

North America

VMS and Beyond

Moderator:

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

Guest Speakers:

Jason Ezratty, Partner, Brightfield Strategies LLC

Tony Gregoire, Senior Research Analyst, Staffing Industry Analysts



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May 24, 2012
10 am PT/ 1 pm ET

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September 18-19, 2012

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Stephanie Burnham
Vice President, Marketing

Our Speakers Today

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

**Tony Gregoire
Sr. Research Analyst
Staffing Industry Analysts**

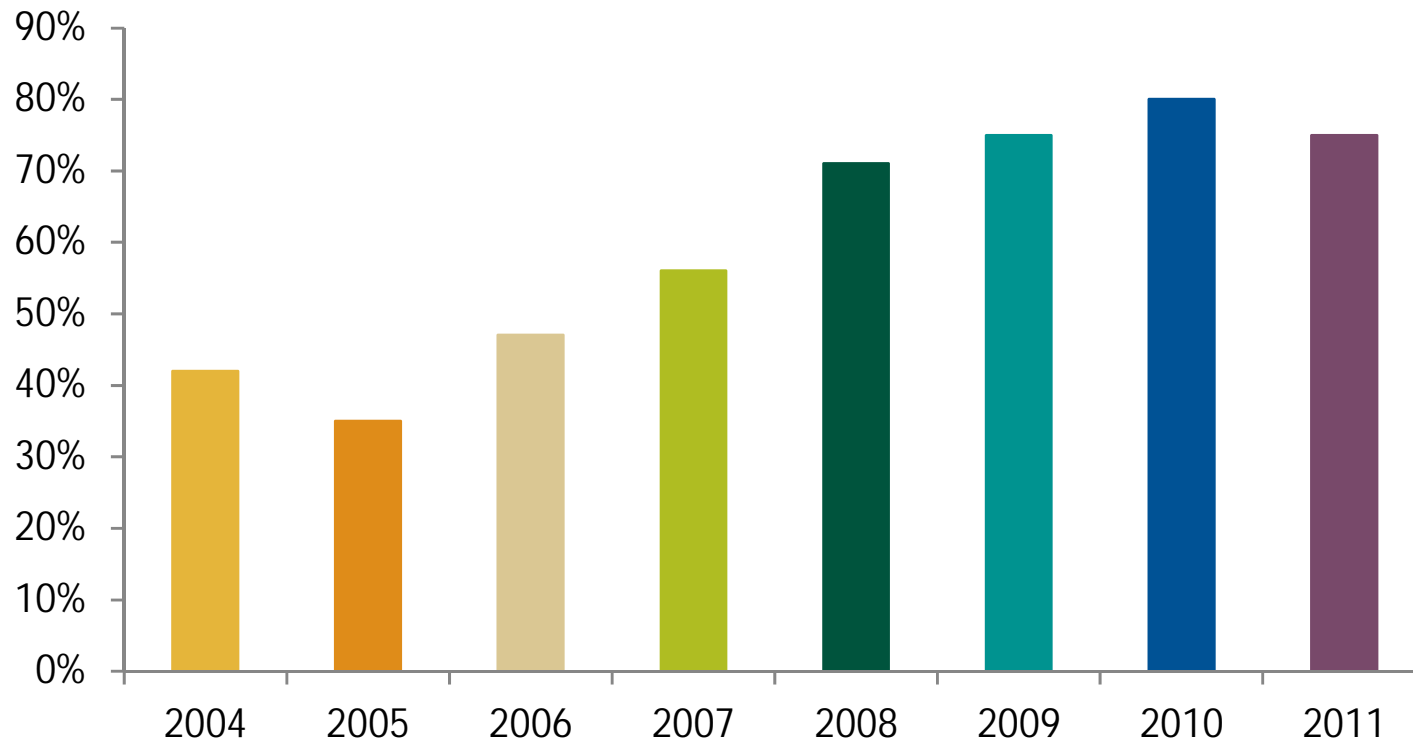
**Jason Ezratty
Managing Partner
Brightfield Strategies**

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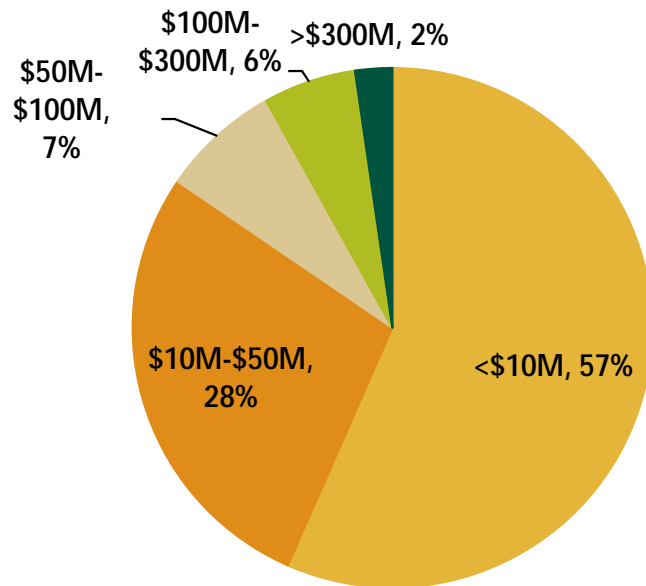
> \$100 Billion

Core buyers using VMS

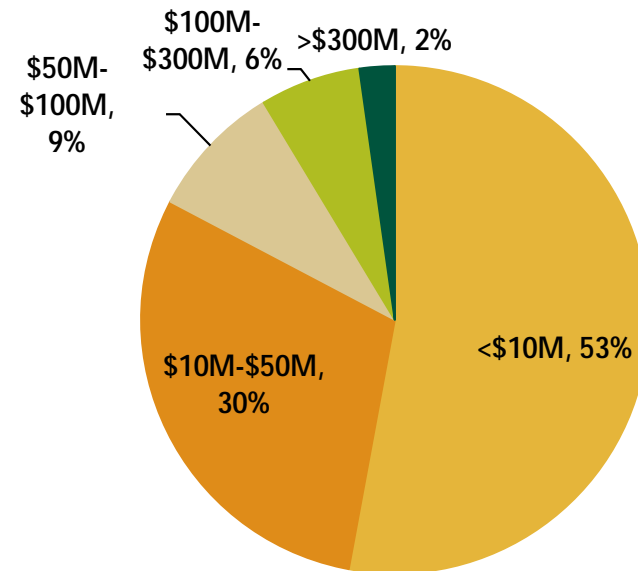


Spend per client

2010

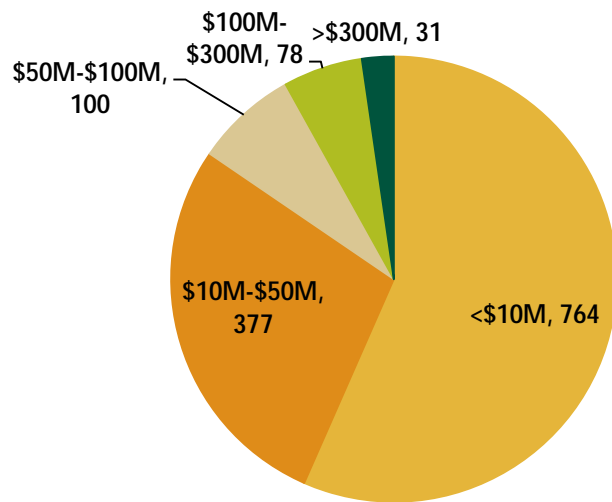


2011

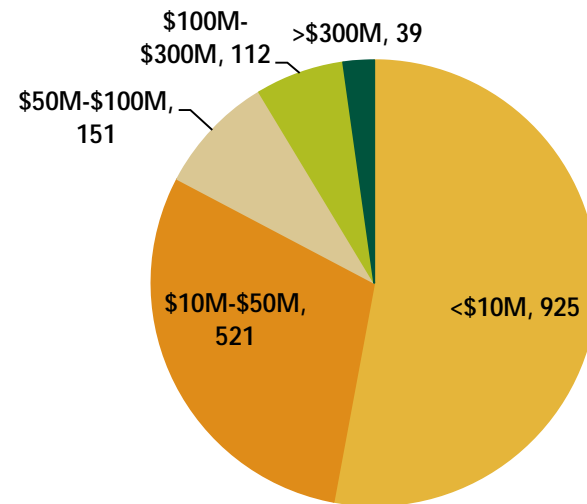


Spend per client

2010

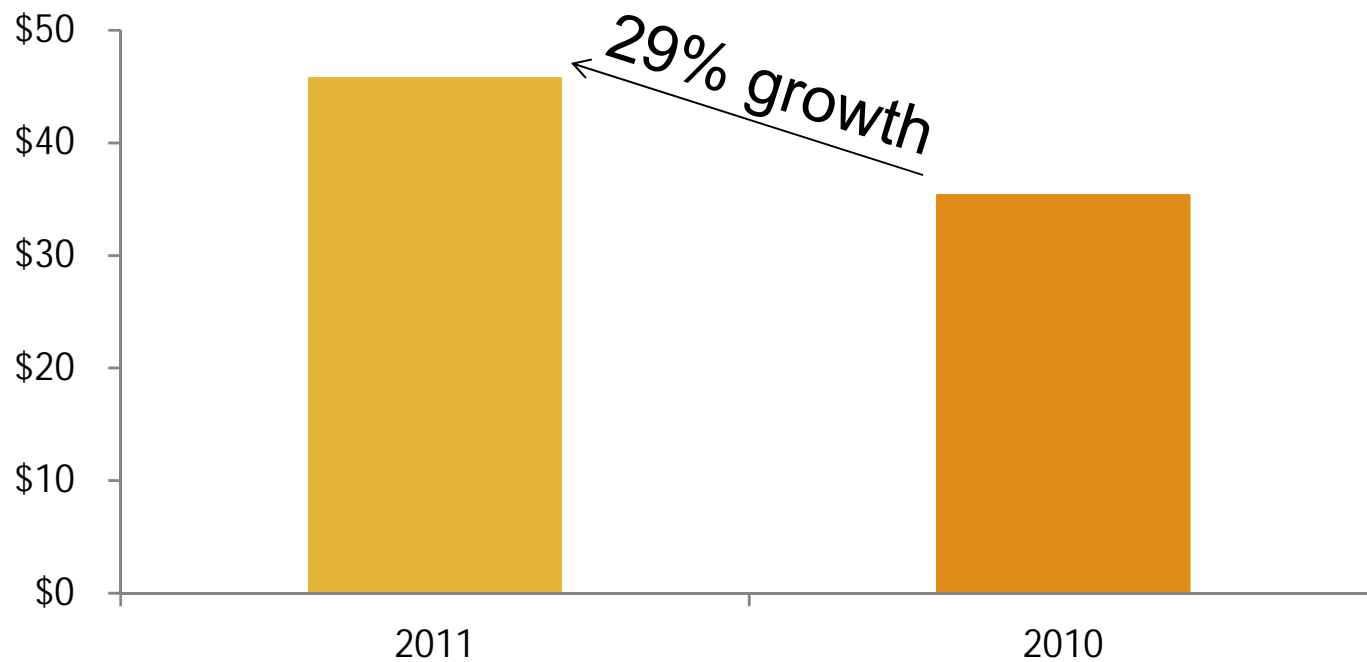


2011



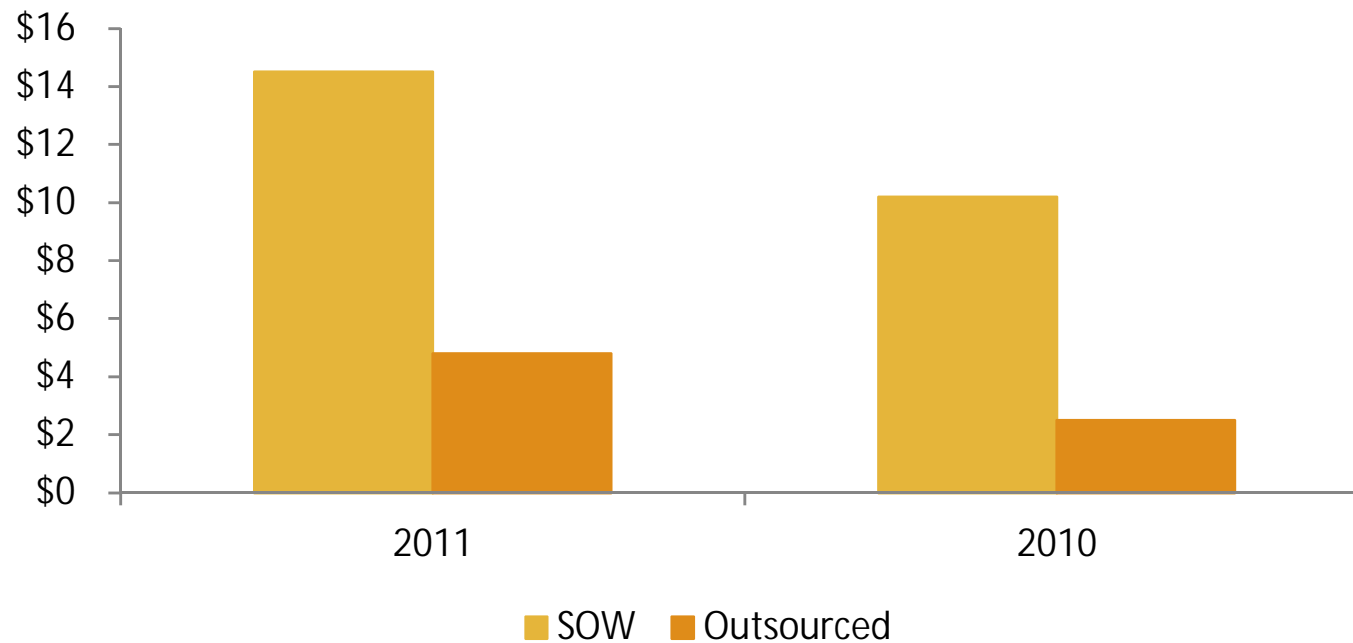
Preliminary landscape data indicates continued strong growth

Temp/contract VMS spend among reporting providers
(billion, preliminary)

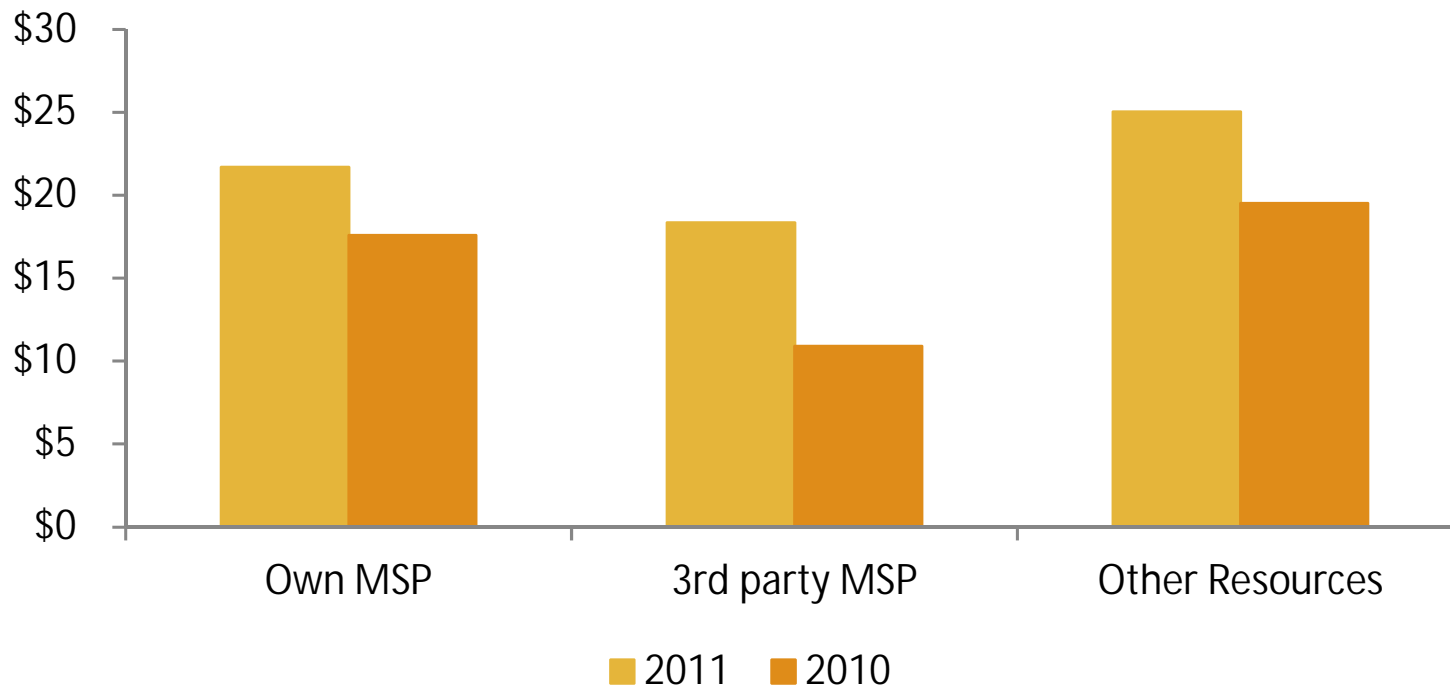


Preliminary landscape data indicates continued strong growth

SOW & outsourced spend among reporting providers
(billion, preliminary)



**VMS spend among reporting providers
(billion, preliminary)**



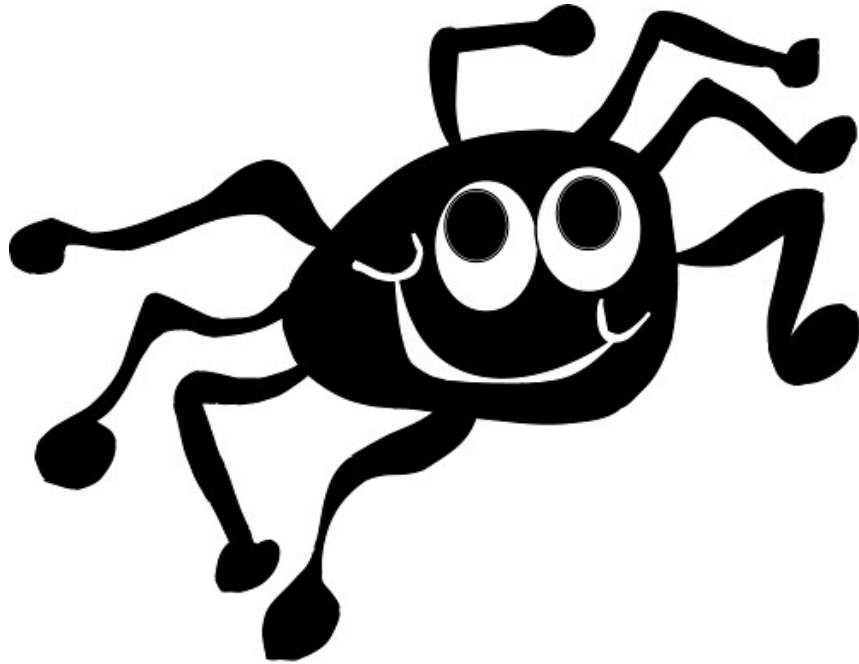
2011/2010 Growth:

U.S. 20%-30%

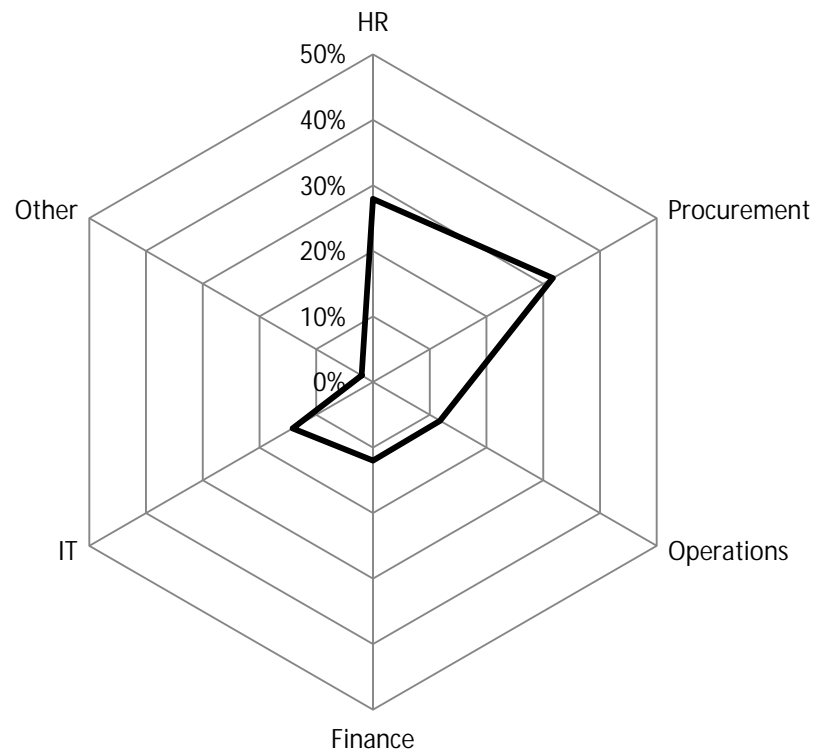
Europe 20%-30%

BRIC >50%

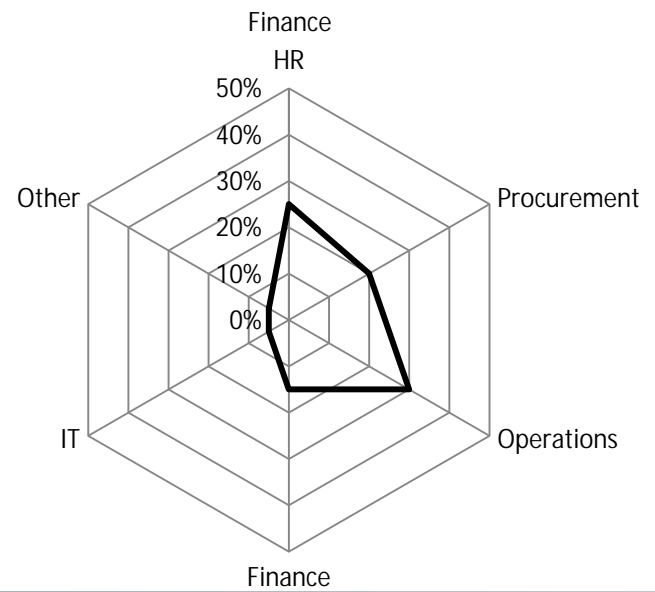
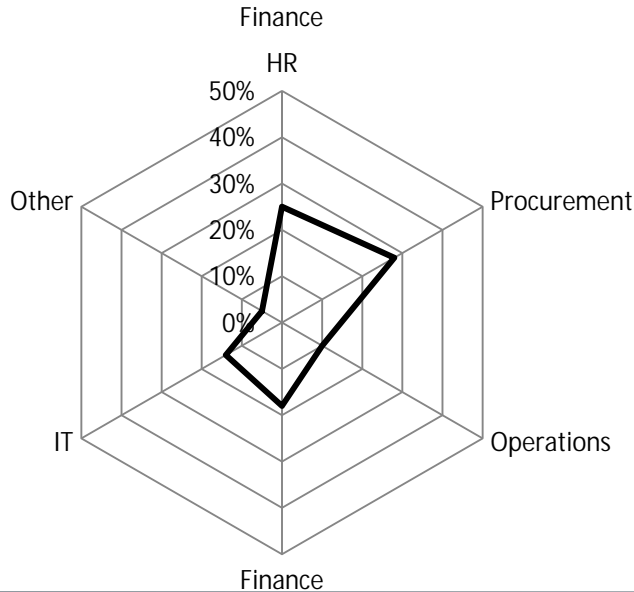
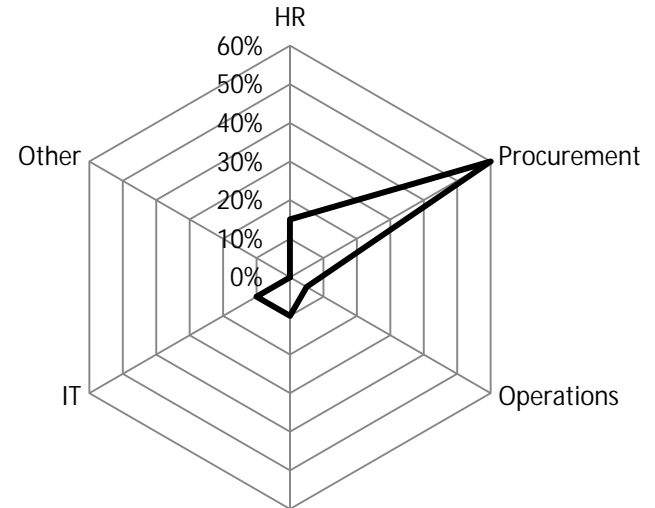
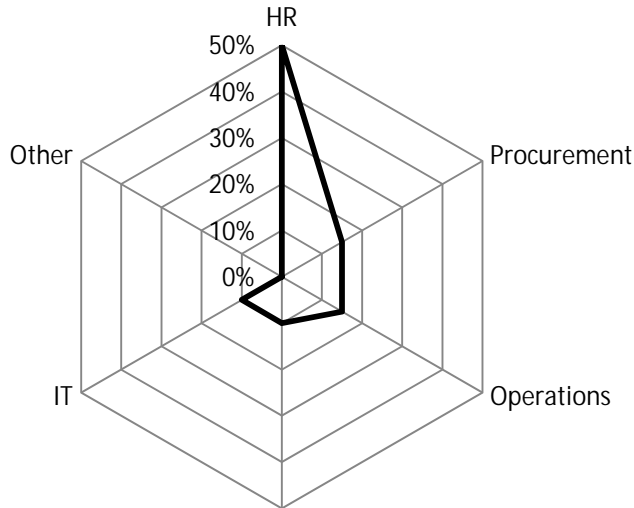
Last year we introduced.....



Company focus – average among VMS respondents



Variety of focus among individual respondents



Current State- Latest Perspective Cutting Edge



Jason Ezratty
Managing Partner
Brightfield Strategies

Evolution of Technology



Configurability



Branding

Workflow Steps & Behavior

Fields & Field Labels

Alerts & Notifications

Languages ...50 consolidate

Currencies ...172 consolidate

Fees ... 270 charge flat amount

Rate Cards & Calculations

Discounts ... 142 have early-pay

Sourcing/Bidding Model

Differentiated Configurations

Improved Quality, Stability, Security & Performance

QA/QC

Consolidation of Code Base

Usability & Human Factors

Error Handling

Back-up & Disaster Recovery

Encryption

Redundancy

Advanced Network Monitoring

Mission Critical Standards



Contextual Data & Decision Support



Candidate Flagging

Rate Intelligence

Worker Type Decision Support

Supplier Selection Support

Statutory-limit Discounting ...102

Tenure-based Discounting ...83

Volume-based Rebates ...77

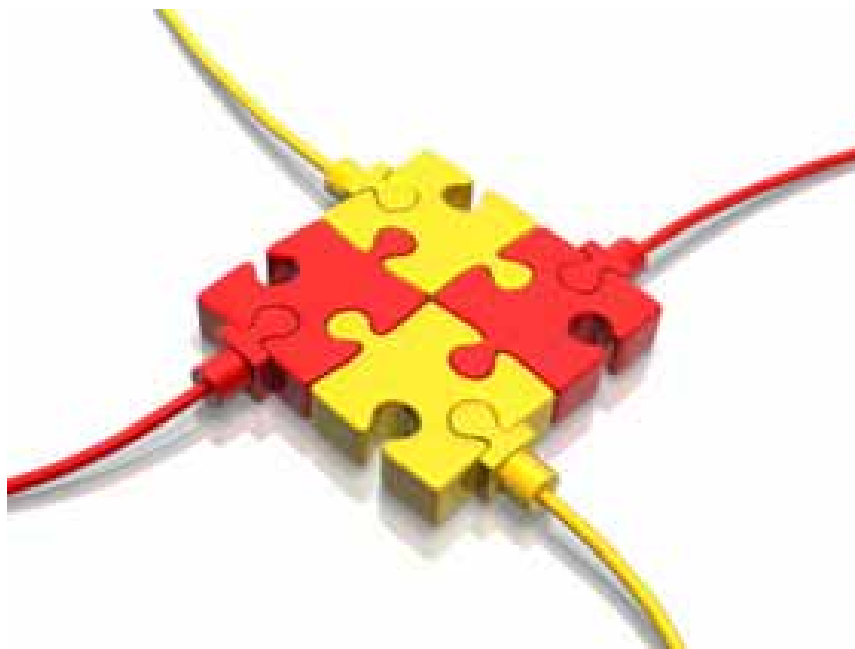
Integrating SOW Work & Workers

**178 programs use their VMS to
profile SOW supplier
capabilities**

**112 programs track non-billable
time for SOW resources**



Integration to Support Specialized Transactions



160 programs integrate directly with background screening providers

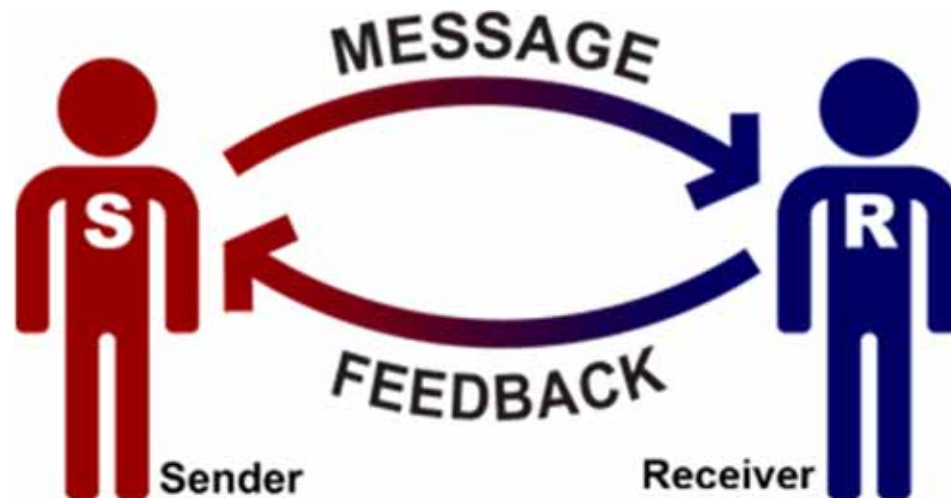
151 programs automatically activate/deactivate systems access based on interface

36 programs integrate with location assignment systems

3 programs integrate with skills testing providers

2 programs integrate with Taleo

Enhanced Supplier Support Features



7036 instances of suppliers configuring order routing to recruiters based on location; 5360 based on skill requirements

Future State- What's Coming

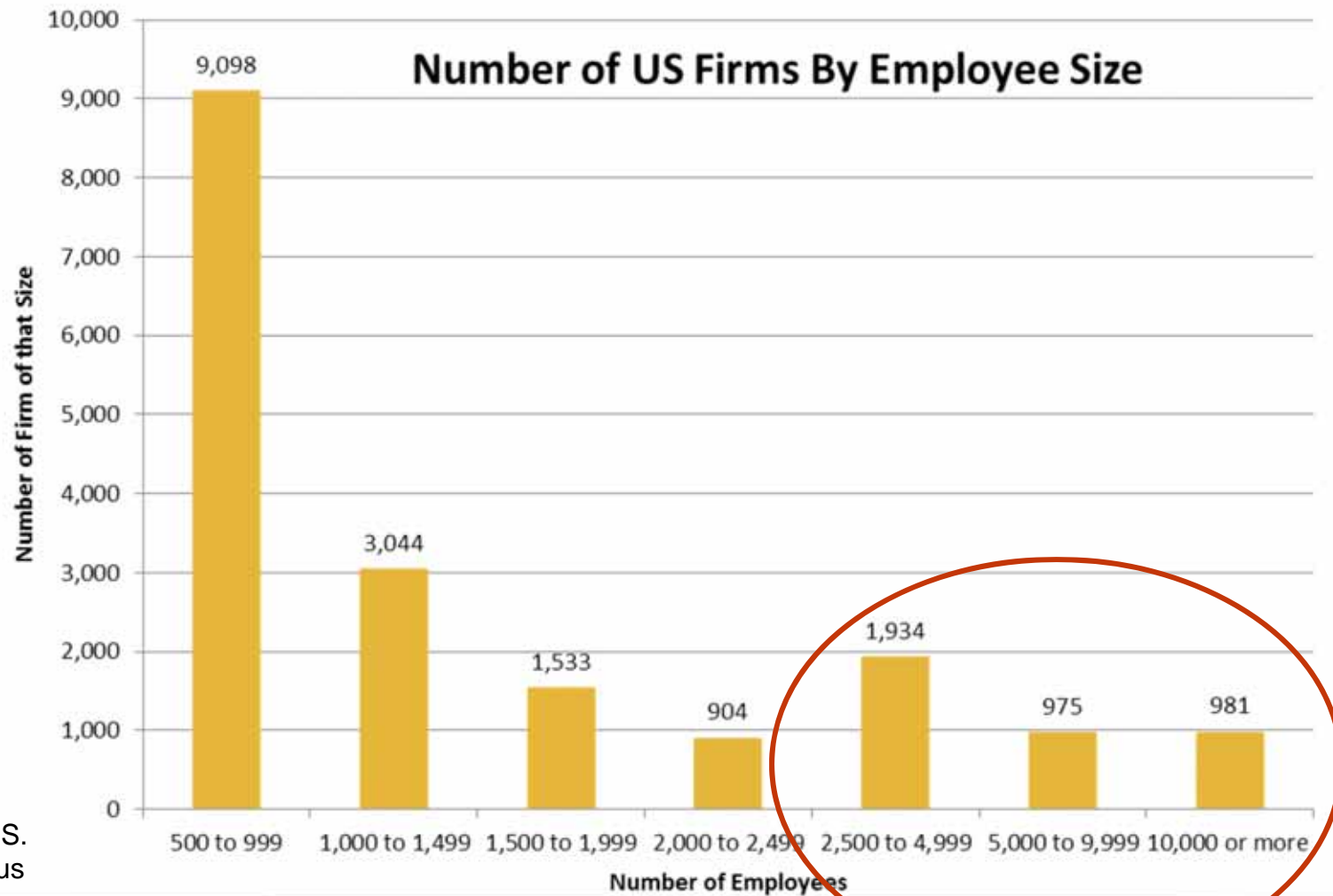


Bryan Pena,
VP CW Strategy & Research

The Future? Disruptive Possibilities.



Is Mid Market Next for VMS?



Source: 2007 U.S.
Economic Census

Don't forget the "Mega Deals"



Source: Staffing Industry Analysts

Is Integrated Talent Realistic?

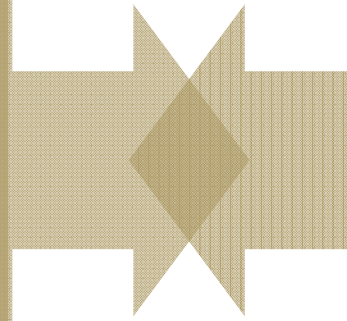
REALISTIC TRAVEL

On Foot:		Maximum Speed:	Average Speed:	Distance Constraints:
	<i>Walking:</i>	30 miles/day	20 miles/day	
	<i>Carrying Weight:</i>	25 miles/day	15 miles/day	
On Horseback:	<i>Hourly:</i>	40 mph	5 mph	
	<i>Daily:</i>	100 miles/day	20-30 miles/day	
On Sea:	<i>Trieme:</i>	8.5 mph		190 miles
	<i>Chinese Junk:</i>	16 mph		~5000 miles?
	<i>Caravel:</i>	9 mph	4.5 mph	~5000 miles?
		150 miles/day	90~100 miles/day	
	<i>Steamship:</i>		25 miles/hour	~4800 miles (before needing to refuel)
		Record transatlantic crossing: 4 days, 13 hours		
	<i>Kayak:</i>	5 mph	3.5 mph	
		40 miles/day	15 miles/day	
By Pigeon:	<i>Hourly:</i>	90 mph	50 mph	1,100 miles
	<i>Daily:</i>	600 miles/day		

Converging Markets/Solutions

Contingent Hire

MSP



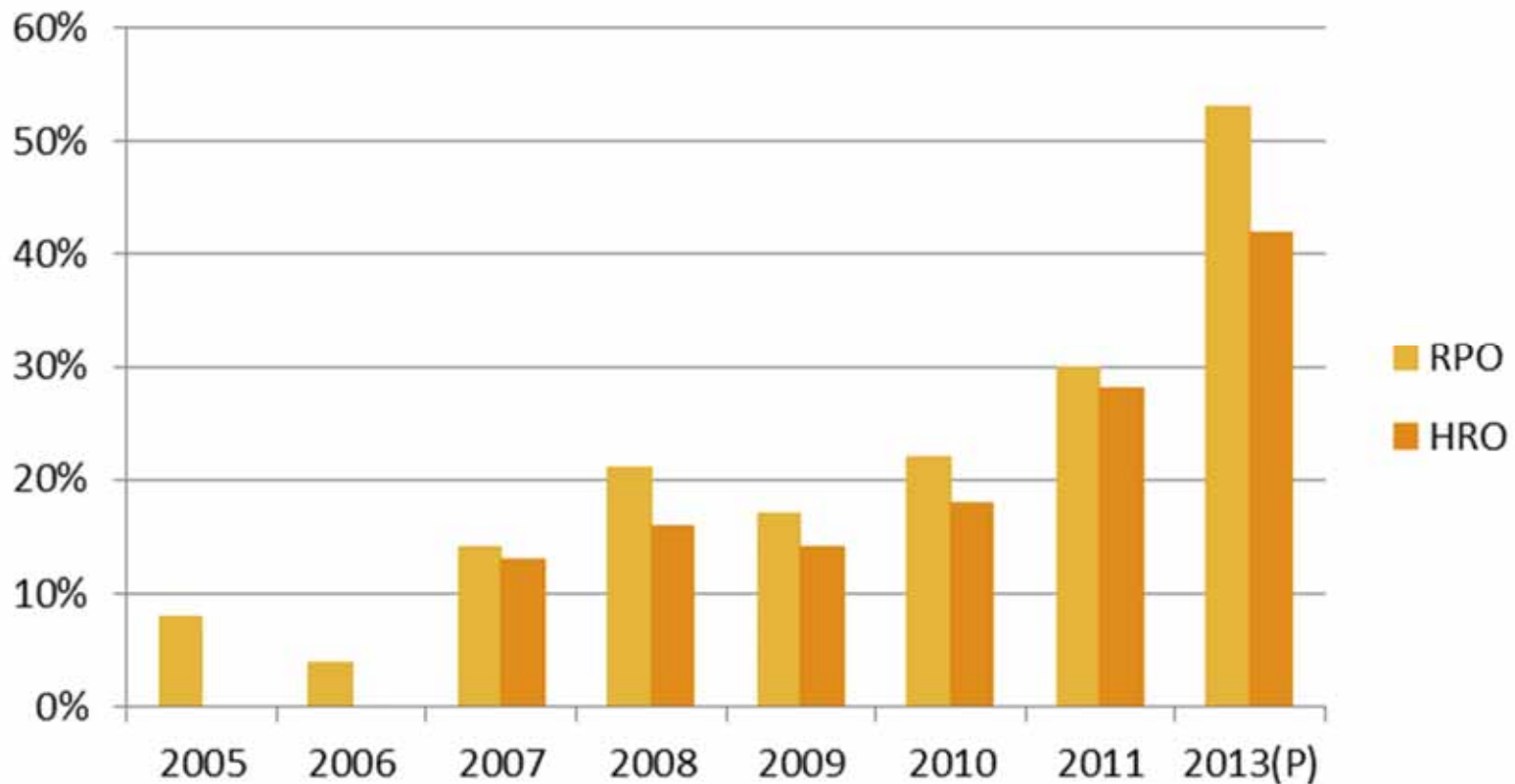
Permanent Hire

RPO



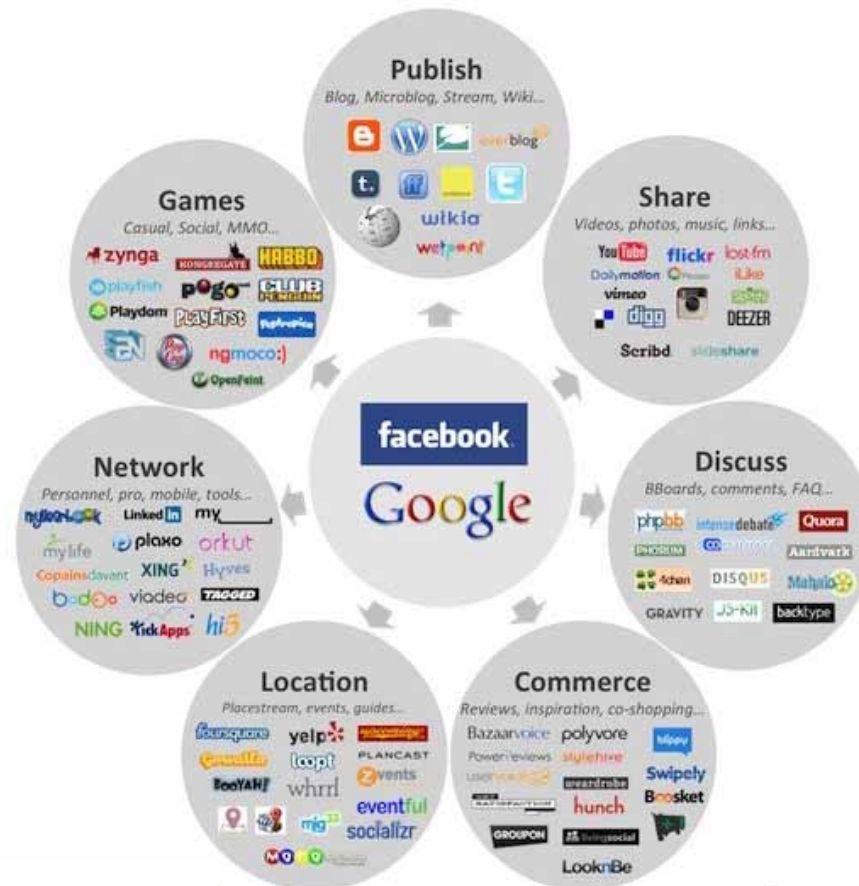
Growth of RPO and HRO

Percent of Large Companies Implementing RPO/HRO



Source: 2011 Contingent Workforce Buyers Survey

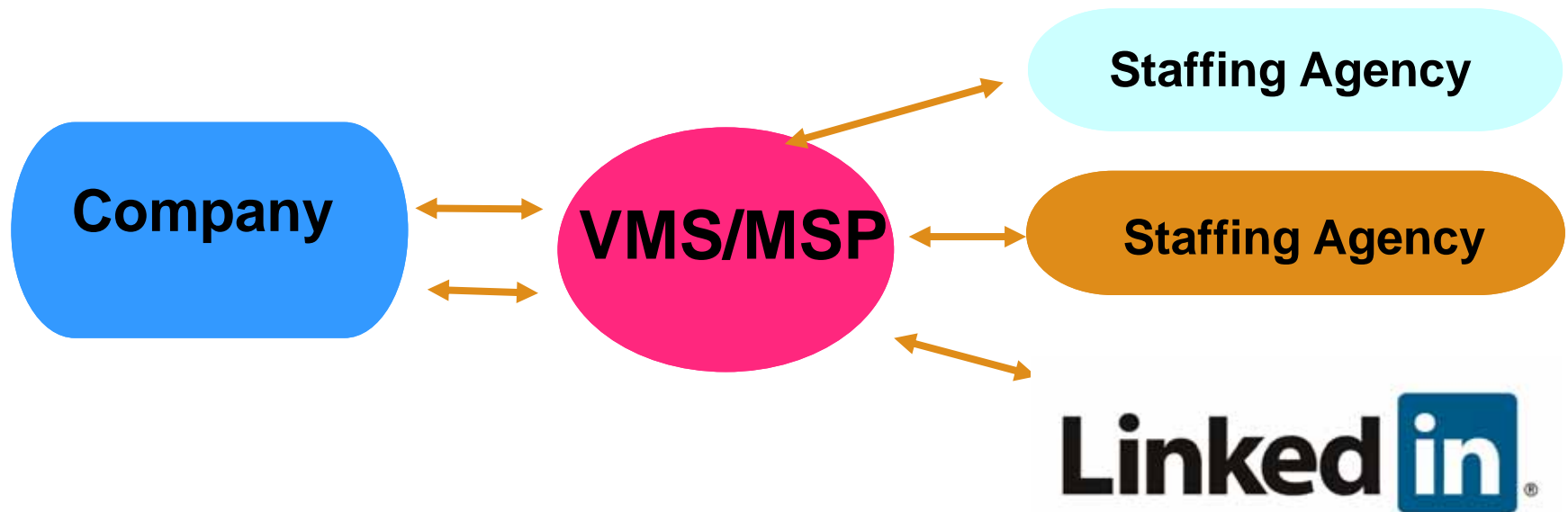
Social media could change everything?



Learn this word....

Disintermediate - (*dis-intr-méd-iat*)

To attempt to do away with intermediary entities between two primary market forces;
to eliminate the middleman



Questions/Discussion?



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Stephanie Burnham
Vice President, Marketing

Upcoming Webinars

May 30, 2012

- MSP and RPO Contracts in Europe: Dealing with the Law

June 6, 2012

- Services Procurement

June 21, 2012

- Legs & Regs Legal Update

Save the date for San Diego

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Your opportunity to show off!

North America

2012 Case Study Competition

Collaborative Intelligence in Action

May 8th, 2012

Bryan Felix, VP, Contingent Workforce Strategies and Research
bfxn@staffingindustry.com

**STAFFING
INDUSTRY
ANALYSTS**

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High Level Program Process Overview:

- A. Submission to SIA by **July 17, 2012**.
- B. *Workforce Strategies 3.0* and direct contact.
- C. Case study finalists will receive complimentary conference registration, hotel for one night
- D. Case studies will be presented as part of the keynote on **September 20**, the first day of CWS Summit San Diego. We will present 7 to 10 cases, during the 75-minute keynote session.
- H. Votes will be tabulated and winners will be announced on **September 21**, during the final session of CWS Summit San Diego.
- I. Highest combined score wins an inscribed plaque and a 1-year North American Single Seat for CWS Council.



Case Competition FAQ's

- Case study must be presented by end client company and have company branding.
Providers are encouraged to solicit client participation but are ineligible to submit on their clients behalf.
- Each company may submit multiple cases.
For example, if Company "A" feels their rollout and policy changes are both innovative they can submit a separate case study for each.
- Company representatives must be at CWS Summit to present as part of the Thursday, September 20 Keynote.
Encouraged to be present at closing session where winning case will be revealed.
- Cases are to be submitted in PowerPoint format, ideally 7-10 slides, but can be as long or detailed as required/desired.
 - Presentation at CWS Summit will be limited to 7-10 minutes in length
 - Reduced in length to no more than 3-5 slides
- Cases may be aggregated and consolidated to create research piece or conference leave behind.



For more information...

The screenshot shows the Staffing Industry Analysts website. At the top, there is a navigation bar with 'Current Region: North America Europe', 'Login', and 'Register' buttons. Below this is a header with the company logo, a '2012 SIGN UP NOW FOR BEST RATES!' banner, a search bar, and links for 'View Cart (0)', 'User Dashboard', and 'Contact Us'. A red navigation bar contains links for 'HOME', 'CONFERENCES & WEBINARS', 'PRODUCTS & SERVICES', 'RESEARCH & PUBLICATIONS', 'SUBSCRIBE', 'STORE', and 'ABOUT'. The main content area features a sidebar with a 'Home' menu and a 'Return to Home' link. The central article is titled '2012 Case Study Competition' and includes the following text: 'The 2012 Case Study Competition uses the unique conference that is the CWS Summit to showcase contingent workforce programs and solutions. Program owners finally have the opportunity to share what makes their CW program stand out. And this is a great forum for other companies to learn how to improve their own.' It also includes 'Who:' and 'When:' sections. A 'WEBSITE FEEDBACK' section is visible on the right.

Current Region: North America Europe Login Register
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2012 Case Study Competition

The 2012 Case Study Competition uses the unique conference that is the CWS Summit to showcase contingent workforce programs and solutions. Program owners finally have the opportunity to share what makes their CW program stand out. And this is a great forum for other companies to learn how to improve their own.

Who: Contingent workforce program owners. Suppliers may encourage their clients to participate, but the actual submission must come from the program owners.

When: Deadline is July 17. Staffing industry Analysts will select five to seven finalists to present their program at the CWS Summit's Keynote on Sept. 20 in San Diego. Participants must be available to present their program in person. Conference attendees will select the winner. The participant with the highest score will win an inscribed plaque and a one-year North American Single Seat membership for Staffing Industry Analysts' CWS Council.

For more details, please click [here](#).

Any further questions, please contact our project team at casestudy2012@staffingindustry.com.

WEBSITE FEEDBACK

We would love your feedback.

COMMENTS

casestudy2012@staffingindustry.com



Certification.....



**CWS Summit Keynote Speaker:
Jon Huntsman
Globalization and the Effects on the US Workforce**

2013 CWS Europe in Berlin

May 15-16, 2013 | Andel's Hotel, Berlin, Germany



We want to know what you are thinking.....

Bryan Pena

VP, CWS and Research

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P: 650-390-6188

