NEAT EVALUATION FOR TCP:

Workforce Management

Market Segment: Overall

Introduction

This is a custom report for TCP presenting the findings of the 2026 NelsonHall NEAT vendor evaluation for *Workforce Management* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of TCP for workforce management, and the latest market analysis summary.

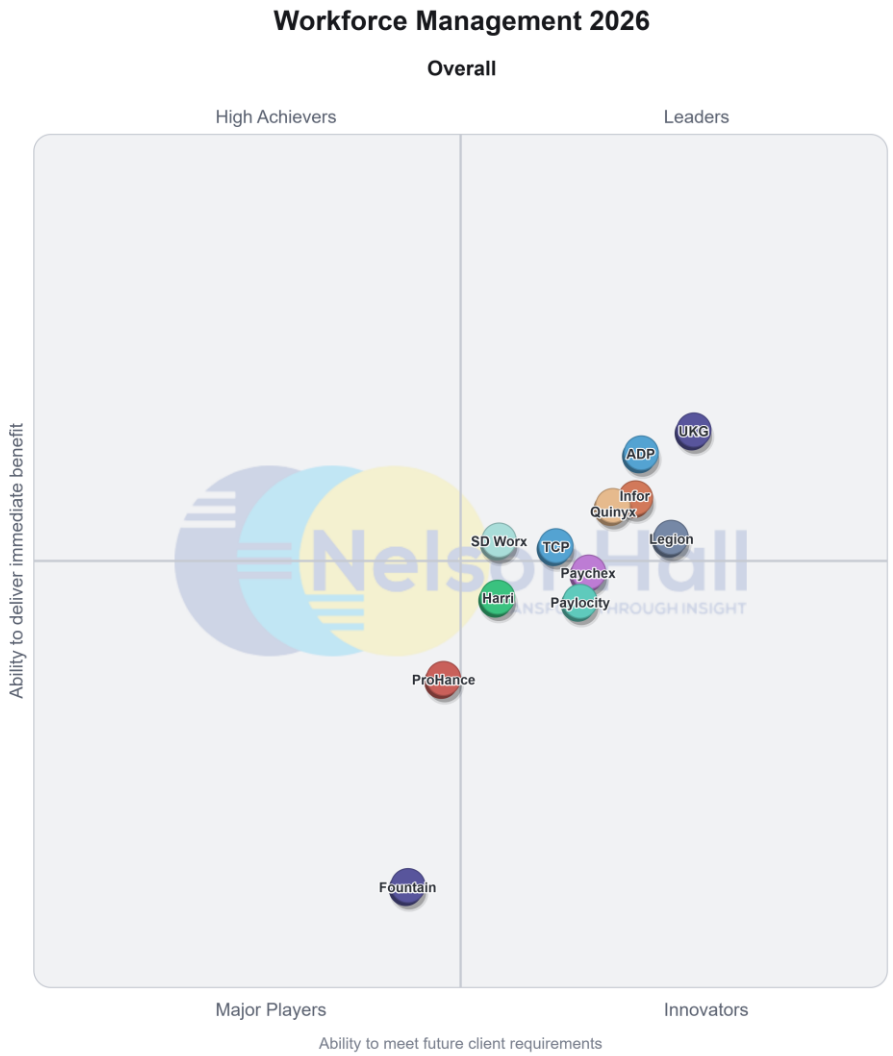
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering workforce management (WFM) services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing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

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

Vendors evaluated for this NEAT are: ADP, Fountain, Harri, Infor, Legion, Paychex, Paylocity, ProHance, Quinyx, SD Worx, TCP, and UKG.

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

NEAT Evaluation: Overall



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

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

Buy-side organizations can access the *Workforce Management* NEAT tool here.

Vendor Analysis Summary for TCP

Overview

TCP's WFM portfolio combines configurable capabilities for employee scheduling, T&A, labor forecasting, compliance, workforce analytics, and employee self-service. The portfolio supports organizations ranging from SMBs to large multi-site enterprises with flexible workforce policies, and has extensive integrations across HR, payroll, ERP, and operational systems, and industry-specific functionality. TCP continues to expand integration across its capabilities while investing in industry-specific functionality and platform standardization.

Recent focus areas include:

- Scheduling capabilities, including shift planning, open shift management, demand-based staffing, and schedule optimization
- Time and attendance capabilities, including automated time capture, attendance tracking, exception management, labor rule enforcement, and payroll-ready time processing
- Employee self-service capabilities, including mobile scheduling, availability management, shift swaps, time-off requests, workforce communications, and manager approvals
- Workforce planning and operational reporting, including labor forecasting, workforce analytics, budgeting, and operational visibility
- Industry-specific functionality supporting K-12 education, public safety, healthcare, hospitality, retail, and other frontline industries
- Platform connectivity and administration, including shared data models, standardized user experience, ecosystem integrations, and continued platform consolidation.

The company supports ~4m users across ~37k customer organizations.

Financials

TCP is a privately-held company. NelsonHall estimates TCP's CY 2025 revenues at ~$145m, of which ~89% is recurring, with ~96% derived from U.S.-based clients.

Revenue split by company size is estimated as: small (<500 employees) 60%, mid-market (500-15k employees) 30%, large/enterprise (>15k employees) 10%.

The top three industry sectors by proportion of revenue are government (23%), professional services (21%) and healthcare (11%).

Estimated revenue split by offering type is: software (subscription/license) 81%, services (implementation/deployment) 14%, hardware (clocks) 5%.

Strengths

- WFM portfolio with capabilities for time and attendance, employee scheduling, and labor optimization, particularly for high-volume, shift-based workforce environments
- Support for complex workforce environments, including multi-state labor rules, collective bargaining agreements, and industry-specific capabilities for K-12 education and public safety
- Configurable WFM capabilities supporting labor forecasting, scheduling, compliance, and complex workforce policies
- Support for diverse scheduling models, including dynamic employee scheduling, rotational scheduling, and complex time and attendance requirements.

Challenges

- TCP's WFM offering operates primarily as a WFM layer within broader HR and payroll environments, relying on integrations with third-party HCM and payroll systems rather than a unified end-to-end platform
- Continued consolidation of acquired scheduling platforms requires further alignment of products, data models, administration, and customer migrations
- AI-assisted scheduling, workforce automation, and agent-driven workflows remain less mature than capabilities offered by other WFM vendors.

Strategic Direction

Current development efforts focus on expanding automation across WFM processes through AI-assisted scheduling, labor optimization, and decision support. TCP is also investing in forecasting, workforce analytics, and optimization capabilities to improve workforce planning, staffing decisions, and operational visibility while maintaining manager oversight.

The company continues to invest in industry-specific functionality, particularly for frontline-intensive industries, while strengthening integrations across the broader workforce technology ecosystem. Additional priorities include standardizing data models, administration, and user experience across its platforms, as well as the continued migration of WhenToWork and ScheduleAnywhere clients to support a more unified WFM portfolio.

Workforce Management Market Summary

Overview

Organizations are increasingly looking beyond core time, attendance, and scheduling functionality toward WFM platforms that also support workforce planning, labor forecasting, real-time exception management, and compliance. Demand is also growing for mobile employee and manager capabilities that provide easier access to schedules, shift changes, time-off requests, communications, and other workforce-related activities.

Meanwhile, WFM providers are responding to rising labor costs, persistent skills shortages, increasing regulatory complexity, and greater variability in workforce demand, and are focused on aligning labor requirements with operational needs while improving workforce visibility, employee flexibility, manager effectiveness, and organizational resilience.

AI is becoming more broadly embedded across WFM offerings, particularly in forecasting, schedule generation and optimization, compliance validation, absence management, analytics, and employee and manager support. Conversational assistants and emerging agentic capabilities are extending this development by providing workforce-related answers, identifying exceptions, recommending actions, and completing selected activities within defined organizational rules and permissions. However, adoption and maturity vary considerably, and buyers continue to prioritize transparency, data governance, configurability, and measurable operational outcomes.

Employee experience transformation within WFM increasingly reflects the needs of frontline workers, including schedule quality and predictability, greater control over availability and shift preferences, access to timely information, and the ability to resolve routine workforce matters with limited administrative effort. For managers overseeing dispersed teams and locations, vendors are focusing on earlier identification of coverage risks, labor and compliance exceptions, and changing demand conditions, allowing staffing and scheduling issues to be addressed before they affect operations.

Buy-Side Dynamics

The top priorities for buyers of WFM technology and services center on improving labor planning and operational control while providing more flexible and accessible experiences for employees and managers, including:

- Improving forecasting, capacity planning, and scheduling accuracy by accounting for expected demand, required skills, employee availability, labor costs, and alternative staffing scenarios
- Providing frontline workers with mobile access to schedules, availability, shift changes, time-off requests, and time records while increasing schedule flexibility and predictability
- Strengthening compliance across jurisdictions, locations, collective bargaining agreements, and worker populations
- Giving managers earlier visibility into coverage gaps, overtime, attendance issues, missed punches, compliance risks, and other workforce exceptions
- Integrating WFM with payroll, HCM, finance, POS, and operational systems to reduce duplicate data entry and improve workforce and labor-cost data accuracy

- Assessing how AI-generated recommendations and actions are governed through organizational rules and permissions
- Reducing implementation time and administrative effort through configurable workflows, prebuilt integrations, industry-specific content, and effective change management
- Securing ongoing vendor support and advisory services to improve adoption and respond to changing workforce requirements post-implementation
- Demonstrating measurable improvements in forecast accuracy, overtime, schedule adherence, payroll accuracy, compliance, manager productivity, employee adoption, and time to value.

Market Size & Growth

NelsonHall estimates the global WFM market to be worth ~$8.1bn in 2026 and is estimated to grow at ~9.5% CAGR to reach ~$12.7bn in 2031.

Growth will be driven by the replacement of legacy and fragmented WFM systems, demand for more advanced forecasting and scheduling, increasing labor and compliance complexity, and continued investment in employee and manager experiences

North America will remain the largest WFM market, while EMEA and APAC will provide continued growth opportunities as organizations modernize workforce processes and seek stronger multi-country and localized capabilities

Demand will remain strongest across labor-intensive sectors such as healthcare, manufacturing, retail, hospitality, and logistics, where variable demand, skills requirements, compliance obligations, and multi-location operations increase the need for advanced WFM capabilities

Mid-market and large organizations will remain the primary adopters of standalone and advanced WFM platforms, while smaller organizations will more commonly adopt WFM capabilities as part of broader HR and payroll offerings.

Challenges & Success Factors

Key challenges faced by WFM providers include:

- Supporting increasingly complex labor, scheduling, leave, and compliance requirements across industries, worksites, and worker populations
- Balancing labor cost and operational requirements with employee preferences, schedule predictability, fairness, and flexibility
- Improving forecast and scheduling accuracy amid fluctuating demand, skills shortages, employee availability, unplanned absences, and factors such as weather, seasonal patterns, local events, and changes in customer volume
- Connecting WFM platforms with payroll, HCM, finance, POS, ERP, and operational systems to enable accurate and timely data exchange
- Replacing fragmented or legacy WFM systems without disrupting payroll processing, time capture, scheduling, or other business-critical activities
- Applying AI to workforce decisions while maintaining transparency, appropriate human oversight, data security, and client control through defined rules and permissions

- Delivering configuration flexibility without creating excessive implementation complexity or increasing ongoing maintenance requirements
- Maintaining effective implementation, change management, training, and post-deployment support amid limited client resources and competing organizational priorities
- Extending multi-country capabilities while accommodating local legislation, languages, workforce practices, and service requirements.

Key success factors for WFM providers include:

- Deep WFM and industry expertise supported by capabilities designed for varied workforce structures, operating models, and compliance requirements
- Accurate forecasting and scheduling that integrates business demand, employee availability and preferences, skills, labor rules, and cost parameters
- Configurable compliance capabilities that identify potential violations before schedules are published or time and payroll data are finalized
- Mobile employee and manager capabilities that simplify time capture, scheduling, shift changes, availability, time-off, communications, and approvals
- Hiring and onboarding capabilities that allow new workers to transition more efficiently from candidate selection and compliance completion into scheduling and active work assignments
- AI-enabled guidance and workflows that provide recommendations and operate within client-defined policies, thresholds, roles, and permissions
- Flexible architecture and integration capabilities that connect WFM with HR, payroll, finance, and operational systems while maintaining data consistency
- Ability to support increasing employee volumes, additional locations, different workforce types, and multi-country requirements without extensive platform reconfiguration
- Strong implementation and ongoing advisory support for change management, administrator training, adoption, and continued platform optimization
- Analytics and benchmarking that show how labor costs, staffing levels, attendance, scheduling, and workforce productivity affect operational performance
- Demonstrated client outcomes supported by relevant case studies, measurable improvements, and time-to-value metrics.

Outlook

In 2026 and beyond:

- Demand will continue to grow. Mid-market, as well as multi-country and global growth, will be key drivers, particularly as companies seek advanced scheduling and time management capabilities. The highest growth is expected in healthcare and manufacturing
- Conversational and agentic capabilities will increasingly progress from answering workforce-related questions to initiating or completing approved actions, including resolving timecard exceptions, processing time-off requests, adjusting schedules, and addressing coverage gaps

- WFM will continue to evolve toward more continuous workforce operations, with staffing requirements, schedules, attendance, labor costs, and compliance conditions evaluated and adjusted throughout the workday
- Workforce planning will extend further beyond historical labor patterns through increased use of operational data, external demand signals, and scenario modeling
- Hiring, onboarding, and WFM capabilities will integrate more closely, enabling organizations to incorporate worker readiness, qualifications, availability, and work eligibility when filling shifts and addressing staffing gaps
- Platform consolidation, acquisitions, and partnerships will continue as vendors add specialized scheduling, workforce planning, employee communication, compliance, and geographic capabilities
- Standalone WFM providers will maintain relevance among organizations with complex scheduling, union, compliance, and industry requirements that are not fully addressed by broader HCM suites
- Multi-country expansion will remain selective, with providers prioritizing markets that align with existing client demand, product localization capabilities, and delivery coverage.

NEAT Methodology for Workforce Management

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

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

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

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

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

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

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

Exhibit 1

'Ability to deliver immediate benefit': Assessment criteria

Assessment Category	Assessment Criteria
Offerings	Overall breadth of WFM offerings Time, attendance, and leave management Workforce planning, forecasting, and scheduling Workforce compliance and rules management Employee experience Workforce analytics, reporting, and benchmarking Embedded AI capabilities Multi-country WFM capability Industry-specific offerings Platform integration and interoperability
Delivery Capability	Implementation, integration, and deployment capability Client support and engagement model Partner ecosystem Multi-country delivery and support
Market Presence	Overall WFM client presence Multi-country WFM client presence Large/enterprise market (>15K employees) Mid-sized market (500 -15K employees) Small market (< 500 employees) North America Latin America EMEA APAC
Benefits Achieved	Improved workforce and manager effectiveness Improved scheduling and workforce coverage Improved time and pay accuracy Improved compliance and risk management Improved employee experience Improved workforce insights and decision-making Reduced labor and administrative costs

Exhibit 2

'Ability to meet client future requirements': Assessment criteria

Assessment Category	Assessment Criteria
Service	Service culture and caliber of personnel Client partnership and proactivity Agility and flexibility
Investments	WFM platform roadmap AI and analytics roadmap Employee experience roadmap

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

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Sales Inquiries

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

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