

OFFERING OVERVIEW

# Global Talent Mobility Is Key for Enterprise Acceleration in a Pandemic World

How Topia helps enterprises identify and move talent  
to where it matters for enterprise success



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# TABLE OF CONTENTS

Executive Summary .....3

About Topia Global Talent Mobility Platform .....4

Functional Capabilities. ....9

Pricing ..... 15

Analysis and Observations ..... 15

Recommendations ..... 17

Related Research ..... 19

Endnotes ..... 21

Analyst Bio. .... 22

About Constellation Research ..... 23



## EXECUTIVE SUMMARY

This offering overview provides an overview of Topia’s global talent mobility platform. The report describes the underlying market trends, introduces the vendor, and presents key differentiators for Topia’s offering. The report outlines issues important to talent mobility planning in pandemic and post-pandemic periods, and continues with an analysis of strengths and weaknesses of the vendor and concludes with a set of tangible and actionable recommendations for CxOs.

### Business Themes



Future of Work

# ABOUT TOPIA GLOBAL TALENT MOBILITY PLATFORM

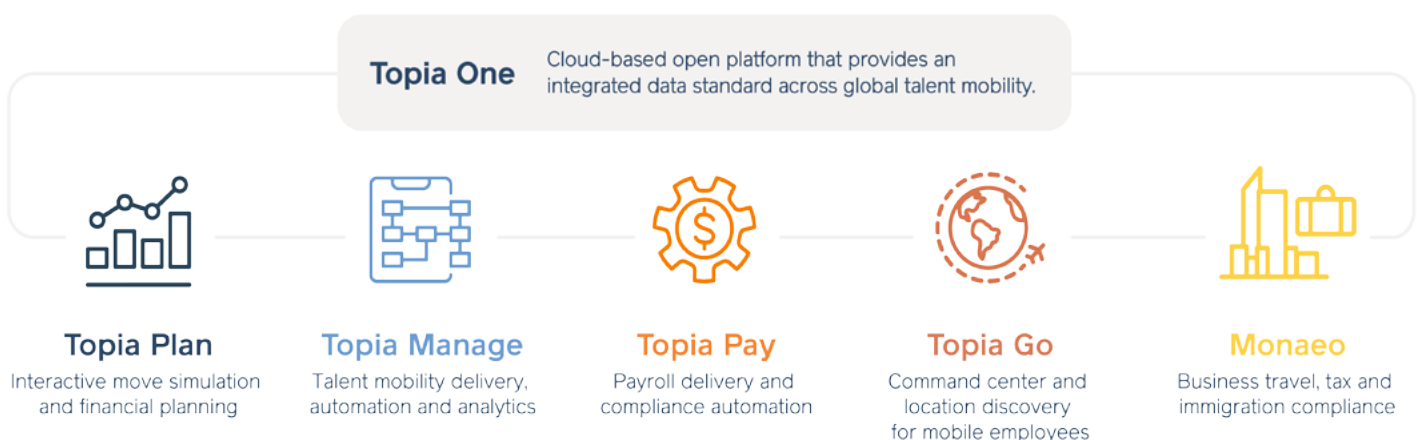
## Overview

Topia was formed in 2012 when founders Brynne Kennedy and Steve Black decided there had to be a better way to globally support the identification and relocation of talent. Through the merger of MOVE Guides, Teleport and Polaris, Topia was formed. Today Topia is led by industry veteran Shawn Farshchi and headquartered in Silicon Valley. With over 120 employees, Topia operates out of three U.S. locations (San Francisco, Seattle and New York) and three European locations (London, Dublin, and Tallinn). Topia is VC funded and raised Series D funding of \$15 million on April 28, 2020, bringing total funding to over \$100 million.

Topia offers a Talent Mobility Platform (see Figure 1), that supports the key elements of global talent mobility:

- **Topia Plan:** Enables real-time planning of global talent movement, with visibility into the cost implications of talent movements as well as to simulate them .

Figure 1 – The Topia Platform



Source: Topia

- **Topia Manage:** Automates the management of global talent mobility through a dashboard that allows management, automation, document management, visibility and reporting on all the tasks involved in moving talent.
- **Topia Pay:** Manages the necessary payroll inputs and interfaces that are needed to make a global talent transfer real. It allows for expense tracking and additional pay-out flexibility with cross border split pay delivery and compliance.
- **Topia Go:** Powers the employee experience with a mobile application that gives global visibility and manageability of transfers.

On March 17, 2020 Topia acquired Monaeo, expanding its functional footprint into business travel, tax and immigration compliance for enterprises and individuals.

## Market Segment

Topia operates in a unique market segment – global talent mobility. Topia operates across a number of subsegments of the HCM market space, specifically:

- **Talent Management.** Topia allows companies to expand the visibility of internal talent beyond the typical national level to a global level. This allows talent acquisition to operate worldwide. Topia also works on the onboarding side of talent management, helping global transferees to onboard in their destination countries.
- **HR Core.** Moving talent across regions and countries affects HR core systems, and Topia provides the necessary interfaces between the relevant HR core systems to support a global transfer of an employee.
- **Payroll.** International transfers have payroll implications, both in the country of origin and destination. Topia automates the necessary interfaces and gives enterprises key support around compliance challenges that arise from global transfers.

With the acquisition of Monaeo, Topia is also becoming a player in the travel management, policy compliance, and travel safety market.

## Talent Deficits fuel the increasing Need for Talent Mobility

Numerous factors have led to a talent deficit in many parts of the world (see Figure 2). An aging population, a deficit in STEM education, low population reproduction ratios are the most prominent drivers.

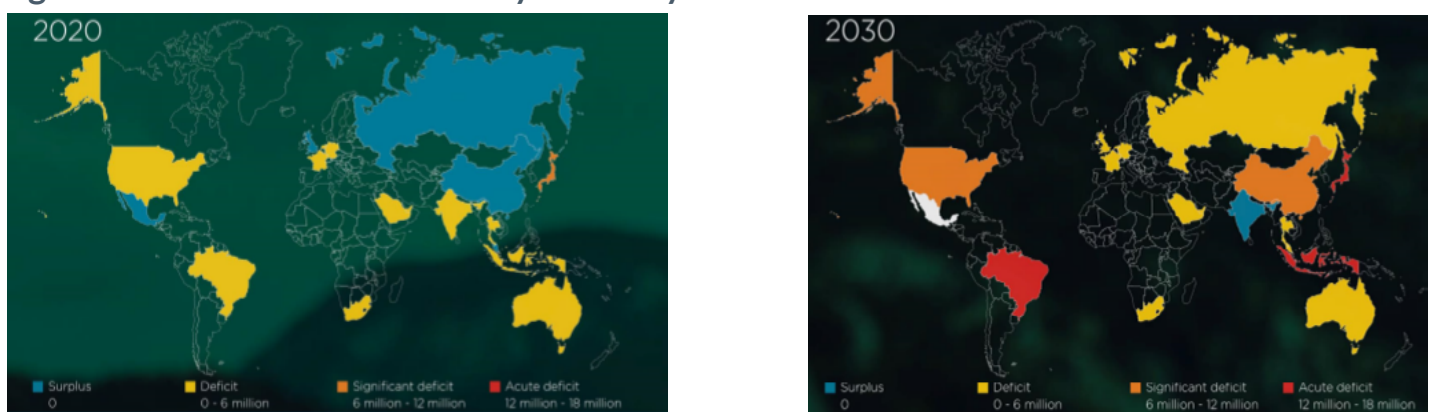
CxOs future-proofing their enterprises need to provide the ability to address the current and growing talent shortage sooner than later. It is likely that the need for better internal talent visibility will become a key topic in the CxO circles by the mid-2020s. Obviously, enterprises that have prepared for this trend and who operate on talent mobility platforms already will be at a key advantage compared to enterprises that wait and delay the implementation of enabling solutions to the talent mobility challenges.

## Topia Enables Enterprise Acceleration

Enterprises need to move faster than ever before – an effect we refer to as Enterprise Acceleration (see Figure 3). Topia enables global enterprises working in the middle layer of the Nine Drivers for Enterprise Acceleration for HR:

- **Lean Recruiting.** Talent visibility needs to go beyond the recruiter and be available to the hiring manager, so talent acquisition can be accelerated. Topia's dashboard

Figure 2 – Global Talent Deficit by economy in 2020 vs. 2030

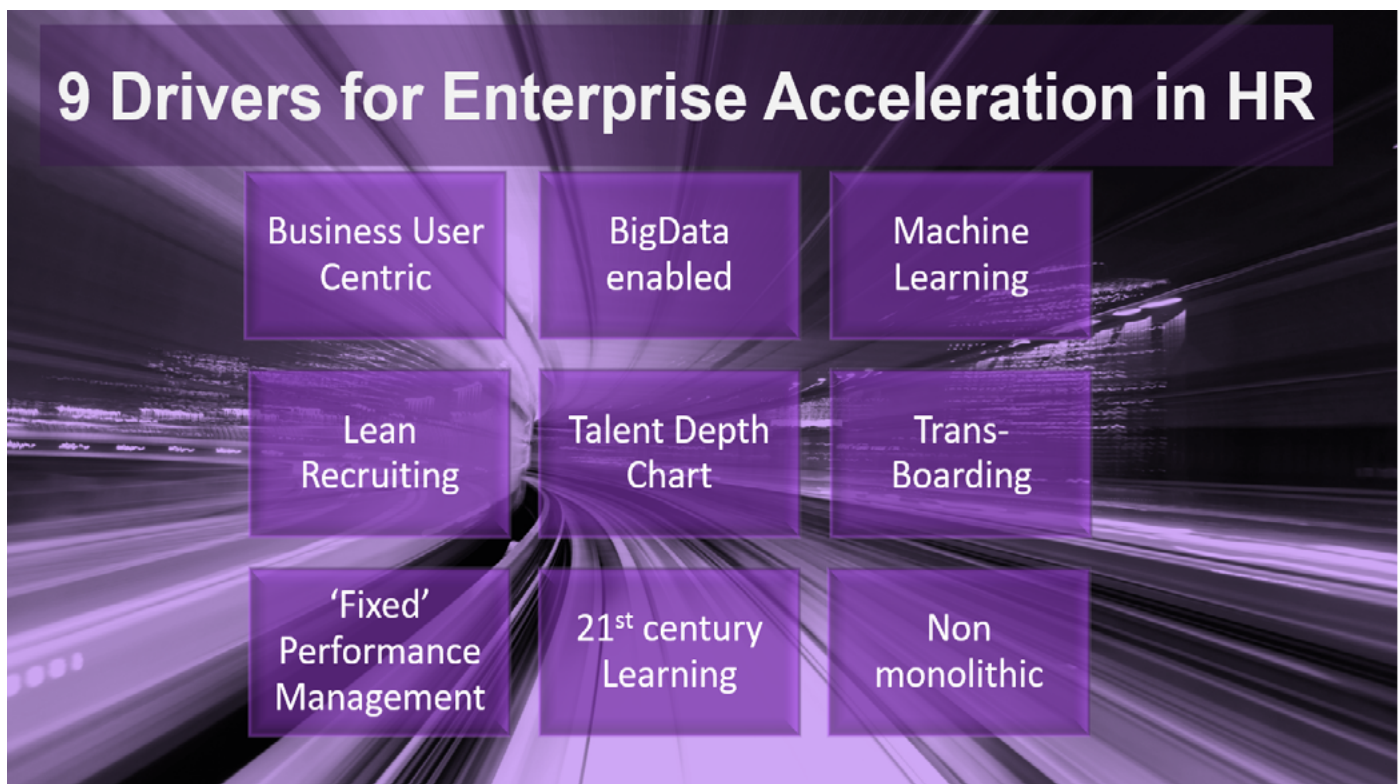


Source: Korn Ferry

for talent visibility enables this, including comprehensive business cases for specific positions / projects.

- **Talent Depth Chart.** Enterprises need to know where talent is, inside and outside the enterprise. Topia enables the visibility for talent inside the enterprise.
- **Transboarding.** Allowing transferees to be productive right at transfer is a key contributor to Enterprise Acceleration. Topia automates manual and error-prone tasks for HR, as well as for the transferee, with back end-integrations that automate the transfer.

Figure 3. The Nine Drivers for Enterprise Acceleration in HR Software



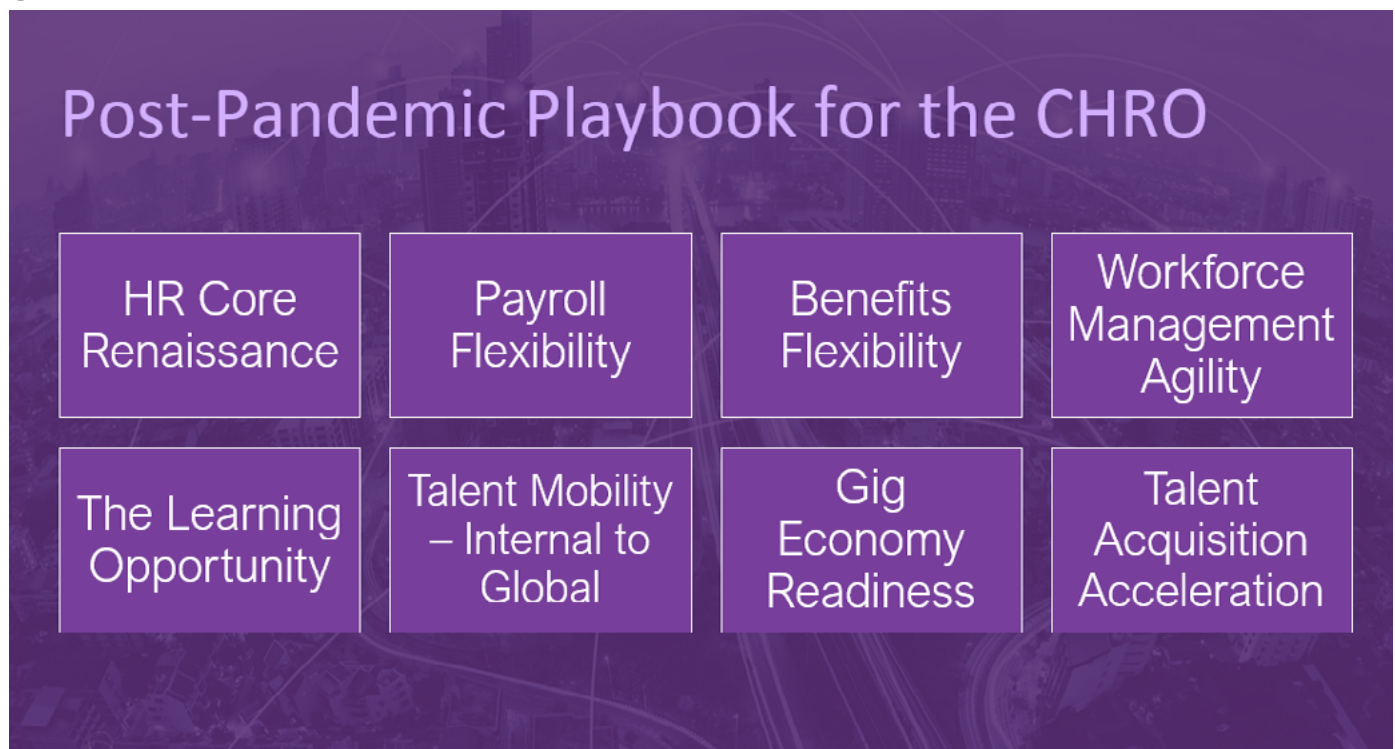
Source: Constellation Research

## Talent Mobility Powers the Pandemic World

Across the eight different strategies in the Constellation Research Post-Pandemic Playbook for the CHRO (see Figure 4), Topia delivers value and key automation across almost all strategic play areas:

- **Talent Mobility – Internal to Global.** Enabling talent mobility on a global basis is Topia's core competence. For enterprises to know where talent can be found, transferring it to where it matters most is key for enterprises to return swiftly to value creation. Missing out on available internal talent is too expensive in a digitally transformed world.
- **Talent Acquisition Acceleration.** As enterprise leaders figure out how to ramp up and ramp down enterprise operations in 70-day cycles (versus the traditional seven-year economy swings), they need faster ways of acquiring talent. Topia enables

Figure 4 – Post-Pandemic Playbook for the CHRO



Source: Constellation Research



faster talent acquisition and complex transfer processes both from a visibility and an automation perspective.

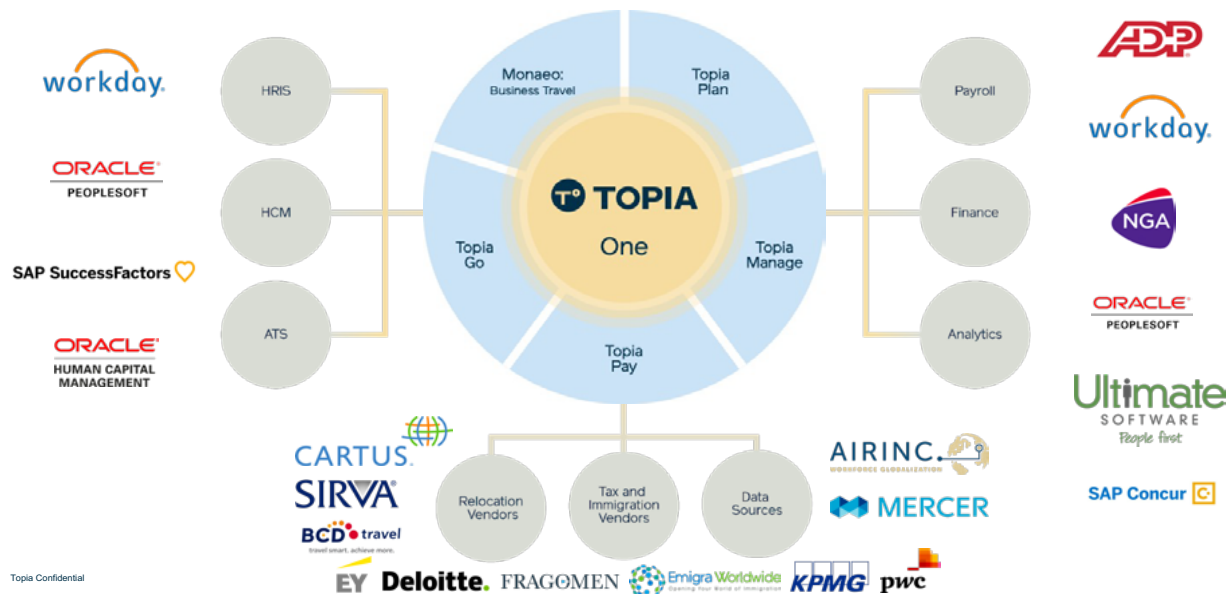
- **Automation for HR core, payroll, and benefits.** Enterprises need to rely on automation more than ever. Topia automates the complex and critical automation processes across HR core systems, payroll and benefits providers.<sup>1</sup>

## FUNCTIONAL CAPABILITIES

### Take A Platform Approach

SaaS vendors have the choice between application- or platform-centric approaches to the architecture of their product. Those vendors who take the application-centric approach end up making platform decisions as well, but they struggle with opening up their platform later in their application life cycle. Topia, on the contrary, chose a platform-centric approach right from the start (see Figure 5). The platform-centric application architecture delivers tangible benefits.

**Figure 5 – Example Topia Platform integrations (50+ partners<sup>1</sup> across HCM, Finance, Mobility and Business Travel)**



Source: Topia, Includes Monaeo partners

- **Purpose-built cloud platforms deliver.** Topia has delivered a cloud-based, purpose-built platform that delivers on the automation of its core use case – automating internal mobility. A cloud-based implementation matters as it allows the necessary elasticity in the offering – both from technical and commercial elasticity perspectives.
- **Platform and best practices merge.** A pure platform is not enough to be an application vendor, best practices need to be provided in a flexible form and fashion to make enterprises successful. Topia does this with workflow templates, flexible policies and business logic that works consistently across web and mobile platforms.
- **Out-of-the-box integration delivers implementation speed.** The nature of global talent mobility is interface heavy, as numerous systems need to be provisioned, synched and deactivated to make a global transfer happen successfully. Topia helps accelerate the implementation of a global mobility implementation with out-of-the-box integration to relevant 3rd-party applications.
- **Openness delivers choice.** No matter how much out-of-the-box integration a vendor can provide, there is always a need for more and additional integration. The openness of the Topia platform enables enterprises to provide additional integrations, for instance to alternative payroll and financial services, as necessary.
- **Security is a table stake.** Needless to say, enterprise systems need to be secure. Topia addresses this key design quality successfully. Notably, security and privacy requirements are addressed on both a local and a global level in the Topia cloud platform.

## Invest in a Data-Driven Knowledge System

A global mobility solution needs to be able to manage substantial amounts of data. Being data driven is key for the sometimes-erratic HR decision process, and decision makers need to be supported with knowledge that will enable them to come to smarter decisions.

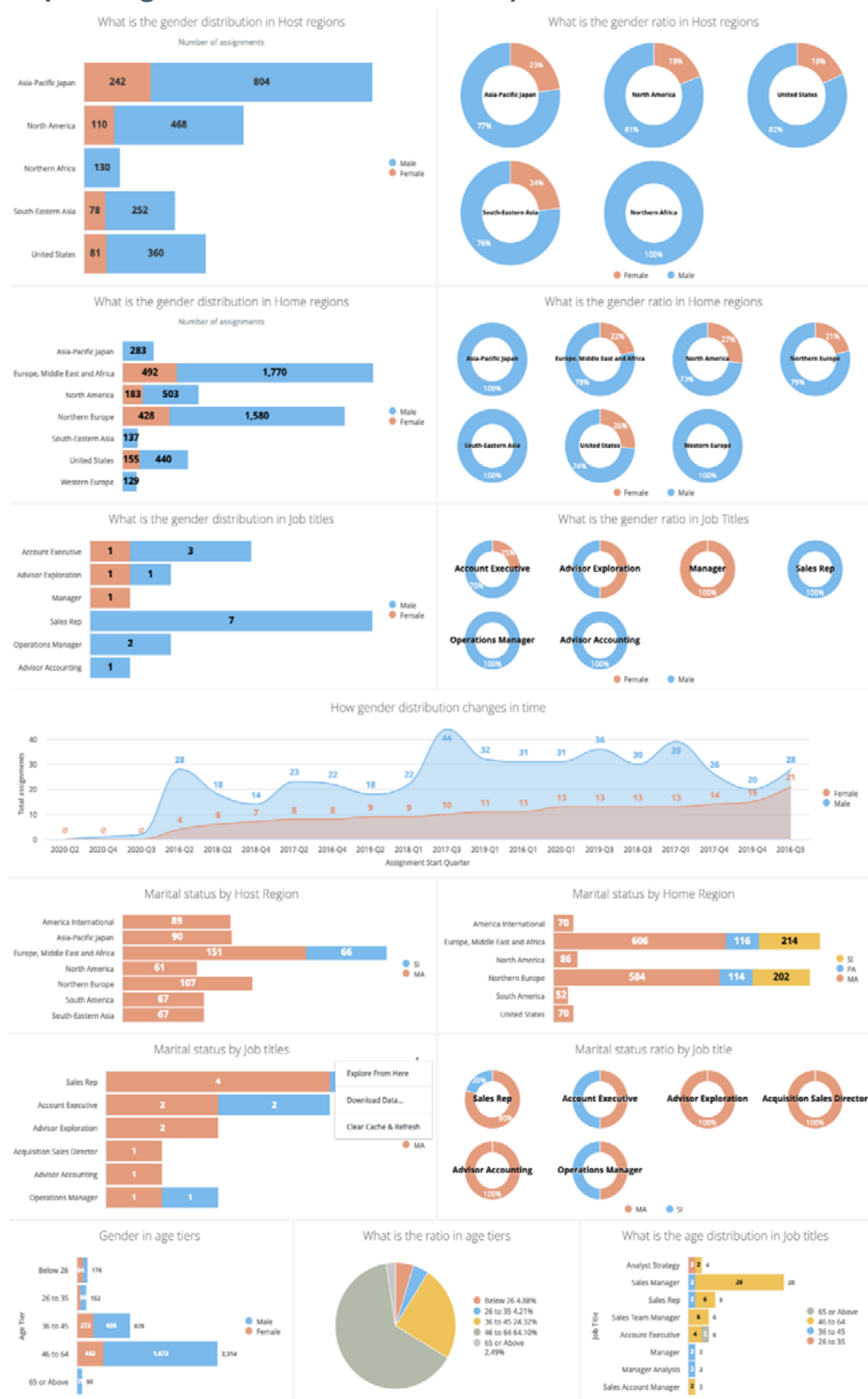
- **Single Source of Truth enables a data-centric approach.** A common data model with out-of-the-box integrations provides one single set of data to make global talent mobility decisions. The Topia Mobility platform comes with out-of-the-box reports and analytics to support data driven decisions.
- **Compliance Management ensures business continuity.** Compliance adds a major complexity dimension to global talent mobility. Topia alerts users of compliance issues across a vast field of compliance topics – from tax, immigration, governance issues as well as enterprise goals in the areas such as diversity, gender pay equality and the like (see Figure 6).
- **Comprehensive Tax Engine for global automation.** The Topia tax engine supports payroll processes across 110-plus countries, handling accruals and cross-border payroll. Beyond the out-of-the-box scope, it is highly configurable and allows for functional expansion during implementation as needed.
- **Benchmarking shows where an enterprise stands.** Topia has enough customer live data so that it can help enterprises by showing them where they stand in comparison with peers in their respective industries and geographies.

## Focus on User Experience

Ease of use remains one of the key success factors for software in enterprises, and Topia has paid attention to usability from the inception of its products.

- **Consumer-Grade UX.** Talent mobility decisions are hard enough, so the user experience should be as intuitive and easy to use as possible. Topia has delivered an easy to use UX for all users involved in a global talent transfer, ranging from the transferee, over the roles of the hiring manager, involved HR specialist and executives, all the way to the global mobility specialist.

Figure 6 - The Topia Insights Dashboard on Diversity



Source: Topia

- **Complete Automation.** All too often island automation happens through best-of-breed vendors, where users must utilize multiple systems to execute and complete a business process. Topia empowers users to complete the whole talent mobility process inside of its UX, allowing, for example, the uploading of HR core master data, and importing those into HR core systems through interfaces in the background (see Figure 7).

**More than software.** Sometimes the best UX is not enough, and users must look for help beyond the software. Topia remains dedicated to the customer, providing responsive and frictionless support – all to enable customer success with global talent mobility.

## Customer References

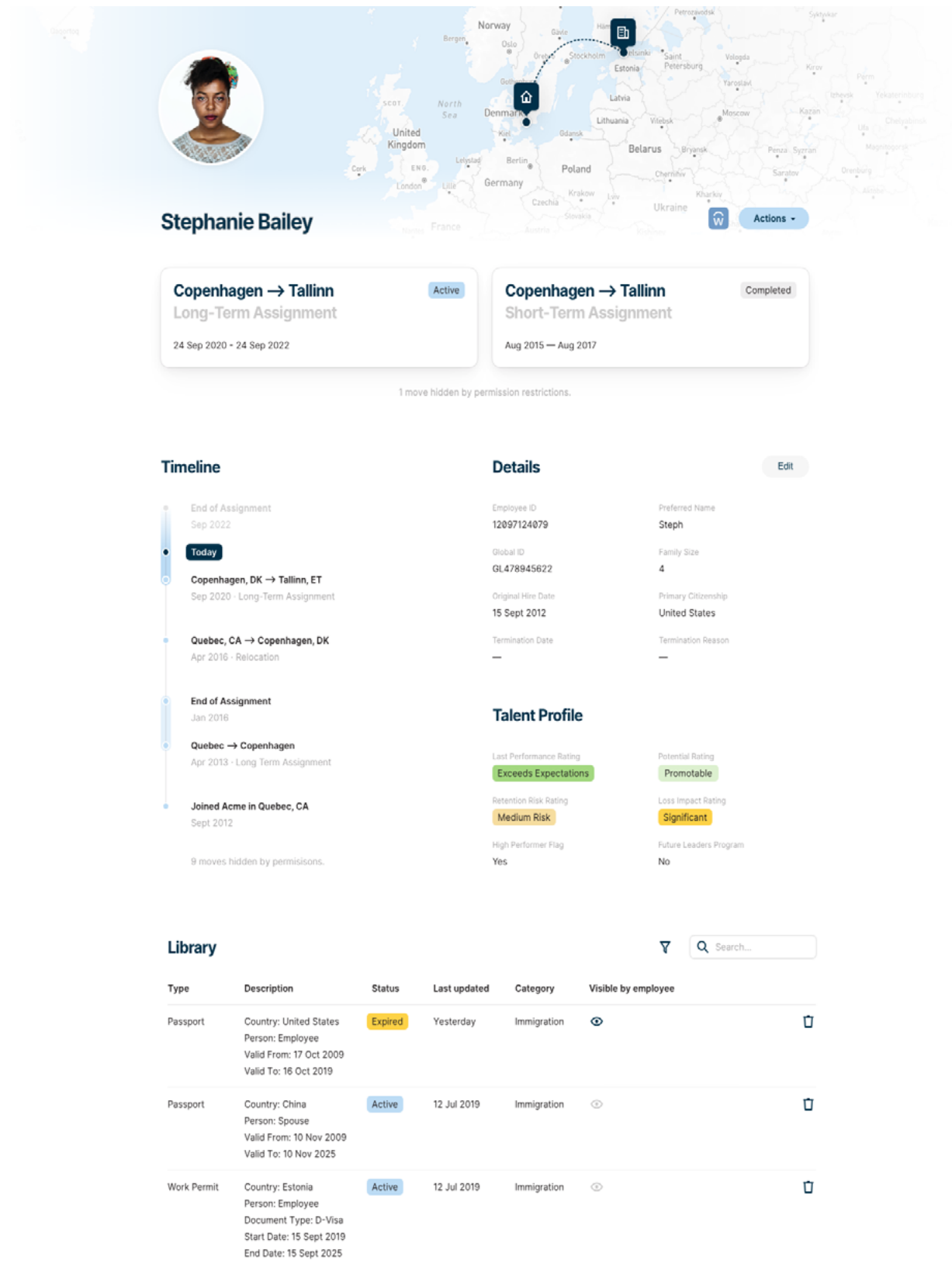
Topia has acquired a long list of blue-chip customers over the almost one decade of operation. Axa, Criteo, Dairy Farm, Dell Technologies, Equinor, Fuze, Hitachi Vantara, Johnson Electric, Kaltura, Memphis Meats, Morning Star, Nortek Security and Control, Paypal, Palantir, Schneider Electric, Siemens, Skyscanner, Texas Mutual Insurance Company and Veolia Group are only few of them.

Customer comments buttress claims for the software's applicability.

“Topia’s technology has allowed us to automate complex global mobility processes and improve the level of self-service we can offer to our business. We have transformed the way that we work and are more efficient in delivering better services for our HR partners.” – Olga Kravchenko, Global Head of International Mobility and CEMI, AXA.

“Choosing Topia has been a great decision for Criteo! We have access to more data than ever before - we have visibility into every live move and are more responsive partners to our business. Having access to Topia Go has significantly improved our employees’ experience.” – Cynthia Callatin-Saar, Global Mobility Manager, Criteo.

Figure 7 – The Transferee UX



Source: Topia

“With Topia, we have integration with our HCM, giving us a centralized repository of our global mobility data. This enables us to produce automated calculations and data transfers across multiple systems.” – Myrna Dela Cruz, Head of Global Mobility, Equinor.

“Topia makes a very stressful process - moving - fairly easy for our employees and we are very grateful for that. When we send our candidates over to Topia, we know that they will be well taken care of.” – Stephanie Jean, Recruiting Operations Coordinator, TrueCar.

## PRICING

Topia's pricing is not shared publicly. It is based on procured functionality and products and paid as an annual license fee.

Constellation can provide price benchmarking for clients on request.

## ANALYSIS AND OBSERVATIONS

Constellation sees the following strengths and weaknesses for Topia:

### Strengths

The following are the strengths of Topia:

- **Purpose-built platform delivers key requirements.** Topia has been able to create and operate a purpose-built platform for global talent mobility. Others would have to build the same and validate it with customers. This gives Topia a 2- to 4-year lead over the traditional talent management / HCM vendors looking to enter the space.
- **Rich expertise in subject creates differentiation.** Focusing on global talent mobility gives Topia differentiation in the talent management space. That expertise is not easy to replicate – but substantial enough to derive abundant automation synergies for its customers.

- **Large customer base proves independence.** Having been in the business for almost a decade, Topia has a large customer base that gives it the independence every software vendor needs. Marquee / brand names are very present among Topia customers, and will give Topia an advantage in client acquisition in the vendor's next decade.

## Weaknesses

The following are the weaknesses of Topia:

- **It is a smaller player versus HCM vendors.** When it comes to automating global processes reach, scale and financial strength matter. Topia is a fraction of the size of the largest HCM vendors, which could take interest in the space (spurred on, for example, by organizational upheaval due to the COVID-19 pandemic), and could make life much harder for Topia.
- **HCM / ERP vendors may wake up.** It is not only the HCM vendors that may look into the space. Even more deep pocketed ERP vendors (with an HCM offering) may be interested to enter the global talent mobility market segment.
- **Talent identification needs to be built.** Topia has built a market leading platform to transfer talent and deal successfully with the intricate requirements of that process. The starting point of any internal talent transfer though is the identification of the talent to start with. Topia needs to get stronger in the area of talent identification in order to fully cover the global talent mobility automation range – starting from square one (see Figure 8).



Figure 8. Topia – Strength and Weaknesses

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"><li>• Purpose-built platform</li><li>• Rich expertise in subject</li><li>• Large customer base</li></ul>	<ul style="list-style-type: none"><li>• Smaller player vs HCM vendors</li><li>• HCM / ERP vendor may wake up</li><li>• Talent Identification needs to be built</li></ul>

Source: Constellation Research

## RECOMMENDATIONS

Constellation has the following recommendations for the internal talent mobility space:

- 1. Find a solution for Global Talent Mobility.** It is clear that talent mobility is key for enterprises in a more challenging and dynamic world. Internal transferees are productive faster and usually more successful than external hires. Being able to tap into the enterprises' inherent talent pools is key for an enterprise that not only have to practice enterprise acceleration, but also demonstrate to their people that they matter. Internal growth is a key factor for employee satisfaction and influences of employee engagement.
- 2. Globalization is here to stay, automate for it.** Globalization is here to stay, and pandemics will make the need for global operations even more urgent, to help benefit and increase enterprise resiliency. But global enterprises are complex, so CxOs should not embrace tedious, manual and error-prone processes if they truly want to take advantage of globalization opportunities. The sooner an enterprise can automate its global processes, the better it will do, as global processes will get more complex.
- 3. The Automation Imperative gets stronger in a pandemic world.** What can be automated, should be automated in a pandemic world. This imperative sees enterprises moving quickly to automate formerly manual processes. Automated, machine-driven, and software enabled processes allow an enterprise to scale with consistency, instead of relying entirely on wits and talent of people in key positions.

4. **Evaluate your ERP / HCM roadmaps.** Suites have won in the past for enterprise software, and they may be the winning formula going forward as well. Therefore, CxOs looking for internal talent mobility solutions should check their existing vendors' roadmaps first. It is likely, however, that internal talent mobility will not be found to be a high-priority item for most ERP / HCM vendors. CxOs need to be cognizant of not losing time waiting for a solution to an automation problem that is already solved by best-of-breed vendors.
5. **Confirm out-of-the-box, vendor offered integration.** Given the complexity of global implementations, CxOs evaluating global talent mobility platforms, need to pay special attention to availability and applicability as well as the ability to implement the out-of-the-box interfaces that vendors offer. The quality and speed of implementation of these interfaces directly influences the ROI of any global project in general, and talent mobility solutions in specific. "Trust is good, testing is better" is a very valid adage in this regard.
6. **Select a global Talent Mobility vendor.** CxOs should not be reluctant to select best-of-breed global talent mobility vendors. The need for automation of the complex international transfer processes will only increase. As it is combined with a more intense need to tap into global talent pools – a need that is exacerbated by COVID-19 – choosing standalone global talent mobility solution is the right decision in almost all selection scenarios.

## RELATED RESEARCH

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For an overview of leading HR system vendors, see: Holger Mueller, “Propelling the Future of Work with Key HCM Suites,” Constellation Research, June 7, 2019. <https://www.constellationr.com/research/propelling-future-work-key-hcm-suites>

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For more on Enterprise Acceleration, see: Holger Mueller, “Why People Leaders Must Embrace Enterprise Acceleration,” Constellation Research, July 3, 2018. <https://www.constellationr.com/research/why-people-leaders-must-embrace-enterprise-acceleration>

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For the impact of AI on HCM, see: Holger Mueller, “AI Changes HR Like Nothing Else Before,” Constellation Research, June 14, 2019. <https://www.constellationr.com/research/ai-changes-hr-nothing-else>

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For the impact of blockchain on HCM, see: Holger Mueller, “The Looming Impact of Blockchain on HR & the Future of Work,” Constellation Research, September 7, 2018. <https://www.constellationr.com/research/looming-impact-blockchain-hr-future-work>

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For more on recent HCM trends, see: Holger Mueller, “Eight Trends Affecting HCM in 2018,” Constellation Research September 11, 2018. <https://www.constellationr.com/research/eight-trends-affecting-hcm-2018>

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For an overview of North American payroll vendors, see: Holger Mueller, “Constellation ShortList Payroll for North American SMBs,” Constellation Research, August 28, 2019. <https://www.constellationr.com/research/constellation-shortlist-payroll-north-american-smb-2>

## RELATED RESEARCH CONTINUED

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For an overview of workforce management suites, see: Holger Mueller, “Constellation ShortList Workforce Management Suites,” Constellation Research, August 14, 2019. <https://www.constellationr.com/research/constellation-shortlist-workforce-management-suites-2>

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For an overview of Europe-headquartered talent management vendors, see: Holger Mueller, “Constellation ShortList European Talent Management Suites,” Constellation Research, August 14, 2019. <https://www.constellationr.com/research/constellation-shortlist-european-talent-management-suites>

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For an overview of compensation management vendors, see Holger Mueller, “Constellation ShortList Compensation Management,” Constellation Research, August 21, 2019. <https://www.constellationr.com/research/constellation-shortlist-compensation-management>

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For an overview of benefits administration vendors, see Holger Mueller, “Constellation ShortList Benefits Administration,” Constellation Research, August 14, 2019. <https://www.constellationr.com/research/constellation-shortlist-benefits-administration>

## ENDNOTES

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- <sup>1</sup> For example, Topia delivered certified Workday Integration on April 8th, 2020: Topia Completes Workday Approved Integration, <https://www.topia.com/company/news/topia-completes-workday-approved-integration/>

# Holger Mueller

Vice President and Principal Analyst

Holger Mueller is vice president and principal analyst at Constellation Research, providing guidance for the fundamental enablers of the cloud, IaaS, PaaS, with forays up the tech stack into big data, analytics and SaaS. Holger provides strategy and counsel to key clients, including chief information officers (CIO), chief technology officers (CTO), chief product officers (CPO), investment analysts, venture capitalists, sell-side firms and technology buyers.

Prior to joining Constellation Research, Holger was VP of products for *NorthgateArinso*, a KKR company. He led the transformation of products to the cloud and laid the foundation for new business-process-as-a-service (BPaaS) capabilities. Previously, he was the chief application architect with *SAP* and was also VP of products for *FICO*. Before that, he worked for *Oracle* in various management functions—both on the application development (CRM, Fusion) and business development sides. Holger started his career with *Kiefer & Veittinger*, which he helped grow from a startup to Europe's largest CRM vendor from 1995 onwards. Holger has a Diplom Kaufmann from University of Mannheim, with a focus on Information Science, Marketing, International Management and Chemical Technology. As a native European, Mueller speaks six languages.

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## Organizational Highlights

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- Organizers of the Constellation Connected Enterprise—an innovation summit and best practices knowledge-sharing retreat for business leaders.
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