SAPIENT
INSIGHTS GROUP

REDEFINE YOUR FRONTLINE TALENT STRATEGY

Beyond the Desk: Talent Trends Redefining How You Recruit, Onboard, and Protect Your Workforce

ClearCo

ANNUAL

29TH EDITION

2026-2027

ClearCo is trusted by organizations managing talent at scale

Clarity backed by results

Supporting organizations across hiring, engagement, and workforce growth.

3,000
clients

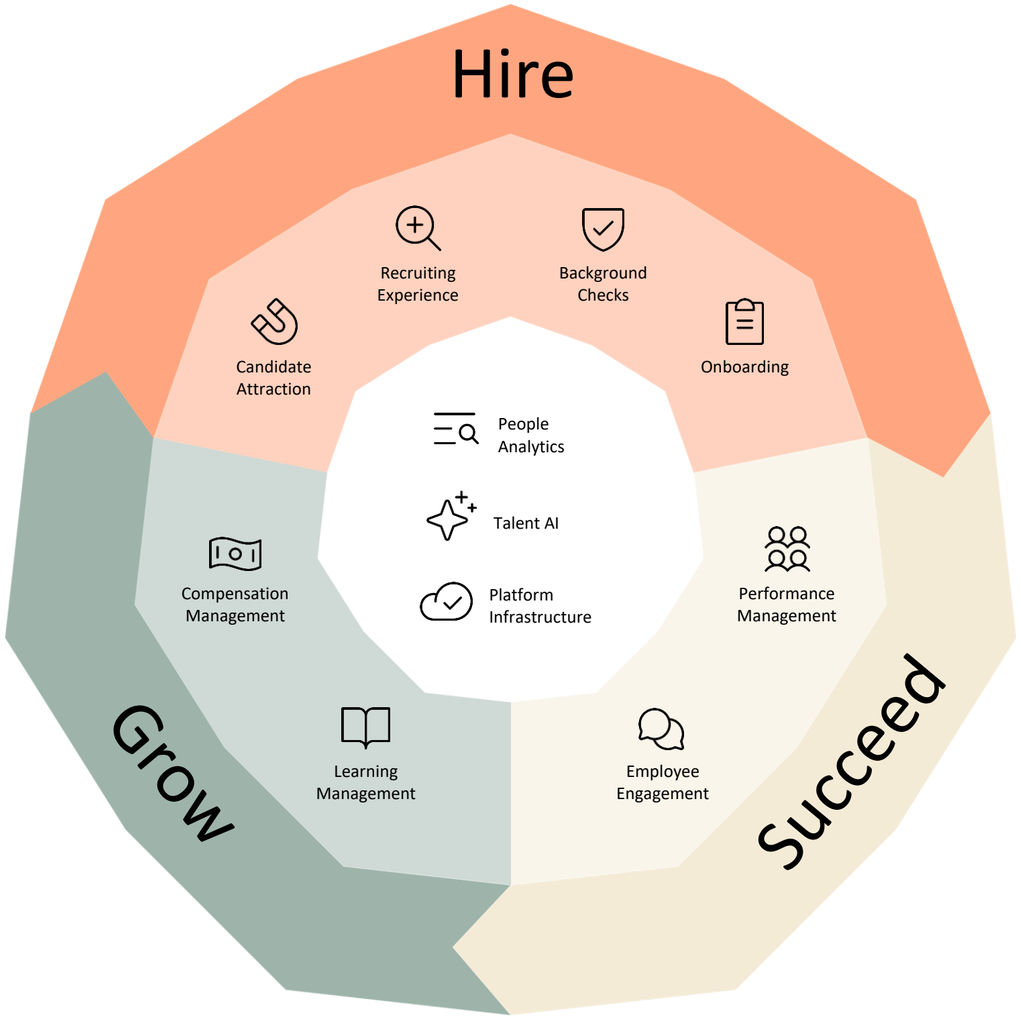
1.8M
employees supported

20+
years experience

85M+
applications processed

ClearCo

Our Unified Talent Platform



Hire

Attract, screen, and onboard — from candidate to day one.

Succeed

Performance and engagement that connects goals to meeting results.

Grow

Learning, compensation, and long-term development.

The core

People analytics, Talent AI, and shared infrastructure that every stage draws on.

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certified
WBENC
WOMEN'S BUSINESS ENTERPRISE

PROVIDING DATA, INSIGHTS, AND PRACTICAL WISDOM TO SOLVE HR AND BUSINESS CHALLENGES

RESEARCH & ADVISORY SERVICES

- HR | Operations Practices and Systems Research
- Change Leadership and Change Management
- Strategy and Transformation
- Leadership and Culture

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- Although many of the charts and information in this presentation are derived from the same data set as the 2017-2026 Annual HR Systems Survey Reports, additional breakouts of the source survey data are included throughout this presentation.

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29 YEARS OF RESEARCH: 6,038 ORGANIZATIONS THIS YEAR

This year's survey saw a 27% increase in the total workforce represented in the research

6038
Unique Organizations

70
Countries

1637
Global Organizations

38M+
Total # of Workers Represented

THANK YOU!

2026-2027 ANNUAL HR SYSTEMS SURVEY PARTICIPANTS



Launches Nov. 6

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PART 1

THE WORKFORCE CHALLENGES

Where will the talent come from?



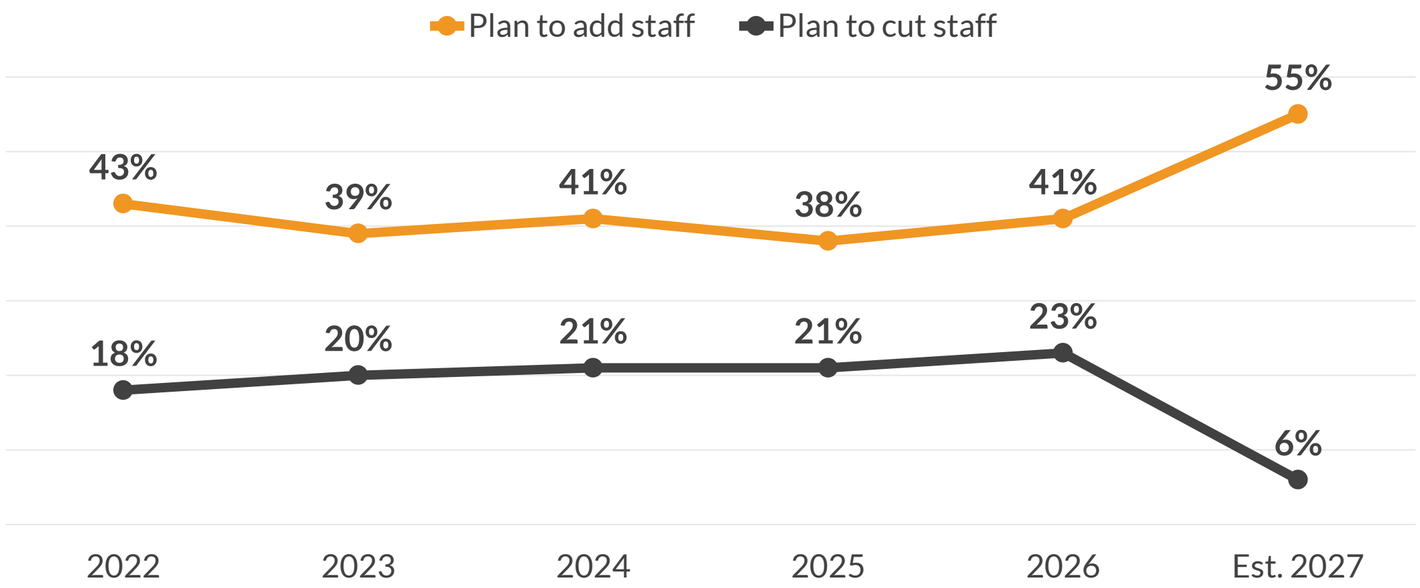
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WE'RE CUTTING AND HIRING AT THE SAME TIME

Welcome to the global hiring paradox, and it isn't getting easier

HIRING PLANS ARE BOUNCING BACK

Organizations planning to add or cut staff in the next 12 months



530K

US job cuts so far in 2026. AI is the #1 reason.

72%

of employers worldwide can't fill roles.

42%

of new US college grads are underemployed.

WHAT TO DO *Before you cut roles for AI, map which skills you will still need and where you will find them.*

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HEALTH CARE IS ABSORBING THE FRONTLINE TALENT POOL

An aging population needs care, and every frontline industry feels the squeeze

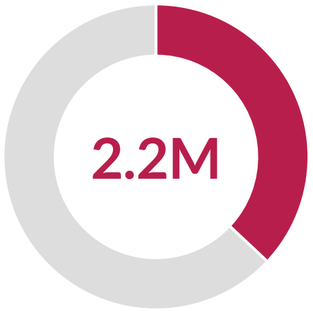
1 in 7 US jobs is already in health care

LAST 12 MONTHS



new US jobs went to health care

2025 TO 2035



new health care jobs,
nearly 4 in 10 of all new jobs

Globally: the world is short **11.1M health workers** by 2030.

CONSTRUCTION

42%

of contractors had projects delayed by worker shortages

MANUFACTURING

47%

say finding and keeping workers is a top challenge

AIR TRAVEL

40

major airports had flights cut when controllers ran short

CHILD CARE

$329B

lost over 10 years when parents can't find care

WHAT TO DO *Expect longer time-to-fill for frontline roles. Widen your talent pool with mobile-friendly hiring and internal mobility.*

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AI AND CONTINGENT TALENT ARE FILLING THE GAP

We already rely on both. With fewer workers, we have to be smarter about how we use them.

AI WILL CHANGE MORE JOBS THAN IT ELIMINATES

Global jobs outlook through 2030

170M new jobs − **92M** displaced = **78M** net new jobs

41% plan AI-driven staff cuts

77% plan to upskill

27% of workers fear their job will be obsolete

THE AI BOOMERANG **32%** of managers who cut a role for AI have already rehired for it.

CONTINGENT TALENT IS ALREADY HOW WORK GETS DONE

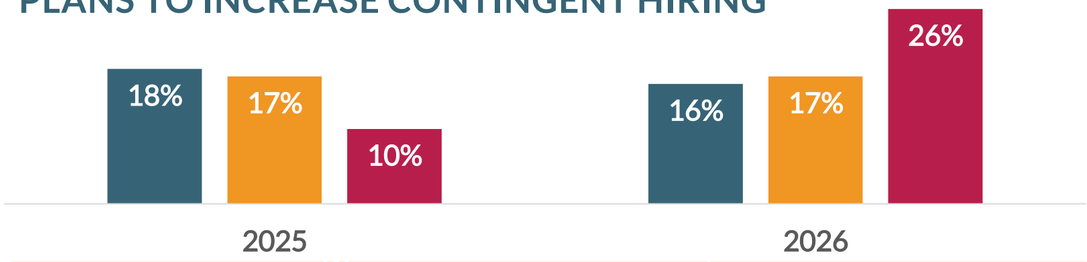
Organizations using contingent or contract workers

69% SMB <500

79% MID-MARKET 500-4,999

92% ENTERPRISE 5,000+

PLANS TO INCREASE CONTINGENT HIRING



The catch: Contingent and outsourced workers come from the same shrinking pool. We'll compete for them too.

WHERE CAPACITY COMES FROM

1. **Develop** the people you have
2. **Bring back** retirees and boomerangs
3. **Plan** contingent + AI as part of the workforce

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PART 2

MEET THE FRONTLINE WORKFORCE

Four ways work gets done, and where the hiring and spending are going

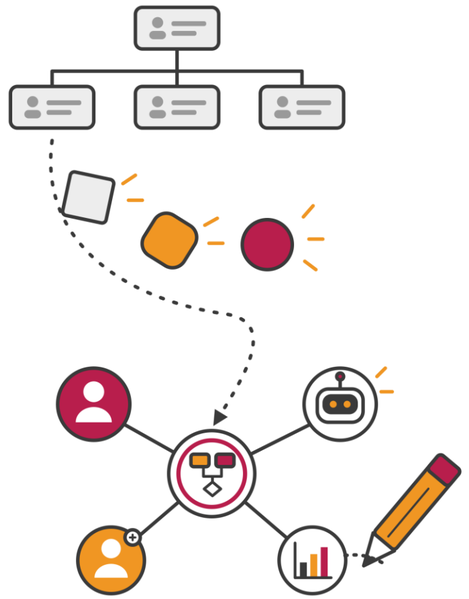


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HR'S NEXT JOB: DESIGN HOW THE WORK GETS DONE

From managing systems and headcount to designing how work gets done by people, contingent talent, and AI

TODAY	NEXT: WORK ARCHITECTING	WHY NOW
Headcount forecasting	**Outcome and work alignment**	**–77M** working-age people by 2050
Skills gap analysis	**Skill, task, and risk analysis for people and AI**	**72%** can't fill roles
Role-based planning	**Scenario plans across employees, contingent, and AI**	**69-92%** already use contingent
Organization design	**Workflow and collaboration modeling**	**3.35** top outcome score
Reacting to strategy	**Co-creating business strategy**	**32%** rehired roles cut for AI



From org charts to connected work

WHAT TO DO *Before you buy, map the work: which tasks need people, which need contingent talent, and which AI can handle.*

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BLUE COLLAR AND WHITE COLLAR NO LONGER FIT THE WORK

Two familiar groups, four modern work profiles

THE OLD LABELS

~~WHITE COLLAR~~

~~BLUE COLLAR~~

Location, title, and education no longer explain the work.

KNOWLEDGE WORK

Technology changed what they contribute



DIGITAL OPERATIONS

EXECUTE & MANAGE

Payroll • Claims • Accounting



DIGITAL BUILDERS

CREATE & TRANSFORM

Developers • Designers • Researchers

FRONTLINE WORK

Technology changed what anchors the work



SITE-BASED FRONTLINE

DELIVER & OPERATE

Store teams • Production • Hospital care



DEVICE-FORWARD FRONTLINE

APPLY & ADAPT

Field techs • Utility crews • Home health

WHAT TO DO Group your workforce by how the work gets done, not by job title, and use it to set HR tech requirements.

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THE FOUR WORKER TYPES DEFINED

What each type does, and what anchors the work

DIGITAL OPERATIONS



EXECUTE & MANAGE

Computer-based work that runs processes, manages information, and supports decisions.

WHAT DEFINES IT

Running established work

Payroll & HR ops • Accounting • Claims • Customer service

DIGITAL BUILDERS



CREATE & TRANSFORM

Digital work that creates products, systems, research, and content, or changes how work gets done.

WHAT DEFINES IT

Creating and changing work

Developers • Designers • Researchers • AI workflow designers

SITE-BASED FRONTLINE



DELIVER & OPERATE

The site's environment, team, schedule, and shared equipment shape how work gets done.

WHAT ANCHORS THE WORK

The place

Store teams • Production • Hospitality • Hospital care

DEVICE-FORWARD FRONTLINE



APPLY & ADAPT

A specialized device carries the job across changing places. Credentials are common.

WHAT ANCHORS THE WORK

The tool

Field engineers • Utility crews • Home health • Trades

How we classified organizations in the survey: Site-Based = frontline industry and 50%+ of the workforce fully at a work location. Device-Forward = 20%+ of the workforce fully in the field (group average about 46%). Digital Operations = mostly remote or hybrid, or office-based in a knowledge industry. Digital Builders = same rule, in High-Tech or Telecoms / Media (industry proxy, directional).

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THE FRONTLINE SPLIT: THE PLACE OR THE TOOL?

Almost every frontline worker uses technology. That alone doesn't make a role Device-Forward.

SITE-BASED FRONTLINE



The place anchors the work

The site's team, schedule, and shared equipment shape the job, the collaboration, and engagement.

HOW HR TECH AND AI REACH THEM

Through the site: kiosks, huddles, and the site manager

THE TEST

If they did the job somewhere else tomorrow, would the job fundamentally change?

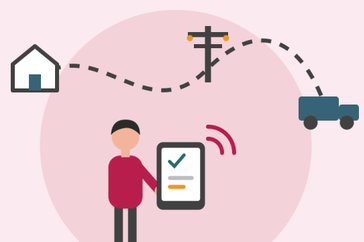
YES Site-Based

NO Device-Forward

SAME SKILLS, DIFFERENT ANCHOR

Hospital Nurse	vs.	Home Health Nurse
Plant Equipment Operator	vs.	Field Service Engineer

DEVICE-FORWARD FRONTLINE



The tool anchors the work

Work moves across changing places. A specialized device connects them to the job, the team, and the company.

HOW HR TECH AND AI REACH THEM

Through the device they already carry. The device is the experience.

WHAT TO DO *Ask vendors how their product reaches each group: through the site and its manager, or through the device in hand.*

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HOW INDUSTRIES SPLIT ACROSS WORKER TYPES

Share of 2026-27 survey organizations in each industry by predominant worker type (25% or more shown)

DIGITAL OPERATIONS
4 primary · 3 secondary

Financial Services / Insurance	**93%**
Business / Professional Svcs.	**89%**
Non-Profit	**85%**
Government / Defense	**72%**
Education	34%
Healthcare / Pharma	26%
Trade / Specialty Services	26%

DIGITAL BUILDERS
2 primary · 0 secondary

High-Tech	**90%**
Telecoms / Media	**76%**

SITE-BASED FRONTLINE
8 primary · 2 secondary

Manufacturing	**78%**
Retail / Wholesale	**69%**
Hospitality / Restaurant	**65%**
Agricultural / Mining	**62%**
Healthcare / Pharma	**59%**
Transportation / Logistics	**54%**
Education	**45%**
Energy / Utilities	**40%**
Trade / Specialty Services	33%
Construction / Real Estate	32%

DEVICE-FORWARD FRONTLINE
2 primary · 4 secondary

Construction / Real Estate	**50%**
Trade / Specialty Services	**37%**
Energy / Utilities	36%
Agricultural / Mining	29%
Government / Defense	28%
Transportation / Logistics	26%

Bold, shaded = primary (largest share) *Italic, outlined* = secondary (25% or more). Bars show the share of organizations.

WHAT TO DO *Use your industry as a starting point, then check your own mix. Energy, Trade, and Transportation often have both frontline types.*

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43% OF ORGANIZATIONS RUN ON A FRONTLINE WORKFORCE

These organizations employ almost 60% of the workforce in our data

PRIMARY WORK MODEL, 2026-27



40% Digital Operations

27% Site-Based

16% Device-Forward

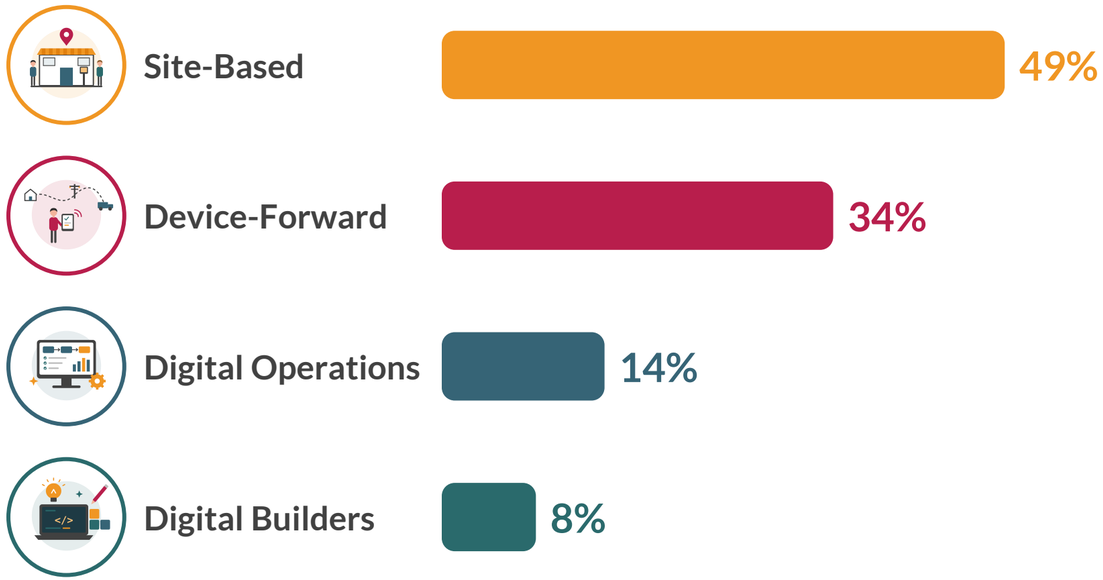
15% Digital Builders

2% have no dominant pattern

1 in 5 organizations have no single dominant work model

WHERE WORKERS TIME IS TRACKED & CLOCKED?

Organizations using a physical time clock



50% of Digital Builder organizations use no time clock at all.

WHAT TO DO *Know your mix. If your people work on-site or in the field, test every HR system on a phone and a shared kiosk.*

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THE FRONTLINE IS WHERE THE HIRING IS HEATING UP

Workforce plans and scheduling, by organizations where most workers are...

SITE-BASED ORGANIZATIONS

57%

plan to grow their workforce this year, the most of any group

Up from 48% last year



Hiring volume is moving to the site.

WORKFORCE SCHEDULING SOLUTIONS IN USE



Site-Based — 48%



Device-Forward — 45%



Digital Operations — 33%



Digital Builders — 24%

Frontline work runs on shifts and dispatch.

DIGITAL BUILDER ORGANIZATIONS

31%

made actual workforce cuts last year, the most of any group

86%

use contingent workers, also the most

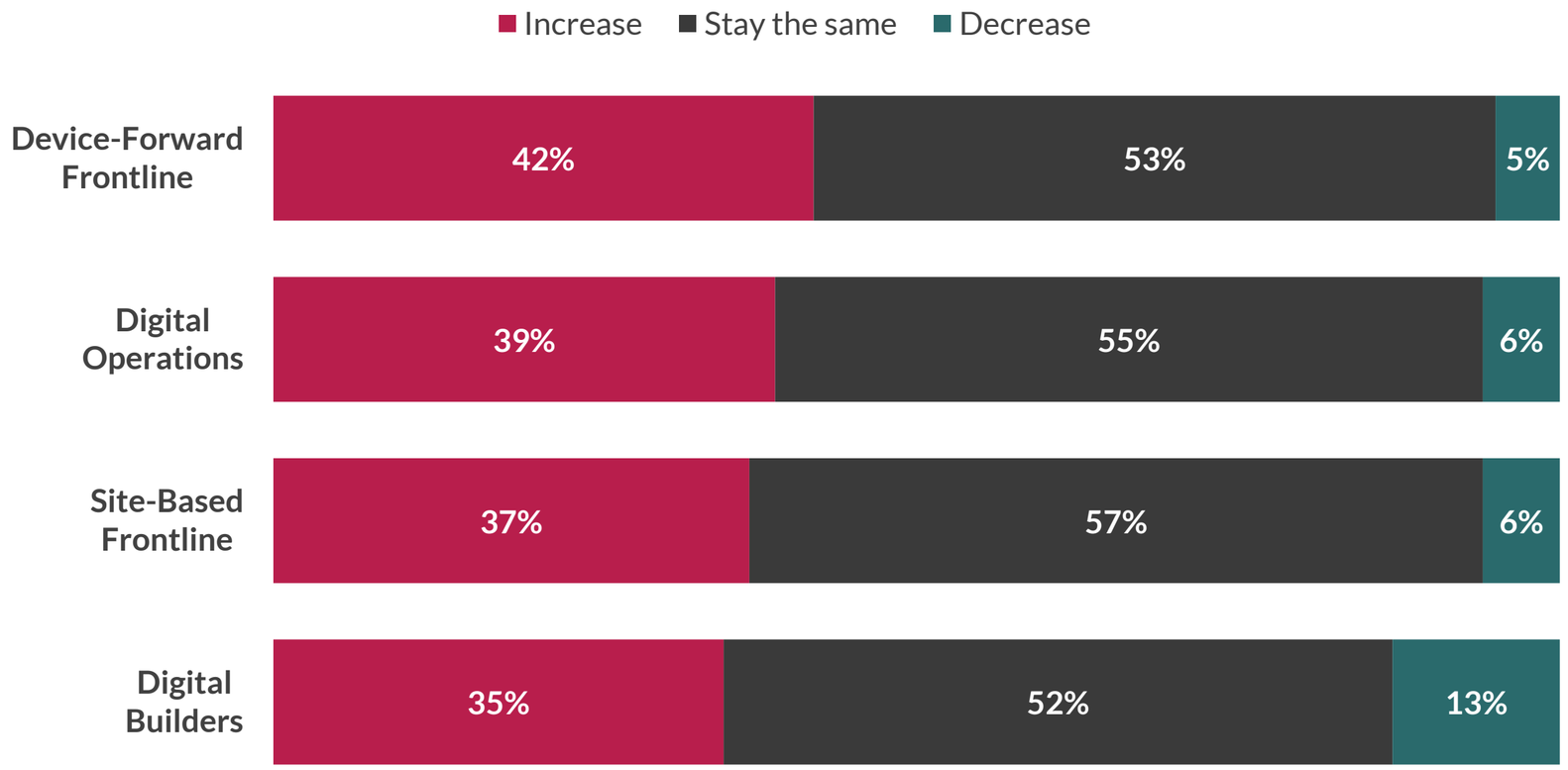
WHAT TO DO *Put recruiting, scheduling, and onboarding capacity where the hiring is: the site and the field.*

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SPENDING PLANS BY WORKER TYPE

Plans to increase HR technology spending rose for every worker type

HR TECH SPENDING PLANS FOR 2026-2027, BY PREDOMINANT WORKER TYPE



GROWTH IN PLANS TO INCREASE

Device-Forward
+13%
37% → 42% YoY

Digital Operations
+3%
38% → 39% YoY

Site-Based
+2%
36% → 37% YoY

Digital Builders
+24%
29% → 35% YoY

WHAT TO DO *Benchmark your spending plans against organizations with a workforce like yours, not just your size.*

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DEVICE-FORWARD ORGANIZATIONS ARE INVESTING THE MOST IN HR

Plans to increase HR tech spending, by organizations where most workers are...

Plan to increase spending on	Site-Based	Device-Forward	Digital Operations	Digital Builders
AI / ML tools	33%	**43%**	46%	55%
Recruiting	30%	**40%**	30%	41%
Onboarding	22%	**32%**	24%	23%
HRMS	20%	**29%**	22%	22%
Health & Safety	19%	**26%**	11%	15%
Time & Attendance	20%	**22%**	14%	14%
Workforce / Labor Scheduling	16%	**20%**	15%	9%
Contingent Workforce Mgmt.	8%	**12%**	11%	14%



DEVICE-FORWARD LEADS ON

78% scheduling run efficiently (vs. 68% to 71%)

73% workforce budgeting (vs. 60% to 64%)

74% HR data governance (vs. 65% to 70%)

WATCH

33%

Site-Based organizations plan the least AI spending, despite having the most room to grow.

WHAT TO DO *Prioritize spending that connects the worker, the tool, and the data: recruiting, onboarding, HRMS, and safety.*

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PART 3

RECRUIT, ONBOARD, AND PROTECT

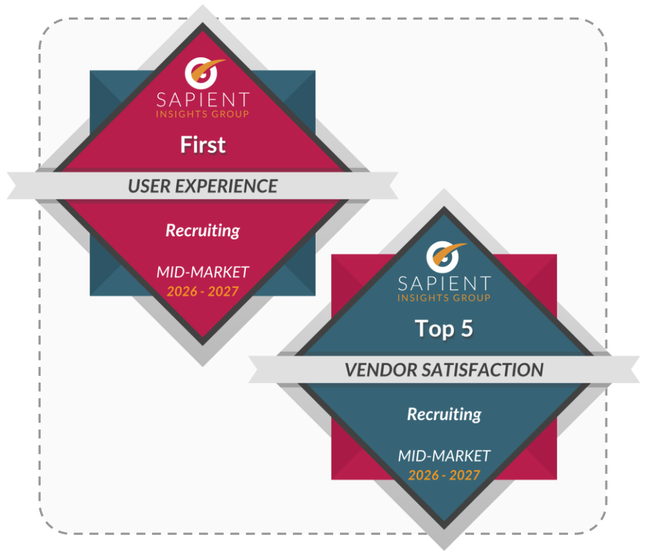
From the first application to ongoing readiness, how the work gets done



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CLEARCO RANKS #1 AND TOP FIVE IN MID-MARKET RECRUITING

Recognized by its own customers in the 2026-2027 Sapient Insights Voice of the Customer research



MID-MARKET | 500-4,999 EE

RECRUITMENT SYSTEMS

WHAT THE RECOGNITION IS FOR

USER EXPERIENCE

3.93

vs. 3.59 mid-market average
About 9% higher

Functionality, ease of use, and user interface

VENDOR SATISFACTION

3.88

vs. 3.54 mid-market average
About 9% higher

Value for the price, customer service, and vendor partnership

Rankings come only from validated survey respondents rating the solutions they use. A solution must reach a minimum number of ratings in its size group to qualify.

WHAT CUSTOMERS SAY

> *"Incredible Customer Service and Support"*
>
> MID-MARKET CLEARCO CUSTOMER

> *"easy to use; responsive for help"*
>
> MID-MARKET CLEARCO CUSTOMER

> *"It's fast and easy to customize..."*
>
> MID-MARKET CLEARCO CUSTOMER

WHAT TO DO *If your business includes frontline workers, always check how your HR Tech handles new hires, onboarding, background checks, and monitoring.*

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EACH WORKFORCE HAS ITS OWN HIRING FRONT DOOR

Recruiting follows the work model, by organizations where most workers are...



SITE-BASED

Front door: job boards

JOB BOARDS

65% of Site-Based organizations hire through job boards, vs. 36% of Digital Builders

WHY Volume hiring for a location



DEVICE-FORWARD

Front door: social search and matching

SOCIAL SEARCH & MATCHING

30% of Device-Forward organizations use matching tools, about 2x the other groups (14% to 21%)

WHY Finding scarce, credentialed skills



DIGITAL BUILDERS

Front door: referrals and LinkedIn

REFERRALS & LINKEDIN

61% of Digital Builder organizations hire through referrals, and 54% through LinkedIn

WHY Networks and reputation

ONBOARDING is table stakes: 78% to 86% adoption and similar ratings in every group.

31% of Builder organizations use embedded recruiting AI, vs. 12% to 15% for everyone else.

WHAT TO DO *Match recruiting tools to the work: mobile-friendly job boards for site hiring, matching tools for scarce credentialed skills.*

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ONBOARDING IS IN PLACE. AUTOMATION AND AI ARE NOT.

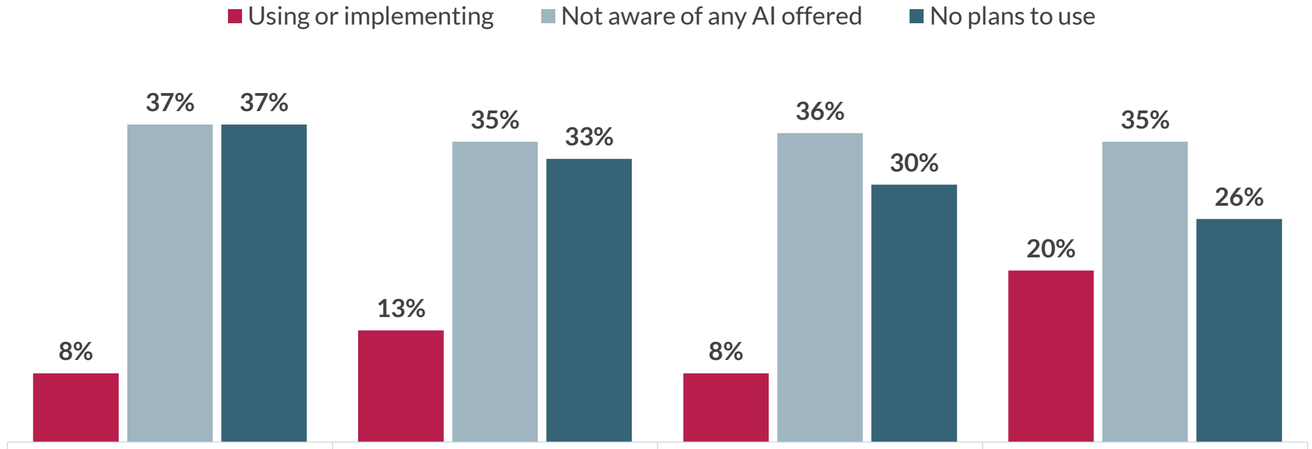
Onboarding solutions, ratings, AI, and spending plans, by organizations where most workers are...

80-86%
have an onboarding solution in use, in every worker type

29-31%
say it always meets their needs, #2 of 14 HR areas

6-14%
use AI in onboarding today

AI IN ONBOARDING SOLUTIONS





DEVICE-FORWARD

3.59 → 3.84
onboarding user experience, the biggest gain of any group

32%
plan to increase onboarding spending, vs. 22% to 24% for the other groups

45%
of mid-market Device-Forward organizations have no plans for AI in onboarding (vs. 24% Site-Based)

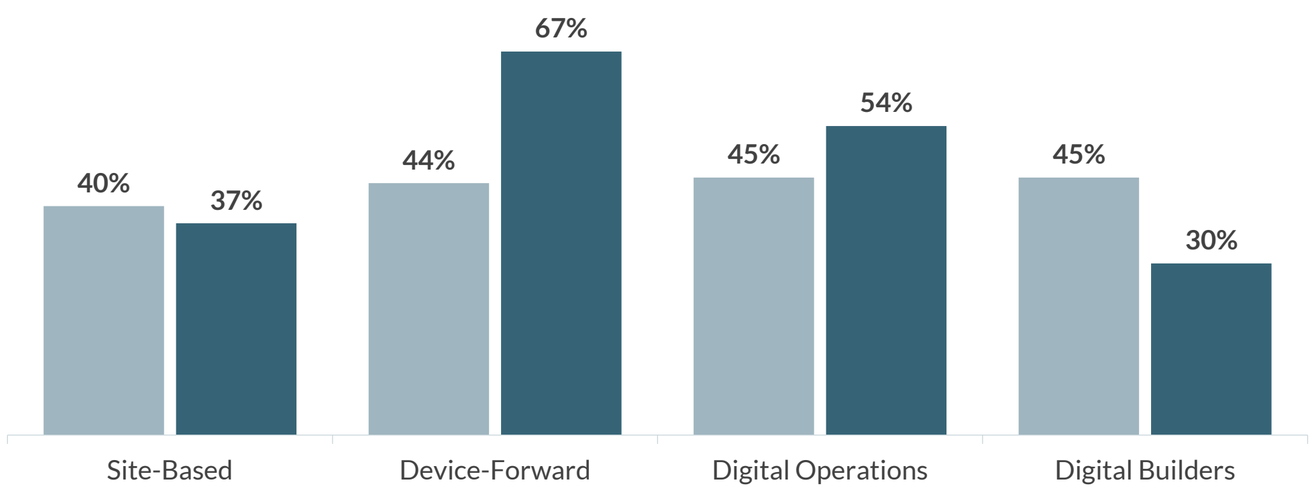
WHAT TO DO *Automate the compliance-heavy steps (I-9, policies, certifications) on mobile, then ask vendors what AI they already include. Extend onboarding past day one with mobile 30- and 90-day check-ins.*

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COMPLIANCE DOESN'T STOP AT THE HIRE

Compliance tools, measures, and spending are all increasing in the age of AI

COMPLIANCE MANAGEMENT SOLUTION IN USE



WHAT DRIVES PRIORITIES: *New or changing regulations are the primary drivers for buying compliance technology for 77% to 81% of frontline organizations. 412 New & Revised compliance requirements were tracked in 2025; that's almost double in 2026.*

DEVICE-FORWARD

13%

say compliance tools always meet their needs, the lowest of any group

59%

Track compliance incidents for compliance spending ROI, a measure taken after the fact. **The average cost to defend 1 employment claim is $160,000!**

32%

plan to increase Learning & Compliance spending, the most of any group

WHAT TO DO *Move from checking compliance at hire to monitoring it: set rules for ongoing checks and for events like promotions, role changes, or certification updates.*

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HEALTH & SAFETY IS A FRONTLINE SYSTEM

Injuries cost lives, money, and fines. Frontline employers are investing in the systems to prevent them.

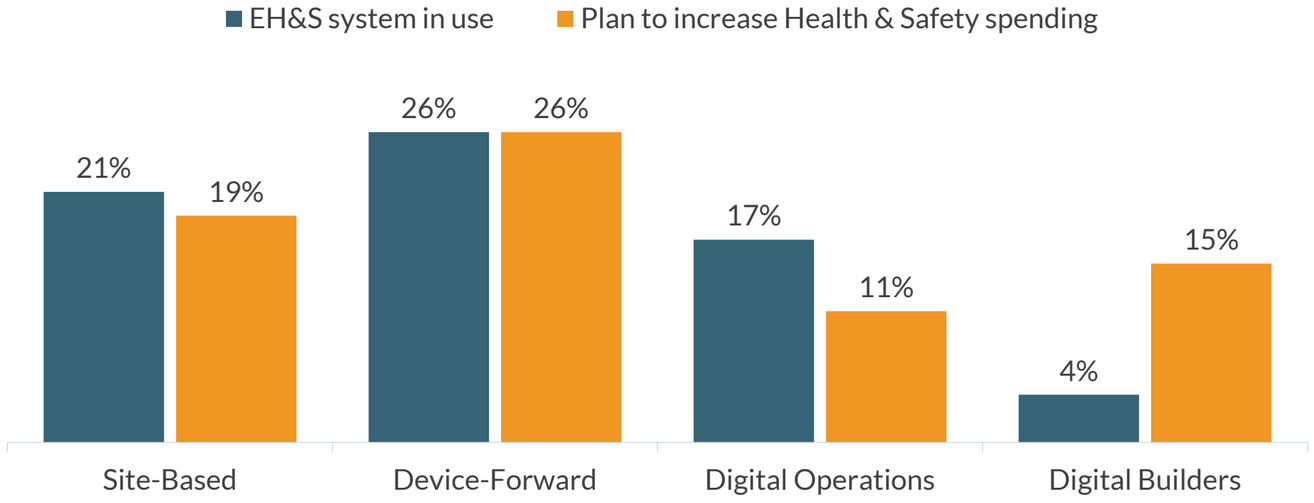
5,070
US workers died on the job in 2024, one every 104 minutes

$48,000
average cost of one medically consulted work injury (2024)

$58.8B
a year in direct costs for injuries that keep people out 5+ days

$165,514
maximum OSHA fine per willful or repeated violation

IN OUR DATA: EH&S SYSTEMS AND SPENDING PLANS



MID-MARKET (500-4,999)

~50%
of frontline organizations use an EH&S system

77%
of Device-Forward keep H&S staff in-house

DEVICE-FORWARD

2.4x
the Digital Ops rate of planned H&S spending (26% vs. 11%)

15%
skip EH&S because of cost

WHAT TO DO *Connect safety training, incidents, and certifications to the HR record, so one view shows who is safe and ready to work.*

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LEARNING HAS GONE MOBILE. AI HASN'T FOLLOWED.

Frontline learning has moved to the phone, but AI hasn't followed

66% of frontline organizations deliver training on mobile devices

5% of Site-Based organizations use embedded AI in learning

25% of Site-Based organizations say training and support is their top system gap

	Site-Based	Device-Forward	Digital Operations	Digital Builders
Training accessed by mobile device	66%	66%	49%	40%
Learning system serves frontline workers	50%	43%	43%	10%
Virtual classroom	37%	53%	59%	40%
Content creation tools in use	16%	35%	26%	13%
Embedded AI in Learning in use	5%	16%	12%	27%
Top system gap: training / support	25%	14%	8%	11%

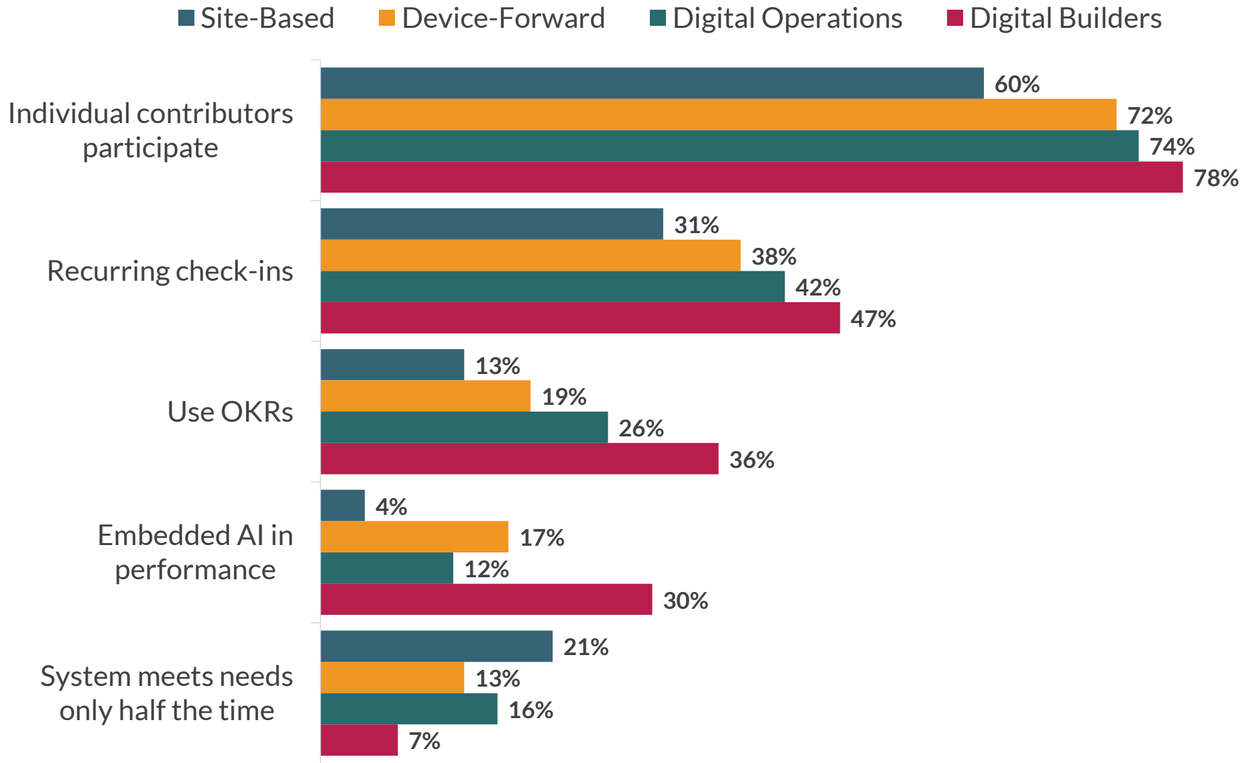
WHAT TO DO *Use the mobile channel you already have. Ask vendors for short safety and job courses with AI guidance built in.*

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PERFORMANCE MANAGEMENT LEAVES THE FRONTLINE BEHIND

Performance practices and what reaches the executive dashboard, by organizations where most workers are...

PERFORMANCE MANAGEMENT PRACTICES



WHAT EXECUTIVES SEE

Share reporting each metric on executive dashboards

	Site-Based	Device-Forward	Digital Ops	Digital Builders
Performance / Productivity	37%	**30%**	37%	**41%**
Engagement	**29%**	33%	35%	**39%**
Compliance / Safety	31%	**33%**	23%	**19%**
Attendance / Availability	**25%**	18%	17%	**12%**

30% of Device-Forward organizations report performance to executives, the lowest of any group. Frontline dashboards track safety and attendance instead.

WHAT TO DO *Give frontline managers a mobile way to run regular check-ins, and put performance next to attendance and safety on the executive dashboard.*

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TRACK READINESS CONTINUOUSLY, NOT JUST AT HIRE

Credentials, safety, and skills change after day one. In every group, the top barrier to skills tech is that it isn't a leadership priority.

THE READINESS LOOP





DEVICE-FORWARD

20%

track skills and credentials digitally, nearly 2x the rate of other groups (10% to 12%)

30%

use succession / career tools, the most of any group (22% to 26% for others)

MID-MARKET (500-4,999)

32% of Device-Forward organizations track credentials digitally, vs. 7% of Site-Based

12% of Site-Based organizations use skills tech, half the Device-Forward rate (24%)

38% of Device-Forward organizations use succession tools, vs. 29% of Site-Based

35% of Device-Forward organizations plan more Learning & Compliance spending, vs. 24%

WHAT TO DO *Track credentials, safety, and skills in one place, and use the same data to spot who is ready for the next role.*

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PART 4

AI WITH A HUMAN IN THE LOOP

Where AI reaches the frontline, and who keeps it in check

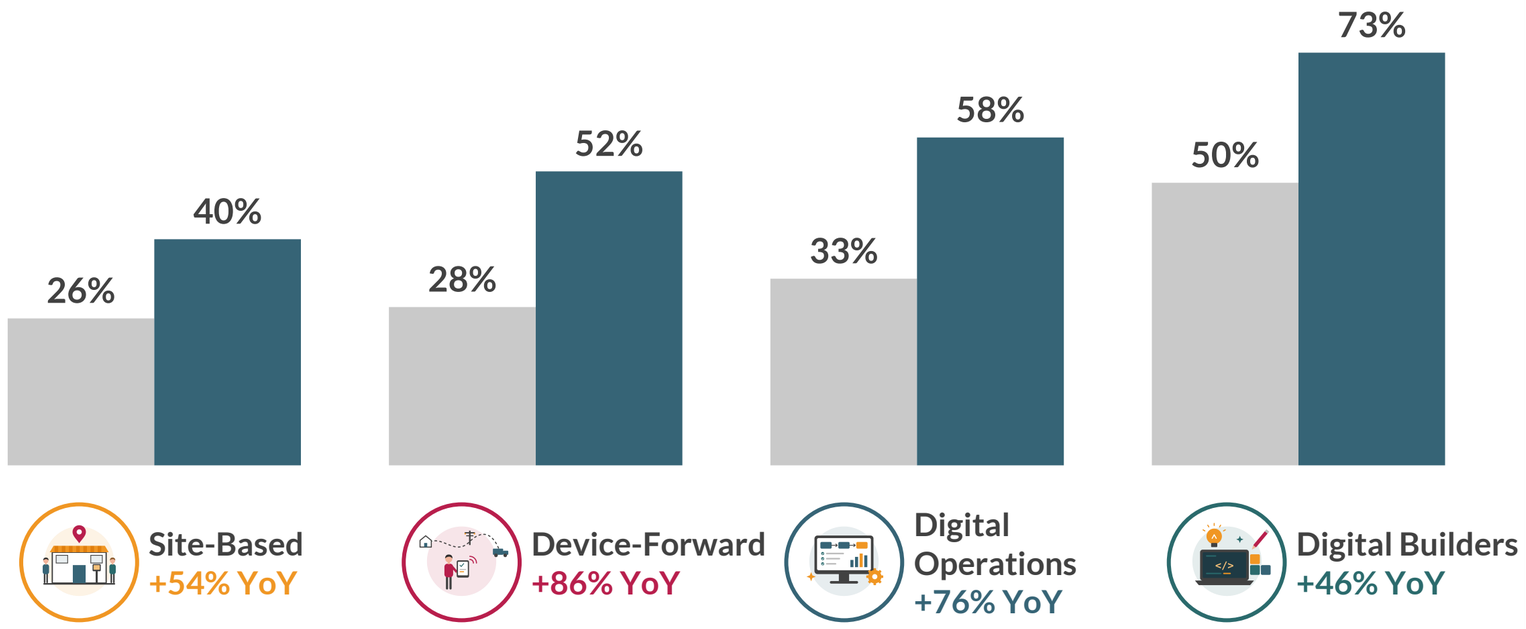


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AI IS REACHING THE FRONTLINE LAST

AI in use, by organizations where most workers are...

AI IN USE IN HR





8%

of Site-Based organizations combine embedded HR AI with stand-alone AI, vs. 19% to 30% for the other groups.

WHO SHAPES AI DECISIONS

48% Site-Based

44% Device-Forward

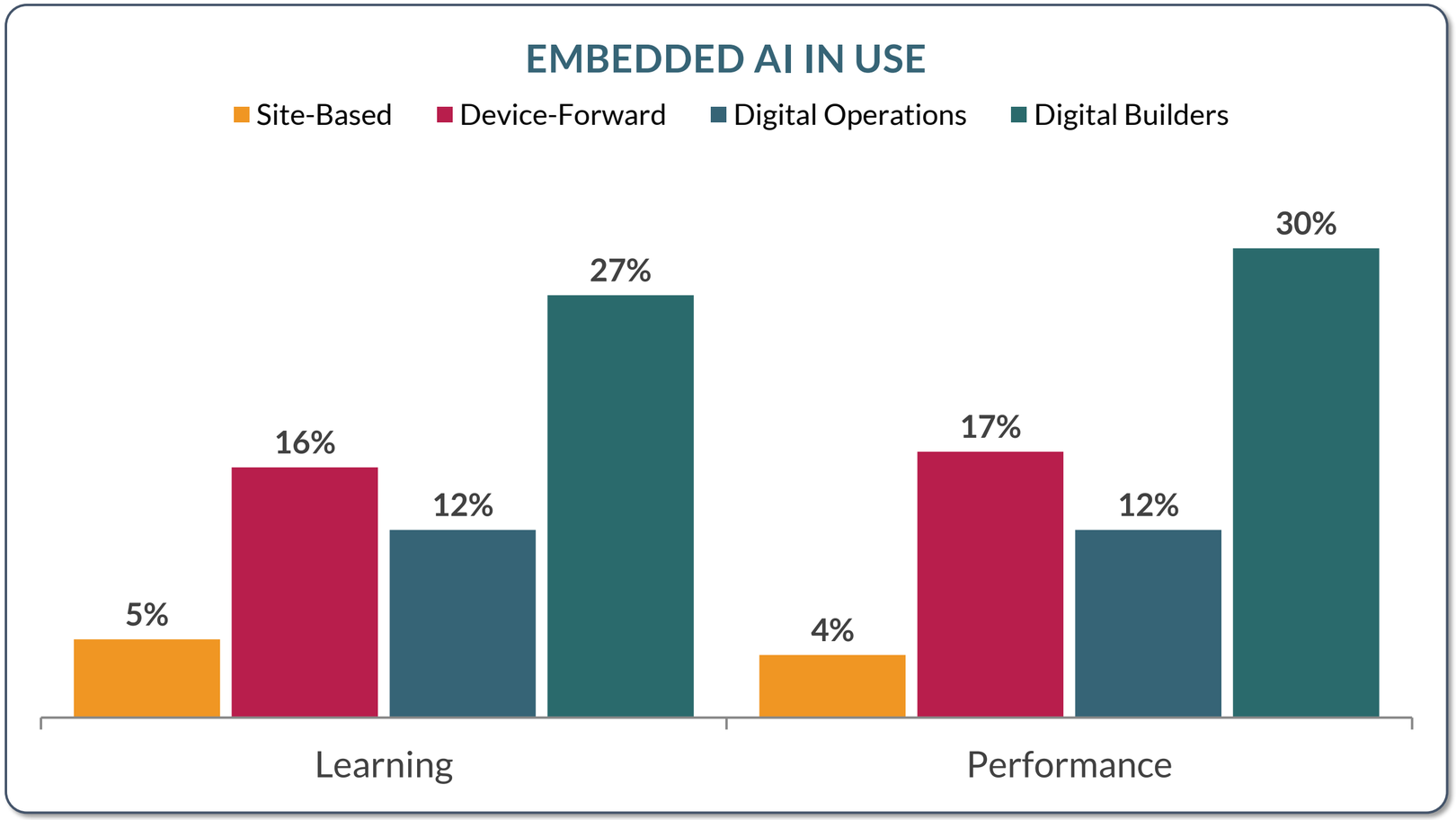
of frontline organizations include HR in AI decisions, vs. 33% to 35% of the digital groups.

WHAT TO DO *Start AI where frontline workers already are: scheduling, time, learning, and HR questions on the phone.*

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HR SYSTEM AI REACHES THE DESK FIRST

Embedded AI in use, by organizations where most workers are...



31%

of Builder organizations use embedded AI in recruiting, vs. 12% to 15% for everyone else.

DEVICE-FORWARD IS CLOSING THE GAP

2x

as likely to track skills and credentials digitally (20% vs. 10% to 12%)

3.59 → 3.84

Onboarding UX, the biggest gain of any group

3.61 → 3.76

HRMS UX



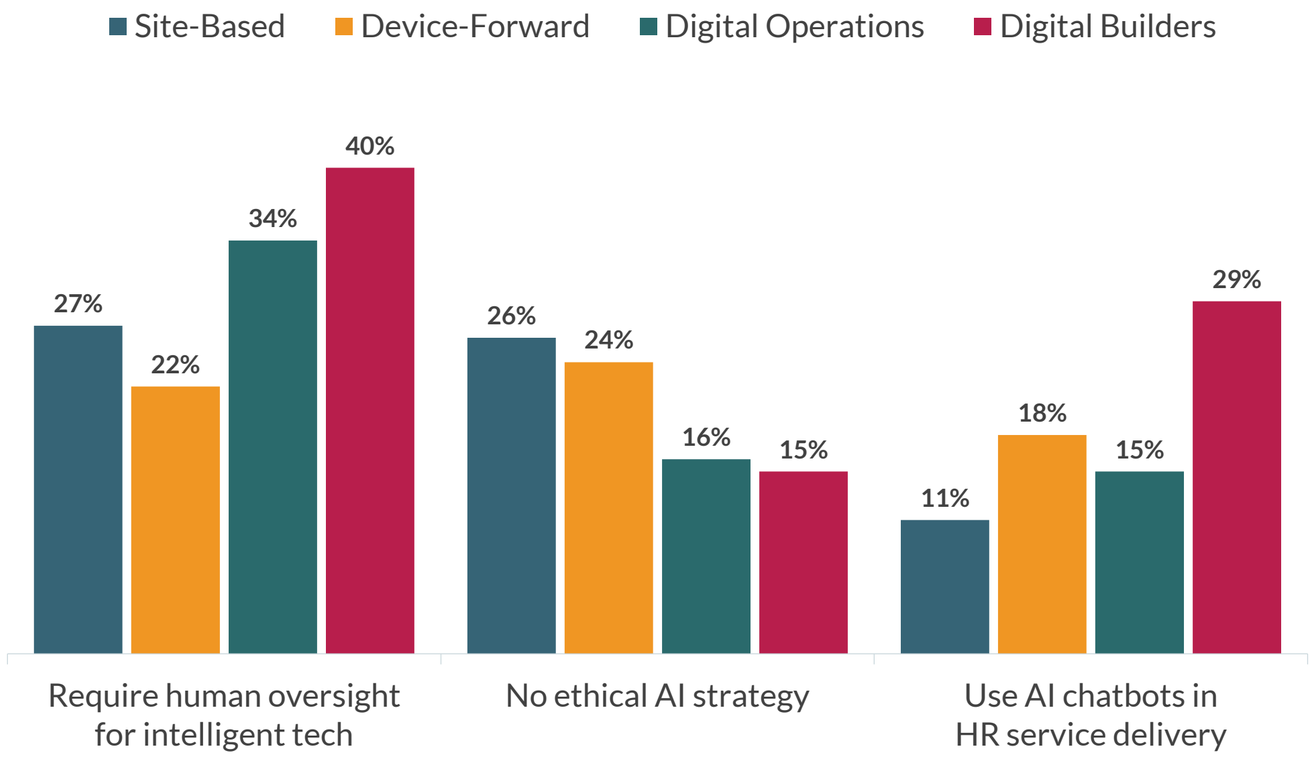
WHAT TO DO *Ask vendors which embedded AI features work on mobile and for hourly workers, not just for desk users.*

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KEEP A HUMAN IN THE LOOP

AI guardrails and HR service delivery, by organizations where most workers are...

HOW ORGANIZATIONS GOVERN AI



THE OPENING

44-48%

of frontline organizations include HR in AI decisions, vs. 33% to 35% of the digital groups. HR has the seat. Use it to set the rules.



DEVICE-FORWARD

22%

require human oversight of AI, about half the Digital Builder rate (40%)

24%

have no ethical AI strategy, vs. 15% to 16% of digital groups

WHAT TO DO *Write down where AI can act alone and where a person must review, especially for hiring, monitoring, and safety decisions.*

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PART 5

IN THEIR OWN WORDS

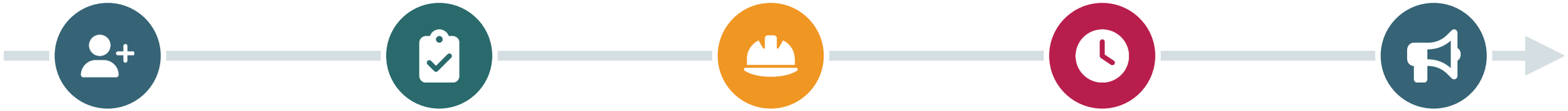
What frontline HR teams tell us about their HR technology



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IN THEIR OWN WORDS: THE PHONE IS THE EXPERIENCE

Where the employee lifecycle breaks for workers who don't sit at a computer



RECRUITING | ONBOARDING | LEARNING & SAFETY | TIME & PAY | COMMUNICATION

RECRUITING

"Internal recruiting / hourly workers without email addresses - no good way to address"

MANUFACTURING | 1,720 EE

ONBOARDING

"The only criticism is the older generation that does not do well on computers having to complete on their phones."

RETAIL | 227 EE

LEARNING & SAFETY

"The safety bundle is great but... often we need smaller courses for our field employees to take."

CONSTRUCTION | 385 EE

TIME & PAY

"Employees cannot see if they have submitted time off, and cannot see last paycheck hours, get locked out and must keep changing passwords."

MANUFACTURING | 225 EE

COMMUNICATION

"Mobile app for employees does not include all the communication pieces we need... Employees do not use the desktop version"

HOSPITALITY | 400 EE

WHAT TO DO *Test every vendor demo on a phone, in the worker's language, without a company email address or laptop.*

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WHO GETS LEFT OUT, AND WHY

Two comments that sum up the frontline experience gap

WHO GETS LEFT OUT

> *"About half of our employees do not have computer access and need to use the mobile version. The way it converts isn't ideal. Our Spanish-speaking population struggles the most with it."*

CONSTRUCTION HR

WHY IT HAPPENS

> *"...many processes default to questions/ steps that are clearly designed for businesses with remote salary employees only. Not always efficient for a business with all in-person workforce, majority hourly employees, and temporary employees"*

HIGH-TECH EXECUTIVE

WHEN IT BREAKS *"You changed the cell phone view of timesheets without letting anyone know. This is how employees watch to make sure they don't have OT."* HEALTHCARE EXECUTIVE

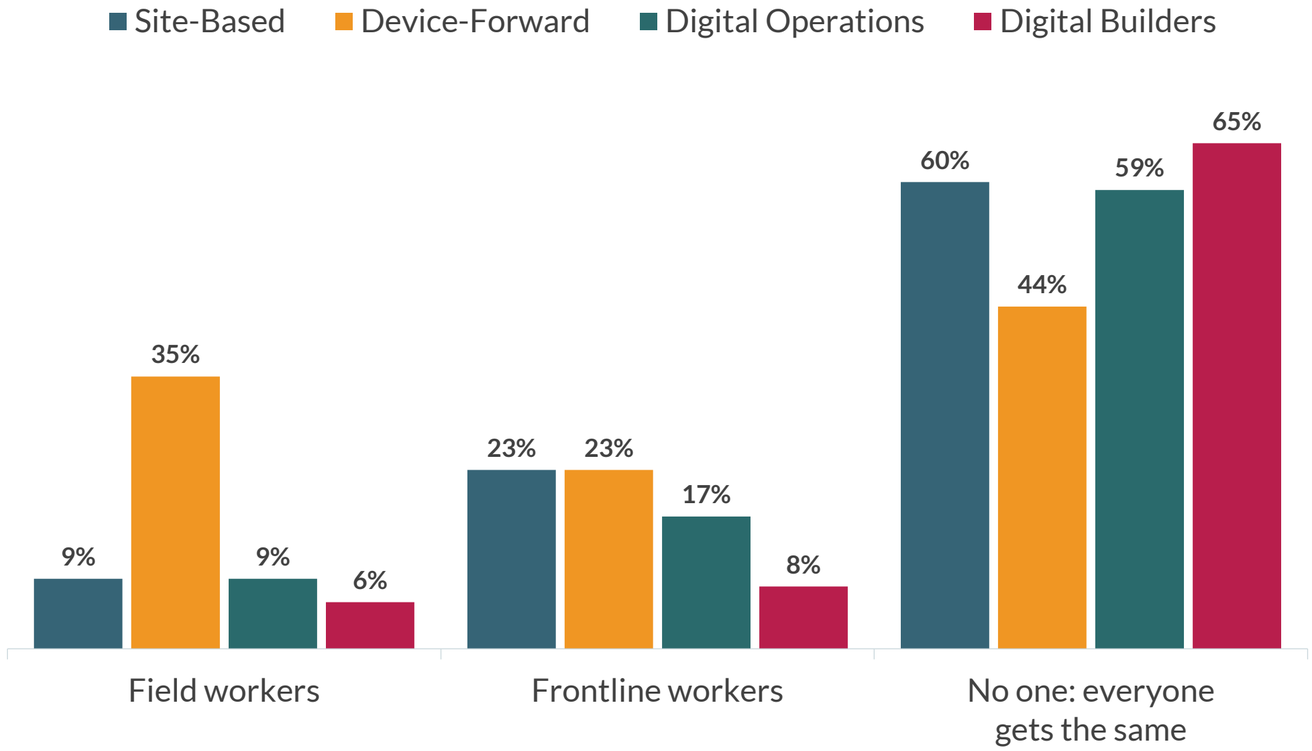
If your HR system was designed for a desk, ***it wasn't designed for half your workforce.***

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ONE HR EXPERIENCE DOESN'T FIT THE FRONTLINE

Unique employee experiences and channels, we just don't build them for our frontline workers!

CREATED A UNIQUE EMPLOYEE EXPERIENCE FOR...



CHANNELS FOLLOW THE WORK

Facebook 19% of Site-Based vs. 8% of Builders

Slack 50% of Builders vs. 9% of Site-Based

Self-service apps 44% of Site-Based, the most of any group

Digital wellness 29% of frontline groups vs. 34-36% digital

SITE-BASED, MID-MARKET

27%
Have someone who owns the Employee Experience (less than half of any other category)

15%
Rely on managers to create the Employee Experience

WHAT TO DO *Design at least one experience for frontline and field workers: the channel they use, the language they speak, the device they carry.*

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DESIGN HR TECH FOR HOW THE WORK GETS DONE

One HR tech experience won't serve all four. Design for how the work gets done.



SITE-BASED FRONTLINE

Deliver through the site

The site and its manager are the channel.

40%
use AI in HR, the lowest

4%
use embedded AI in performance

66%
already train on mobile



DEVICE-FORWARD FRONTLINE

Make the device the Experience

HR, learning, and AI belong in the field tool.

2x
as likely to track credentials digitally

40%
plan more recruiting spend

78%
run scheduling efficiently



DIGITAL OPERATIONS

Automate and Simplify

Keep people accountable for the exceptions.

40%
of organizations, the largest group

58%
use AI in HR

38%
of AI users are Too Early



DIGITAL BUILDERS

Govern and Connect

More AI isn't the answer. Outcomes are.

73%
use AI in HR, the highest

3.10 → 3.04
outcomes slipped

31%
made cuts last year

WHAT TO DO *Write separate requirements for each workforce type in your next RFP, and score vendors on all four.*

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THE MID-MARKET FRONTLINE EMPLOYER

Mid-market organizations (500-4,999 employees) where most workers are Device-Forward vs. Site-Based

Use a compliance management solution

67% Device-Forward

37% Site-Based

Use an EH&S system

50% Device-Forward

47% Site-Based

Track credentials digitally (LER, badges)

32% Device-Forward

7% Site-Based

Use succession / career tools

38% Device-Forward

29% Site-Based

Use skills management tech

24% Device-Forward

12% Site-Based

Have no plans for AI in onboarding

45% Device-Forward

24% Site-Based

Built an experience for field workers

35% Device-Forward

7% Site-Based

Plan more Learning & Compliance spending

35% Device-Forward

24% Site-Based

50% of all mid-market organizations plan to increase HR tech spending this year, vs. 34% of SMB. Device-Forward leads on nearly every lifecycle tool.

WHAT TO DO *If you are mid-market, plan for a connected platform: recruiting, onboarding, compliance, and safety data in one place as you grow.*

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THREE NEXT STEPS FOR HR BUYERS

What to do with this data before your next HR technology decision

1

MAP YOUR WORKFORCE BY WHAT ANCHORS THE WORK

Sort your people by place or tool, not job title. Use that mix to set requirements for every HR system you buy.

44% to 65%
give every employee the same HR experience

2

MAKE THE DEVICE THE EXPERIENCE

Test recruiting, onboarding, learning, time, and pay on a phone, in the worker's language, before you sign.

66%
of frontline organizations already train on mobile

3

TRACK READINESS CONTINUOUSLY

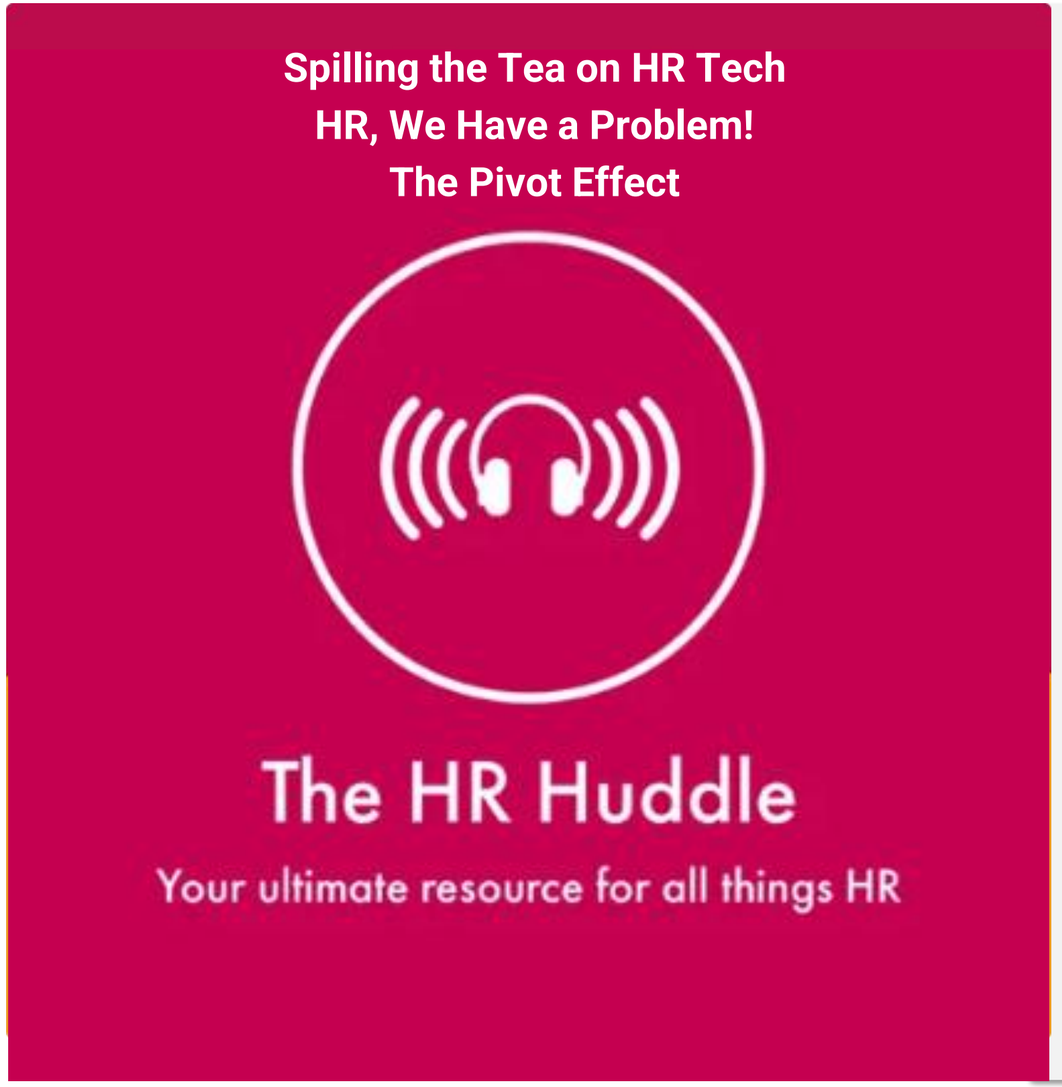
Keep credentials, safety, and skills in one record. Monitor after the hire and use the same data to find internal mobility.

13%
of Device-Forward organizations say compliance tools always meet needs

WHAT TO DO *Pick one frontline group this quarter and walk its full lifecycle, from application to promotion, on a phone.*

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