

Global HCM Technology: Results from the 2011 HR.com/ Oracle Survey

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Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Introduction	3
Key Insights	5
Part I: Overall Findings	6
What is the Business Situation?	6
Organic versus Inorganic Growth	7
Is Globalization of the Workforce Happening?	8
Is Web 2.0 used to Support Globalization?	9
Is Data Privacy an Issue?	10
Part 2: HCM Deployment	11
Breadth of HCM Deployment	11
Choice between Single and Multiples Instances of HCM Software	11
Preferred Hosting Method	12
Part 3: Effectiveness of HCM Technology	14
The Quality of Reporting and Analytics	14
Adopting Best Practices	16
Distributed versus Central Control of HCM technology	17
Parting Advice	19

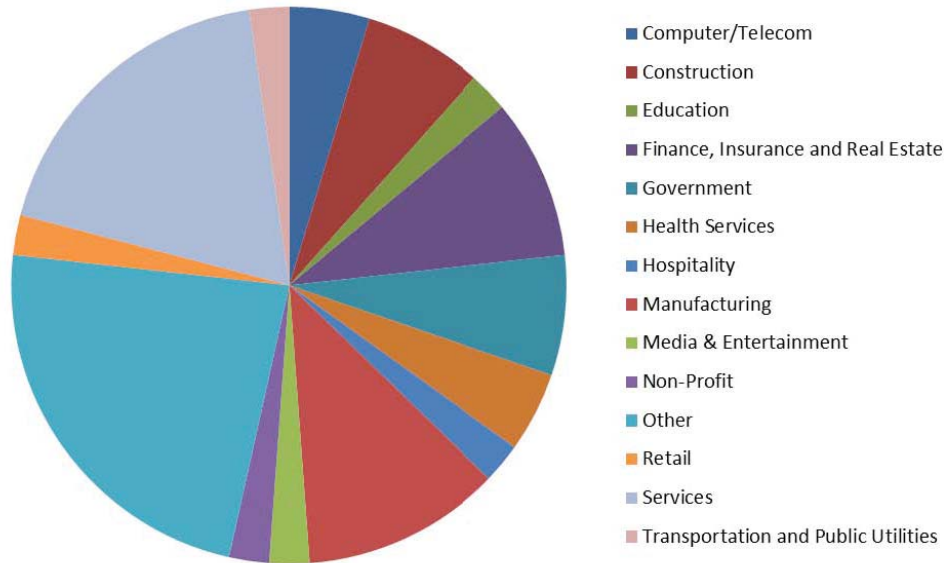
Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Introduction

Global businesses face special challenges in handling human capital management (HCM) technology. In this survey, responses from just over 100 organizations provided us with a variety of insights on global HCM practices and processes. This data alerts readers to the key issues, allows them to assess the status of their own HCM solutions relative to other organizations, and provides insights on which technology solutions are most likely to give global organizations the tools they need.

This was a broad-based survey. It includes a good mix of industries (Figure 1), a range of geographic spread (Figure 2), and all sizes of organizations (Figure 3). As such it provides a snapshot of current HCM global practices.

Figure 1: Sectors participating in this survey



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Figure 2: Number of countries the organization operates in

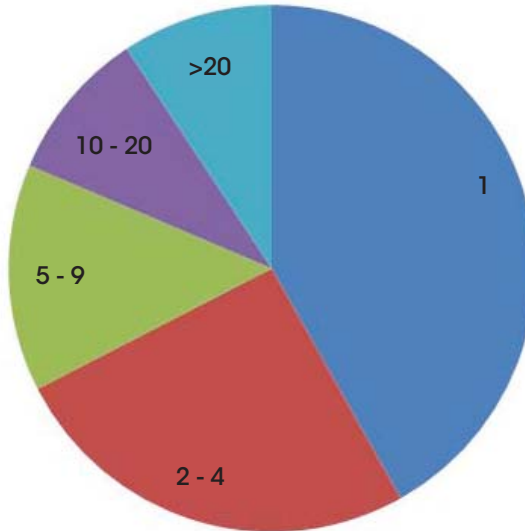
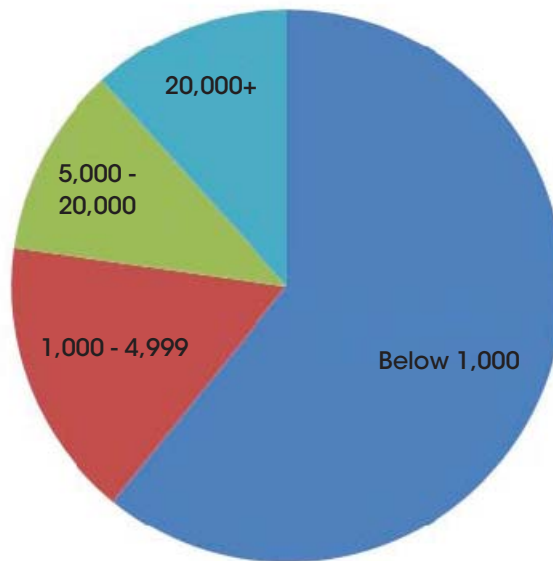


Figure 3: Organization size by number of employees



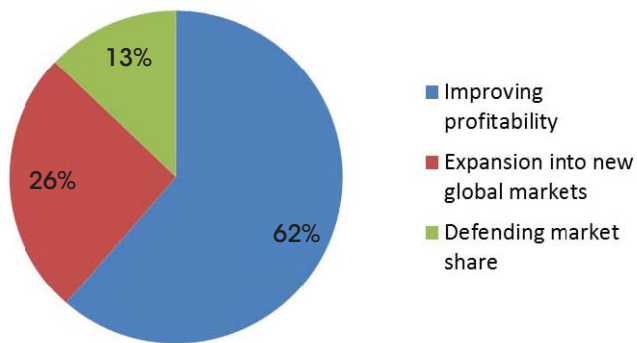
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Key Insights

- **Profitability before growth.** Organizations are currently more likely to be focused on improving profitability than on expanding into new markets. Where this is the case HR should focus on their ability to impact profitability rather than build the capability for growth. It is essential to recognize that HR's ability to improve profitability comes from making the organization more efficient, not from the relatively minor impact of reducing the HR budget.
- **Inorganic growth creates a need for an ERP.** Organizations pursuing inorganic growth (growth in the operations of a business that arises from mergers or takeovers, rather than an increase in the organization's own business activity) are much more likely to have invested in an ERP solution than those that pursue only organic growth. This likely reflects the extra demands on HR technology that arise when organizations need to quickly integrate acquisitions onto a common HR platform.
- **Web 2.0 tools have not been widely embraced.** Two-thirds of organizations are not yet using Web 2.0 tools to support global teams. We predict that once organizations adopt HCM technology that offers Web 2.0 capabilities within the firewall, we will see a dramatic upward swing in the use of Web 2.0.
- **Large organizations prefer centralized control of HCM.** Large organizations (those with over 5,000 employees) are more likely to have established centralized control over HCM technology than smaller firms. This is likely a result of the maturity of their HCM operations, as well as the increased need for central control as greater size brings greater complexity. It may also indicate a greater use of shared services to drive down costs of HR service delivery.
- **ERP solutions are best for reporting and analytics.** The survey showed that for reporting and analytics, ERP users have the best experiences; those with a homegrown solution have somewhat more difficulty; and those with a Mixed/Point solution face the most difficulty.
- **Homegrown HCM solutions have the most difficulty in rolling out best practices.** For implementing best HR practices, ERP users generally have the best experience; those with a Mixed/Point solution have somewhat more difficulty; those with a homegrown solution have the most difficulty.

Global HCM Technology: Results from the 2011 HR.com/Oracle Survey**Part I: Overall Findings****What is the Business Situation?**

HR leaders should always ground themselves in the business strategy before venturing into decisions about HCM technology. One major issue to consider is whether the organization is more interested in growth or in improving profitability—or if times are tough, simply defending its existing market share. Figure 4 shows which issues are predominant in 2011.

Figure 4: Which issue currently is predominant in your organization?

Profitability rather than growth is the predominant issue—and this translates in large part to cost control. HR leaders should be alert to the predominant issue in their own organization; for those where improving profitability is management's priority, initiatives with a short-term payoff will be greeted more warmly than ones that build capabilities for growth.

The big areas for cost reduction typically involve compensation since this is such a large expense. Ensuring time and labor is managed efficiently can be a big saving, ensuring the spend on both regular and contingent labor is controlled can yield immediate gains, and simply ensuring good decisions are made in giving salary increases and bonuses can have a significant impact.

If the organization has already reaped these cost savings, then there may be savings to be found in reducing absenteeism and turnover. Often organizations make efforts to reduce absenteeism or turnover, have some success, but then see the numbers deteriorate once management's attention has been turned elsewhere. Returning to these perennial areas can often pay dividends. Employee and manager self-service holds promise as a way to cut administrative costs, but sometimes it has run into problems because the systems were hard to use. Self-service remains a possible source of savings as long as the HCM technology is intuitive for the employees. According to CedarCrestone, while employee self-service has been fairly widely adopted, manager self-service still has a long way to go.

A longer-term project is process alignment. Making processes more efficient and more standardized—while not quite the quick hit to the bottom line one gets from some of these other initiatives—ultimately delivers benefits that are noticeable and lasting. A recent study by CedarCrestone showed that business process improvement topped the list of key initiatives where organizations are spending time and budget.¹

¹ Going Global with HR Technologies: One Organizational Model Consistently Outperforms! CedarCrestone (2011)

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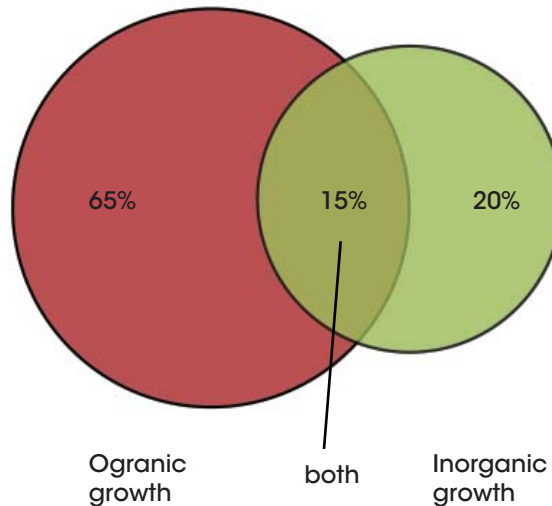
Where growth is the predominant concern, HR needs to be active in removing any bottlenecks in terms of talent, processes or systems that could inhibit the growth. The HR bottlenecks are often in talent management, particularly recruiting and leadership development. However, when expanding into new markets it may also be the case that the fundamentals of HCM technology (such as payroll and compensation) are simply inadequate in the new locations. In that case getting the fundamentals right must be addressed simultaneously with fixing talent bottlenecks.

The important point for HR leaders is that once they are clear about the business strategy, then they can design an HR technology strategy that drives profits or removes bottlenecks to growth. An HR technology strategy presented in this way will garner better support from top management than one framed only in terms of improving general HR capabilities.

Organic versus Inorganic Growth

For those organizations where growth is on the agenda, HR needs to be aware whether it is organic or inorganic growth. As Figure 5 shows, organic growth is the most prevalent strategy.

Figure 5: Is the organization pursuing organic or inorganic growth?



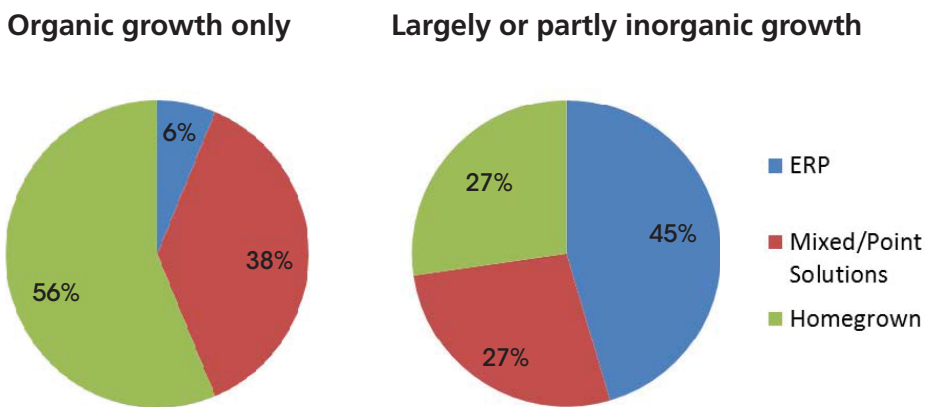
The growth choice, inorganic or organic, is important to HR. An organization growing organically makes managing technology relatively easy. Inorganic growth means acquiring not just new products and new people, but also additional and often incompatible HR systems. This leaves HR with the choice of migrating the acquired organization to the corporate system, integrating the newly acquired system, or simply living with the incompatibility.

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While migrating to a common system is the ideal option, it is not always the realistic one; at least in the short term. HR needs a technology strategy to guide how it will handle acquisitions. Figure 6 shows the different technology choices made by organizations pursuing organic growth versus those pursuing inorganic growth. The big difference is that where growth is organic, a homegrown system is often sufficient; whereas where growth is inorganic, organizations generally prefer an ERP.

Again, technology choices framed in terms of the key elements of strategy will be better accepted by management than those framed purely from an HR viewpoint.

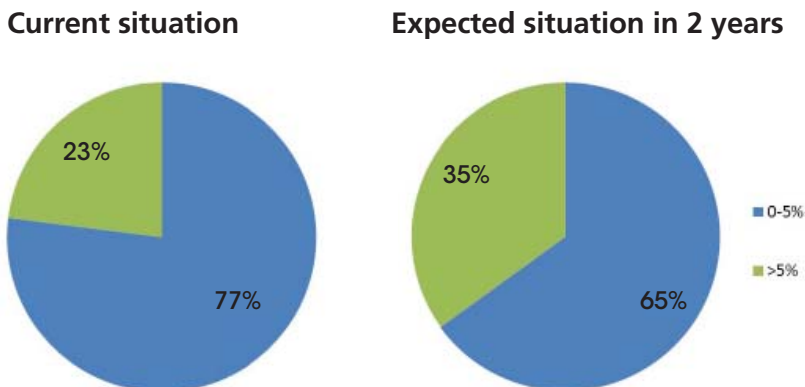
Figure 6: Technology choices in relation to growth strategy



Is Globalization of the Workforce Happening?

Academics often make a distinction between multinational organizations and global ones. In this view, multinational organizations have operations in many different countries, but each one largely stands on its own whereas global organizations are much more integrated. One aspect of being truly global is that increasing numbers of employees are working on global assignments. Figure 7 shows that about a quarter of the organizations surveyed have more than 5% of their staff on global assignment (the green segments) and in two years, one-third of organizations expect to have more than 5% of their staff on global assignments.

Figure 7: What percentage of your workforce is on global assignment?



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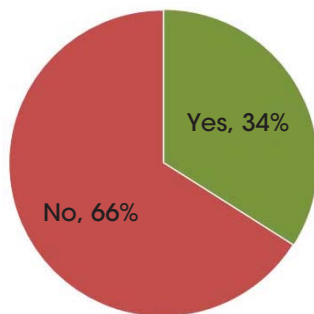
From an HR perspective, having a large number of employees on global assignment means a focus on new competencies. These employees need cross-cultural sensitivity, adaptability and possibly language skills. It may also mean dotted-line management reporting responsibilities, which will add complexity to performance reviews at a minimum. The change in required competencies will affect many aspects of talent management: from sourcing to selection to training to promotion decisions.

For HCM technology, having a 'person profile' at the center of the talent management system is important for global firms. These profiles allow HR to identify who has the skills to fill specific openings and, beyond that, to identify overall talent gaps by comparing the talent they have with the talent they anticipate needing. The need to fill any gaps will drive recruitment and training plans. But none of this is possible if the HR technology cannot give HR the data they need about the talent they have.

Is Web 2.0 used to Support Globalization?

Given that organizations are globalizing, one would expect they would be eagerly adopting Web 2.0 capabilities and teleconferencing to support global teams. Surprisingly, most still do not (Figure 8).

Figure 8: Do you use Web 2.0 capabilities and teleconferencing to support global teams?



It is true that many Web 2.0 tools are inexpensive and can be set up by the employees themselves with little support from IT. However, organizations tend to be anxious about tools that they have no control over and so, for example, would be hesitant to encourage a global team to linkup on Facebook—in fact access to Facebook may even be blocked at work.

Fortunately, the newer HCM technologies have Web 2.0 tools embedded. This is not just a slick add-on; it adds a whole new dimension to what HCM technology can offer. For years HCM technology was solely the tool of the HR department. More recently self-service capabilities allowed managers and employees to directly interact with HR systems. The third step, embedded Web 2.0 tools, allows employees to work in a much more networked way, using the HR systems (not to mention other applications like financials and supply chain) not only to connect to HR but also to connect directly to each other.

The uses of Web 2.0 within an HCM system include instant messaging, providing positive feedback about other staff in a way that can trickle into the performance review, and most importantly, connect to the people who have the experience and competencies they need to tap—once again highlighting the importance of having a 'person profile' in the system. Just as with the Web in the world at large, Web 2.0 tools within the organization help minimize horizontal and vertical barriers.

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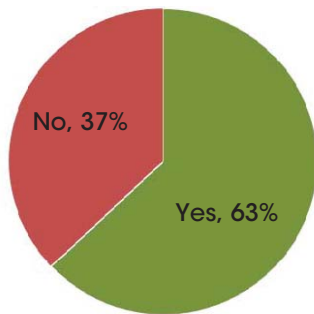
Getting back to Figure 8, the problem is not that excellent Web 2.0 tools do not exist or are too expensive, it's that they are sitting outside the firewall. As more and more organizations bring in up-to-date HCM technology, that "Yes" slice will rapidly grow and organizations will come to recognize the power of this kind of infrastructure.

When Web 2.0 truly becomes embedded in the organization it enhances informal means of getting work done—people are better able to connect with whomever they need to connect to, without being cut off by organizational silos or geography. The informal solutions can even influence formal structures if it becomes apparent that the existing structures do not facilitate the kind of information flow or decision-making the organization needs. In Web 2.0 a lot happens beneath the surface, and solutions tend to emerge rather than be designed, but it is a very exciting area that will improve organizational effectiveness, particularly in complex or fast-moving organizations.

Is Data Privacy an Issue?

HR data privacy is important and becomes more important as organizations become global, as sending data across borders can be a sensitive issue. Europe in particular has strong regulations around how employers can handle HR data. Hence it is no surprise to see nearly two-thirds of respondents cite HR data privacy as an issue (Figure 9).

Figure 9: Is HR data privacy a business challenge?



Interestingly, the choice of technology has a big impact on whether or not data privacy is a challenge. ERPs tend to be the best choice in this regard because data protection is built-in and there is no need to transfer data between different point solutions (Figure 10). Within any one point-solution, data privacy may be well-managed; however, as soon as different systems need to connect more possible points of failure arise. Homegrown systems could potentially be as good as ERPs in handling data privacy, however in practice organizations with homegrown systems are the ones most likely to find it troublesome (over 75% said it was a challenge). While each homegrown system is unique, in most cases the demands for new functionality draw resources away from engineering the system to address privacy concerns.

Figure 10: Is HR data privacy a business challenge? (Analysis by type of HCM system)

	Yes	No
ERP	33%	67%
Mixed/Point Solutions	60%	40%
Homegrown	77%	23%

Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Part 2: HCM Deployment

Breadth of HCM Deployment

Comprehensive talent management suites have been available for several years; however, having all the major modules in place is the exception, not the rule. What would normally be considered as core modules like compensation, learning, and performance were found in less than half of the organizations responding—irrespective of the HR technology (Figure 11). Organizations with an ERP are more likely to be running a wide range of modules than those with Mixed/Point solutions or homegrown solutions. This may be because organizations that have an ERP have found it easier to add modules or because those who need many modules are more likely to choose an ERP—probably both reasons play a role in the results.

Figure 11: Prevalence of HCM modules

	HR	Payroll	Compensation	Benefits	Learning	Recruiting	Performance
ERP	100%	86%	29%	43%	14%	57%	43%
Mixed/Point Solutions	87%	67%	33%	27%	27%	47%	40%
Homegrown	43%	48%	33%	24%	14%	43%	19%

Limited breadth of HCM deployment in a given organization may be a reflection of need or it may simply mean they have not ‘got there yet.’ Some sectors like the government and higher education tend to lag in technology deployment, others like professional services firms and technology organizations tend to have the latest HCM technology fully deployed. It is also the case that some organizations just do not have the same pressing need to deploy the full range of HCM modules. In a very large organization it can be difficult to manage training without a good learning module, whereas smaller organizations will not rely as heavily on technology.

One theme that arises when one looks at HR technology choices in this kind of broad-based survey is that there is no right choice for everyone; what organizations do is a reflection of their history and individual needs. A good understanding of the peculiarities of an organization’s needs will help HR make the right technology decisions.

Choice of Single vs. Multiple Instances of HCM Software

While there is nothing wrong with having multiple instances of HCM software running in different locations, it is clearly simpler and probably cheaper to run a single instance. Over three-quarters of the respondents indicated they have gone the simpler route with a single instance of their HCM software (Figure 12).

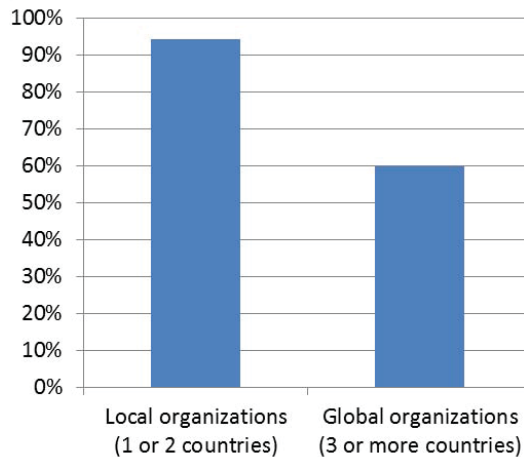
Figure 12: Single vs. multiple instances of HCM software

Single Instance	Multiple Instances
79%	21%

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The likelihood of being able to run a single instance depends on how global an organization is; over 90% of organizations with operations in only one or two countries are running single instances, which drops to 60% for organizations operating in three or more countries (Figure 13).

Figure 13: Likelihood of having a single global instance of HR/talent systems



Unless there is a problem with poor connectivity (as does occur in some developing countries), the latest HCM systems can readily run a single instance in even a large global organization. Generally it is not that the technology is holding organizations back, it is more a matter of the business needs and philosophy. Where an organization wants tight control and common best practices there will be a greater desire for a single instance. Where there is more willingness, or greater need, to let different countries or business units do their own thing then organizations may opt for multiple instances—certainly in these cases moving the HCM technology to a single instance will not be priority. The point to remember in all cases is the importance of having a good global reporting hub so that the organization can get a handle on HCM data globally. Get this in place and then the choice of single versus multiple instances can be safely made based on the organization's particular circumstances in different countries.

Preferred Hosting Method

One important technology decision facing HR is whether to keep their HCM system on-premise or run it on the vendor's servers (i.e. "hosted" or "SaaS"). Sometimes the choice is dictated by the particular system; for example, some products only run in a hosted mode. However, in many cases vendors provide both options and the decision of which to choose will depend on the strength of the IT department (an overstretched IT department will prefer a hosted/SaaS solution), and on how much control the organization wants over the system and data.

The reason HR in particular has shown interest in hosted/SaaS solutions is that the HR function often has a hard time competing for IT investments and IT resources. A hosted/SaaS solution requires less up-front investment and a reduced dependence on IT staff than an on-premise solution. It is also more easily scalable, which is an attractive choice for rapidly growing organizations. And new functionality is typically rolled out by the vendor more frequently, allowing the organization to adopt the latest features and functions without the time and expense of a major upgrade.

Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

However, despite the seeming attractiveness of hosted/SaaS solutions, Figure 14 shows there is a greater likelihood that HR modules will be on-premise rather than being hosted/SaaS. Payroll, which has a long history of being offered as a hosted solution is the only module more likely to be hosted/SaaS than on-premise, and pension administration is close with a 50/50 split. Both of these are big transactional processes where HR may prefer to hand the whole thing off to a vendor. Otherwise, despite the promise of SaaS technology, most organizations still run their HR modules on-premise.

Both on-premise and hosted/SaaS solutions can work well, however the market tends to lean towards on-premise solutions for most modules. It will be interesting to see if this shifts in the years ahead.

Figure 14: Are your HR modules on-premise or hosted/SaaS?

	On-premise	Hosted/SaaS
Payroll	47%	53%
Pension Administration	50%	50%
Recruiting	58%	42%
Benefits	62%	38%
Performance Management	68%	32%
Learning Management	69%	31%
Time Collection	71%	29%
Absence Management	73%	27%
Compensation	75%	25%
Human Resources	82%	18%
Career and Succession Planning	88%	12%
Position Management	94%	6%

Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Part 3: Effectiveness of HCM Technology

The Quality of Reporting and Analytics

Reporting, dashboards and analytics have received a lot of press, especially thanks to books that celebrate the power of analytics, like Tom Davenport’s *Competing on Analytics*.²

However, the reality of the current situation as outlined in Figure 15 is that few organizations feel their HCM technology is very good at providing operational reports, dashboards or analytics. A disheartening number report their situation is mediocre or poor.

It is not that the technology to do reporting and analytics does not exist; rather putting a good solution in place can be hard. Even before getting to the technology issues, organizations need both clean data and analytical skills within HR—all this takes time and investment, and most organizations are not there yet. It is particularly hard for global organizations because even if there is clean data and good systems in some regions, the ability to do effective global reporting will be dragged down by the weakest regions. CedarCrestone cites integrating data from multiple systems as one of the most pressing challenges facing HR.³

Figure 15: Ability of HCM to provide global insight through reporting and analytics

	Very Good	Okay	Mediocre	Poor
Operational reports	26%	49%	9%	17%
Dashboards	14%	39%	14%	33%
Transactional embedded analytics	14%	43%	11%	31%

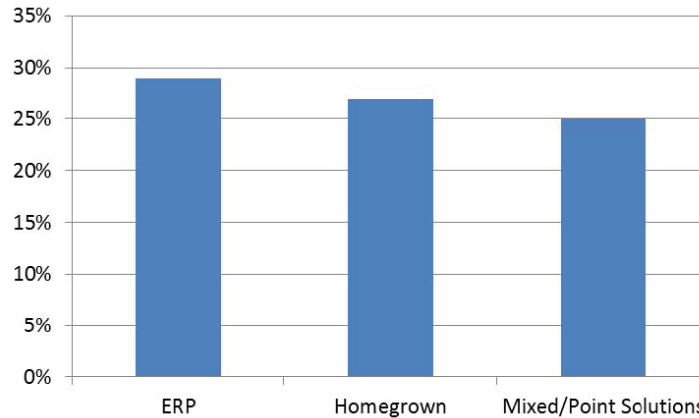
As the charts below show, ERP solutions tend to be much better suited to reporting and analytics than Mixed/Point or Homegrown solutions (Figures 16-18). In all cases, those organizations with ERPs were much more likely to state they had a very good solution.

² <http://www.tomdavenport.com/>

³ Going Global with HR Technologies: One Organizational Model Consistently Outperforms! CedarCrestone (2011)

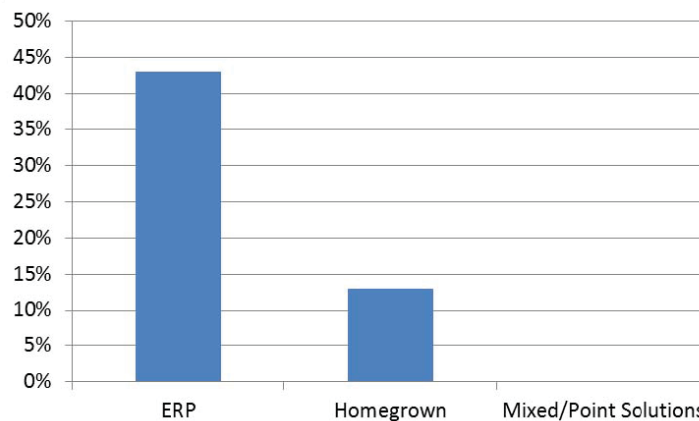
Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Figure 16: Operational reports – percent where capability is very good



Historically, the problem with reporting and analytics has been access to the data and the tools to do the analysis. However, as John Boudreau and Ravin Jesuthasan point out in their forthcoming book *Transformative HR*⁴, we are increasingly facing a problem of information overload rather than a data famine. HR needs to focus not just on the HCM systems that provide the analytics, but also the decision frameworks so that management knows how to make sense of the data and use it to drive decisions. Investment in HR reporting systems will need to be matched by an investment in talented HR analysts.

Figure 17: Dashboards – percent where capability is very good

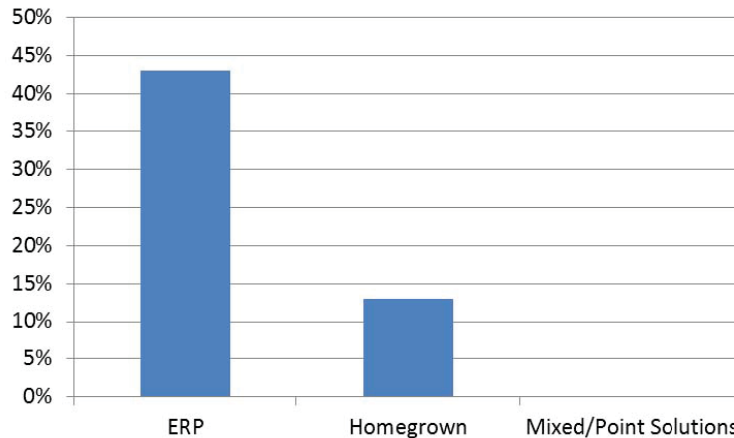


⁴ http://ceo.usc.edu/book/transformative_hr_how_great_co.html

Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Dashboards are of most interest to managers who need to know if things are going well or if there are problems. From an HR department's point of view, they also keep HR issues in front of managers so that the relevance of people factors are not overshadowed by everything else that is going on.

Figure 18: Transactional embedded analytics – percent where capability is very good



Transactional embedded analytics are much appreciated by frontline managers because they help with decisions made in real time. For example, a manager faced with a decision on who to assign to overtime work or whether to allow a change in the schedule needs to know the cost implications then and there. The ability to build analytics into the on-going process, as opposed to it being an after-the-fact activity, is a big shift.

Another interesting change in analytics is a shift of attention from looking back on what did happen, to thinking about what might happen—i.e., predictive analytics. For example, rather than reviewing turnover numbers and lamenting the loss of good talent, HCM systems can sniff out individuals who are at risk of turnover and then predict, based on past experience, whether a promotion, lateral move, or pay increase is likely to reduce that risk. The value of predictive analytics is that they are used when a decision needs to be made, which stands in contrast to the situation organizations too often face where they prepare reports but those reports do not affect decision-making.

Adopting Best Practices

HR is always seeking to implement best practices, but does not always have the time or resources to do so. Figure 19 shows that the choice of technology has a big impact on the likelihood an organization has adopted best practices. In all but one of the best practices covered in this survey, those with an ERP solution have been most likely to have implemented best practice. After that, those with Mixed/Point solutions are usually better off than those with homegrown solutions.

The two areas where best practices are most likely to be in place are the core transactional areas of payroll and time & labor. The two areas where best practices are least likely to be in place both relate to reporting and analysis. The implication here is that organizations running ERP systems are more likely to have executed business process analysis and standardized their processes and practices. ERP systems make this easier to accomplish due to a common user interface and common data model, and delivered processes that support best practices.

Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Figure 19: What technology is most likely to support best practices?

	ERP	Homegrown	Mixed/Point
Payroll - 100% direct deposit for all employees where law allows.	Most Likely	Least Likely	In-Between
Time & Labor - Work flow enabled manager notification and approvals for time & labor.	In-Between	Least Likely	Most Likely
Shared Services - HR services are delivered through a shared services center that includes portal access, self-service capabilities, a knowledge base, and HR help desk for escalation of issues.	Most Likely	Least Likely	In-Between
Talent Integration - Talent management systems are fully integrated with the core HR system/system of record.	Most Likely	Least Likely	In-Between
Employees and managers are supported with automated tools to manage their competencies.	Most Likely	Least Likely	In-Between
Competencies are used in planning, recruiting, development, and compensation activities.	Most Likely	In-Between	Least Likely
Reporting and analysis tools to support analyzing HR and talent management processes are available and used directly by line managers.	Most Likely	Least Likely	In-Between
Managers are able to analyze worker performance with integrated systems from the HRMS, financial, and customer-facing systems to constantly fine-tune recruiting, development, and retention programs.	Most Likely	In-Between	Least Likely

Distributed versus Central Control of HCM technology

Establishing best practices throughout the organization is usually easier when there is central control. As Figure 20 shows, organizations are much more likely to maintain central control of some modules (like the core HR module and compensation) than others (like career and succession planning).

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Figure 20: Module by module breakdown of likelihood of distributed control

Module	Distributed Control	Central Control
Human Resources	13%	87%
Compensation	16%	84%
Position Management	17%	83%
Benefits	20%	80%
Global Assessment Management	31%	69%
Payroll	35%	65%
Pension Administration	36%	64%
Stock Administration	45%	55%
Performance Management	50%	50%
Absence Management	53%	47%
Learning Management	53%	47%
Time Collection	60%	40%
Career & Succession Planning	62%	38%

We can see that, for most HCM modules, centralized control is more likely in large organizations with over 5,000 employees (Figure 21). For the HR module, compensation module and benefits module 90% or more of large organizations prefer centralized control.

Figure 21: Impact of organization size on control

Likelihood of Centralized Control		
Module	<5,000 employees	5,000 or more employees
Human Resources	78%	92%
Compensation	71%	91%
Benefits	67%	90%
Payroll	56%	82%
Career & Succession Planning	20%	75%
Performance Management	71%	65%
Learning Management	83%	59%

Not surprisingly, there is a relationship between the desire for control and the number of instances of the HCM technology being run. Figure 22 looks at the performance management module as an example, and the results clearly show that where organizations have opted for central control they are much more likely to run a single instance of the software than those who have chosen distributed control.

Global HCM Technology: Results from the 2011 HR.com/Oracle Survey

Figure 22: Relationship between number of instances and control for the performance management module

	Distributed Control	Central Control
Single instance	57%	88%
Multiple instances	43%	12%

Parting Advice

Decisions about HR technology are strategic ones because they have widespread impact and that impact plays out over many years. The results of this survey lead us to three main pieces of advice:

- 1. Start by understanding business strategy.** Which HCM solution is best depends on your business strategy. Invest time in understanding the organization’s priorities and then frame your technology decisions based on that. This will lead to both better decisions and to better acceptance of your decisions. And ultimately better business results.
- 2. Get the reporting and analytics infrastructure up to par.** Far too many organizations are sitting with clearly unsatisfactory HR reporting and analytics. The technology and know-how for effective reporting exists; it is time to implement it.
- 3. Embrace Web 2.0 tools behind the firewall.** Organizations are missing a great opportunity by not embracing Web 2.0 tools; HCM systems can put these behind the firewall and open new vistas in lateral communication.

The good news is that HCM technology is always getting better with new functionality and easier implementation. For many organizations HCM technology is troublesome, but as they upgrade their systems in the years ahead they will find the future is bright.

To learn more about the latest in HCM technology go to www.oracle.com/hcm