee Feedback systems**
- N = 68
  - 2-5 Years: 38%

**User Satisfaction**
- N = 68

<table>
<thead>
<tr>
<th>Module</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neutral</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
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<tbody>
<tr>
<td>HRIS Module</td>
<td>25%</td>
<td>25%</td>
<td>12%</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Best of Breed</td>
<td>18%</td>
<td>35%</td>
<td>42%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Overall</td>
<td>19%</td>
<td>34%</td>
<td>37%</td>
<td>3%</td>
<td>7%</td>
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</table>

**Employee Feedback recorded the highest % of very satisfied responses out of all the functional areas**

**2-5 YEARS**
With 59% of respondents recording No Solution, this area shows low adoption. The current view of Success Planning / Career Pathing is either as an ‘add-on’ module to an existing system or as an Internally Developed solution (typically spreadsheets).

With high exposure at the CxO level, Succession Planning typically relies on the involvement and expertise of the HR Director / HR Manager to develop and roll-out. This likely contributes to the slow uptake of Best of Breed solutions in this category.

**Best of Breed vs. HRIS Module**

<table>
<thead>
<tr>
<th>Best of Breed / Non-HRIS</th>
<th>Core HRIS</th>
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<tbody>
<tr>
<td>62%</td>
<td>38%</td>
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**Future System Expenditure**

<table>
<thead>
<tr>
<th>More than last year</th>
<th>Same as last year</th>
<th>Less than last year</th>
<th>No spend</th>
<th>Don't know</th>
</tr>
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<tbody>
<tr>
<td>21%</td>
<td>42%</td>
<td>5%</td>
<td>21%</td>
<td>11%</td>
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**Most Common Systems**

1. ELMO
2. ichris/chris21 (Frontier Software)
3. Internally Developed
4. Workday
Succession Planning / Career Pathing

69% of respondents that use their core HRIS for succession planning are satisfied or very satisfied with their system.

34% of respondents

Replaced their Succession Planning system in the last year.

System Deployment

N = 32

Don't Know
19%

On-Premise
16%

Cloud
65%

69% of respondents that use their core HRIS for succession planning are satisfied or very satisfied with their system.

User Satisfaction

N = 32

HRIS Module

23% Very Satisfied
46% Satisfied
8% Neutral
8% Dissatisfied
15% Very Dissatisfied

Best of Breed

16% Very Satisfied
53% Satisfied
26% Neutral
5% Dissatisfied

Overall

9% Very Satisfied
28% Satisfied
35% Neutral
19% Dissatisfied
9% Very Dissatisfied

N = 32

Replaced their Succession Planning system in the last year

N = 32
Almost half of all respondents Internally Develop (with spreadsheets) their Remuneration / Salary Planning solution or use their existing payroll system. There’s increased intention to move away from internal solutions with 22% of respondents indicating an intention to spend more in the next year (up from 15%) last year.

Pivot / ELMO Remuneration continue to be the leading Best of Breed systems of choice. The larger HRIS systems are also starting to creep up on ichris/chris21 (Workday and Cornerstone).
### Remuneration / Salary Planning

**7th Australian HR Technology Survey**

**Remuner ation / Salary Planning**

**System Deployment**

- **Cloud**: 40%
- **On-Premise**: 47%
- **Don't Know**: 13%

**Have had their Remuneration system for 2+ years**

- **N = 55**

**User Satisfaction**

- **HRIS Module**
  - Very Satisfied: 23%
  - Satisfied: 55%
  - Neutral: 14%
  - Dissatisfied: 9%
- **Best of Breed**
  - Very Satisfied: 12%
  - Satisfied: 36%
  - Neutral: 43%
  - Dissatisfied: 3%
- **Overall**
  - Very Satisfied: 16%
  - Satisfied: 44%
  - Neutral: 31%
  - Dissatisfied: 5%

**Nearl y 80% of all respondents that use their core HRIS for remuneration are satisfied with their system**

**N = 55**
OH&S, Accident & Incident Reporting systems continue to slowly transition from Internally Developed Systems (25%) to a range of Best of Breed platforms. Core HRIS systems continue to underrepresent (13%).

Looking at the Future Expenditure (50%, the same as last year) modernisation of OH&S, Accident and Incident Reporting platforms looks to be low on the agenda for most organisations.
WITH THE MAJORITY OF RESPONDENTS KEEPING THE SAME SYSTEM FOR 7+ YEARS, ORGANISATIONS ARE LESS INCLINED TO CHANGE THEIR SYSTEM.
PART 3

Reporting Details
Methodology

Navigo’s 7th Australian HR Technology Survey was conducted using an online survey between May and June 2019. The respondent profile included professionals working in the HR and IT sectors across Australia. Overall, 135 responses were gained from 126 organisations.

When several subjective responses were received from one organisation, all answers were considered. To maintain integrity and accuracy, objective answers were combined or further investigated.

We have only ranked Best of Breed vendors that received 2 or more responses. In some functional areas there was either no Best of Breed vendors in the results or not enough responses.

Sampling

The aim of this survey is to gain accurate industry insights via a diverse representation of the market. We invited HR vendors across Australia to promote the survey to their customer base. Sampling bias may occur depending on individual vendor promotion.

As Navigo offers HR technology solutions, our customers account for a higher percentage of survey respondents when compared to the total market.

In some instances, respondents have indicated ‘Don’t Know’ for the name of their Non-Core HRIS system. This may result in Core HRIS appearing higher on the ‘Most Common Systems’. In the Overall Satisfaction Chart (page 19), vendors that received less than 3 responses were excluded.
Navigo is an Australian HR solutions company specialising in cutting-edge software to solve operational and strategic HR issues. We provide tools for workforce modelling, HRIS visualisation, succession planning and HR data analytics.

Our core objective is to help organisations to unlock their HRIS data, enabling them to use it in a meaningful and valuable way.

We have worked with over 600 industry-varied customers across Australia, New Zealand and Papua New Guinea. Our team of HRIS veterans and technology experts are committed to delivering HRIS and org charting solutions that provide hard ROI against transactional HR activities.

After receiving feedback that there was a gap in Australian HR technology research, we decided to conduct a wide spread survey to provide a comprehensive report taking the pulse of the HR tech space. Since the first Navigo HR Technology Report in 2010, we have maintained a focus on understanding how hundreds of HR teams across the nation utilise HR technology.

To learn more about Navigo, visit navigo.com.au
## Complete Vendor List

### Core HRIS
- ichris/chris21 (Frontier Software)
- ELMO
- Ascender
- EmpowerHR (Fusion5)
- SAP HCM
- Connx
- Technology One
- Workday
- Oracle HCM
- PeopleStreme
- Payglobal (MYOB)
- Aurion
- HR3
- Affinity
- Attache
- Civica
- Ellipse
- EmployeeConnect
- enableHR
- Flare HR
- Payforce (ADP)
- Pays Online
- People Inc
- SuccessFactors (SAP)
- Thompson Reuters
- Zambion

### Payroll
- ichris/chris21 (Frontier Software)
- Ascender
- Payforce (ADP)
- MicrOpay (Sage)
- SAP HCM
- Payglobal (MYOB)
- Aurion
- EmpowerHR (Fusion5)

### Recruitment / Talent Acquisition
- Meridian (Sage)
- HR3
- Technology One
- Payroll Metrics
- Peoplesoft (Oracle)
- Zambion
- KeyPay
- ELMO
- Pays Online
- Workday
- Pronto
- APS
- Ellipse
- Attache
- Affinity
- Xero
- MYOB IMS
- MYOB Exo

### Employee Onboarding
- Ascendre
- Cornerstone OnDemand
- Snaphire

### Workforce Management
- Workforce Central (Kronos)
- ichris/chris21 (Frontier Software)
- ConnX
- RITEQ
- RosterOn
- EmpLive (WFS Australia)
- TimeFiler
- Payglobal (MYOB)
- EmpowerHR (Fusion5)
- Ascender
- Pays Online
- Mitrefinch
- SAP HCM
- Ento
- Easy Employer
- Greentree
- Cisco Finess
- HR3
- MyWorkplace
- TimeTarget
- Payroll Metrics
- Workday
- Reset
- Deputy
- ELMO
- Technology One
- Microsoft SharePoint
- Deltek Vision
- Microstar
- Zambion
- APS
- Infor Workbrain
Complete Vendor List

Learning & Development
ELMO
Learning Seat
SuccessFactors (SAP)
PeopleStreme
Kineo
SumTotal
Skillport
SABA
My Health Learning (HETI)
Litmos
MYOSH
Moodle
Nexus
SafetyHub
Halogen
Southrock
Online Induction
Summit
PageUp People
Velpic
Panorama
Kallidus

People Inc
Oracle HCM (Oracle)
Qlik
Technology One
Jet Reporting
Tableau Software
Pays Online

Workforce Modelling / Planning
OrgPlus Enterprise
ichris/chris21 (Frontier Software)
Workday
OrgPlus Desktop
Planning@Work
org.manager
HR3

Employee Feedback
Survey Monkey
Culture Amp
Qualtrics
Workday
AON Hewitt
Gallup
Ask Your Team
PeoplePulse
IntelliHR
Survey Sparrow
Cornerstone OnDemand
ELMO
PMS
OfficeVibe
BPA
Affinity
Teamgage
Ascender
Pekon
Hyphen
People Matters
Orima

Succession Planning / Pathing
ELMO
ichris/chris21 (Frontier Software)
Workday
Cornerstone OnDemand
SuccessFactors (SAP)
ConnX
Cognology
PeopleStreme
SABA

Remuneration / Salary Planning
ichris/chris21 (Frontier Software)
Pivot (ELMO)
Workday
Cornerstone OnDemand
ConnX
SAP HCM
HR3
Ascender
AON Hewitt

OH&S, Accident and Incident
MYOSH
RiskMan
EmployeeConnect
Vault
SkyTrust
ichris/chris21 (Frontier Software)
Enterprise Risk Management
System
Risk Wizard
People Inc
HR3
IRIS
ConnX
Pays Online
Ascender
Periscope
CAMMS

Reporting & Analytics
ichris/chris21 (Frontier Software)
Power BI
Ascender
SuccessFactors (SAP)
Cognos (IBM)
Workday
ELMO
EmployeeConnect
Business Objects (SAP)
SQL Server Reporting Service (Microsoft)
org.manager
ConnX
Thompson Reuters
Zambion

ERIC
Themis
Incontrol
AQD
Beakon
INX
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