

Workforce Management Healthcare Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY

***iSG** Research



Workforce Management Healthcare

Workforce management (WFM) has long been the quiet engine of operational efficiency, keeping labor costs in check while ensuring the right people arrive at precisely the right moment. In 2025, the discipline stepped into the spotlight. A still-tight labor market, lingering post-pandemic upheaval and a sudden flowering of generative and conversational artificial intelligence (AI) are remaking software roadmaps and daily practices. Where yesterday's tools

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ISG Research defines WFM for Healthcare as technology that marries traditional time and scheduling with patient-centered acuity forecasting, licensure validation, union and ratio compliance and fatigue-risk safeguards.

confirmed hours after the fact, today's platforms predict tomorrow's demand, surface the financial impact of every option before a single shift is published and deliver a low-friction experience that has become a survival imperative for any sector that relies on hourly talent.

ISG Research defines WFM for Healthcare as technology that marries traditional time and scheduling with patient-centered acuity forecasting, licensure validation, union and ratio compliance and fatigue-risk safeguards. It must ingest electronic medical-record data, census projections and clinical rotation rules to align nurse and clinician skills with dynamic patient needs while controlling overtime and premium pay. Integrated rounding, float-pool management and on-call tracking are baseline, as is secure mobile access that lets staff self-schedule, swap shifts and review credential expirations—all under the strict privacy and audit requirements unique to healthcare.

Only a decade ago, WFM technology was still dominated by on-premises time clocks and overnight batch processing. Mobile capability meant a clunky browser in kiosk mode, forecasts relied on static sales

history and “integrations” were mostly flat-file exports to payroll. The turning point arrived as cloud providers rewrote scheduling engines for real-time memory, smartphones placed self-service in every pocket and early machine learning (ML) models began nudging managers when rosters drifted off budget. By the late 2010s, regulatory shifts—most visibly Europe's working-time ruling and renewed U.S. overtime scrutiny—forced enterprises to log hours more accurately, propelling biometric clocks and app-based punches into the mainstream.

That compliance wave dovetailed with the employee-experience movement. Hourly workers started demanding the same transparency and flexibility enjoyed by knowledge staff: instant shift swaps, visibility into accrued pay and fair-chance scheduling. Software providers responded with consumer-grade interfaces, but the bigger leap came when AI matured enough to treat skills, preferences and cost as coequal variables. The result was a flywheel:



richer data produced better forecasts, which justified deeper investment, opening the door to today's generative assistants and real-time cost simulations.

Against that backdrop, enterprises now share four pressing needs. First, they must see labor risk in real time—wage exposure, fatigue flags and compliance drift—before the roster is locked. By 2027, two-thirds of enterprises using workforce management systems will benefit from having real-time visibility into the cost of schedules, including rates and worker types. Second, they need elastic access to talent, pulling from gig marketplaces or agencies the moment core staff fall short. Third, precision has shifted from job titles to granular skill tags as production lines, patient acuity and omnichannel retail flows change by the hour. Fourth, frontline workers expect consumer-grade autonomy: choose shifts, check accrued earnings and resolve HR questions through a chat-style interface rather than a help-desk queue.

To satisfy those needs, successful WFM software must deliver a new technical baseline. Forecast engines have to ingest live signals such as point-of-sale flashes, IoT telemetry or census updates, not just historical averages. Rostering logic must weigh skills, certifications, preferences, regulations and real-time cost in one pass, then push confirmed hours straight to payroll and gig marketplaces without rekeying. Self-service must be conversational, allowing workers to swap shifts, request early wage access or dispute a punch in normal language. By 2027, one-half of enterprises using workforce management systems will assign work or shifts by skills required, not just job type, achieving much greater precision in optimizing resource deployments. Finally, open APIs and low-code configuration kits are essential so that scheduling, time and skills data can feed robotics systems, learning platforms and ESG dashboards without provider-only customization.

These same capabilities are now tuned for vertical nuance. Manufacturers couple AI schedules with machine-health alerts to re-sequence cross-trained crews only when lines need them. Healthcare providers blend electronic medical-record feeds, rotation rules and licensure checks to project staffing curves with clinical acuity. Retailers pair computer-vision footfall counters with promotion calendars to shape sub-hourly demand curves, letting associates instantly claim or trade shifts. Suppliers once known for generic clocks now release micro-bundles—food-safety checklists, OR-ready nurse rosters, loss-prevention analytics—tailored to the pain points of each industry.

For senior leaders, the challenge has outgrown the old mandate of “fill every slot.” They now juggle cost, compliance, skills, well-being and brand promise in one dynamic equation. Hourly workers remain the operational heartbeat of plants, wards and shops, yet they expect

Workforce Management
Market Assertion

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Matthew Brown
Director of Research, Human Capital Management

ISG Research



predictable pay, transparent growth paths and digital tools that feel like the apps they use at home. Enterprises that treat WFM as a strategic enabler rather than an administrative expense already see dividends: predictive rosters that curb overtime without understaffing, skill ontologies that feed succession pipelines and audit trails that give legal, finance, and HR the same real-time view of risk. WFM technology is racing ahead, but the winners will be those that pair automation with humanity—using intelligence to remove friction and improve decisions while doubling down on empathy, growth and trust.

To explore these dynamics in the depth they deserve, our 2025 research divides the workforce-management landscape into five focused guides—WFM Basics, WFM Suites, WFM for Healthcare, WFM for Manufacturing and WFM for Retail. Each report applies a common evaluation lens yet weights criteria to reflect the operational realities, compliance pressures and innovation priorities unique to its scope. Together, they provide a panoramic view of the market and a set of targeted benchmarks that let buyers zero in on the capabilities—and partners—best aligned to their context.

The ISG Buyers Guide™ for Workforce Management Healthcare evaluates products purpose-built to meet the operational and regulatory complexities of healthcare delivery. To be included, products must offer a healthcare-specific solution that supports shift-based and on-call scheduling, credential and compliance tracking, AI-driven patient demand forecasting, floating staff assignments, fatigue risk monitoring and emergency staffing protocols. Evaluation categories include staffing and credentialing, compliance and risk management, and patient and workforce coordination, in addition to core WFM functions. In a sector where patient safety, labor shortages and regulatory oversight converge, it is essential for buyers to assess whether a product is truly aligned with the realities of healthcare workforce management—not just broadly functional, but clinically relevant.

This research evaluates the following software providers that offer products that address key elements of healthcare workforce management as we define it: ADP, ADP WorkForce Software, Dayforce, Infor, isolved, Oracle, Quinyx, SAP, UKG, Workday and Zebra.



Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for Workforce Management Healthcare is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for healthcare workforce management software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for workforce management to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of workforce management technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and



deployment time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of workforce management software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating healthcare workforce management systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.


Overall Scoring of Software Providers Across Categories

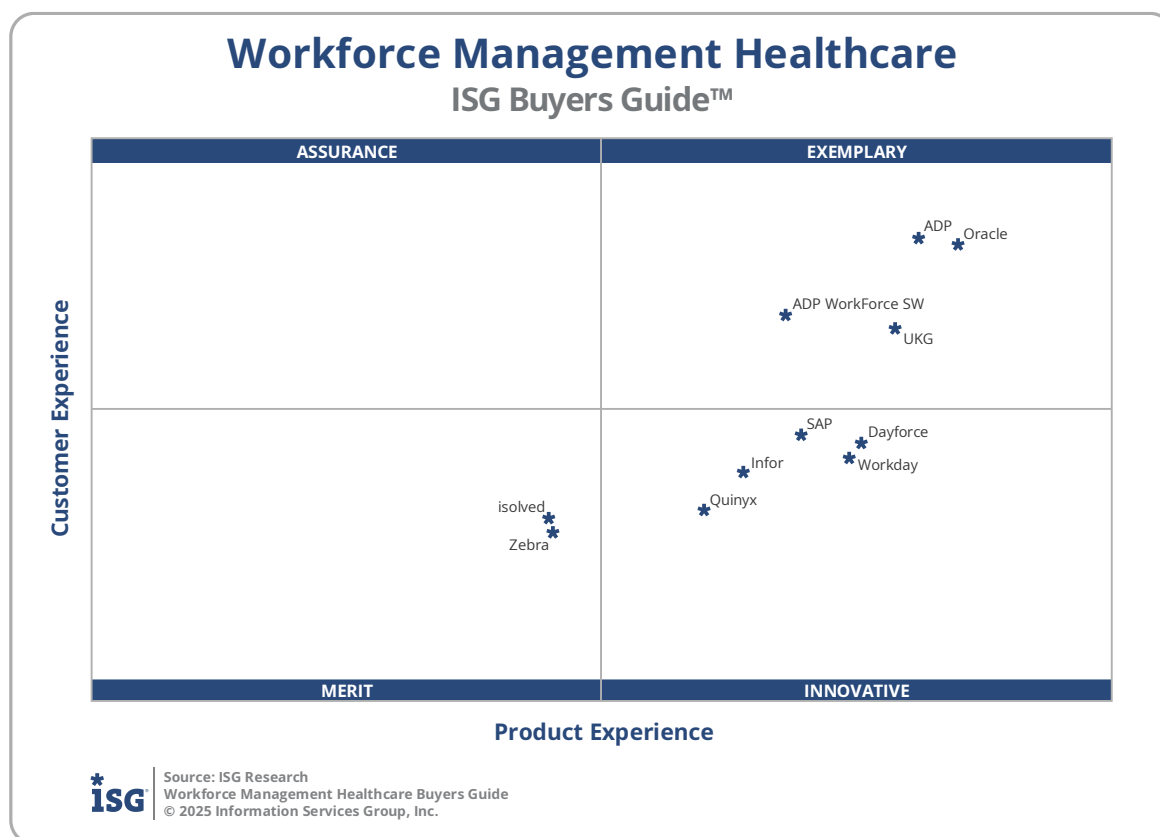
The research finds Oracle atop the list, followed by ADP and UKG. Companies that place in the top three of a category earn the designation of Leader. Oracle has done so in seven categories; ADP in six; ADP WorkForce Software in four; UKG and Dayforce in two; and SAP in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

WFM Healthcare			
Overall			
Providers	Grade	Performance	
Oracle	A	Leader	88.7%
ADP	A-	Leader	87.3%
UKG	A-	Leader	85.2%
Dayforce	A-		81.5%
Workday	B++		81.0%
ADP WorkForce SW	B++		81.0%
SAP	B++		80.6%
Infor	B++		75.4%
Quinyx	B+		72.4%
isolved	B		66.3%
Zebra	B		65.9%

 Source: ISG Research
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Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: ADP, ADP WorkForce Software, Oracle and UKG.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: Dayforce, Infor, Quinyx, SAP and Workday.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. There are no providers rated Assurance in this Buyers Guide.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: isolved and Zebra.



We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle healthcare workforce management, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (15%), Capability (35%), Reliability (10%), Adaptability (10%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research. Oracle, ADP and UKG were designated Product Experience Leaders.

WFM Healthcare Product Experience

Providers	Grade	Performance
Oracle	A	Leader 70.8%
ADP	A-	Leader 69.3%
UKG	A-	Leader 68.3%
Dayforce	A-	66.9%
Workday	A-	66.4%
SAP	A-	65.3%
ADP WorkForce SW	B++	63.4%
Infor	B++	60.7%
Quinyx	B+	58.6%
Zebra	B	51.9%
isolved	B	51.8%



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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are ADP, Oracle and ADP WorkForce Software. These category Leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

WFM Healthcare Customer Experience

Providers	Grade	Performance
ADP	A	Leader 18.0%
Oracle	A	Leader 17.9%
ADP WorkForce SW	A-	Leader 17.3%
UKG	A-	16.9%
SAP	B++	15.3%
Dayforce	B++	15.1%
Workday	B+	14.9%
Infor	B+	14.7%
Quinyx	B+	14.1%
isolved	B+	14.0%
Zebra	B+	13.8%



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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Workforce Management Healthcare in 2025, a software provider must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 50 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 18 months.

To qualify for inclusion in the Workforce Management Healthcare Buyers Guide, software providers must demonstrate the ability to satisfy basic and advanced workforce management capabilities, along with delivering a marketed offer specific to the healthcare industry that supports shift-based and on-call scheduling, credential and compliance tracking, AI-driven patient demand forecasting, floating staff assignments, fatigue risk monitoring and emergency staffing protocols.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant healthcare workforce management products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
ADP	ADP Workforce Manager	1H2025	May 2025
ADP WorkForce Software	ADP WorkForce Suite	20.2.0.25060	May 2025
Dayforce	Dayforce Workforce Management	2025.1.0, Patch 3	April 2025
Infor	Infor Workforce Management	2025.05	May 2025
isolved	Workforce Management	11.4	April 2025
Oracle	Oracle Workforce Management	25B	March 2025
Quinyx	Workforce Management	0211	May 2025
SAP	SAP SuccessFactors	1H2025	May 2025
UKG	UKG Pro Workforce Management	2024.R2	January 2025
Workday	Workforce Management	2025 R1	March 2025
Zebra	Workcloud Workforce Optimization Suite	SaaS	May 2025



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	Revenue	Geography	Customer	Scope
ATOSS	ATOSS	Yes	Yes	Yes	No
OneAdvanced	Time & Attendance	Yes	Yes	Yes	No
Paychex	Paychex Flex	Yes	No	Yes	No
Paycom	Time & Labor Management	Yes	Yes	Yes	No
Paychex Paycor	Paycor Workforce Management	Yes	Yes	Yes	No
Paylocity	Time & Labor Management	Yes	Yes	Yes	No
Rippling	HCM	Yes	Yes	Yes	No
TCP Software	TimeClock Plus	Yes	Yes	Yes	No



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

About ISG

ISG (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.