



# SEI's Mobility-Centric Culture Reduces Agency Spend and Doubles Hires





# The Challenge

Technology and investment solutions provider SEI® is on a mission to *build brave futures*™ through the power of connection — which means investing in their employees' growth is non-negotiable.

SEI recognized early on that strong internal mobility is the path to success — both in terms of employee satisfaction and retention, as well as more efficient talent acquisition spending and workforce planning, according to Chris Carey, HRIS Director.

Yet the perception of hiring managers “poaching” other teams’ talent needed to be overcome to get company-wide buy-in.

Another challenge? “We had no real career site for both internal and external candidates. That was our biggest gap,” Carey shared. “We had a lackluster career page that fed into our applicant tracking system, which just led to further complications. We needed to find better alignment to evolve.”

But SEI didn’t want just another point solution. They wanted a fully integrated platform that would transform both their talent acquisition and management processes while simultaneously providing a next-level experience and better communication among their teams and candidates.

“Internal mobility was a top agenda item. We wanted to get people moving around the company, but we needed a mindset shift first.”

**Chris Carey**

HRIS Director  
SEI



# The Solution

When Carey spoke with Phenom at an HR industry conference, Phenom's approach to connecting people and data to benefit all talent stakeholders stood out compared to other providers. "The fact that Phenom primarily came from a technology and AI background interested me," he noted. "And the conversations we had on ways to grow our offering just made sense."

After implementing a [Phenom Career Site](#), [CMS](#), and [CRM](#) to improve their external candidate experience — as well their recruiters' ability to build, engage, and track talent pipelines — SEI soft-launched [Phenom Talent Marketplace](#).

A key product of Phenom's employee experience capabilities, Talent Marketplace gives internal talent more actionable visibility into open roles and growth opportunities within the company. A convenient employee portal that integrates with both SEI's CRM and ATS allows employees to search and apply for new internal jobs, all recommended to them based on their experience, skills, and interests. Through it, employees can identify future roles and the skills required to get there through career pathing, learning and development courses, short-term gigs or projects, and even mentorship opportunities.

On the back-end, sourcers and recruiters are able to quickly identify employees who want to move positions and proactively reach out to fill internal opportunities, while hiring managers are better able to identify and fill skill gaps while boosting employee engagement.

"Phenom approaches the experience — for both external and internal talent — differently than anyone else we spoke to. We knew we could advance our goals and grow together."

**Chris Carey**







# The Results

Conscious of hiring manager concerns of losing employees to other departments, SEI initially launched their internal talent marketplace with little fanfare, Carey shared. Yet the avid response from employees revealed they'd hit on a true need: "After three months, we found 1,500 people submitted applications. Without even telling people about it, they just found it. People definitely want to move around the company," he noted.

The marketplace has been especially resonant with the company's newer employee base. "It's been great for employees who are early in their career and looking for something different. It's so easy for them to create a profile, add their resume, keep it updated, and see relevant jobs based on their skills, experience and interests."

Used in combination with the CRM, the Talent Marketplace is also helping SEI recruiters accelerate hiring efforts considerably — especially for high-volume roles. "With Phenom's tools, we were able to hire for over 200 jobs with one person, versus 30 to 40 jobs previously," Carey shared. "That's a big win for us. We've seen an uplift in filling repeatable roles quickly thanks to Phenom's automation and employee mobilization."

Another huge benefit as a result? SEI is able to scale hiring efforts internally, saving thousands of dollars in staffing agency fees. "We're definitely not using agencies like we used to because of the tools we have now," said Carey. "If you spend \$200,000 on two recruiters that can do all your hiring, you could potentially save \$1,000,000 on agency costs and net \$800,000," he hypothesized.

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**Chris Carey**



# What SEI is Achieving With Phenom

“Our ability to hire internally and mobilize employees rather than paying outside agencies gets better every year, thanks to Phenom.”

Chris Carey  
HRIS Director



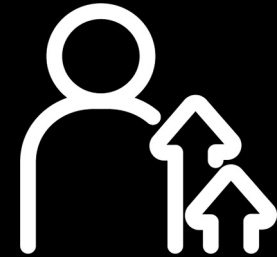
1,500

Internal applicants in  
3 months



200

Jobs filled in 1 year by  
1 FTE recruiter



2x

More new hires



Reduced agency spend





# The Future

The positive feedback from employees and recruiters alike has changed the mindset of hiring managers to actively embrace internal mobility, inspiring Carey and his team to create an internal mobility index metric.

The metric uses Phenom data in tandem with SEI's ATS to measure total mobility — including promotional and lateral moves within the company. "Now we'll have effective ways to track mobility and adjust our strategies," Carey explained.

Moving forward, Carey wants to focus on maximizing all the Phenom capabilities at their disposal — likening the breadth and depth of automation at their fingertips to the seemingly

endless enhancements of a new car. "You don't realize the full benefits until someone shows you," he noted, eager to participate in Phenom's user community to share learnings and see how others are optimizing the platform.

"College hiring is what will be the next big thing for SEI," he said, expressing why **Phenom University Recruiting** is a keen area of interest. "It significantly impacts the entire company's growth, and we're committed to excelling."

Further down the line, SEI is looking to implement **Phenom AI Scheduling** to scale the company ecosystem with even more convenient, seamless automation.

"I see our journey with Phenom as a continuous evolution," Carey said. "We're confident in our partnership choice, and we're getting there together."





For more than 50 years, SEI has delivered technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to solve problems, manage change and help protect assets—for growth today and in the future.

SEI’s culture is built upon its values of courage, integrity, collaboration, inclusion, connection, and fun. It prioritizes personal and professional growth. “We are a place to inspire your work, build your voice, and grow your community. We’re different. And we’re proud of it.”

<b>Industry</b>	<b>Financial Services</b>
<b>Career site</b>	<b><a href="https://careers.sei.com">careers.sei.com</a></b>
<b>Headquarters</b>	<b>Oaks, PA</b>
<b>Employees</b>	<b>3,800</b>
<b>ATS</b>	<b>PeopleFluent</b>





# See the Phenom Intelligent Talent Experience platform in action

Book a demo

## Candidate Experience

Best-fit candidates find and choose you faster. Attract job seekers and broaden talent pools with personalized job recommendations and an intelligent career site.

## Recruiter Experience

Recruiters become wildly productive. Discover and engage top talent with AI, put tedious tasks on autopilot, and maximize your team's ability to streamline workflows.

## HR Experience

HR leaders align employee development with company goals through an intelligent workforce planning solution that allows them to identify skill and competency gaps, manage career frameworks, and identify DE&I opportunities.

## Employee Experience

Employees develop their skills and evolve their careers. Upskill, evolve, and retain your workforce with intelligence and personalized opportunities.

## Manager Experience

Managers build stronger-performing teams with real-time analytics, insights, and collaboration tools.

## HRIS Experience

HRIS teams seamlessly integrate with your HR tech stack — including ATS, HCM, and LMS tools — to create a holistic infrastructure.



# Helping a billion people find the right job.

Phenom has a purpose of helping a billion people find the right job. Through AI-powered talent experiences, employers are using Phenom to hire employees faster, develop them to their full potential, and retain them longer. The Phenom Intelligent Talent Experience platform seamlessly connects candidates, employees, recruiters, hiring managers, HR, and HRIS — empowering over 500 diverse and global enterprises with innovative products including Phenom Career Site, Chatbot, CMS, CRM, AI Scheduling, Video Assessments, Campaigns, University Recruiting, Talent Marketplace, Career Pathing, Gigs, Mentoring, and Referrals.

