

NEAT EVALUATION FOR INFOR:

New World Workforce Management

Market Segments: Overall, Scheduling Capability

Introduction

This is a custom report for Infor presenting the findings of the 2024 NelsonHall NEAT vendor evaluation for *New World Workforce Management* in the *Overall* and *Scheduling Capability* market segments. It contains the NEAT graphs of vendor performance, a summary vendor analysis of Infor for workforce management, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering workforce management (WFM) services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall, and with specific capability in cost value, scheduling, employee empowerment, IoT, and multi-country delivery.

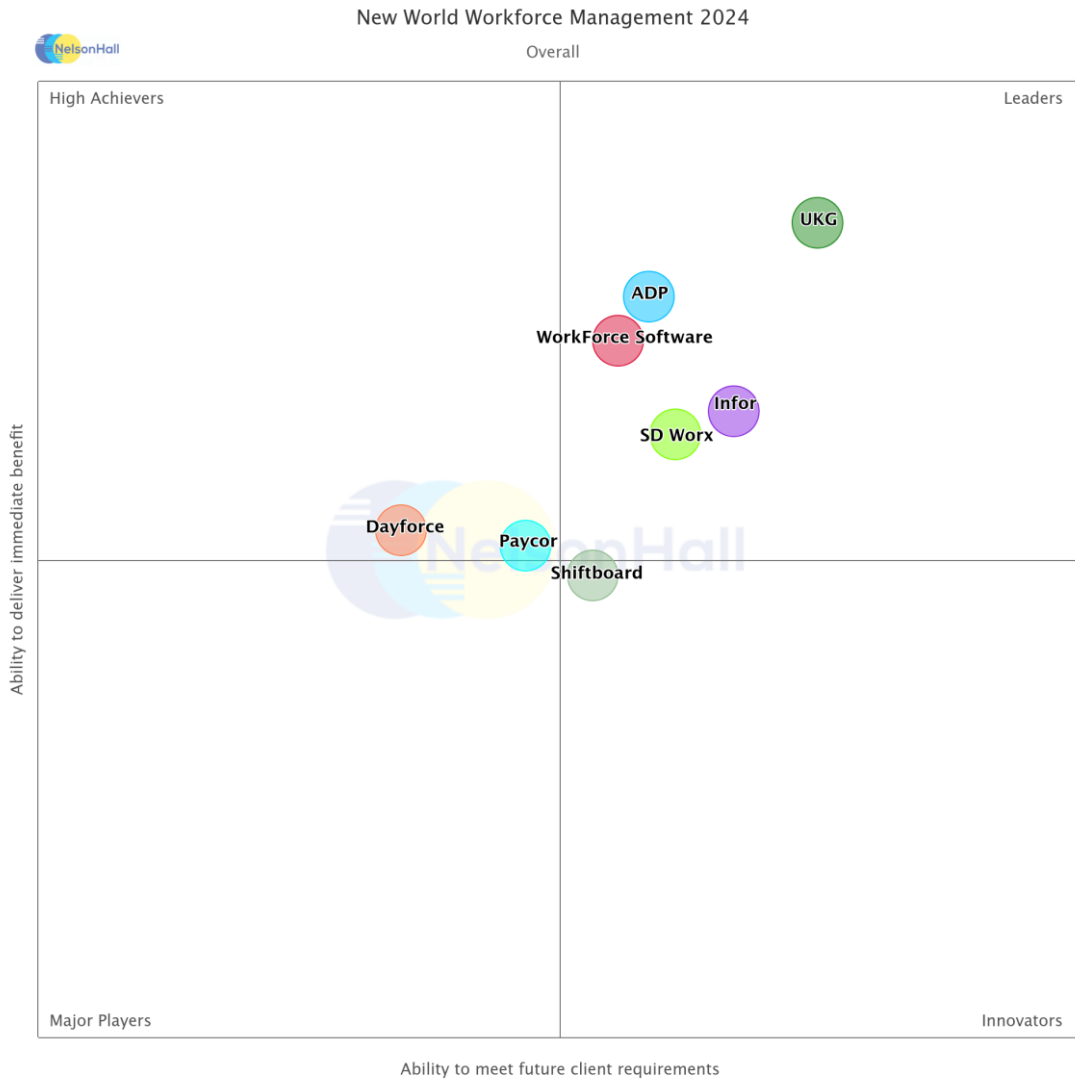
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: ADP, Dayforce, Infor, Paycor, SD Worx, Shiftboard, UKG, and WorkForce Software.

Further explanation of the NEAT methodology is included at the end of the report.



NEAT Evaluation: New World Workforce Management (Overall)



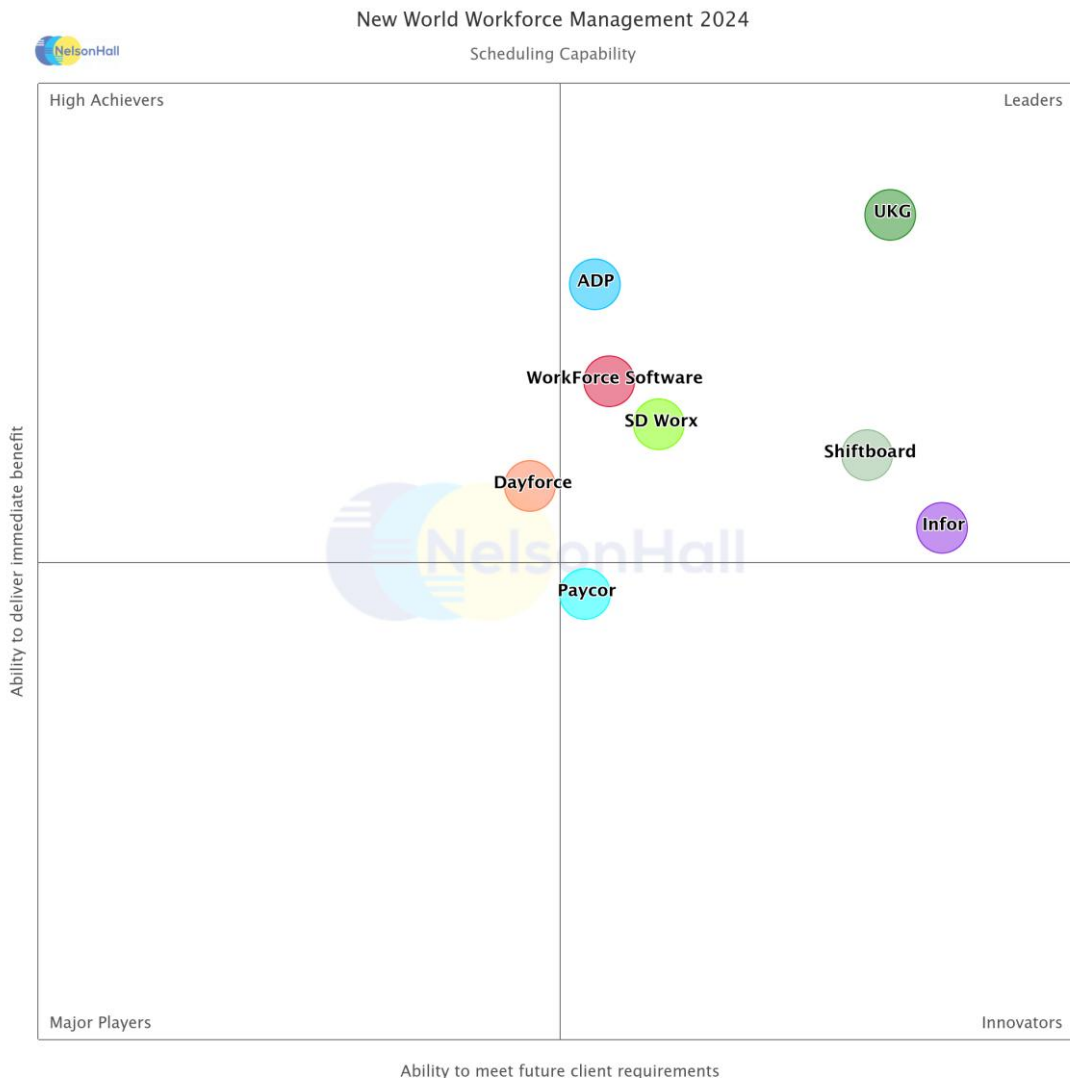
NelsonHall has identified Infor as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects Infor’s overall ability to meet future client requirements as well as delivering immediate benefits to its workforce management clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *New World Workforce Management* NEAT tool (*Overall*) [here](#).



NEAT Evaluation: New World Workforce Management (Scheduling Capability)



NelsonHall has identified Infor as a Leader in the *Scheduling Capability* market segment, as shown in the NEAT graph. This market segment reflects Infor’s ability to meet future client requirements as well as delivering immediate benefits to its workforce management clients with specific capability in scheduling.

Buy-side organizations can access the *New World Workforce Management* NEAT tool (*Scheduling Capability*) [here](#).



Vendor Analysis Summary for Infor

Overview

Infor is a provider of enterprise software solutions. It offers several business platforms, including ERP, CRM, HR, Finance, Supply Chain, and numerous vertical-specific offerings, including automotive, healthcare, industrial, retail, public sector, and hospitality.

Infor built its portfolio of ERP offerings primarily through several acquisitions, including Infor Business Solutions (February 2004), and began focusing on industry-specific solutions. Infor then expanded its portfolio to include WFM with its acquisition of Workbrain in 2007 (a leading workforce time and attendance and scheduling solution at the time). In April 2020, Koch Industries, Inc. (Koch) completed the acquisition of Infor from Golden Gate Capital. Infor had been a critical component of Koch's technological transformation. Before Koch became Infor's parent company, it selected Infor's HR solution to modernize its key HR processes. In late 2019, through Infor and Deloitte Consulting's partnership, Koch rolled out Infor's HCM applications, providing the foundation for Koch's 2020 decision to invest in Infor.

Infor continues to target markets and solutions primarily by industry vertical. Currently, healthcare organizations account for its largest WFM client group, with the public sector being the fastest-growing adopter. Infor's WFM product is FedRAMP certified, a key differentiator in the public and federal sectors. Infor reached FedRAMP authorization after an extensive review of the company's security posture to ensure that it met government standards for security assessment, authorization, and continuous monitoring of its cloud products and services. In 2023, the state of Idaho had a successful go-live of Infor's cloud-based public sector applications, powered by AWS GovCloud. The ERP solution unifies 85 agencies and departments across the state with the same base budget, financial management, procurement, payroll, HCM, T&A, WFM and governance, risk and compliance solution, made possible by Infor's FedRAMP certification.

Notably, ~60% of Infor's WFM clients still have not adopted its HCM suite, leaving the potential for further cross-selling opportunities. As part of its HR technology suite, it offers the Infor WFM product alongside its Infor HCM product.

Infor has established capabilities to deliver WFM software to 71 countries supporting 21 languages. It has ~230 WFM clients servicing ~5m users.

Financials

Infor is a privately-held company and does not report its earnings publicly.

NelsonHall estimates Infor's calendar year revenues (CY2023) at ~\$3bn, with revenues derived directly from WFM at ~\$150m. NelsonHall estimates revenues for H1 2024 at ~\$75m. Infor's revenues are primarily derived from the U.S. (88% of revenues).



Strengths

- Deep industry experience and industry-specific solutions across its WFM business. Roadmap and recent product enhancements show a continued focus on the development, marketing, and delivery of industry-specific solutions
- Capabilities and experience to support the unique needs of complex organizations, specifically those with union and CBA-dependent workforces
- Expertise in building solutions incorporating ML, RFID, and integrations with platforms including ERM and the ability to add value with the broader capability of Infor products such as HCM, ERP, CRM, Finance, Supply Chain technology
- Significant global capability to support WFM solutions in 75 countries and 21 languages
- Ability to offer a cloud-based, multi-tenant solution with an extensible framework for quicker implementations and enhancement upgrades, and analytics delivered out-of-the-box
- Powerful scheduling tools, including Shift Billboard featuring AI-based forecasting, powered by ML
- Significant client base with 250 WFM clients, with the ability to serve clients at scale, covering large, mid, and small markets. Customers include a large number of global brands with high visibility
- FedRAMP certification provides a key differentiator in the public and federal sectors
- Open architecture via Infor OS, as well as established partner relationships and a recently launched extensibility framework to support implementations
- Leadership Council that allows strategic customers to meet monthly with the product management and development teams to facilitate customer-driven, strategic client co-development, cross-collaboration, and customer-influenced roadmaps and product enhancements.

Challenges

- Compliance for local country legislation traditionally managed through client-specific configuration rather than through the platform
- Meeting customer demand for consolidated WFM platforms from a single vendor for a more consistent employee experience; however, Infor plans to consolidate its two scheduling solutions into one (a beta version was released in October 2023)
- Lack of communication and employee engagement tools.



Strategic Direction

Infor is currently focused on a global growth strategy for its WFM offering, with delivery of key regional and industry-specific features, as well as staffing for delivery in these regions. Its WFM roadmap is highly focused on improving the user experience (as demonstrated by its recently-upgraded employee self-service portal), accessibility, and “last-mile” industry capabilities. Within the next two years, Infor plans for its WFM platform to deliver a new time and scheduling management experience, while leveraging a GenAI-powered hyper digital assistant with functionalities to answer and perform common questions and tasks via NL. Additionally, the system is being developed with capabilities to respond to more complex inquiries by leveraging the entire ecosystem of Infor products, e.g., Infor WFM + HR Payroll to provide net pay projections.

Infor’s WFM will continue to focus on frontline employees and managers with a reimagined time-off request and approval experience embedded with contextual data to support more effective administrative decision-making. To further support managers, a new Billboard Manager will be introduced that will allow supervisors to better manage posted, claimed, and expiring shifts.

Infor WFM currently offers two distinct industry-specific scheduling solutions, for retail, healthcare, manufacturing, and services. To refine and simplify its go-to-market strategy for scheduling, the two solutions will be combined into one, leveraging the specific strengths and capabilities of each. The result will provide a single intuitive user experience, including data-driven insights to support decisions throughout the scheduling process.

Labor forecasting is another focus area on the product roadmap. This includes a reimagined forecasting engine and management experience that aims to improve the overall productivity and user experience. The current forecasting engine will be further improved by leveraging ML across multiple models to provide the best aggregated results. New modeling capabilities will allow forecasting across industries, such as census forecasting for healthcare.

Outlook

Infor’s efforts to focus heavily on going to market with specialized services and industry-based offerings, especially in retail, healthcare, and manufacturing, while still allowing for cross-customizations, has helped bolster its growth model and enable the organization to continue winning significant new customer contracts. Infor is well-positioned to continue its growth trajectory, driven by industry-specific solutions such as Clinical Science, while increasing its share of growing verticals such as the public sector. Additionally, Infor’s experience in navigating uniquely complex unionized and heavily regulated work environments will be a strong differentiator as it looks to extend its international footprint.

Infor is also investing in incorporating GenAI into its platform. Its relaunched forecast management capabilities now use self-teaching AI models that go beyond set algorithms that define and execute “if/then” scenarios to also understand and learn individual business needs and processes to build specific use cases. Ongoing enhancements to its scheduling and reporting functionalities through Shift Billboard and Billboard Analytics will also help further expand the platform's labor and workload planning capabilities. Additionally, integrating its two scheduling solutions and implementing processes that are directly in the flow of work will help to improve the user experience of both employees and leaders. NelsonHall predicts growth earnings of 10-15% in 2024.



New World Workforce Management Market Summary

Overview

The workforce management market continues to adapt across the HR spectrum to meet evolving needs for hybrid work models, specifically as it relates to supporting hourly, shift, and deskless workers with flexible workforce requirements.

Reimagined solutions use industry-leading and innovative technology to facilitate both local and global administration, manage risk assessments, and offer adaptable workplaces. This includes the ability to reinvent and digitalize workforce management solutions to support transformed workplace practices, focus on more holistic employee experiences, attract and retain top talent, and use in-depth prescriptive analytics. There continues to be a strong focus on digitalized offerings that enhance automation to better manage the speed of business change through emerging technologies such as Gen AI, AI and ML.

Buyers continue to look to providers for industry best practices, as well as innovation that adapts to long-term business goals. Employee engagement tools are a key development focus currently, providing the democratization of workplace practices and more robust communication functionality. AI-driven enhancements enable advanced scheduling capability across vendors through recommendation engines and automated scheduling and approvals, while Gen AI is being integrated for stronger communication and employee support tools. Additionally, vendors are strengthening API capabilities with solutions and expanded marketplaces that help organizations more easily integrate with new and emerging applications.

The WFM market has also experienced significant progress with acquisitions, including Sheepblue and Gavdi Poland by SD Worx, and technology and service partnerships, such as UKG's expanded relationships with Microsoft and Google Cloud.

Buy-Side Dynamics

The top priorities for buyers of WFM center on leveraging modern technology to enable greater agility and effectiveness to achieve strategic business goals, including:

- Increased focus on shift and deskless workers requiring automated scheduling, absence management, and workforce planning
- Digitalization and technological advancement
- Labor cost management to more effectively manage employee fatigue and compliance adherence
- AI-based automated tools that enable management to quickly assess and audit productivity
- The need for enhanced scheduling tools that integrate with existing payroll and HR platforms
- Data analytics that allow for real-time reporting and auditing
- Leveraging technology for effective communication, information sharing, and community building
- Focus on long-term organizational goals and sustainability measures



- Ability to better support business through easy-to-configure technology
- Improved compliance for expanding regional and global businesses with complex workforce needs.

Market Size & Growth

NelsonHall estimates the WFM market to be worth ~\$5.8bn in 2024, with North America the largest market (58% of the global market). Greatest growth is expected in healthcare and manufacturing.

Growth will be driven by the demand for modern technology to automate administrative offerings, enhance the employee experience, mature HR operations, and enable greater agility in supporting current and future strategic business goals through AI-enabled forecasting analytics and peer benchmarks.

Global benefits will see significant growth as vendors look to increase market shares in EMEA and other regions.

Challenges & Success Factors

Key challenges faced by WFM providers include:

- Supporting clients and solutions with best practice guidance and advocating for transformed digital practices, especially in specific industries that have unique staffing and workforce needs
- Labor forecasting that can account for various scenarios (high/low traffic times, weather, holiday, etc.) and provide prescriptive guidance
- Conservative organizational spend due to economic uncertainties
- Innovative incentives and rewards
- Ability to support talent management as buyers seek to increase competitiveness for talent attraction and retention, especially in high turnover industries
- Lack of leadership buy-in for change management, along with limited bandwidth for administrators to take on the implementation, deployment, and maintenance of new platforms
- Supporting compliance across multiple countries, worksites, and job requirements
- Many organizations expect compliance to be delivered 'out of the box' by the vendor
- Vendors that have a heavy reliance on partners to manage deployments are less likely to have compliance built into the product across multiple countries
- Developing effective consulting partnerships to assist with the deployment of workforce management products
- Time to ROI expectations for process improvements and cost reduction
- Driving greater insights from improved analytics
- Developing and integrating employee communications alongside WFM solutions that are easily accessible within the flow of work.



Key success factors for WFM providers include:

- Deeper domain knowledge and industry-specific solutions to ensure developments are suitably tailored to meet unique customer needs
- Enabling compliance and keeping up-to-date with changes in legislation in countries serviced
- Ensuring configuration can be easily updated by end users to support ongoing change and can meet needs
- Strong analytics, predictive insights, and benchmarking to drive continuous improvements
- Adaptability in clock technology such as facial recognition/touchless, durable equipment to withstand rugged and all-weather conditions, freestanding kiosks for deskless employees
- Demonstrating (e.g., referenceable clients) proven experience, leadership in execution and innovation
- Supporting integrations with HCM, payroll, access management (security), and service delivery (CRM) platforms for optimized experiences
- Supporting employee engagement solutions that support a holistic approach to workforce needs
- Aligning to specific industries and engaging with industry experts to develop industry specific solutions and innovations
- Integration of emerging technologies such as AI and ML to bolster scheduling and labor forecasting functionalities
- Ongoing investments in product and service roadmaps.

Outlook

In 2024 and beyond:

- Demand is expected to continue to see an uptick, with ~10% growth, driven by evolving labor needs as well as multi-country and global growth. Greatest growth in 2024 is expected in manufacturing and healthcare
- AI will be increasingly used to optimize staffing and labor forecasting with automated scheduling and approvals and prescriptive guidance
- Extensive compliance offerings will be a necessity for businesses operating and expanding both regionally and globally
- WFM and payroll solutions are expected to become more closely integrated through on-demand pay, whereby hourly employees can opt to be paid at the end of a shift
- Shift planning is expected to continue to attract new buyers as AI-driven algorithms enable more flexible working for shift-based and deskless staff, as well as remote/office-based staff, so that employees can more easily share preferences and availabilities and trade/auction shifts themselves as part of an employee empowerment focus
- Enhanced communication tools will continue to develop to include features such as task management, labor optimization, and post-shift employee sentiment analysis



- Innovative employee engagement tools will be a key differentiator as organizations continue to navigate high turnover and retention difficulties
- Industry-wide benchmarks will continue to grow as organizations seek KPI data related to functions including recruiting, performance, and industry best practices
- Business continuity plans will be an integral part of workforce management as businesses invest in crisis management preparedness.



NEAT Methodology for New World Workforce Management

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

‘Ability to deliver immediate benefit’: Assessment criteria

Assessment Category	Assessment Criteria
Offerings	<ul style="list-style-type: none"> Range of WFM offerings Scheduling offerings IoT integration Breadth of employee engagement Capability to offer decision support tools Ability to support benchmarking User Experience and Mobile Offering Depth of Industry-specific solutions
Delivery Capability	<ul style="list-style-type: none"> Breadth of implementation, integration & support services Application of intelligent technology features Configuration flexibility Partnerships in support of WFM solutions Strength of proprietary IP Ability to scale delivery North America presence Global capability
Market Presence	<ul style="list-style-type: none"> North America presence EMEA presence ROW presence Small Market (<500 employees) Mid Market (>500 to 15k employees) Large Market (>15k employees)
Benefits Achieved	<ul style="list-style-type: none"> Increased workforce management effectiveness Speed and agility to support business changes Improved decision making from better insights & visibility Improved compliance Supported HR Transformation Cost savings for process improvements Improved digitalization of WFM processes



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Innovation Culture	Suitability to meet WFM needs
	Flexibility
	Caliber of personnel
	Proactively brings best practice
	Value
	Innovation & creativity
Roadmap Initiatives & Developments	Ability to deliver transformation
	WFM solutions roadmap
Market Momentum	Multi-Country offerings roadmap
	WFM market momentum

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.



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Sales Inquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:
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