

# The Future is Now- Where is Contingent Workforce Management Headed?

North America

**Speakers:**

Andrew Karpie, Research Analyst, Staffing Industry Analysts

Dawn McCartney, Director, CW Strategy and Research, Staffing Industry Analysts

Jon Osborne, VP of Research, Staffing Industry Analysts

Bryan Pena, VP of CW Strategy & Research, Staffing Industry Analysts

**Moderator:**

Subadhra Sriram, Editorial Director, Staffing Industry Analysts



January 22, 2013  
10 am PT/ 1 pm ET

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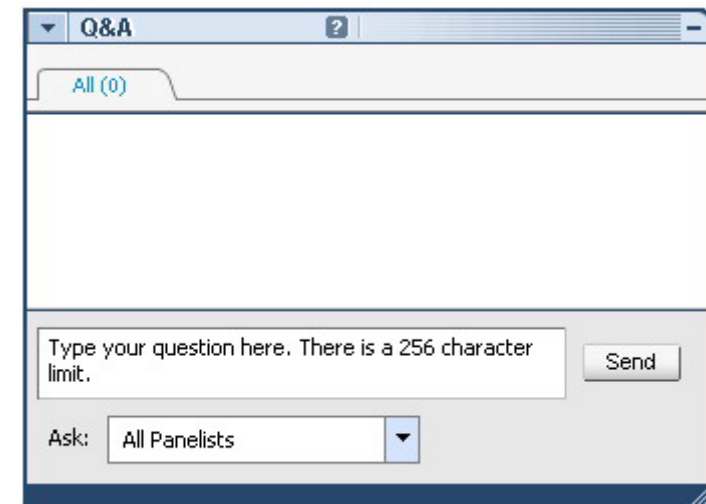
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Staffing Industry Analysts is the global advisor on contingent work

- **Over 700 firms benefit from our international research services**
  - 19 of the world's 25 largest staffing firms are members
  - More than 60 buyers of contingent labor are members of our CWS Council, representing over \$100 billion in annual contingent workforce spend
  - Customers in more than 25 countries
- **Founded in 1989**
  - Acquired by Crain Communications (\$200M media conglomerate) in 2008
  - Headquartered in Mountain View, California and London, England
  - 80+ years of industry and advisory service experience among executive team



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North America

# CWS Summit Berlin 2013



## SAVE THE DATE!

### Contingent Workforce Strategies Summit

May 15-16, 2013

Andel's Hotel | Berlin, Germany

[www.cwssummitwe.eu](http://www.cwssummitwe.eu)



North America

# CW Solutions Forum and CWS Summit Chicago 2013



## MARK YOUR CALENDAR!

Fairmont Millennium Park | Chicago, IL



September 10, 2013



September 11-12, 2013



September 10-12, 2013



## Our Speakers Today



**Andrew Karpie,  
Research Analyst,  
Staffing Industry Analysts**



**Jon Osborne,  
VP of Research,  
Staffing Industry Analysts**



**Dawn McCartney,  
Director,  
CW Strategy & Research,  
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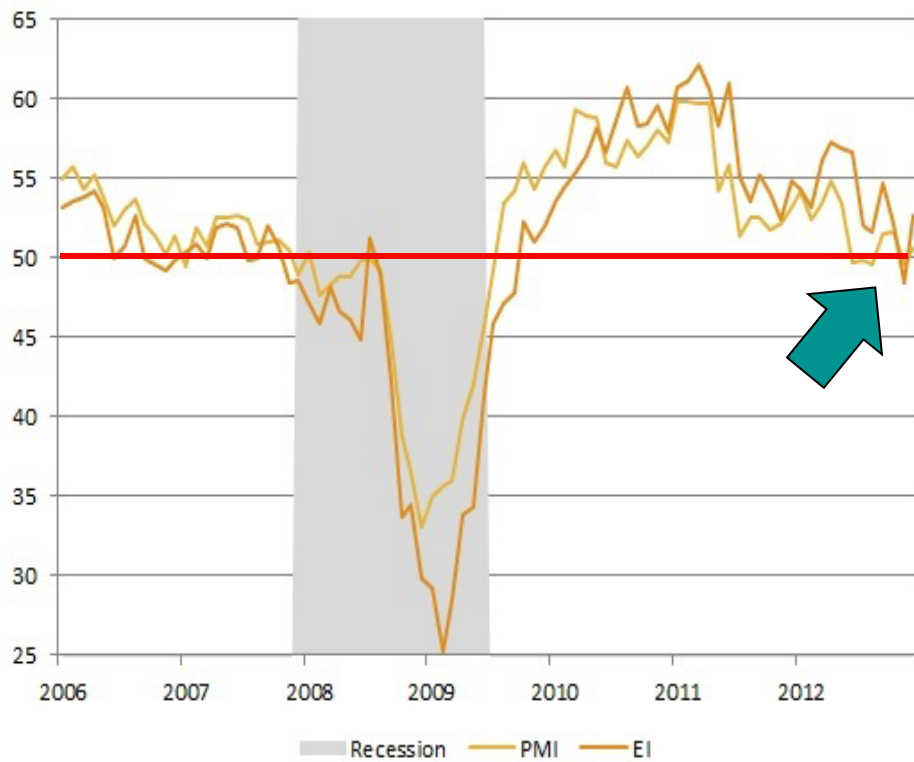


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Editorial Director,  
Staffing Industry Analysts**

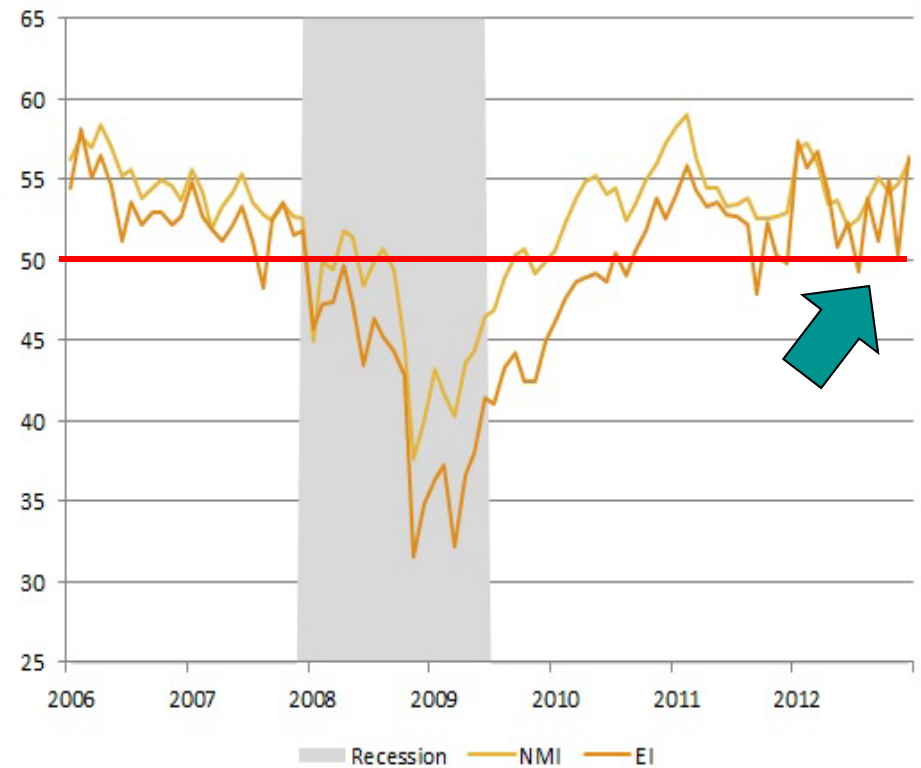
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## Both purchasing manager's indices above fifty

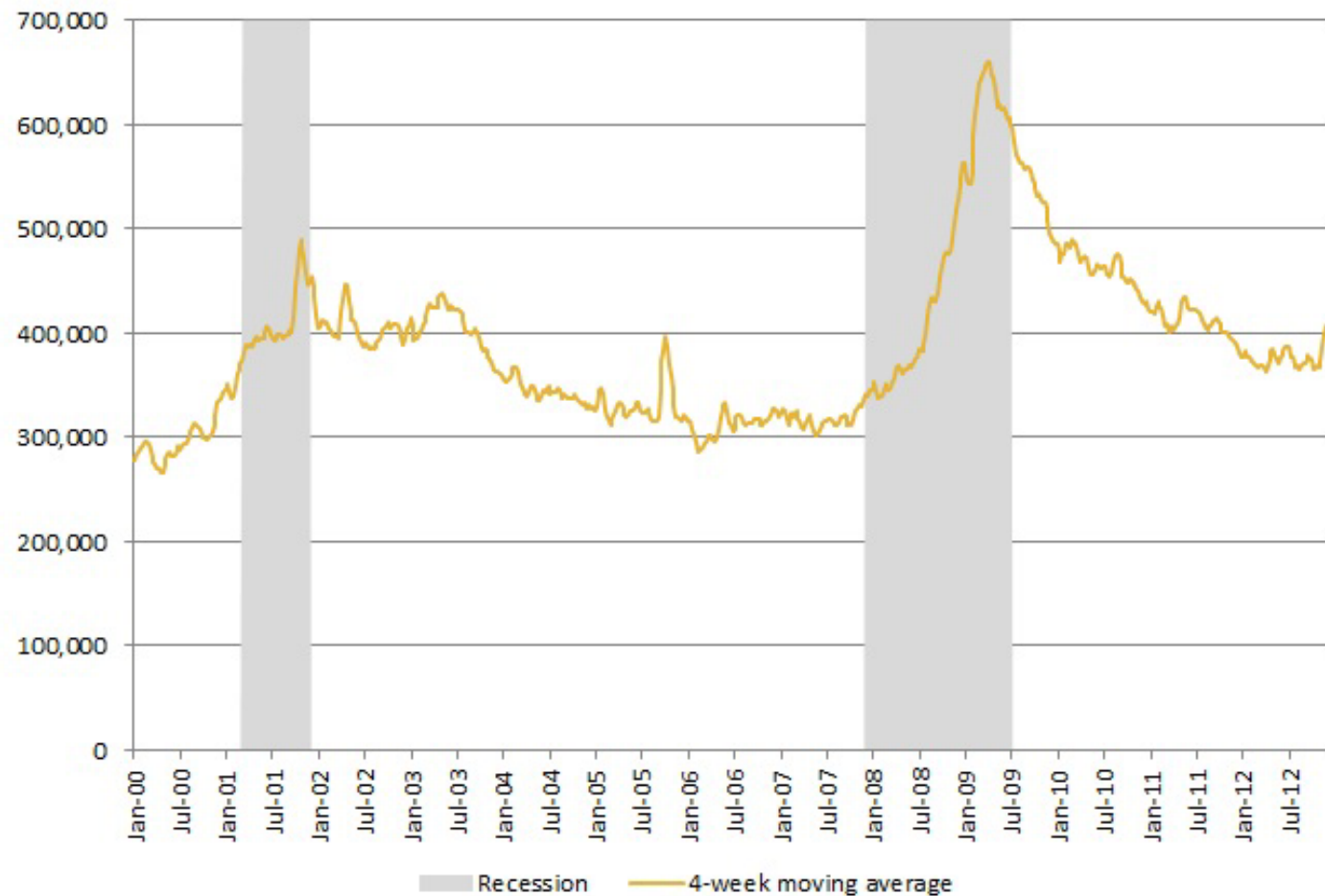
**Purchasing Manager's Manufacturing Index**



**Purchasing Manager's Non-Manufacturing Index**

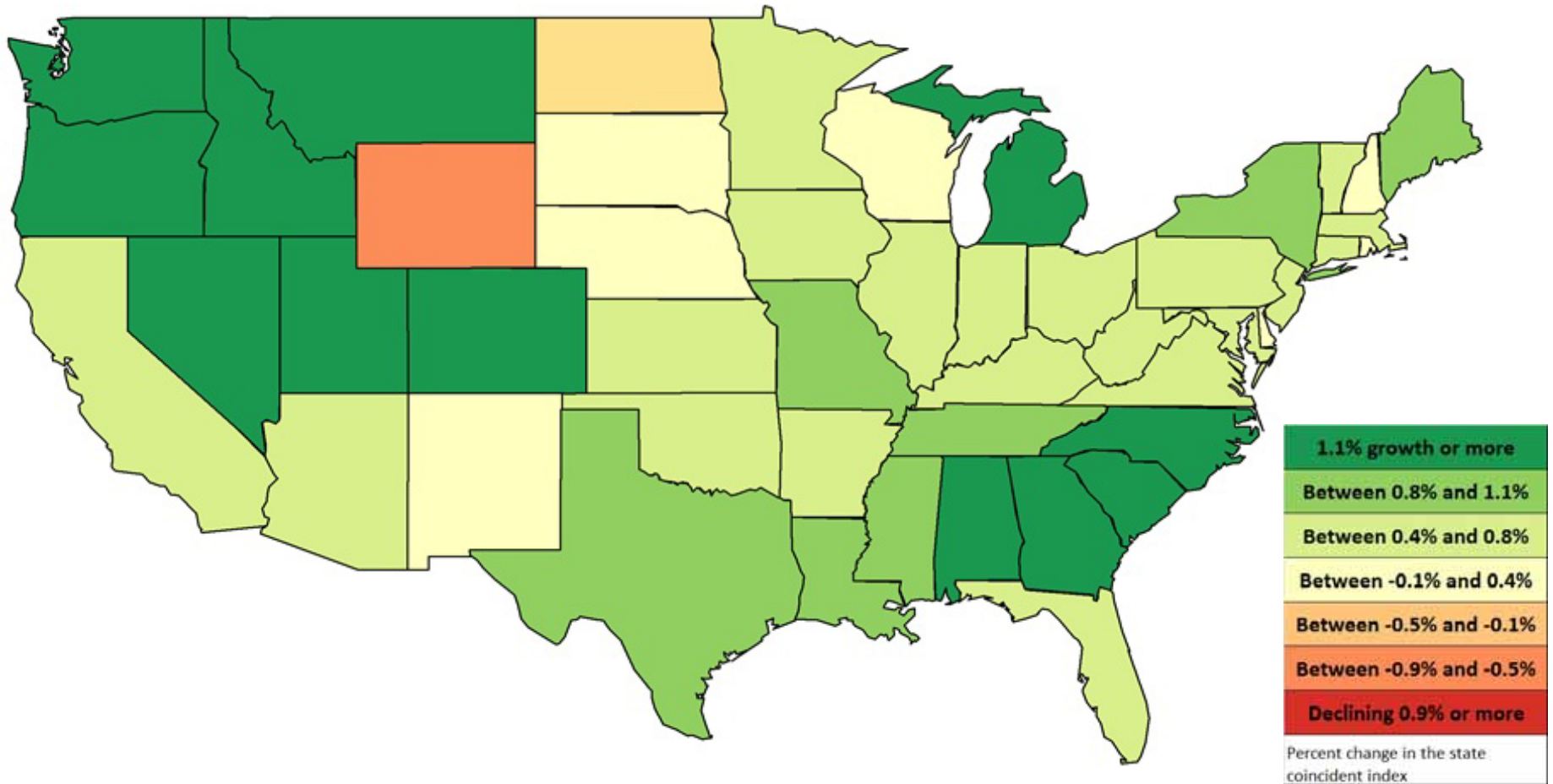


## New unemployment claims solidly below 400K



Source: Department of Labor & Staffing Industry Analysts

## More evidence of turnaround: lots of green



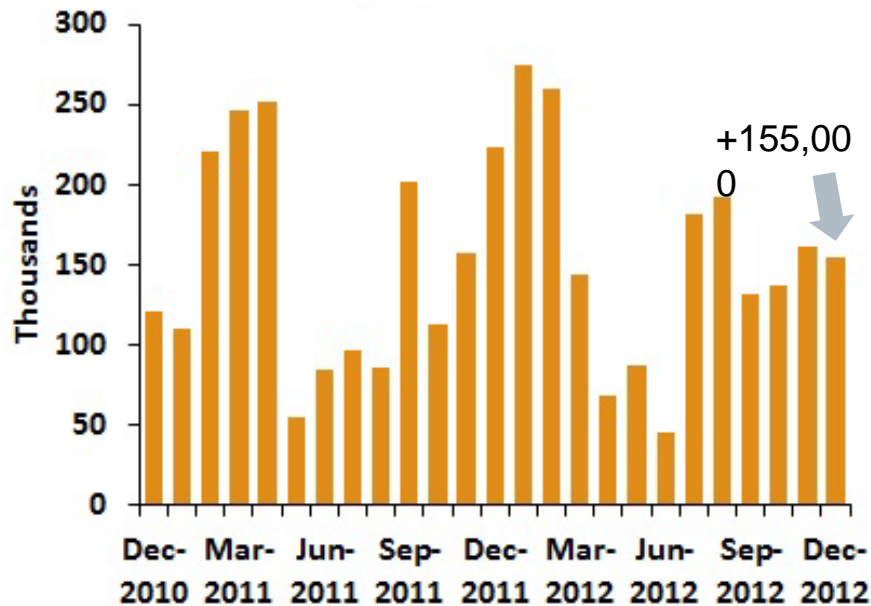
Source: Philadelphia Federal Reserve & Staffing Industry Analysts

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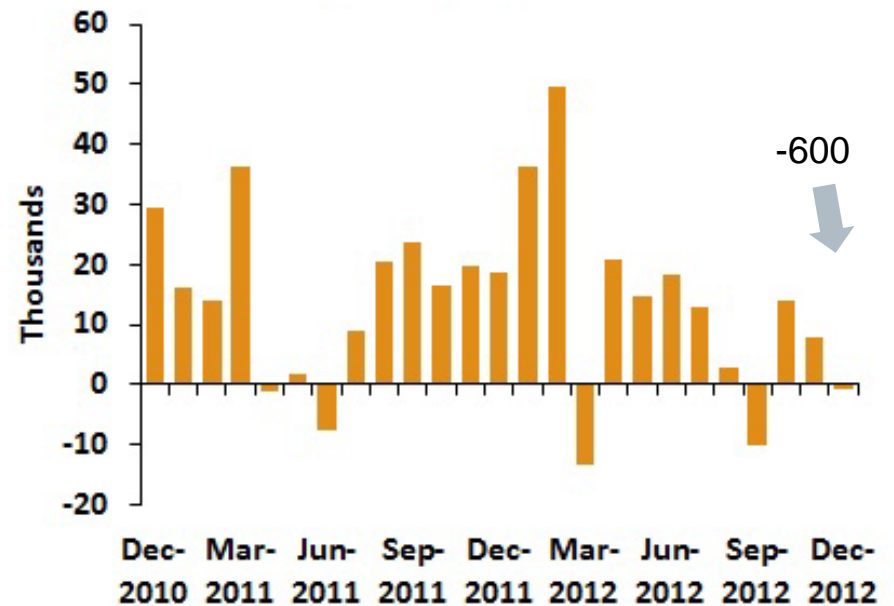


## Trends in total employment & temp employment

### Monthly Change in Total Nonfarm Employment

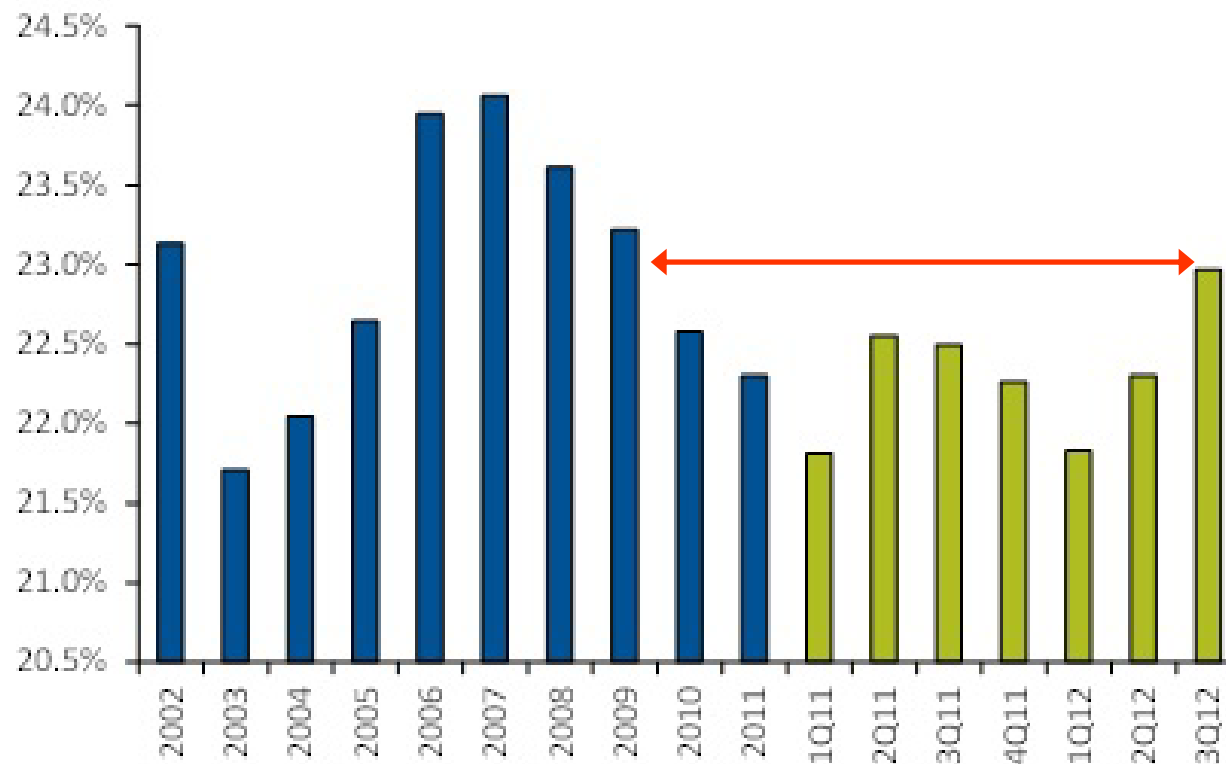


### Monthly Change in Temporary Help Employment



But margins highest since 2009

### Median Gross Margin for Eight Large Publicly-Held Staffing Firms



## Historical trend in y/y gross margin change

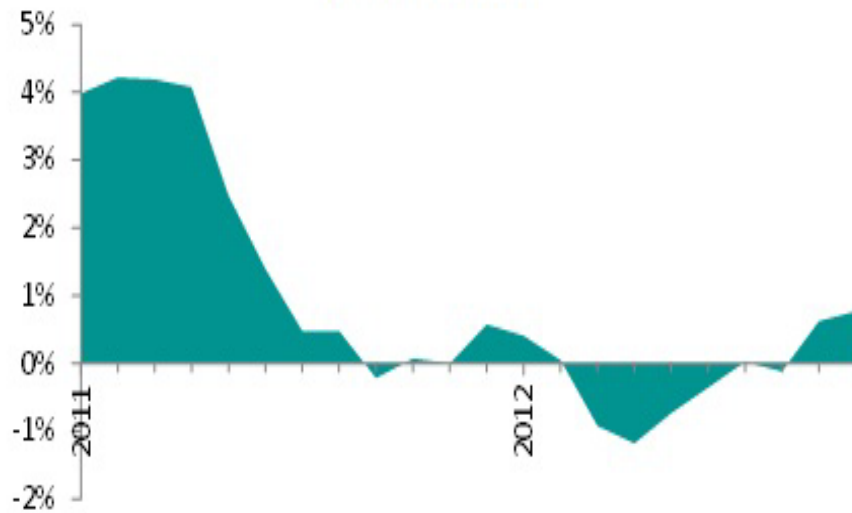
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	3Q12 vs 3Q11
Resources Connection	-1.8%	-0.2%	-1.1%	-0.4%	-0.7%	0.5%	-0.3%	-0.1%	-0.9%	0.1%	0.7%	-1.4%	1.2%
Computer Task Group	-3.7%	-0.7%	-1.1%	-0.3%	-0.3%	-4.0%	-0.4%	-0.4%	0.0%	0.2%	-1.0%	-0.2%	1.0%
TrueBlue Inc.	-1.0%	0.0%	-1.0%	0.9%	0.5%	1.3%	0.4%	-0.2%	-2.1%	-1.2%	-2.2%	0.0%	0.8%
Kelly Services	-0.3%	-0.2%	-0.3%	-1.0%	-0.1%	0.0%	0.3%	1.1%	0.3%	-1.5%	-0.2%	0.1%	0.8%
Insperity	-0.8%	-0.2%	-3.4%	2.6%	-1.7%	-0.2%	0.2%	-0.9%	0.4%	-2.5%	-0.1%	0.5%	0.8%
AMN Healthcare Services	2.4%	-1.1%	-0.7%	-1.6%	0.2%	1.2%	2.6%	-0.7%	0.0%	0.9%	0.9%	0.3%	0.7%
Adecco (in euros)		0.0%	-1.0%	-0.8%	-0.3%	0.2%	0.5%	1.3%	-0.2%	-0.5%	-0.1%	-0.4%	0.7%
RCM Technologies	1.0%	1.1%	-1.7%	-3.4%	2.6%	-0.6%	1.4%	-0.3%	1.1%	0.1%	2.6%	-0.2%	0.7%
Kforce	1.7%	-6.6%	-5.6%	-1.6%	0.2%	1.5%	2.3%	1.1%	-1.6%	-3.1%	0.1%	-0.4%	0.5%
Robert Half Intl.	1.6%	-1.6%	-3.9%	-0.7%	2.7%	1.7%	1.1%	0.4%	-1.0%	-5.2%	1.3%	1.8%	0.4%
Manpower	0.5%	0.7%	-0.7%	-0.5%	0.7%	-0.3%	0.0%	0.9%	0.2%	-1.4%	-0.4%	-0.4%	0.1%
Randstad (in euros)	0.5%	-1.0%	-1.1%	-1.2%	0.4%	0.0%	0.0%	0.9%	-0.9%	-1.6%	-0.8%	-0.6%	0.1%
Mastech Holdings						-0.7%	1.5%	-1.7%	-2.1%	-0.1%	0.7%	0.0%	-0.7%
CDI	0.1%	-1.4%	0.9%	-1.8%	-0.8%	-0.3%	0.0%	1.0%	-1.3%	-2.9%	1.0%	0.4%	-1.6%
Hudson Global	3.0%	-6.3%	-9.7%	2.9%	0.7%	-0.6%	1.1%	3.7%	-0.3%	-4.5%	-0.1%	0.3%	-1.9%
Cross Country Healthcare	3.3%	-0.5%	0.0%	-2.5%	-0.7%	-0.1%	1.3%	1.0%	1.9%	0.3%	1.7%	-0.8%	-2.6%
On Assignment	0.2%	-0.2%	-3.0%	-2.7%	-1.0%	0.8%	0.5%	4.6%	0.6%	0.5%	1.4%	-0.6%	-2.9%
<b>Median</b>	<b>0.5%</b>	<b>-0.4%</b>	<b>-1.1%</b>	<b>-0.9%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>0.9%</b>	<b>-0.2%</b>	<b>-1.2%</b>	<b>0.1%</b>	<b>-0.2%</b>	<b>0.5%</b>

Source: Staffing Industry Analysts

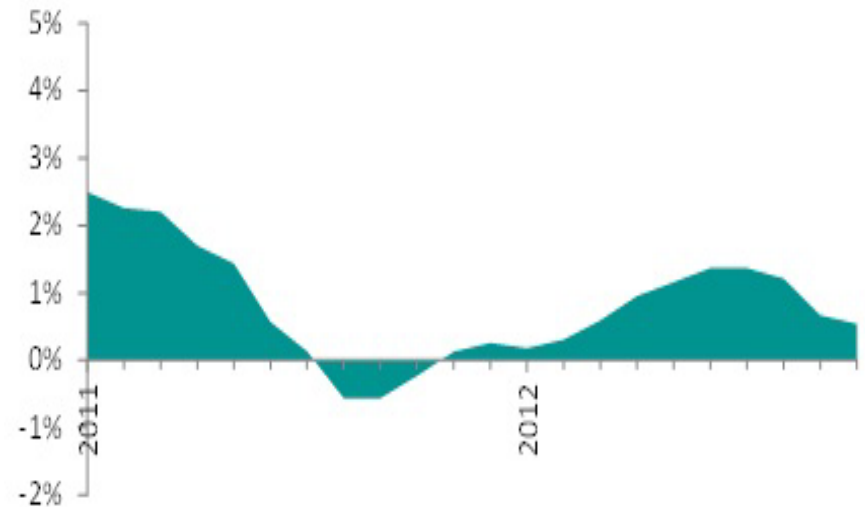


## Bill rates up in office/clerical, industrial staffing

**Y/Y Change in Bill Rate Index for Office/Clerical Occupations**  
(3 month average)



**Y/Y Change in Bill Rate Index for Industrial Occupations**  
(3 month average)





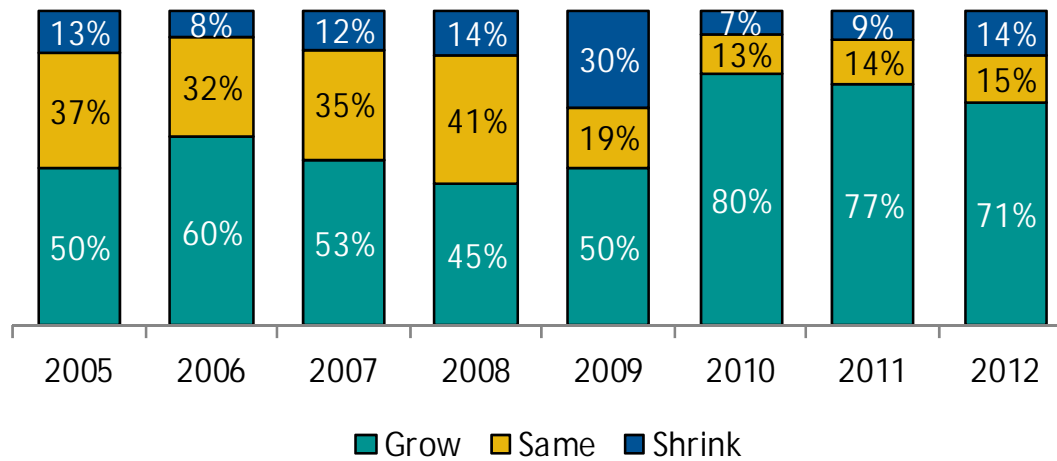
## New topic pages on the staffingindustry.com website

	Growth, Market Sizes and Forecast		Legal, Legislative & Regulatory		Margins, Pay & Bill Rates, Fees
	Mergers & Acquisitions		Online Staffing		Operational Metrics & Best Practices
	Other Staffing Services		Place & Search, RPO		Recruiting & Talent Acquisition
	Sales/Mktg & Market Opportunities		Staffing Firm Lists & Market Share		Staffing - Commercial
	Staffing - Healthcare		Staffing - Information Technology		Staffing - Professional
	Surveys		VMS/MSP & Staffing Technology		Exclusive CWS Council Research



# What is the future?

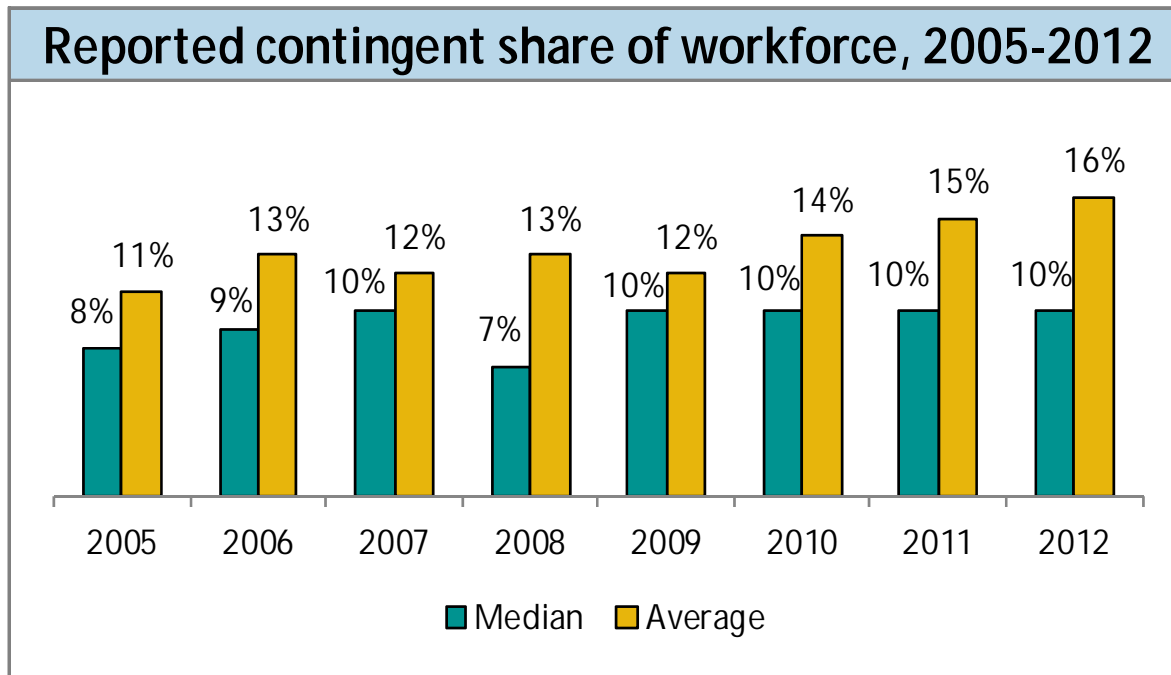
## How will your total workforce change over the next two years? Answers from 2005-2012



Source: Staffing Industry Analysts, © Crain Communications 2012



You will all be using more.....

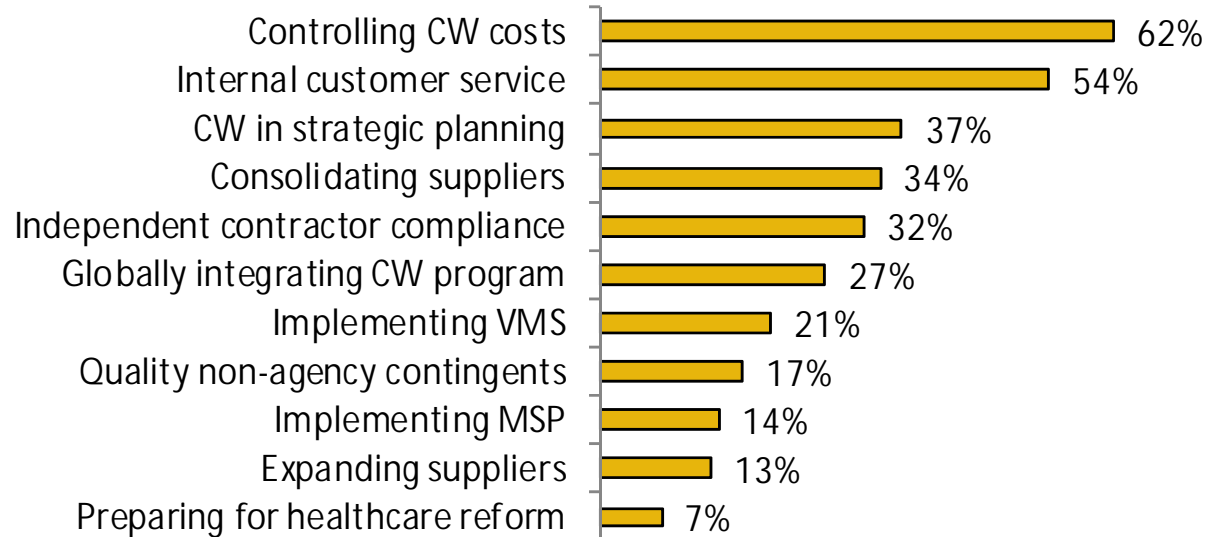


Source: Staffing Industry Analysts, © Crain Communications 2012



# Show me the \$\$\$

## Buyers' top priorities for their CW programs in 2012



Source: Staffing Industry Analysts, © Crain Communications 2012



## What is the future?

Lines will be blurred

FOCUS  
FOCUS  
FOCUS  
FOCUS  
FOCUS

# What is the future?



Buyers are getting more sophisticated



# What is the future?



Work is being tasked differently



# What is the future?



We've moved well beyond CW 2.0





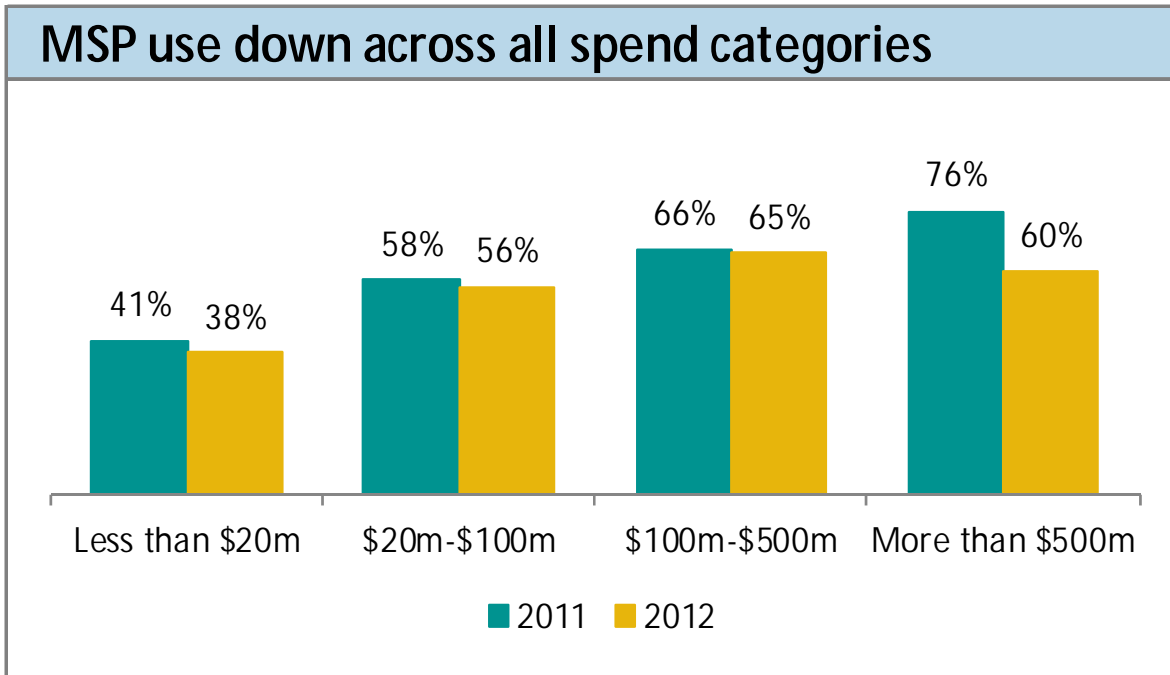
## Buyers' Top Priorities



<b>Buyers' top priorities for 2012: Preparing for health care reform</b>	
<b>Industry</b>	<b>Percent</b>
Finance/insurance	18%
Pharma/biotech/med	9%
Energy/chemical	5%
Manufacturing	3%
Tech/telecom	3%
<b>Number of employees</b>	
1,000-9,999	8%
10,000-14,999	27%
15,000-29,999	0%
30,000-99,999	12%
100,000 or more	0%
<b>Primary skill purchased</b>	
Office/clerical	18%
Engineering/design	7%
Information technology	4%
Industrial/logistics/transport	4%
<b>All buyers</b>	<b>7%</b>



# Bringing programs back in-house/outourcing



Numbers are for all buyers, not just core buyers.

Source: Staffing Industry Analysts, © Crain Communications 2012

# MSP Growth



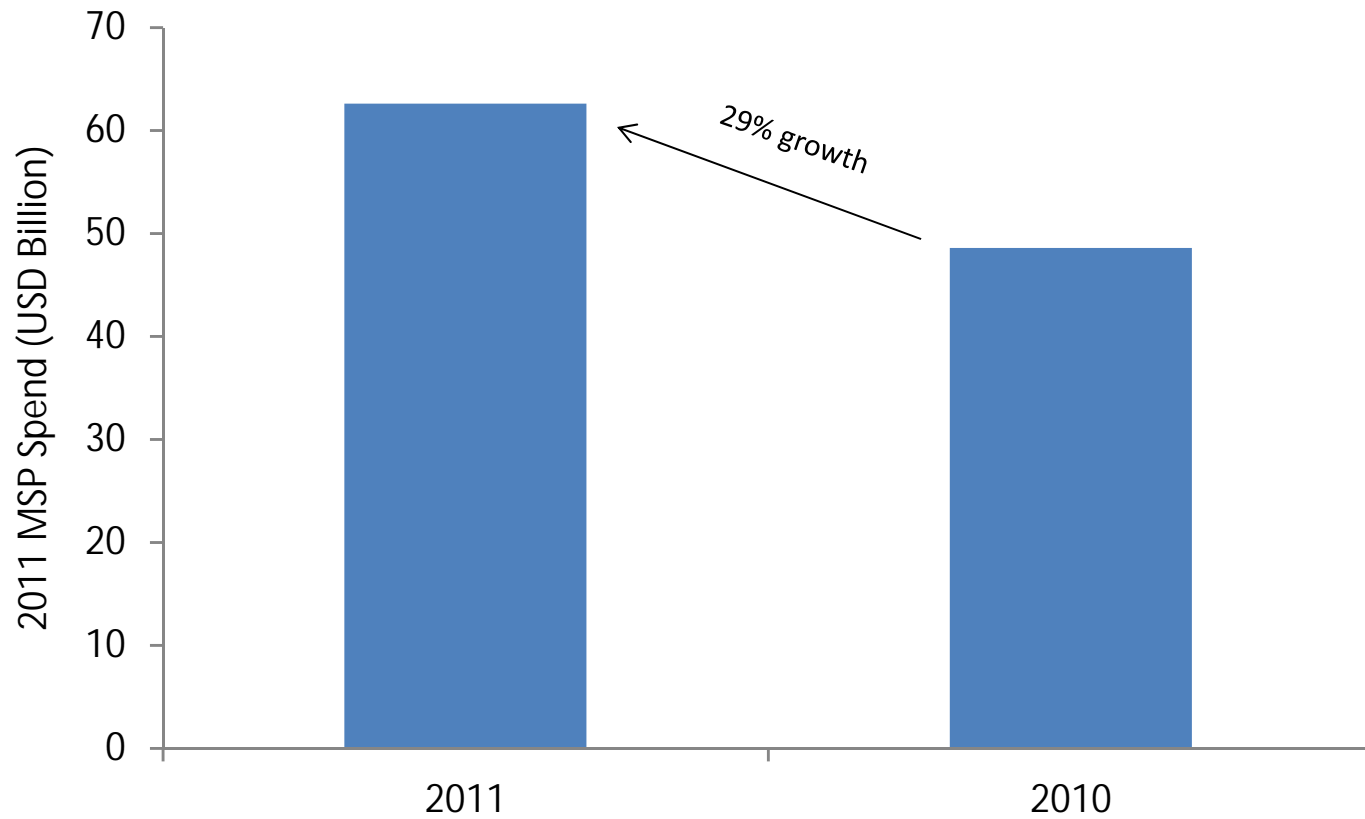
## MSP use down across all spend categories



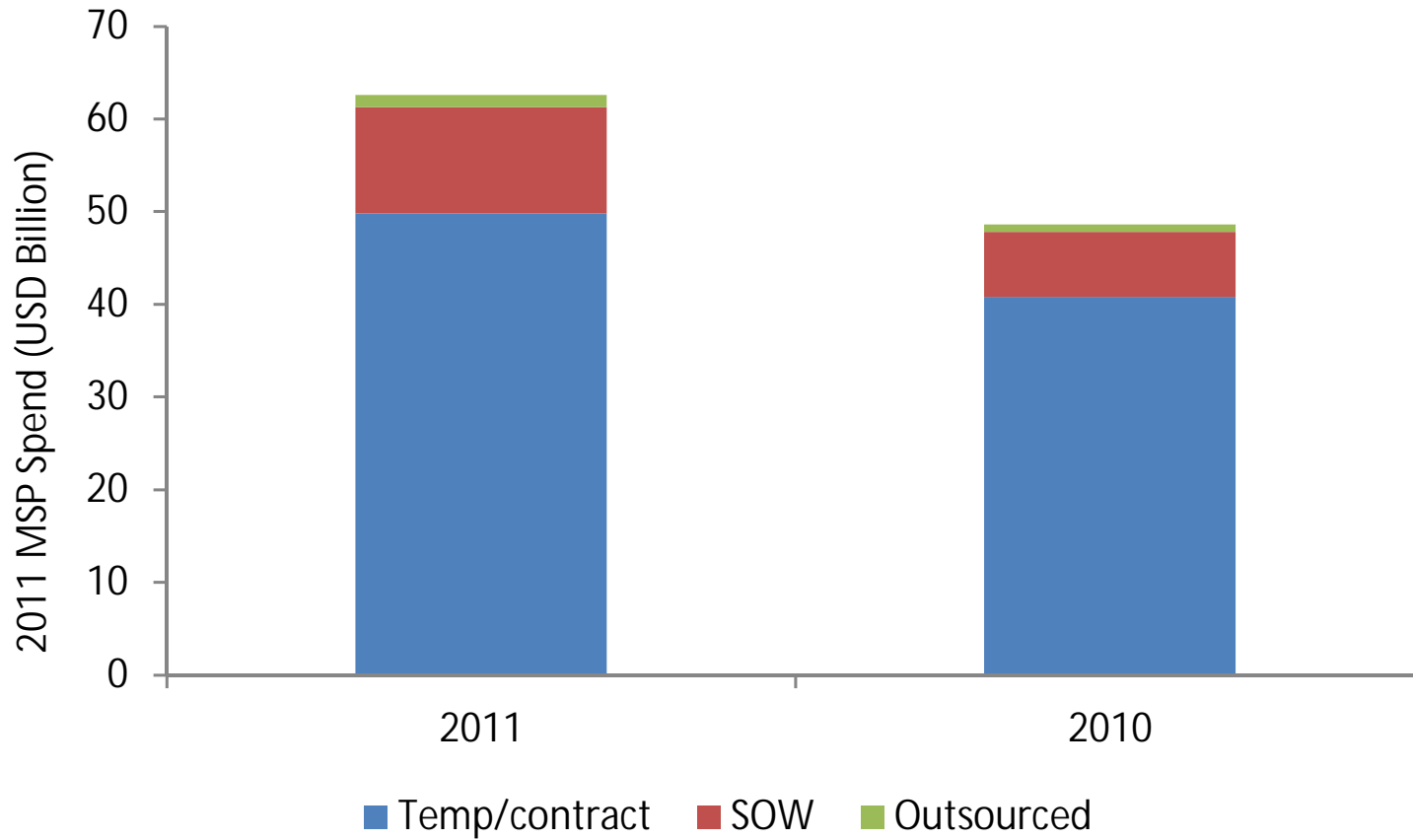
Numbers are for all buyers, not just core buyers.

Source: Staffing Industry Analysts, © Crain Communications 2012

# 29% growth in MSP market



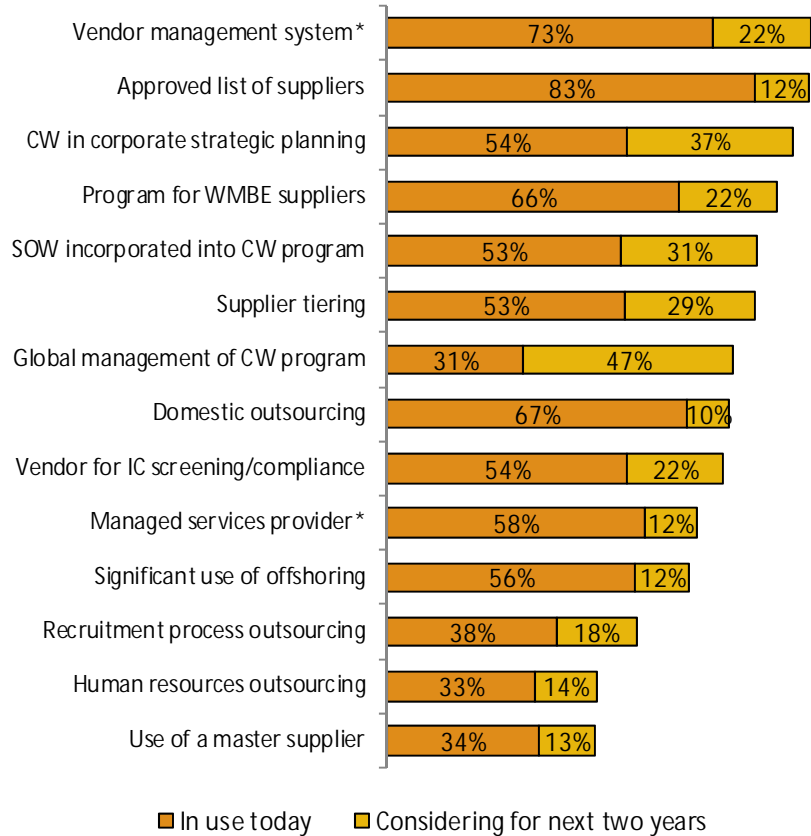
# Growth in Global MSP Spend



# VMS

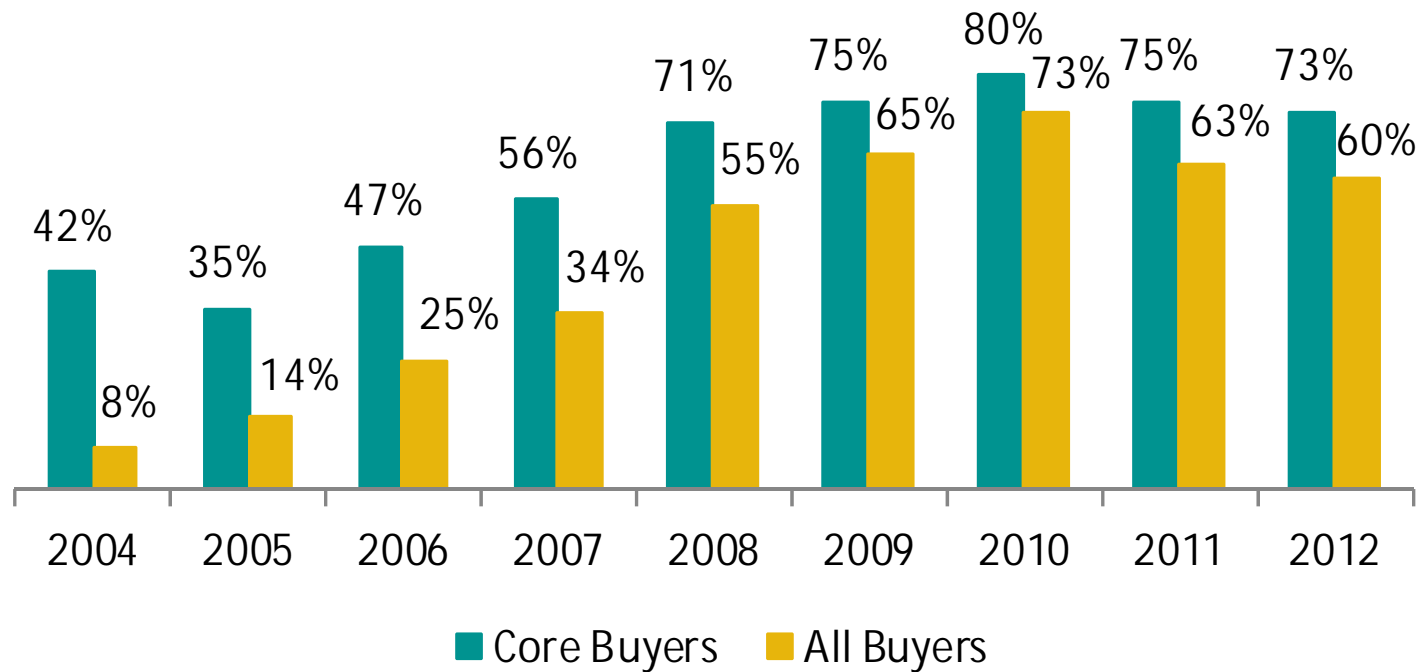


## Use of vendor management strategies



\*= Among core buyers only, meaning those whose primary function is managing CW  
 Source: Staffing Industry Analysts, © Crain Communications 2012

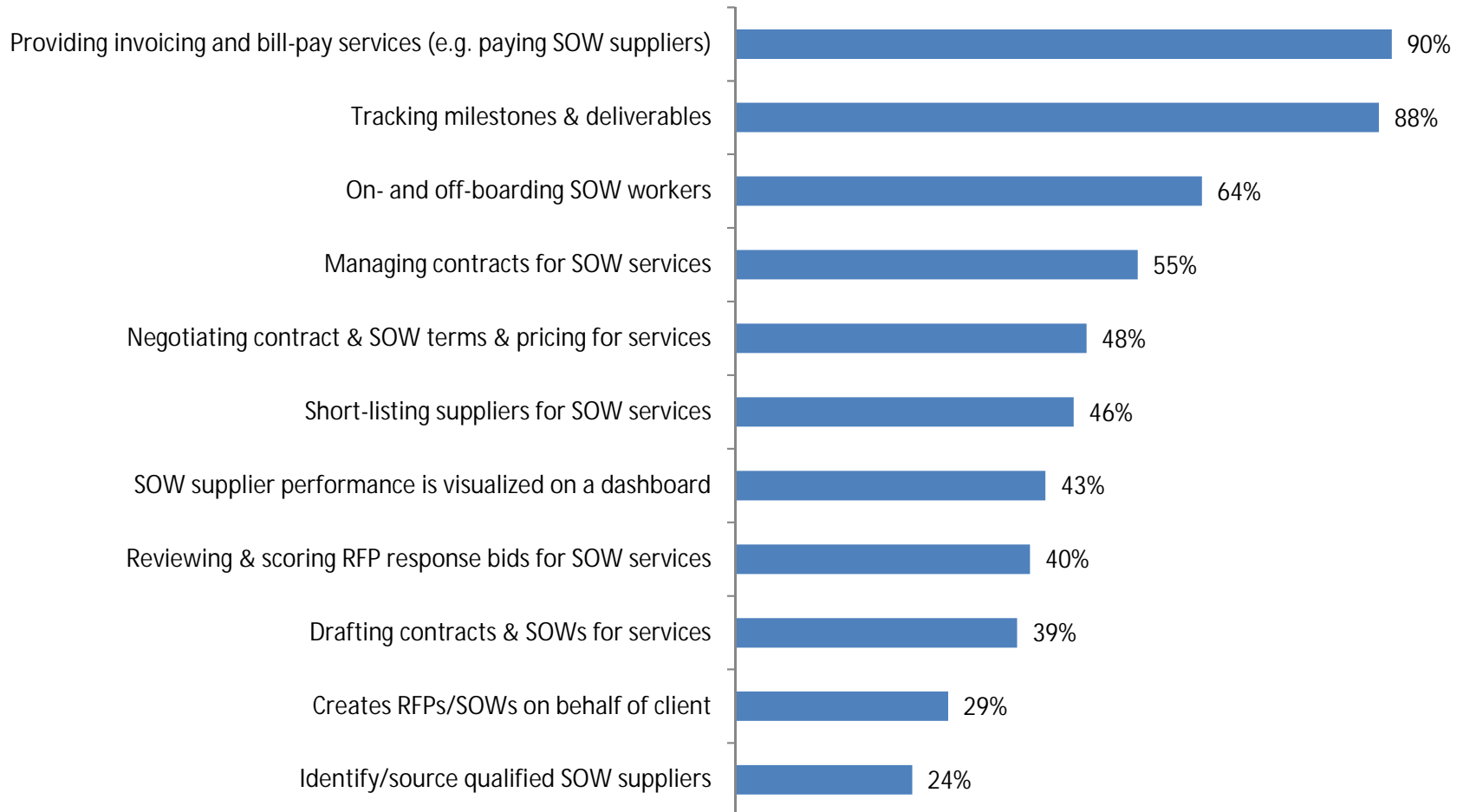
## Trends in VMS use





# What does SOW service really mean?

Of 284 SOW programs in study, percent offering features below

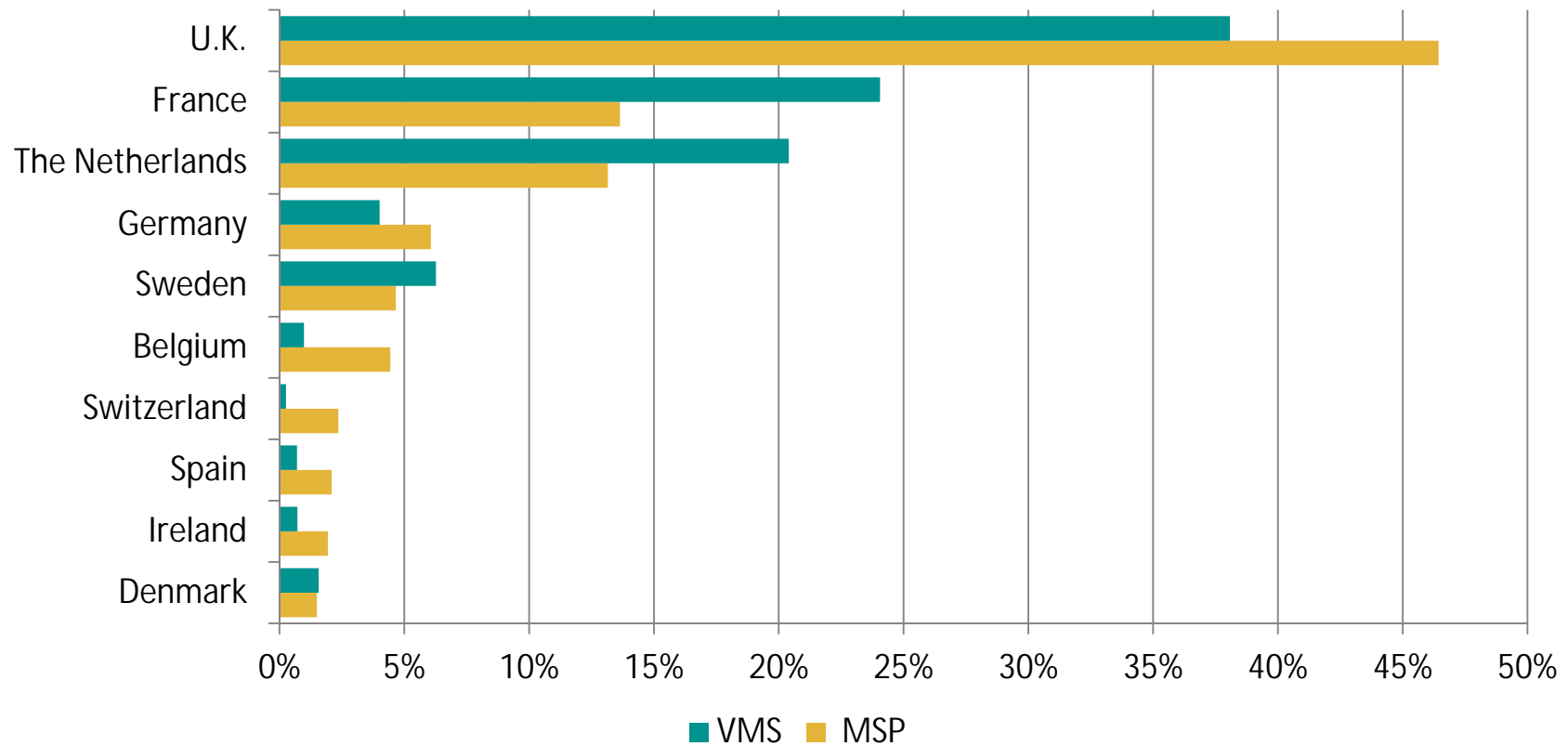




# UK Largest MSP/VMS Market in Europe



## Spend under Management 2011



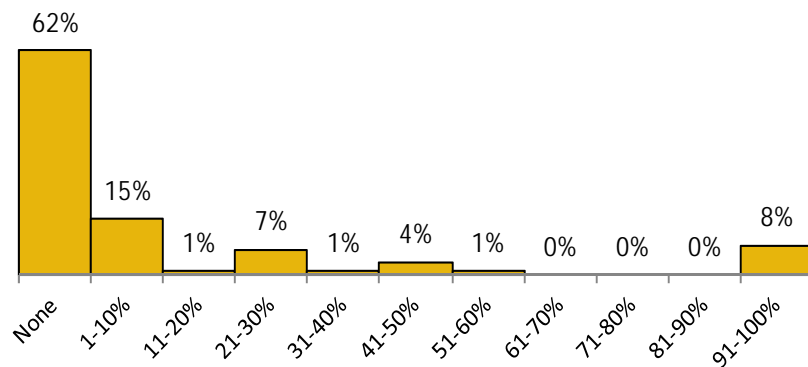
**% of Client VMS/MSP Programmes in Place in Europe 2011**

Source: Staffing Industry Analysts – “A Look at” Reports and VMS/MSP Landscape Report 2012

# Good news for both parties: someone else will pay

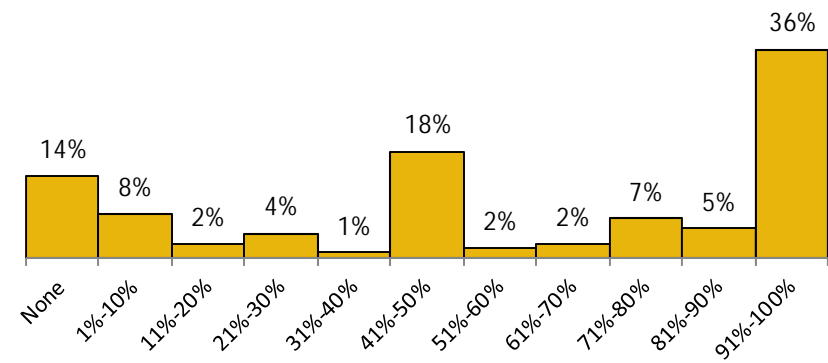


Percentage of increased costs due to healthcare reform that buyers expect to absorb



Source: 2012 SIA Contingent Buyers Survey

Percent of increased costs due to healthcare reform that staffing firms expect to pass on



Source: 2011 SIA Staffing Company Survey

# Tips for 2013



Cost containment/Correction

Prepare for PACA

Track quality metrics

Evaluate job descriptions

But also:

Be curious

Be open minded



Some of these companies you may have heard of?





## How do we define “online staffing?”

- Online staffing is a unique business/technology model that did not exist 15 years ago. It is distinguished by being based on a fully-automated platform (analogous to an iTunes or Amazon) that “transacts” and supports work arrangements (including payments) between buyers and sellers of “contingent work.”
- Online staffing platforms bring together matches of (typically) contingent work buyers and sellers and support the complete work transaction without the costs of staffing personnel (sales and recruiting).

SIA's 2012 Lexicon of Global Contingent Workforce offers this definition:  
*A type of Talent Exchange (typified by a growing number of companies like oDesk and Elance), consisting of an online platform where contingent workers, contractors, and freelancers can offer their skills and services for limited projects or even on-going assignments and where organizations and individuals can post their requirements or put tasks/projects out to bid.*



# Online Staffing: Current Reality vs. Perception

- Online staffing did not exist 15 years ago
- Growth was gradual initially, but accelerated coincident with the “Great Recession.”  
Example: oDesk has expanded 8X in size since 2009
- Today, it is \$1B worldwide industry segment, supported by over 50 firms

## Current Worldwide Picture

Estimated 2012 On-line vs. Traditional Temporary Staffing  
Billed Revenues (All Segments)

	Annualized Billed Revenue	Annualized % Growth
Online Staffing	<b>\$1B+</b>	<b>&gt;60%</b>
Traditional Staffing	<b>\$300B+</b>	<b>~10%</b>

↓

Traditional  
now 300 X  
size of Online

↓

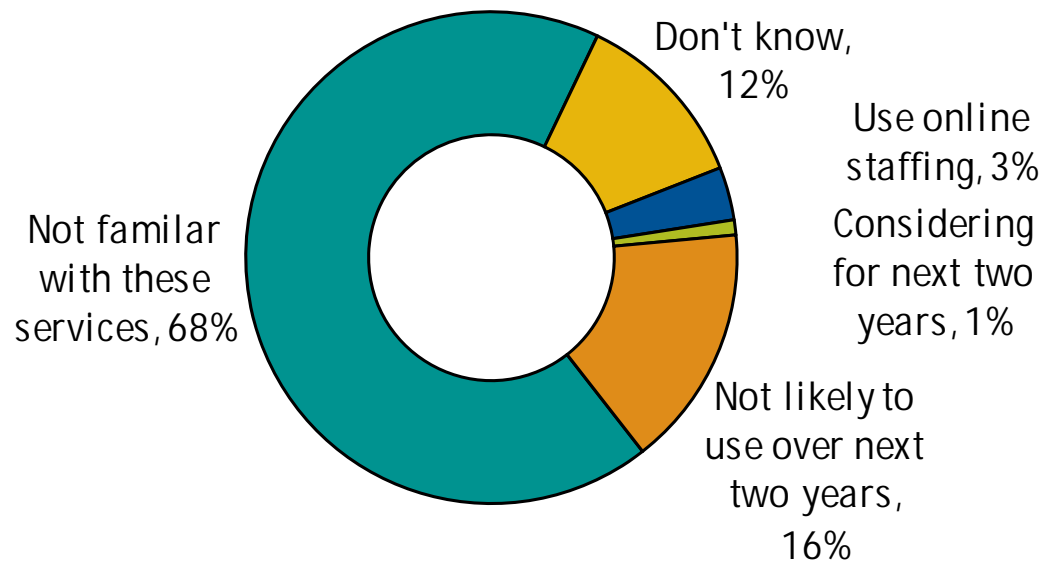
Online growth  
more than 6 X  
Traditional

# Online Staffing: Current Reality vs. Perception ...



## 2012 CW Buyer Awareness

Buyers were asked whether they used online web-based staffing services, such as Elance, oDesk and Guru.com.



- Only 3% of respondents indicated they use online staffing services
- 12% said they don't know whether they use online staffing services
- 1% said that they are considering using these over the next 2 years
- 16% said that they have no plans to use online staffing services.
- 68% said that they are not familiar with online staffing services;
- Among those that use online staffing services, 71% said that they use them for less than 10% of spend

# Evolving "work intermediation" models/technologies



Degree of value chain integration



## Emerging Models

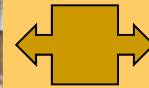


Crowdsourcing  
Microtasks, WaaS  
Platforms

## Maturing Online Staffing Platform Models



Global Buyers

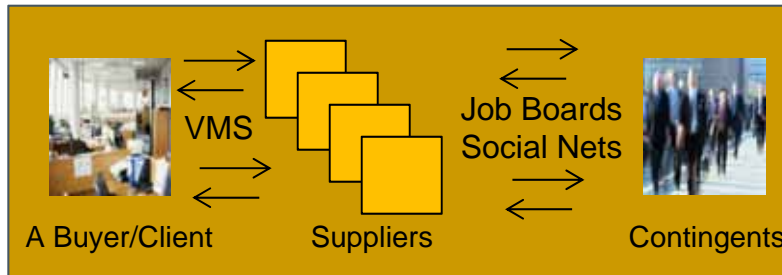


Platform



Global Contingents

## Mature Staffing Supply Chain Models



Online staffing is a model that is clearly maturing and ready for prime time. It provides a way for business managers or individuals to indicate a demand for task/project work and for freelancers/ contractors to make themselves available for such work, et al. The relationship is direct between *work user* and *work provider*, and the level of work is typically project or task.

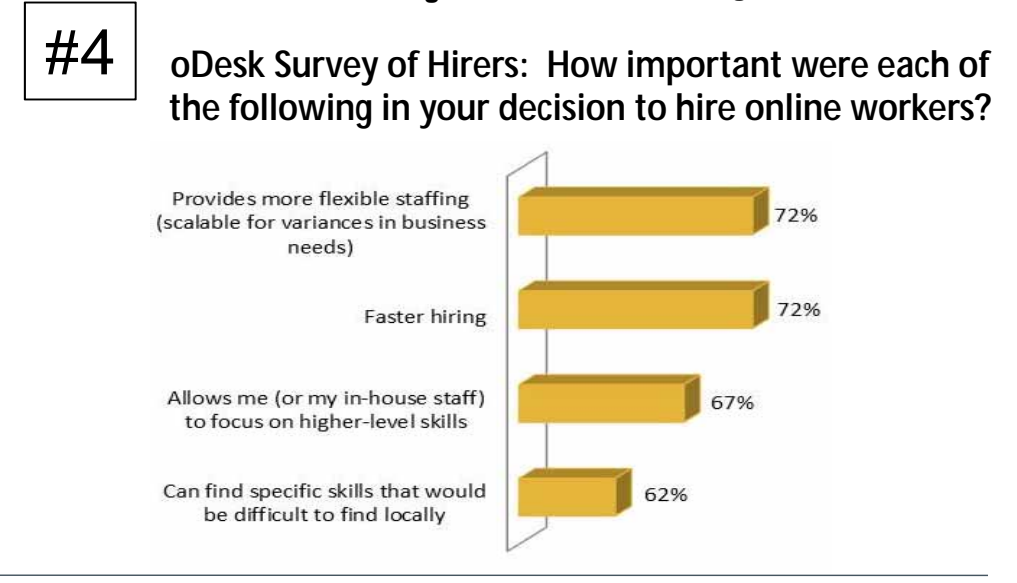
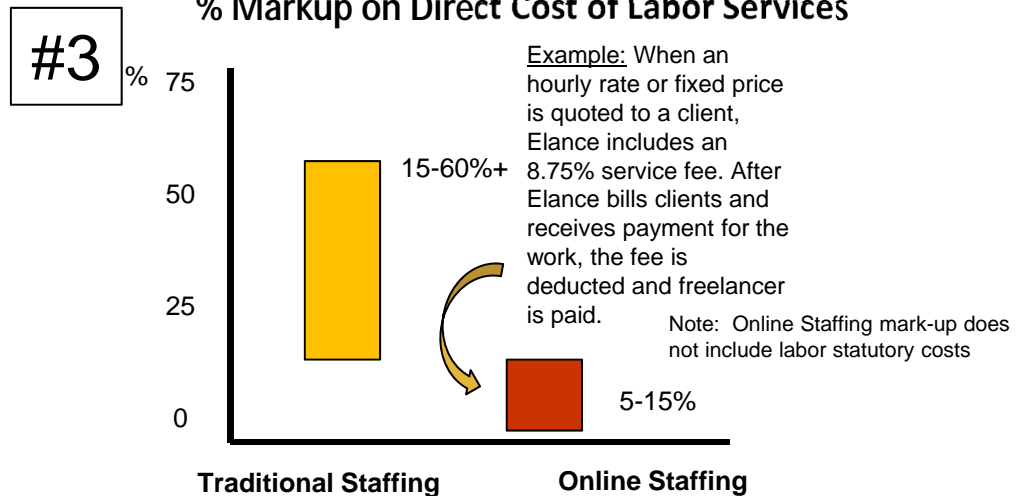
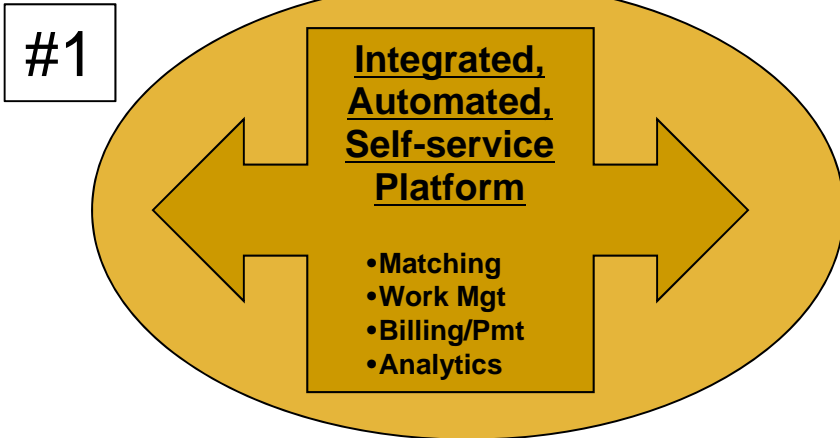
Degree of work decomposition





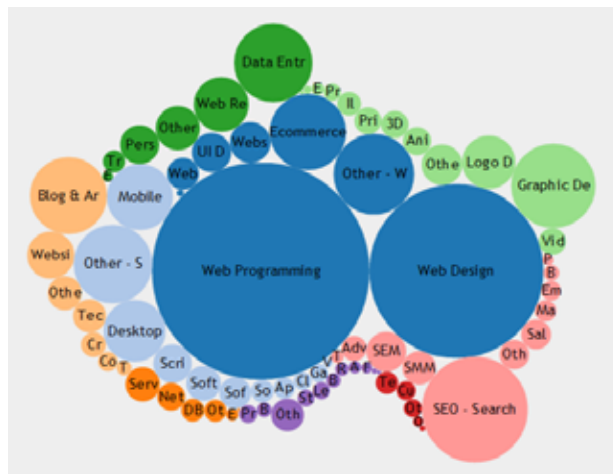


# "Online Staffing" Benefits and Advantages





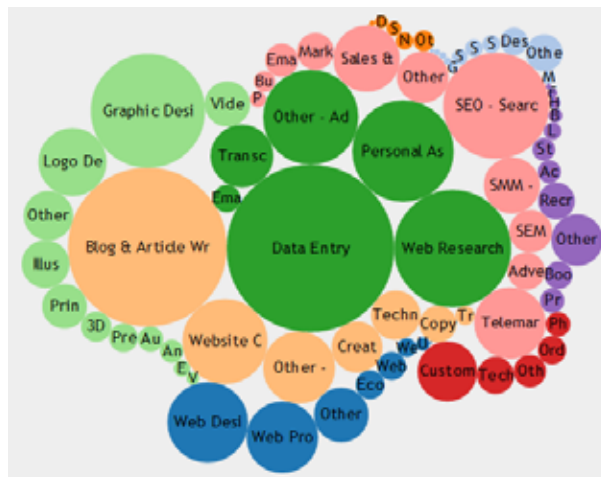
In India, projects x type (293,179 done)



oDesk projects performed 2005-Q2 2012 are broken down by country and 9 broad work categories:

- Web Development
- Administrative Support
- Writing and Translation
- Design & Multimedia
- Sales & Marketing
- Business Services
- Software Development
- Customer Service
- Networking & Information Systems

In Philippines, projects x type (355,480 done)



Different Platforms Tend to Support Mainly "Remote/Local" vs. Mainly "Local/On Site" Work



VS.



Type of work activities of online freelancers is highly varied and geographically distributed, as suggested by the country/ activity bubble charts provided by oDesk

# “Online Staffing” Concentration

Six “major players,” out a total of over 50 (see Appendix 1), account for about one half of the \$1B+ revenues (2012) in this global industry

Company	Founded	2011 Est Rev*	HQ Loc	Business Profile	Website
oDesk	2006	~\$225M	US	oDesk is privately held, is well funded, and has grown very rapidly since its inception in 2006. Besides providing "core," publicly-available "online staffing" capabilities/ services, oDesk also offers a range of ancillary services today, including: (1) pulling together teams of 20+ workers to deliver services/solutions, (2) compliance/payrolling services for ICs and W2s, and (3) health insurance benefits services for contractors.	<a href="http://www.odesk.com">www.odesk.com</a>
Elance	2007	~\$150M	US/NO	Elance is privately held and well funded. It has grown rapidly since launching its "online staffing" platform business in 2007. Besides providing "core," publicly-available "online staffing" capabilities/ services, Elance also presents the market with a range of what it offers as business solutions, which fall under the headings of (1) <i>Contractor Management</i> (i.e., payrolling), (2) <i>Collaboration</i> , (3) <i>Controls</i> , and (4) <i>Compliance</i> .	<a href="http://www.elance.com">www.elance.com</a>
freelancer.com	2004	>\$50M	AU	Founded in Sweden (as GetAFreelancer), Freelancer.com went through a number of M&A incarnations and is now privately-held by Ignite Networks (a/o 2009), as it pursues an aggressive global-scaling strategy of country openings and acquisitions. Freelancer.com offers a "standard set" of "core," publicly-available "online staffing" capabilities/ services and supports small businesses engaging freelancers from emerging economies.	<a href="http://www.freelancer.com">www.freelancer.com</a>
freelance.com	1995 (2005 IPO)	~\$50M	FR	Actually started in 1995, became a French public company in 2005 (and has reported its financial information ever since). The company appears to have largely focused on French-speaking workers and companies in Europe, Africa, and the Mideast. Besides providing "core," publicly-available "online staffing" capabilities/ services, since 2010 freelance.com has also provided organized team solutions to corporate enterprises.	<a href="http://www.freelance.com">www.freelance.com</a>
vWorker	2001	~\$50M	US	Originally founded and owned by Exhedra Software as Rent-a-Coder (specializing in software developer freelancers), the company has grown consistently and was rebranded as vWorker in 2010. Besides providing "core," "online staffing" capabilities/ services (which it refers to as "Outsourcing"), vWorker has also added two other distinguishing services: "Crowdsourcing" and (for qualifying larger project workers) "Trialsourcing."	<a href="http://www.vworker.com">www.vworker.com</a>
guru.com	2005	~\$50M	US	Guru.com, today, is a business that began in 1995 as a series of eMoonlighter.com business incarnations, was rebranded Guru.com in 2003, and was subsequently acquired in 2005 and placed under new management, after which it has achieved a consistent growth path. Guru offers "core," publicly-available "online staffing" capabilities/ services with enhanced knowledge management and local-geo features.	<a href="http://www.guru.com">www.guru.com</a>

\* Revenue estimates are intended to represent gross contractor billings and other services gross revenues generated through each platform. These numbers are only estimates and may be subject to change should further information become public. Only Freelance.com publicly reports its financial results. Estimates for the other providers were derived based on publicly-stated data points on websites, press reports and other sources.

# Current List of Known, Existing “Online Staffing” Platform Businesses\*



1	99Desk	<a href="http://www.99desk.com/">http://www.99desk.com/</a>	27	Newspepper	<a href="http://newspepper.com/">http://newspepper.com/</a>
2	BizReef	<a href="http://www.bizreef.com/">http://www.bizreef.com/</a>	28	oDesk	<a href="http://www.odesk.com">www.odesk.com</a>
3	Bpovia	<a href="http://www.bpovia.com/">http://www.bpovia.com/</a>	29	OfficeCalvary	<a href="http://www.officecavalry.com/">http://www.officecavalry.com/</a>
4	Care.com	<a href="http://www.care.com">www.care.com</a>	30	Prialto	<a href="http://prialto.com/">http://prialto.com/</a>
5	Codeur	<a href="http://www.codeur.com/">http://www.codeur.com/</a>	31	Project4Hire	<a href="http://www.project4hire.com/">http://www.project4hire.com/</a>
6	DoNanza	<a href="http://www.donanza.com/">http://www.donanza.com/</a>	32	Projektwerk	<a href="http://www.projektwerk.com/de/">http://www.projektwerk.com/de/</a>
7	Elance	<a href="http://www.elance.com">www.elance.com</a>	33	ProZ	<a href="http://www.proz.com">www.proz.com</a>
8	ExpertBids	<a href="http://www.expertbids.com/">http://www.expertbids.com/</a>	34	Shorttask.com	<a href="http://www.shorttask.com">www.shorttask.com</a>
9	Freelance Free	<a href="http://www.freelancefree.com/">http://www.freelancefree.com/</a>	35	Skill Galaxy	<a href="http://www.skillgalaxy.com">www.skillgalaxy.com</a>
10	freelance.com	<a href="http://www.freelance.com">www.freelance.com</a>	36	Speakertext	<a href="http://www.speakertext.com/">http://www.speakertext.com/</a>
11	freelanced.com	<a href="http://www.freelanced.com">www.freelanced.com</a>	37	Staff.com	<a href="https://www.staff.com/faq/">https://www.staff.com/faq/</a>
12	freelancer.com	<a href="http://www.freelancer.com">www.freelancer.com</a>	38	Starbytes	<a href="http://www.starbytes.it/starbytes/home.action">http://www.starbytes.it/starbytes/home.action</a>
13	Geek Freelancers	<a href="http://www.geekfreelancers.com/">http://www.geekfreelancers.com/</a>	39	TaskCity	<a href="http://www.taskcity.com/">http://www.taskcity.com/</a>
14	Get Ninjas	<a href="http://www.getninjas.com.br/">http://www.getninjas.com.br/</a>	40	Taskrabbit.com	<a href="http://www.taskrabbit.com">www.taskrabbit.com</a>
15	GetaElance	<a href="http://www.getaelance.com">www.getaelance.com</a>	41	Thumbtack.com	<a href="http://www.thumbtack.com">www.thumbtack.com</a>
16	GigWalk	<a href="http://gigwalk.com/">http://gigwalk.com/</a>	42	Trabajo Freelance	<a href="http://www.trabajofreelance.com/">http://www.trabajofreelance.com/</a>
17	Go Freelance	<a href="http://www.gofreelance.com/">http://www.gofreelance.com/</a>	43	Twago	<a href="http://www.twago.com/static/what_twago">http://www.twago.com/static/what_twago</a>
18	Great Lance	<a href="http://www.greatlance.com/">http://www.greatlance.com/</a>	44	Virtual Employee	<a href="http://www.virtualemployee.com">www.virtualemployee.com</a>
19	Guru.com	<a href="http://www.guru.com">www.guru.com</a>	45	Voices	<a href="http://www.voices.com/">http://www.voices.com/</a>
20	HighLance	<a href="http://highlance.com/">http://highlance.com/</a>	46	vWorker	<a href="http://www.vworker.com">www.vworker.com</a>
21	ifreelance.com	<a href="http://www.ifreelance.com">www.ifreelance.com</a>	47	Witmart	<a href="http://www.witmart.com/">http://www.witmart.com/</a>
22	Infolancer	<a href="http://www.infolancer.net/">http://www.infolancer.net/</a>	48	Workana	<a href="https://www.workana.com/">https://www.workana.com/</a>
23	Jobboy.com	<a href="http://www.jobboy.com">www.jobboy.com</a>	49	WorkMarket	<a href="http://www.workmarket.com">www.workmarket.com</a>
24	Key Administrative Associates	<a href="http://www.keyadministrativeassociates.com/">http://www.keyadministrativeassociates.com/</a>	50	Zarly.com	<a href="http://www.zaarly.com/#/">http://www.zaarly.com/#/</a>
25	Liveops.com	<a href="http://www.liveops.com">www.liveops.com</a>	51	Zhubajie	<a href="http://www.zhubajie.com/">http://www.zhubajie.com/</a>
26	Mini Freelance	<a href="http://minifreelance.com/index.php">http://minifreelance.com/index.php</a>	52	ZipTask	<a href="https://www.ziptask.com/pages/zAboutWhatIsZiptask.aspx">https://www.ziptask.com/pages/zAboutWhatIsZiptask.aspx</a>
27	Net4Manpower	<a href="http://www.net4manpower.com">www.net4manpower.com</a>			

\* This is a list of “Online Staffing” platform businesses (i.e., platforms that intermediate the services of discrete free-lancers working on projects separately or in teams by pre-arrangement). It does not cover other labor platform models (social networks, “crowdsourcing,” et al)

# Time for Your Questions



## Upcoming Webinars



January 23, 2013

Introduction to the Contingent Workforce in Asia

February 21, 2013

Term Limits and Other Contingent Workforce Risks

# Slides and Audio



- Copies of the slides and a link to the audio recording will be distributed to all attendees within 24 hours following the webinar
- A replay of the webinar will be available for CWS Council Members at [www.staffingindustry.com](http://www.staffingindustry.com)

The image displays a grid of 10 presentation slides from a CWS Council webinar. The slides are arranged in two rows of five. The top row includes slides numbered 1 through 5, and the bottom row includes slides numbered 6 through 10. Each slide features the CWS logo and various content related to the webinar, including legislative updates, audio instructions, Q&A sessions, industry analyst information, council member lists, and event announcements for Berlin and Chicago summits.



THANK YOU!