

# The 2021 Digital Staffing Marketplaces Technology Advisor

*Research designed to help business leaders navigate the enterprise technology and solution landscape.*

## Ardent Partners

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## Executive Summary

*The 2021 Digital Staffing Marketplaces Technology Advisor is designed to help procurement, HR, human capital, and talent acquisition executives navigate the digital recruitment and talent marketplace landscape.*

## Ardent Partners' 2021 Digital Staffing Marketplaces Tech Advisor

Ardent Partners evaluated the market's top digital staffing marketplaces' **Solution Strength** (ability to support talent engagement, candidate alignment, etc.) measured along the X-axis, and **Provider Strength** (such as execution ability, client success, references, and product vision) measured along the Y-axis.



## The Ardent Partners Advantage

Ardent Partners uses a rigorous, multimodal research process that leverages qualitative, quantitative, and deep market knowledge to produce its *Technology Advisor* series. It contains inputs on usability, solution functionality, completeness of offering, future solution strategy, technology adoption, company presence and ability to execute, as well as company focus and vision. Ardent Partners' mission in delivering the *Technology Advisor* is to provide straightforward, useful information that can help organizations make more educated technology decisions. As a result, this *Advisor* is a valuable tool that practitioners can utilize during their solution evaluations.

Ardent Partners analysts have decades of experience in the contingent workforce and staffing spaces, making them eminently qualified to publish research that informs and guides readers on how to plan and execute a talent transformation strategy and which solution provider(s) can deliver the greatest value. For over a decade, Ardent Partners has delivered the highest-quality research and advisory support in the industry and directly influences thousands of global organizations each month. Ardent Partners is uniquely qualified to provide technology-assessment research for the staffing solutions marketplace. It has in-depth knowledge of the staffing, CWM, talent acquisition, and HR industries, including deep empirical organizational data on CWM programs, a user community that relies on Ardent for thought leadership in this space, and expert coverage of the solution provider landscape. Its qualifications include:

- ▶ An unrivaled team of senior analysts with decades of staffing/CWM-specific expertise.
- ▶ Contingent workforce management, staffing, and talent/workforce management data on nearly 9,050 companies.
- ▶ An engaged, global community of CWM program leaders.
- ▶ Hosting the industry's first dedicated weekly podcast, [Contingent Workforce Weekly](#).
- ▶ A network of websites (including [CPO Rising](#) and [Payables Place](#)) that publishes insights and articles on the Future of Work, CWM, and the evolution of staffing.
- ▶ A unique understanding of the underlying processes and technologies in staffing and workforce management, which allows Ardent's analysts to provide valuable, insightful, and actionable information.
- ▶ This report is part of Ardent Partners' comprehensive series of *Technology Advisor* reports that analyze the contingent workforce and Future of Work solution provider markets. The series includes:
  - [The 2019 Digital Staffing Technology Advisor](#)
  - [The 2020 MSP Solution Advisor](#)
  - [The 2020 VMS Technology Advisor](#)
  - [The 2021 Digital Staffing Platforms Technology Advisor](#)

## Research Methodology

Ardent Partners leveraged a rigorous and complex research process to develop the *Digital Staffing Marketplaces Technology Advisor* report, utilizing its expertise, decades of contingent workforce management experience, and both quantitative and qualitative knowledge. The Ardent team identified the platform and solution leaders in the total digital staffing space for inclusion in this research study.

The twelve (12) talent marketplaces and solutions included in this report are:

- |                         |               |
|-------------------------|---------------|
| ▶ Aquent Scout          | ▶ FieldNation |
| ▶ Bluecrew              | ▶ GigSmart    |
| ▶ Business Talent Group | ▶ TalMix      |
| ▶ Catalant              | ▶ Toptal      |
| ▶ DeepBench             | ▶ Upwork      |
| ▶ Expert360             | ▶ Worksome    |

Participating companies were asked to complete a robust questionnaire covering all aspects of their solution. Areas of focus included core talent engagement and talent sourcing functionality, depth of talent network, integration with enterprise workforce management systems, development of distributed/remote teams, and visibility into skills gaps.

Ardent Partners conducted in-depth customer interviews from each of the selected solution providers. Ardent's analyst team also participated in detailed briefings and product demonstrations to gain a complete company overview, as well as a deep understanding of specific solution capabilities and differentiators.

This report contains inputs on usability, marketplace functionality, completeness of offering, customer reviews, company presence, and ability to execute, as well as company focus and future solution strategy. Ardent Partners' mission in delivering this *Technology Advisor* is to provide straightforward information and analysis that can help organizations make smarter buying decisions. Questions about our methodology, analysis, and conclusions are welcomed and may be directed to [research@ardentpartners.com](mailto:research@ardentpartners.com) (please put the report title in the subject line).

## The Evolution (and Impact) of Digital and On-Demand Staffing

It has long been Ardent Partners' view that the teams that adeptly engage and leverage talent to support the evolving needs of the business will succeed above all others. As more and more enterprises have come to adopt that view, the development of an "agile workforce," which represents the ability to engage non-employee talent and integrate it with the traditional workforce to improve the way work gets done, has become an important strategic goal. As a result, the Digital and on-demand staffing technology has grown considerably over the past several years.

Ardent Partners' research has discovered that utilization of these solutions has increased *more than 700%* since 2015. As we proceed through a global pandemic, an uncertain corporate landscape has placed a premium on finding solutions that can drive alignment between dynamic enterprise requirements and available, vetted, and skilled talent. Enter 'digital staffing marketplaces' that can enable hiring managers to tap into talent pools and on-demand talent networks while also supporting direct sourcing initiatives. These Digital Staffing Marketplaces are the focus of this report.

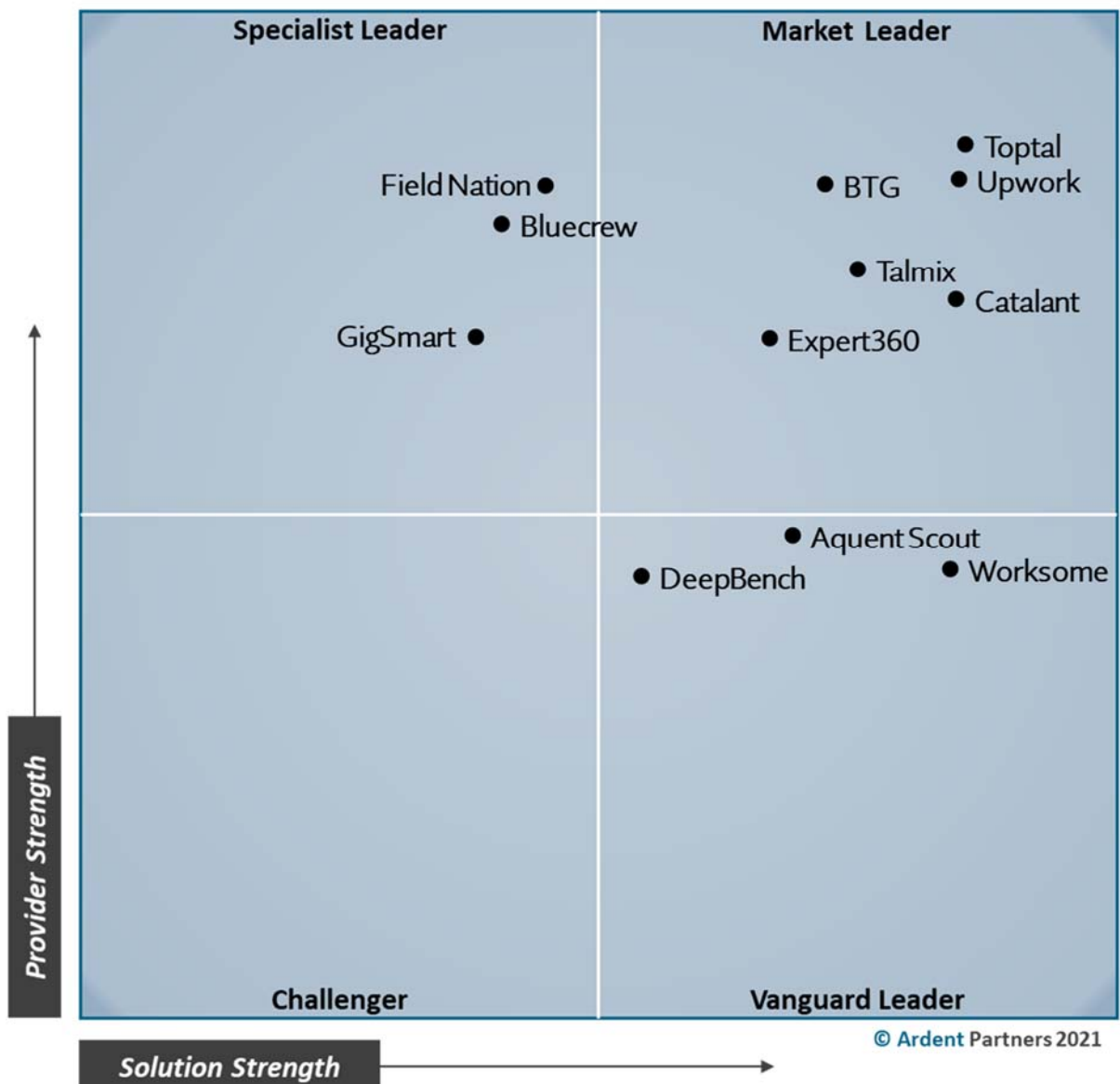
In its research and for the purposes of this report, Ardent Partners defines "marketplaces" as the enterprise-grade solutions that facilitate real-time and on-demand talent engagement with independent, freelance, or contract workers via a web-based network or portal. Talent marketplaces typically offer "white-glove" or high-touch talent management services (akin to Managed Service Providers) to help their clients source the best-fit talent for their project requirements as well as the automation of core workforce management processes (such as requisition management, talent pool development, and back-end financial operations). In general, these solutions also offer:

- ▶ **Talent-matching capabilities for enhanced project/role-to-candidate alignment.**
- ▶ **On-demand access to a network of pre-vetted, high-quality talent.**
- ▶ **Portals that provide users with real-time engagement of specialized skillsets and expertise.**
- ▶ **Both automated and white-glove capabilities for assisting businesses in building remote teams of high-quality talent.**
- ▶ **A gateway to true workforce agility via targeted talent acquisition support across all enterprise functional units.**
- ▶ **Full compliance and risk mitigation, as well as classification management.**
- ▶ **Technology-enabled services to assist businesses in achieving workforce objectives through the utilization of agile talent.**
- ▶ **High-touch, MSP-like services for helping users find the best-fit talent for a particular job or project.**
- ▶ **Reporting and analytics to measure cost, quality, performance, impact, etc. of non-employee talent.**
- ▶ **Intelligence related to predictive skills gaps/shortfalls, future talent needs, etc.**
- ▶ **Integration with workforce management platforms, such as Vendor Management Systems (VMS), Applicant Tracking Systems (ATS), Human Resources Information Systems (HRIS), and similar technology.**

## The Digital Staffing Marketplace Technology Advisor Rankings

Ardent Partners evaluated and ranked the **digital staffing marketplaces** in this report based upon two essential areas of consideration: (1) **Solution strength**, which considers nearly a dozen distinct quantitative and qualitative factors, including overall talent sourcing and engagement, candidate matching, depth of recruitment or talent network/marketplace, and breadth of talent acquisition services; and (2) **Provider strength**, which considers overall service delivery, dedication to innovation, global footprint, product roadmap, Future of Work readiness, total workforce/talent management prowess, and customer references. See the Appendix for a more complete definition of Ardent Partners' evaluation criteria.

**Figure 1: Digital Staffing Marketplace Technology Advisor Rankings**



## Upwork

*Ardent Partners' evaluation and analysis have ranked Upwork and its solutions as a "Market Leader" in the 2021 Digital Staffing Marketplaces Technology Advisor report. Upwork is synonymous with digital and on-demand staffing due to the longstanding breadth of its platform and marketplace solutions. Upwork's hybrid offering, which presents its users with both the industry's largest talent network and an end-to-end workforce management application offers robust features, functionality, and global impact.*

Upwork is a household name in the digital and on-demand industry due to its relative maturity, longstanding strengths in offering businesses access to real-time talent, and, over the past several years, a powerful end-to-end workforce management platform. Upwork's product offerings have been designed to meet the dynamic requirements of today's challenging climate (the company was also ranked as a "Market Leader" in this report's companion piece, Ardent's [Digital Staffing Platforms Technology Advisor](#)). The solution is one of the premier flexible talent technologies in the greater workforce management market. The company offers its customers a comprehensive suite of tools to improve overall talent access, compliance, visibility, and quality. Based upon these strengths and Upwork's robust, wide-ranging functionality, and its robust talent network (of over 20 million candidates), Ardent Partners has named the solution a "Market Leader" in the 2021 *Digital Staffing Platforms Technology Advisor* report.

## Strengths

- ▶ Flexibility is at the core of the Upwork marketplace, as the solution helps its clients scale their workforce with a range of services and technology offerings that align with a company's overall talent requirements.
- ▶ Upwork boasts the industry's largest overall talent network, with over 8,000 unique skillsets available within its "Expert-Vetted Talent" marketplace.
- ▶ Upwork employs rigorous talent screening and talent assessment processes for all of its candidates, helping to boost the overall quality of its marketplace offering.
- ▶ Upwork enables its users with a "Bring Your Own Talent" offering that is akin to direct sourcing or talent pool technology.
- ▶ The Upwork Enterprise solution offers robust compliance and risk mitigation offerings to safeguard clients against non-compliance, intellectual property concerns, etc.
- ▶ Upwork's searchable talent network boasts a frictionless user experience that is driven by e-commerce-like functionality for simplicity and speed.

## Considerations

- ▶ Upwork Enterprise is just one "half" of the solution; the Upwork Enterprise solution is considered a "Market Leader" in the companion *Direct Staffing Platforms Advisor* report.
- ▶ Upwork's talent network has begun to include staffing agencies within its marketplace, and states that it plans to expand access to these in the near future.

- ▶ **Upwork Enterprise now only integrates tightly with Microsoft Teams for remote work management, with other platforms slated for integration in the coming months.**

### **Solution Fit**

Based upon its solution and provider strength rankings, Upwork deserves strong consideration from organizations that are seeking both an end-to-end workforce management platform and market-leading talent marketplace. Additionally, the company deserves special consideration in the following customer scenarios:

- ▶ **Businesses that require dynamic and on-demand access to top-tier talent and expertise.**
- ▶ **Companies that need to boost the overall agility of its contingent workforce management programs via a flexible, scalable talent network.**
- ▶ **Enterprises that require a talent marketplace solution that offers a consumer-like user experience that promotes workforce agility.**

## Overview of Solution Evaluation Criteria

The *Digital Staffing Marketplaces Technology Advisor report* leverages a series of evaluation criteria to determine its technology, solution, and marketplace provider rankings, all of which reflect the core functionality and vision of today's digital and on-demand staffing offerings.

### Core Talent Sourcing and Engagement Functionality

Digital staffing platforms have one major goal: enhance the way a user finds, engages, and sources top-tier talent. Ardent Partners evaluated both platforms and marketplaces on functionality related to talent acquisition, candidate management, candidate comparisons, candidate matching, access to talent networks, etc.

### Depth of Talent Network

The very depth of a talent or recruitment marketplace is what often sets it apart from the competition. Whether a solution is a "specialist" in a particular vertical or provides wide-ranging roles for businesses across the globe, the depth of a talent network is crucial in meeting the intricate standards for users in regard to on-demand talent. Ardent Partners evaluated each talent and recruitment marketplace on functionality, services, and ultimate access to a deep, vetted, network of top-tier talent and how these marketplaces enable customers the ability to build teams from this workforce.

### Compliance and Risk Management

Compliance and risk mitigation must be built into every digital staffing platform as the utilization of non-employee continues to grow in both size and prominence. From background screening, independent contractor compliance checks, and certification management, Ardent evaluated the range of compliance and risk management functionality and support within today's major digital staffing platforms.

### Analytics and Reporting

Analytics are a driving force behind most Best-in-Class organizations. As such, the ability to perform both basic and advanced analysis of temporary labor, candidates and workers, staffing suppliers, etc. is critical in gaining a deeper understanding of the overall impact of the agile workforce. Ardent evaluated each provider's ability to present its users with detailed information and data regarding the utilization of talent, talent pool depth, standard acquisition metrics (time-to-fill, etc.),

### Product Roadmap

As the agile workforce grows in size, utilization, and impact, digital and on-demand staffing solutions will become even more critical to serve the evolving needs of the modern enterprise. Ardent Partners analyzed how each provider structured its future product



roadmap to align to shifting enterprise and market requirements regarding how on-demand talent is found, engaged, and sourced, as well as how the solutions in this market react to the ever-evolving shifts in the greater talent industry.

## **Global Footprint**

Today's contingent workforce programs often span multiple geographic locations, each requiring specific expertise, tactics, and strategic means of managing localized non-employee talent in a compliant manner. Ardent evaluated each provider's global footprint and overall geographical reach for multi-location contingent workforce management support.

## **Future of Work Readiness**

The Future of Work movement revolves around three key areas: talent, innovation, and transformative business thinking. Ardent's evaluation of the digital and on-demand staffing solutions market included "Future of Work readiness" and the ability to support its clients' progression within each of these three key areas of work optimization.

# Appendix I

## Research Process

Ardent Partners used a rigorous, multi-modal research process that leveraged qualitative, quantitative, and deep market knowledge to produce the *Digital Staffing Platforms Technology Advisor report*. Ardent Partners' analysts leveraged seven different sources of data to produce their rankings and evaluations:

1. **RFI survey:** Each provider in this report completed a comprehensive survey (a "Request for Information") that addressed the company, including its size, customers, partners, and financial strength. The survey also captured details regarding the overall platform, including core functionality, reporting and analytics, workforce management, direct sourcing, talent pool development, and operational capabilities.
2. **Briefing:** Each provider presented an interactive briefing to the Ardent Partners analyst team.
3. **Product demonstration:** Ardent Partners' analysts viewed an in-depth product demonstration covering each provider's core offerings.
4. **Reference calls:** Ardent Partners conducted between three and five phone reference calls for every provider in the report and graded how the platforms were being used today and the overall satisfaction with both the provider and the solution.
5. **Analyst experience:** The analyst team responsible for authoring this report has collectively spent 30-plus years working in the contingent workforce, HR, and staffing technology spaces.
6. **Market research:** Over the past decade, Ardent Partners has conducted an extensive series of market research studies that has enabled it to survey, benchmark, interview, and engage leaders from thousands of distinct staffing and contingent workforce operations. This working body of knowledge helps frame this report and others focused on the greater talent market.
7. **Market inquiries:** Each year, Ardent Partners takes hundreds of inquiries from HR, human capital, talent acquisition, and procurement professionals to discuss their overall technology and solutions strategies, technical and business requirements for outsourced contingent workforce management and additional automation, solution selection RFPs, and their opinions and views of the providers in the marketplace.

The reference calls and product demonstrations were used to validate Ardent's overall findings, including usability, solution functionality, breadth of offering, future solution strategy, proprietary automation and tools, technology partnerships, company presence, and ability to execute.

## Ranking Criteria and Definitions

Ardent Partners evaluated and ranked the solution providers in this report based upon two essential areas of consideration: (1) **Solution strength**, which considers nearly a dozen distinct quantitative and qualitative factors, including depth of talent network, overall platform UX, direct sourcing functionality, mobility, service and support for talent acquisition; and core integrations, (2) **Provider strength**, which considers presence of talent marketplaces and platforms, overall service delivery, global footprint, product roadmap, Future of Work readiness, total workforce/talent management prowess, and customer references.

## Ranking Definitions

Each provider receives an overall ranking based upon its performance in the solution strength and provider strength areas. The individual rankings are defined in the figure below.

**Figure 2: Ardent Partners' Technology Advisor Ranking Definitions**

|                                                                                                                            |                                                                                                                                              |
|----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Specialist Leader</b><br><br>Providers with particular strength and suitability to service unique markets and/or needs. | <b>Market Leader</b><br><br>Providers with universal strength across their offering matched with an ability to execute at the highest level. |
| <b>Challenger</b><br><br>Providers with competitive and/or emerging offerings.                                             | <b>Vanguard Leader</b><br><br>Providers with uniquely progressive and innovative solution strength.<br><br>© Ardent Partners                 |

## Solution Strength

### Depth of Talent Network/Marketplace

Ardent Partners' ranking criteria focused on the depth of the talent or recruitment marketplace. Key factors in the evaluation include:

- ▶ **Overall service delivery** in meeting talent acquisition requirements.
- ▶ **On-demand access** to the talent or recruitment network and its candidates and suppliers.
- ▶ Ability to provide **white-glove, enterprise-grade service** to users to help facilitate talent-matching.
- ▶ **User access** to specific talent roles, functions, jobs, etc.
- ▶ Ability for users to **directly communicate with workers and talent**.

### Workforce Management Support

Ardent Partners' ranking criteria also focused on specific aspects of workforce management that some marketplaces, particularly those with "hybrid" models, offer to their users. Key factors in the evaluation include:

- ▶ **Overall end-to-end offering** for automating job searching, requisition development, etc.
- ▶ **Core automation** that includes compliance management, contract and SOW management, and VMS-like reporting and analytics.
- ▶ Ability to provide **a seamless channel of talent** to users that will allow them to integrate these candidates into larger, enterprise software systems.
- ▶ **Full automation** of back-end processes, such as billing, invoicing, and payment.

### Core Talent Engagement Functionality and Services

Ardent Partners' ranking criteria focused on how the solution providers addressed and managed core operational capabilities for contingent workforce management. Key factors in the evaluation include:

- ▶ **Ability to automate core facets of talent acquisition**, including creation, development, visibility, and alignment with talent.
- ▶ **Self-service ability to configure core functionality** based on the specific requirements of the user's contingent workforce management or similar program.
- ▶ **Candidate management** capabilities, including unique algorithms for candidate matching, profile comparison, and candidate tracking.
- ▶ **Compliance management**, including background screening, independent contractor compliance, adherence to user and federal/state worker policies, etc.
- ▶ **Talent technology partner ecosystem depth**, which includes partnerships with key technology- and services-based workforce management providers, including VMS solutions, MSPs, compliance and risk mitigation services, human capital management and HR systems, video interviewing technology, etc.

## Reporting and Analytics

Ardent Partners' ranking criteria focused on the relative power of each provider's reporting, analytics, and data management capabilities. Key factors in the evaluation include:

- ▶ **Contingent workforce and staff augmentation analytics**, including access to data related to staffing suppliers, candidates, skillsets, requisitions, spend, etc.
- ▶ **SOW and services procurement analytics**, such as access to data and reporting around SOW agreements, milestones, delivery dates, supplier performance, etc.
- ▶ **Overall user experience** of the provider's analytics module.
- ▶ **Depth of intelligence**, including the extent of data that is available to users in reports (i.e., skills gap identification, scenario-building, predictive analysis of future usage of talent, etc.).
- ▶ **Ability to harness total talent intelligence** from both the platform and integrated solutions (i.e., VMS, HRIS, etc.) to provide users with data related to the "total workforce," including FTEs and non-employees.

## Provider Strength

The providers included in this report have a longstanding track record of performance in the market and a proven ability to deliver digital staffing technology to global enterprises.

## Execution

1. **References:** Analysts engaged in conversations with the references of each provider (HR, staffing, and procurement practitioners) to discuss how the solution was deployed and used. The calls also captured general comments and feedback around feature capabilities, support, usability, and performance as well as their overall satisfaction with both the provider and their solution.
2. **Platform capabilities:** Each solution provider was ranked on their proficiency across a wide range of areas, including solution security, deployment methodology, solution support, industry expertise, data and analytics, core functionality, workforce management, direct sourcing, and services procurement support, talent pool development, Future of Work readiness, and mobile applications.
3. **Reporting and analytics:** Each solution provider was ranked on how well their platforms extracted and presented data, the depth and impact of that intelligence, how users are enabled to perform analysis and present insights, and overall ease-of-use.
4. **Support/delivery method:** Each solution provider's delivery models were examined to understand what support resources are provided to users, along with how solutions were implemented, how services were delivered, and the frequency of new or updated offerings.
5. **Other:** This included a wide range of areas not covered in other categories, including a provider's ability to sell, support, and develop their solution globally. It

also included their presence and staffing levels in regions other than North America.

## Vision

1. **Briefing grade:** Ardent Partners' analysts ranked the in-depth solution briefing and product demonstrations from each provider. The ranking combined the overall solution grade and the provider's understanding of the market's needs and ability to deliver a clear and cogent message.
2. **Product strategy and roadmap:** The vision and strategic direction of the solution provider and its offerings were examined, including recent solution innovations and the specific and general direction of the product roadmap.
3. **Breadth/depth of solution:** The completeness of solutions and services offered across the contingent workforce spectrum and the aggregate capabilities and services of the solution suite.
4. **Market specialization and global footprint:** The strategy and solution fit for capitalizing on a specific segment of the market, whether it be by industry, geographic region, customer size, or individual market/vertical segments.
5. **Future of Work readiness and vision:** The overall "readiness" of the solution to support the three key tenets of the Future of Work, including the evolution of talent acquisition, advancements in technology and innovation, and the transformation of business strategy.
6. **Total workforce management support:** The ability for a platform or marketplace to support short- or long-term progress towards "total workforce management," which involves standardized and centralized capabilities for managing all types of talent (regardless of its source) through an umbrella program that accounts for engagement, sourcing, compliance/risk, performance management, candidate/employee experience, learning and development, analytics and intelligence, and the integration of 1) core procurement and human capital management competencies and 2) VMS, RPO, HRIS, and digital staffing systems and platforms.

# Appendix II

## About the Author

For the past 15 years, Christopher J. Dwyer has been the industry's preeminent contingent workforce management (CWM) analyst and an early Future of Work evangelist. His research focuses on the application of innovative workforce and technology strategies that help businesses around the world optimize how work is done. Dwyer is the author of hundreds of research studies and briefs related to CWM, talent acquisition, human resources, and supply management, and the underlying technologies that enterprises can utilize to improve how talent is engaged and managed. This research has enabled thousands of organizations make smarter technology investment decisions related to their talent and workforce needs.

As the Vice President of Research at Ardent Partners, Dwyer oversees all research programs related to talent and workforce management. His research and consulting in the digital and on-demand staffing space have helped revolutionize how businesses source talent and labor.

Dwyer is the also voice behind [Contingent Workforce Weekly](#), the industry's first podcast dedicated to the contingent workforce industry. Now in its fifth season, the podcast is one of the top Future of Work-oriented shows across all major podcast platforms.

Dwyer has been quoted/featured in *USA Today*, *Staffing.com*, *The Christian Science Monitor*, *Forbes*, *CNBC*, *The Recruitment Innovation Exchange*, and other major business publications. He has been honored multiple times by *HRO Today* (2013, 2014, 2015, and 2016) as an "Analyst and Advisor Superstar" and was twice recognized as a "Pro to Know" by *Supply and Demand Chain Executive Magazine* (in 2014 and 2019). And, in 2018, he was named as a "Top 100 Future of Recruitment Influencer" by *Onalytica*. He welcomes your comments at [cdwyer@ardentpartners.com](mailto:cdwyer@ardentpartners.com), via phone (617.752.1624), Twitter ([@CJD\\_Ardent](#)), and on LinkedIn ([www.linkedin.com/in/christopherjdwyer](https://www.linkedin.com/in/christopherjdwyer)).

## Ardent Partners: Research with Results

**Ardent Partners** is celebrating a decade as the leading research and advisory firm focused on identifying and advancing the strategies, processes, and technologies that define Best-in-Class contingent workforce management performance.

Since 2010, Ardent Partners has delivered the highest quality research and advisory services to the solution providers in the contingent workforce and digital staffing industries. Each year, business decision makers use Ardent's research to (1) industry best practices and how to improve performance and (2) the technology landscape and how to identify the best-fit solution(s) for their specific budget and requirements.

Contact [research@ardentpartners.com](mailto:research@ardentpartners.com) if you have any questions about this report or our research in general.





## Disclosures

Ardent Partners utilizes a rigorous research methodology developed over the past decade and works tirelessly to deliver the high-quality, independent research. Your comments and feedback are welcomed at [research@ardentpartners.com](mailto:research@ardentpartners.com).

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