



Mastering Statement of Work (SOW)

Moderator:

Stephen M. Clancy, CCWP

*Director, Contingent Workforce Strategies,
Knowledge & Research, Staffing Industry Analysts*

Panelists:

Scott Bedell, Services Procurement, Beeline

Lynn Morton, Assistant Vice President

Contingent Workforce –Procurement, State Street

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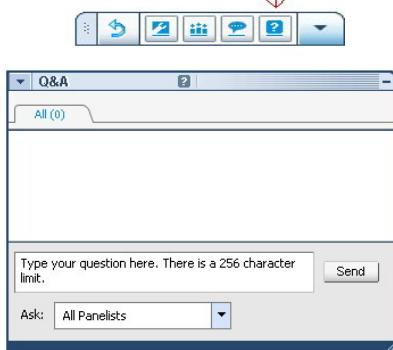
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- Our members comprise many of the largest regional, U.S. and global staffing firms in addition to representatives from all parts of the workforce solutions industry.
- Our CWS Council membership represents over \$100 billion in annual workforce spend.
- We are a trusted advisor providing objective research within the workforce ecosystem.



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- Comprehensive and vast industry and advisory service experience among executive, advisory and research team



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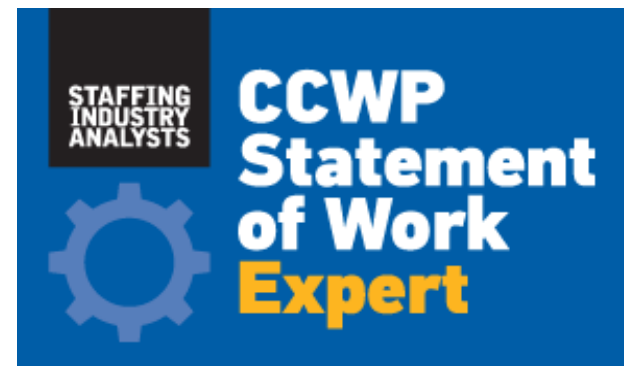
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- Program benchmarking



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Today's speakers...

Scott Bedell, *Services Procurement,*
Beeline



Lynn Morton, *Assistant Vice President Contingent Workforce –Procurement,*
State Street



Stephen M. Clancy, CCWP
Director, Contingent Workforce Strategies,
Knowledge & Research,
Staffing Industry Analysts



SOW Key Market Trends

1

Growth in the Usage of SOW Contingent Talent

2

Increase in Staffing Providers' Delivery of SOW Engagements

3

Rise in "Rogue" SOW Spend and CW Engagement \$

4


Expansion of CW Program Management of SOW Engagements

5

Expansion of Supply Chain Partner SOW Management Capabilities

Buyers' 10-year plans for SOW Resources

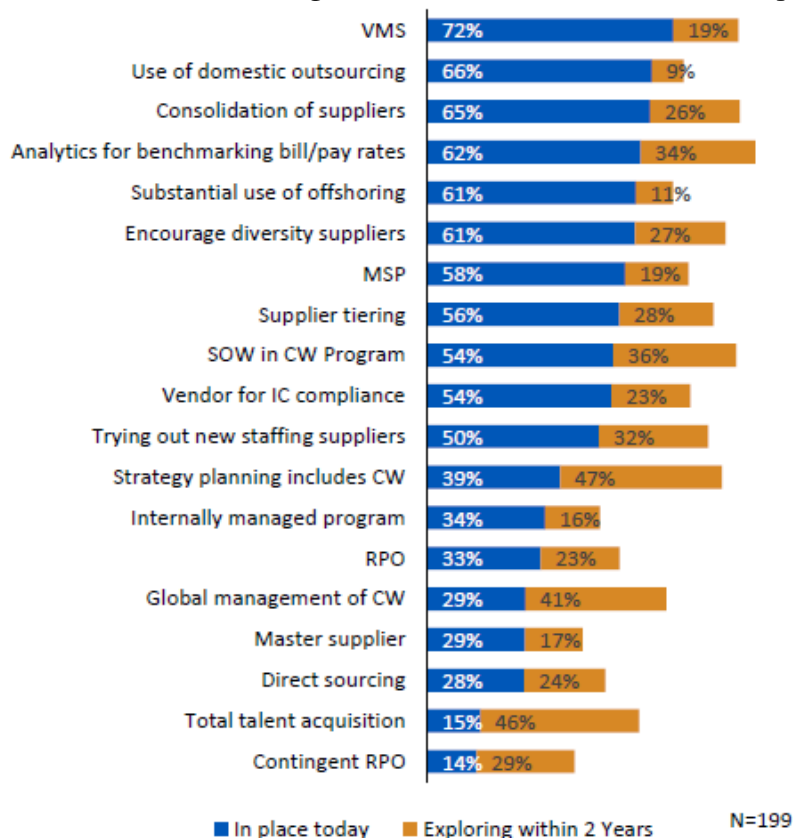
How will the following employee types change as a share of your total labor force over the next ten years?



	Significant decrease	Moderate decrease	About the same	Moderate increase	Significant increase	Net increase - decrease
Outsourced workers	4%	4%	42%	39%	10%	41%
SOW consultants	2%	12%	33%	40%	14%	39%
Freelancers	3%	8%	47%	33%	10%	32%
Agency temporary workers	6%	14%	36%	36%	7%	23%
Internal temporary workers	6%	9%	57%	21%	7%	13%
Independent contractors	9%	17%	38%	28%	7%	9%
Part-time employees	5%	10%	63%	19%	2%	7%
Full-time employees	8%	36%	37%	15%	4%	-24%

N=180

Current and Projected use of Supplier Management Strategies



CW Program Management Coverage

SOW Management In Place Today:

54%

Exploring SOW Management within next 2 years:

36%....

(Data from 2016 Survey)

Audience Poll



If you are considering a centralized SOW procurement and management solution—*as an addition to your CWM program, or as a separate program*—what is your primary reason?

- A. Gain visibility of your overall spend?
- B. Reduce costs?
- C. Mitigate compliance risks?
- D. Improve physical or data security?
- E. Increase operational efficiency?
- F. All of the above

6 Essentials for Mastering SOW Services Procurement

1

Structure &
Organization

2

Geography

3

Deployment
Planning

4

Change
Management

5

Data
Migration

6

Future
Focus

State Street

- State Street is focused on providing a superior Contingent Workforce solution
- Facts: Beeline implementation October 2016
 - Invoicing in 13 countries (SOW & Temp)
 - Resource Tracker in 37 countries
 - Full data migration



Current

stabilize
expand
enhance

Complex implementation

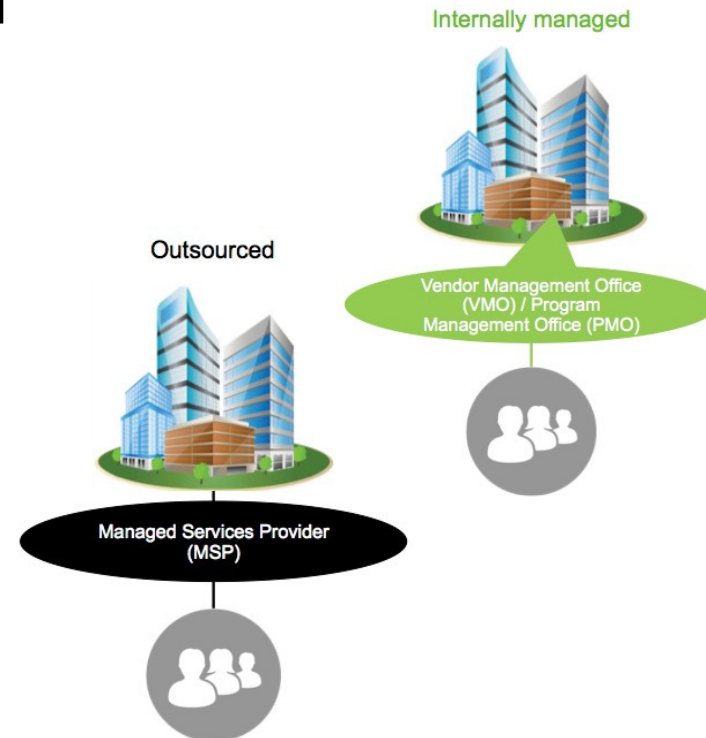
Big bang approach

Currently exiting from stabilization to operational mode

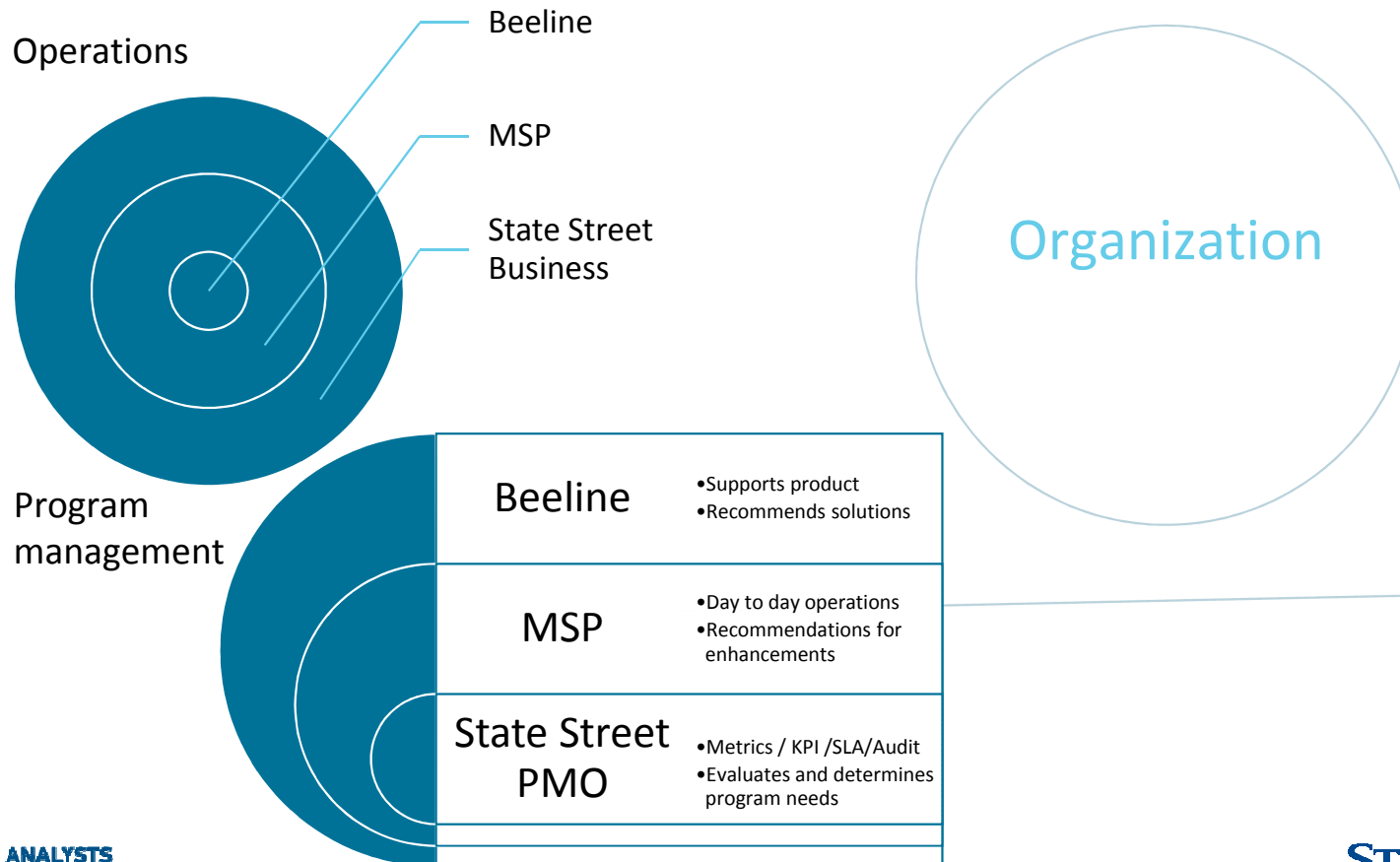
ESSENTIAL #1

Structure & Organization

- Management model – internal program office or MSP
- Different models for different geographies?
- Roles and responsibilities



State Street



State Street MSP Model

Advantages

- Leveraging business excellence and knowledge to support State Street
- MSP covers all day to day activities and support
- Provides solid advice and support
- Regional model
- Leverage MSP Project Management for deployments and enhancements
- Extensive breadth of knowledge

Benefits

- Model allows State Street to focus on defining State Street needs.
- Audit and Risk compliance
- Enhancements
- Expansions

Partnering

Growing together and collaborating

- Evolving the business model, to build a strong, defined business practice

Model

efficient
knowledgeable
accountable

ESSENTIAL #2

Geography

- Needs assessment – which are global, and which are strictly local?
- Setting priorities
- Gradual rollout or “big bang”



State Street

North America	EMEA	APAC
United States Canada Mexico	Germany Unites Kingdom Ireland Luxembourg Switzerland France Italy Poland Belgium Guernsey Jersey Netherlands South Africa Austria Cayman Islands Ukraine Norway Spain	Japan Singapore Hong Kong South Korea Australia China India Taiwan Philippines New Zealand * Bold indicates TEMP/SOW deployment



ESSENTIAL #3

Deployment Planning

- Assess and prioritize deployments
- Cost control may be “optional,” but compliance is mandatory
- Can Resource Tracking be an effective “gateway drug” to comprehensive CWM, including Services Procurement?



State Street

- State Street is highly concerned with Risk aversion and Audit Controls.
- Expansions are carefully vetted through a Country Pre-qualification Process.
- Countries are carefully
 - evaluated for local regulations and laws,
 - assessed for full compliance and risk obligations,
 - approved or rejected to deploy based on evaluation
 - prioritized for deployment

Stages

stabilize
expand
enhance

Planned expanded deployments

- SOW 6 countries,
- Temp 4 countries
- RT 6 countries

ESSENTIAL #4

Change Management

- Re-engineer process or not?
- Involves all parties:
 - VMS
 - Program Office
 - Multiple client constituents



State Street

Change Management

Patience with changes for all users (Hiring Managers, contractors, Suppliers, MSP, State Street PMO)

Train, re-assess, train again.

- Listen to the MSP and users for keys on what additional training needs are required.

Give the Users all the **tools to be successful**.

- Quick Cards, hand holding, patient explanations
- Process documentation, leave no stone unturned, large effort, still learning and editing

Allow MSP to become the face to the customer

- Separation of duties vs accountability. PMO needs to learn to step back and allow the MSP to take full control.
- Enhance the MSP relationship. Give the MSP the power to respond and support the MSP 100%.
- Positively recommend ways to improve, encourage, recognize success, directly deal with any concerns.

Change
Management
patience
training
documentation
embrace the MSP

State Street

Challenges and Opportunities

- Absorbing Beeline support model, understanding how to best prioritize our competing needs and requirements
- Functionality
 - Rate Card Management
 - Mass amendments
 - Cross modules population SOW to Project
 - Visibility of approval flows
- Budget and calculations auto updating
- Process documentation – no stone unturned, large effort, still learning and editing

Stages

growth
opportunity
enhancements

ESSENTIAL #5

Data Migration

- Consider your baseline
- Divide what is needed for:
 - Audit
 - Operations
 - Analysis



State Street

Data Migration Recommendations

- Data Mapping
 - Meticulous
 - Especially watch field length limitations between integrations.
- Testing Migration
 - UAT – can't do enough testing
 - Carefully assess data preparation
 - Make sure data is correctly migrated , validate all fields
 - Thoroughly test migrated data though functional UAT for product
 - Test integrations carefully
- Document lessons learned carefully

Data Migration

map
test
lessons learned

ESSENTIAL # 6

Future Focus

- Most value first – less value second
- Decisions for current state should not compromise future state
- Line up future targets that can produce consistent “wins”
- Identify path to self-service



State Street

New Functionality – RFX Competitive Bid

- Objective is to enhance the SOW functionality and bolt the RFX competitive to the front end of the SOW.
- All SOW's will be required to be reviewed by procurement. Procurement will determine if an RFX is required or a sole source SOW is approved
- A pre-approval is required before the RFX is generated to approve spend.
- Through consultation with Beeline Team and our MSP we are evaluating the best options to accomplish this.
- State Street will deploy RFX in a phased approach
 - Phase 1: Deploy skinny version: Procurement controlled, Contracted suppliers, Local currency
 - Phase 2 (2018): Complexity level 1: Non-Contracted or new supplier and Shared Suppliers across IT and Business
 - Phase 3 (2019): Complexity level 2: Business controlled, Complex Bid SOW sections can be independently bid, non local suppliers can bid on SOW, Multi-currency
 - Phase 4 (2020): Complexity level 3: Red-lining and eSignature

*phase 2-4 may change due to evolving business needs

Stages


stabilize
expand
enhance

Questions?

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For more information



Are you effectively managing your Statement of Work (SOW) initiatives?

Services Procurement is the strategic sourcing and management of complex services. As organizations look for additional ways to cut costs and improve control of their extended workforce, this is where most attention is focused.

- 1 Gain control and visibility of your SOW initiatives**
Does your extended workforce include complex services operating under Statement of Work-based contracts? Calm the chaos and gain control. Read this whitepaper to learn how. [> Download Whitepaper](#)
- 2 Are you leaving money on the table?**
A better, more efficient competitive bid process can deliver big savings. Read our data sheet to find out how. [> Source SOW Services](#)
- 3 Build better Statements of Work**
Collaboratively build and negotiate SOW terms and conditions with real-time visibility. This data sheet shows how. [> Build & Negotiate SOWs](#)
- 4 Manage SOW-Based Projects**
Automatically track and manage SOW-based service engagements. Read this data sheet to learn how. [> Manage Service Projects](#)
- 5 Services Procurement Success Story**
One of North America's leading financial services and banking institutions relies heavily on the use of consultants and project-based resources procured through Statements of Work (SOW). For more strategic sourcing, negotiating, and engaging suppliers, they turned to Beeline. [> Read Success Story](#)
- 6 Services Procurement Demo**
Watch this short video demo to learn how Beeline's Services Procurement solution can provide total visibility into your complex service contracts. [> Watch Demo](#)

Visit the Services Procurement resources page at beeline.com

Looking for additional ways to cut costs and improve control of your extended workforce? Check out these resources now: data sheets, whitepaper, case study, and video demo.

Beeline.com/services-procurement



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August 31, 2017	Increasing Value in CW Programs
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December 14, 2017	2017 Lessons for CW Managers

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SIA RESOURCES CITED IN THIS WEBINAR:

[Lexicon of Global Workforce-Related Terms](#)

[Workforce Solutions Buyers Survey 2016 - North America - Cumulative Report](#)

