



WEBINARS
CONTINGENT WORKFORCE
STRATEGIES COUNCIL



Join the Evolution: VMS and MSP Transformed

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October 26, 2023

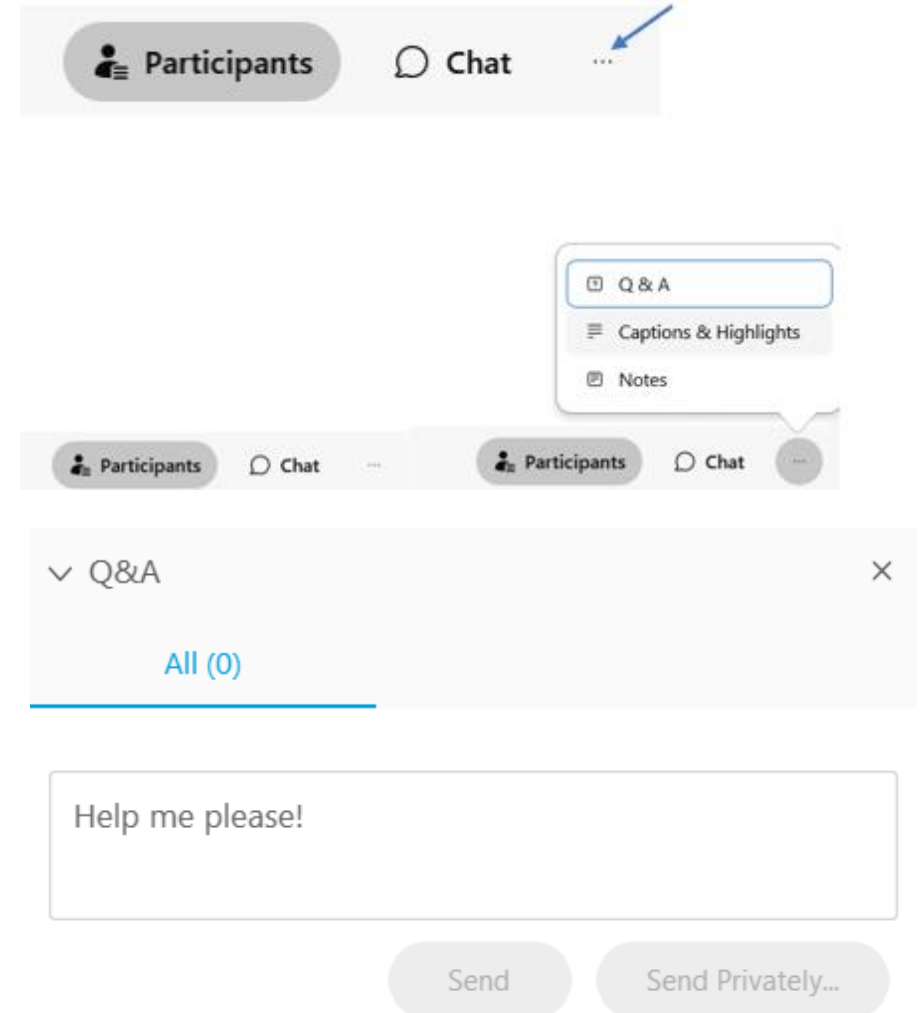
Logistics

Questions

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- **Click on the 3 dots on the lower right to open the Q&A window.**
- Type your question into the small dialog box and click the Send Button.

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<i>Events</i>		
<i>Editorial</i>		
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CWS Council (partial list)



Today's speakers...



- **Stephen Day**, Chief Procurement Officer, Kantar



- **Joao Martires**, Chief Operating Officer, YunoJuno

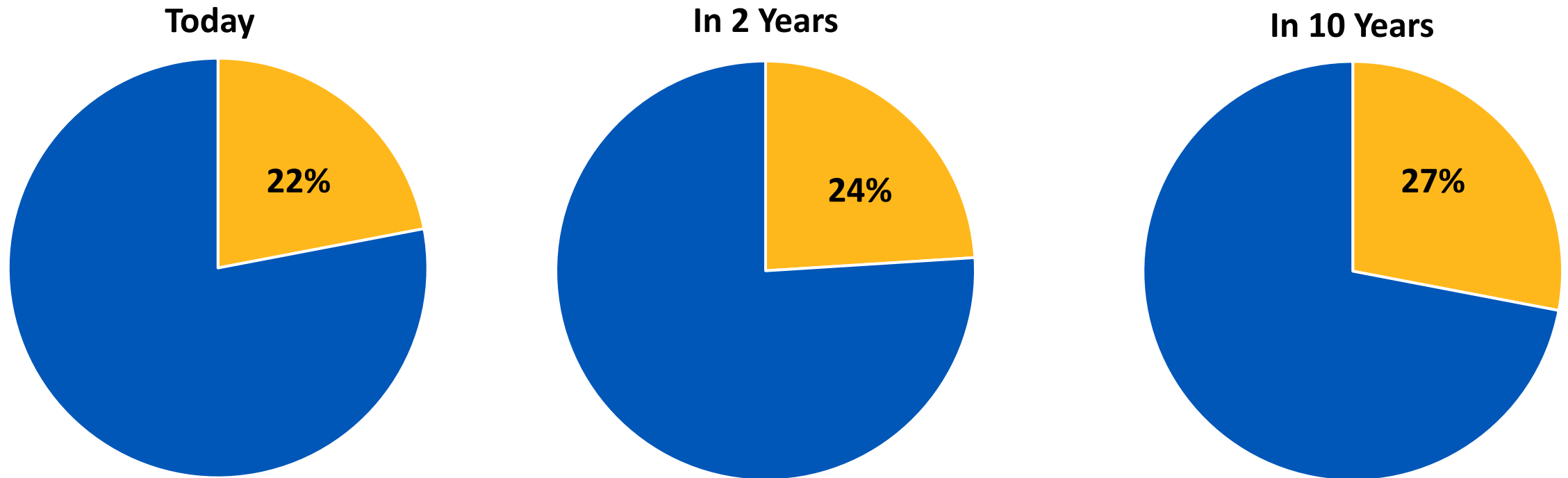


Moderator

- **Stephen Clancy**, Senior Director, CWS, Knowledge & Research, SIA

Contingent Share of Workforce

Estimate the percent of your organization's workforce that is (or will be) contingent



Source: SIA Workforce Solutions Buyer Survey 2023: Americas

What is the Best Type of Worker for the Work?



Freelancer

Temporary
Agency
Worker

Robot

SOW
Consultant

'Traditional' Employee
Full-time? Part-time? Remote?

Other
Temporary
Worker

Offshore
Worker

RPA

Outsourced
Worker

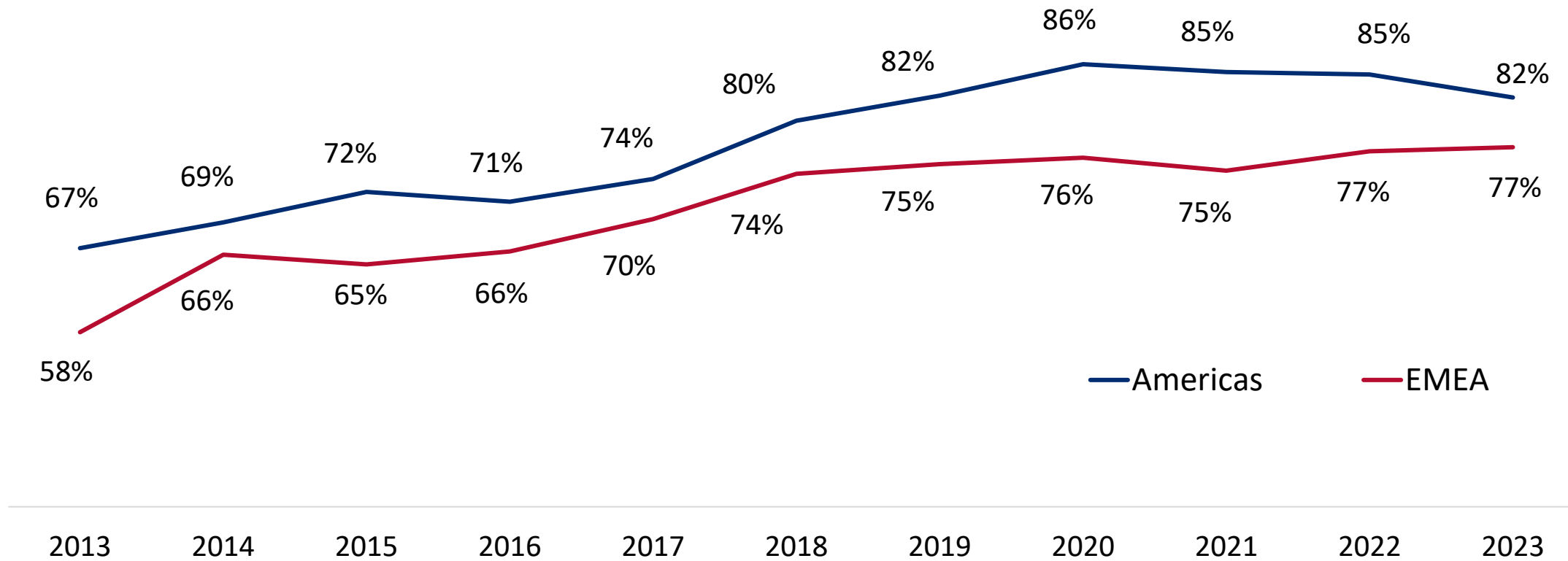


MANAGERS

Independent
Contractor

Market Penetration of VMS

Increase in VMS Adoption 2013-2023 by Organizations with >1,000 employees (3-year average)



Source: SIA Workforce Solutions Buyer Survey 2023

VMS Landscape Trends



- VMS as part of an IT ecosystem with focus on integrations (ERP, Direct Sourcing, Internal systems)

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- Innovate solutions for organizational demands – remote on/off boarding capabilities and high volume hiring

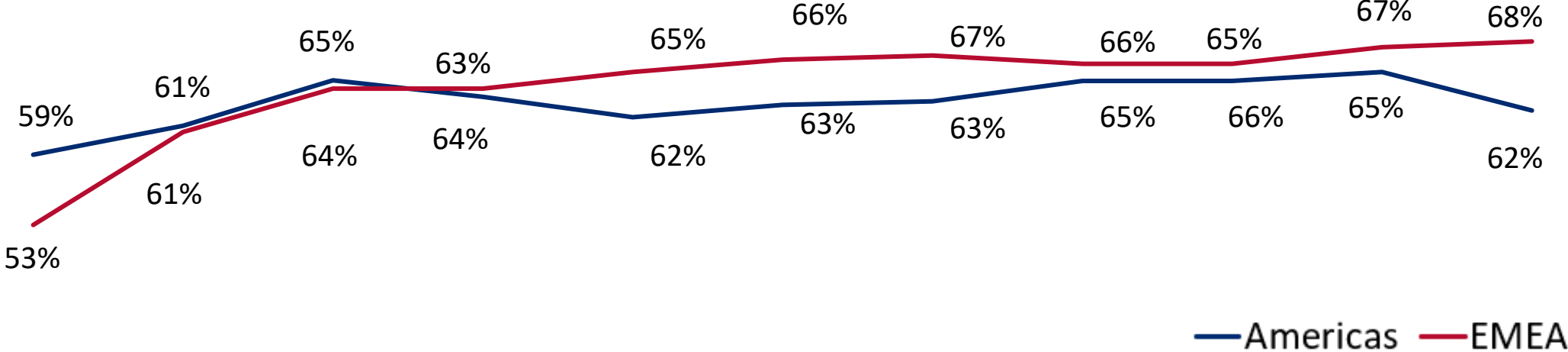
VMS Landscape Trends

- VMS as part of an IT ecosystem with focus on integrations (ERP, Direct Sourcing, Internal systems)
- AI now instrumental in driving decisions based on workforce needs (e.g. timing, rates, locations, suppliers)
- Innovate solutions for organizational demands – remote on/off boarding capabilities and high volume hiring
- Greater emphasis on workforce integration
 - Employees/ non-employees
 - All engagement types
 - Total talent acquisition
 - Total workforce optimization

Market Penetration of MSP



Increase in MSP Adoption 2013-2023 by Organizations with >1,000 employees (3-year average)



SIA | Staffing Industry Analysts **Contingent Workforce Strategies Council**

Source: SIA Workforce Solutions Buyer Survey 2023

MSP Landscape Trends



- Proprietary workforce intelligence platforms with integrations to VMS and external data

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- Partnerships with diversity leaders and experts for informed program development

MSP Landscape Trends

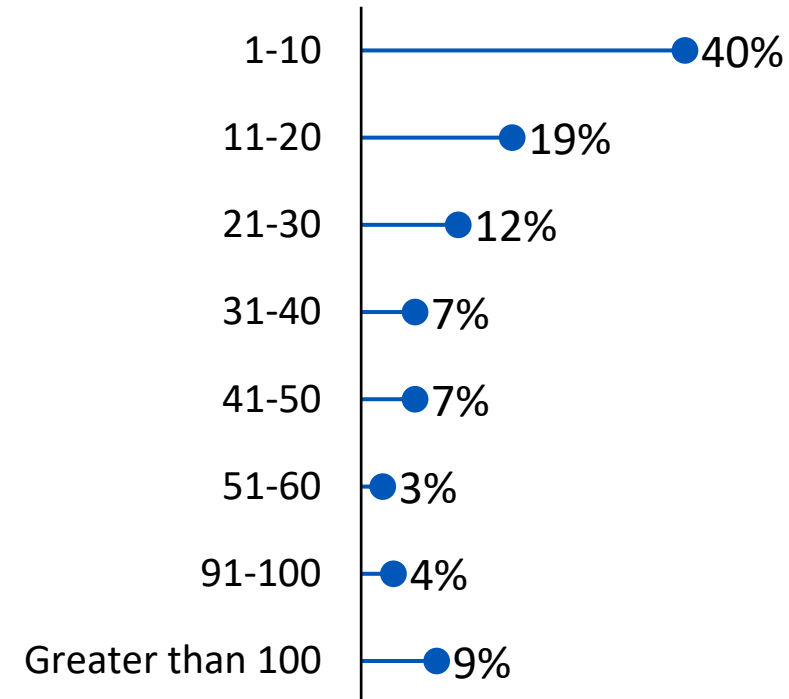
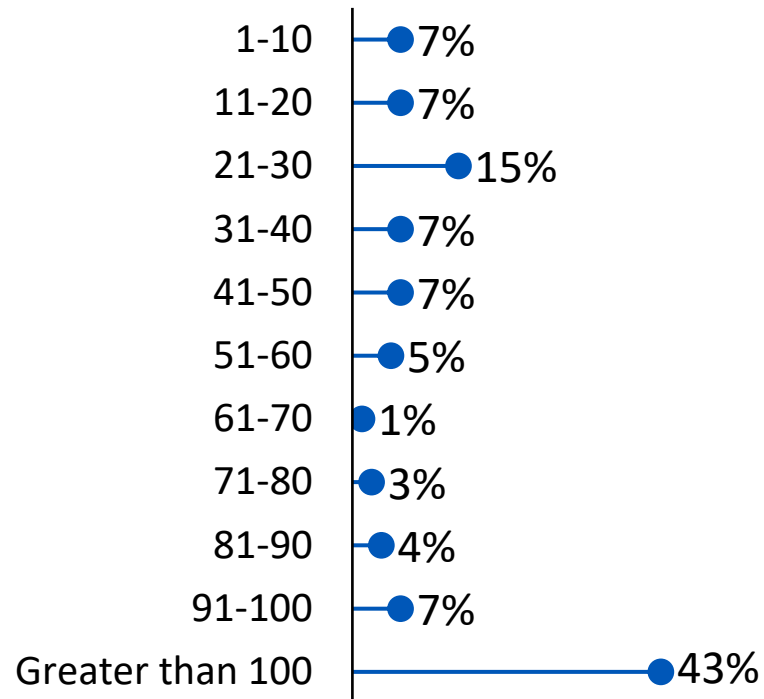


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- Dedicated market insights centers of excellence with qualified researchers
- Development of proprietary technology that includes AI matching, screening, employee referral and visibility of all talent types
- Formal partnerships with direct sourcing platforms to access and curate public and private talent pools
- Partnerships with diversity leaders and experts for informed program development
- Growing spend management expertise (SOW, etc...)

Total Number of Suppliers in Program



What is the total number of suppliers in your program and in a tier 1 capacity?



Source: Workforce Solutions Buyer Survey, Global Results

Net Promoter Scores for MSP and VMS

How likely are you to recommend your supplier(s) to a friend or colleague?



Supplier Type	Net Promoter Score*
Staffing Agency Supplier	-13
MSP	-29
HRIS	-32
VMS	-43
ATS	-47
ERP	-49
Job Board	-50
Talent Platform	-58
RPO	-67

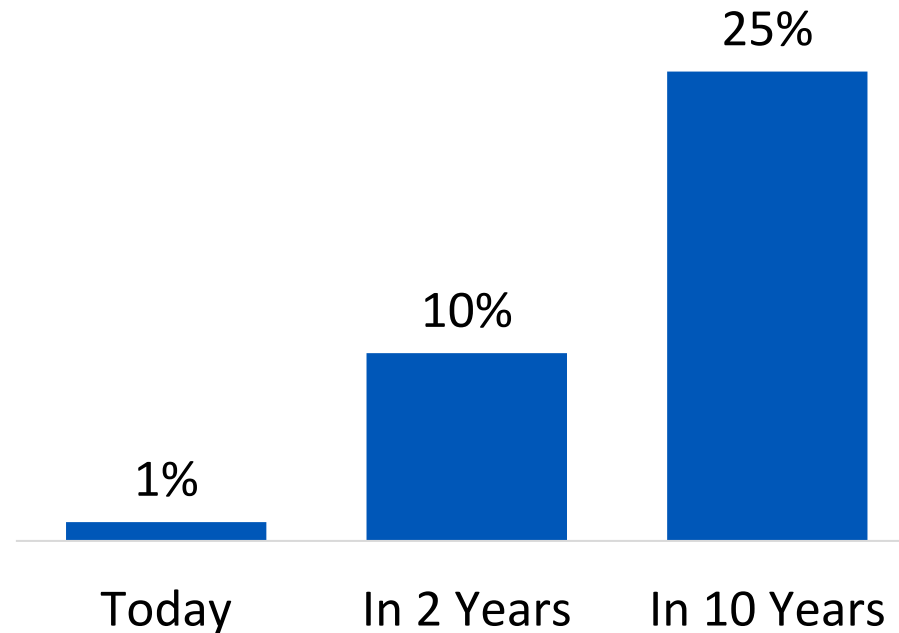
*Net Promoter Score as developed by Fred Reichheld at Bain & Co

Source: [Workforce Solutions Buyer Survey – 2023 Global Results](#)

Disintermediation Initiatives are Being Embraced... Buyers Direct Sourcing Plans

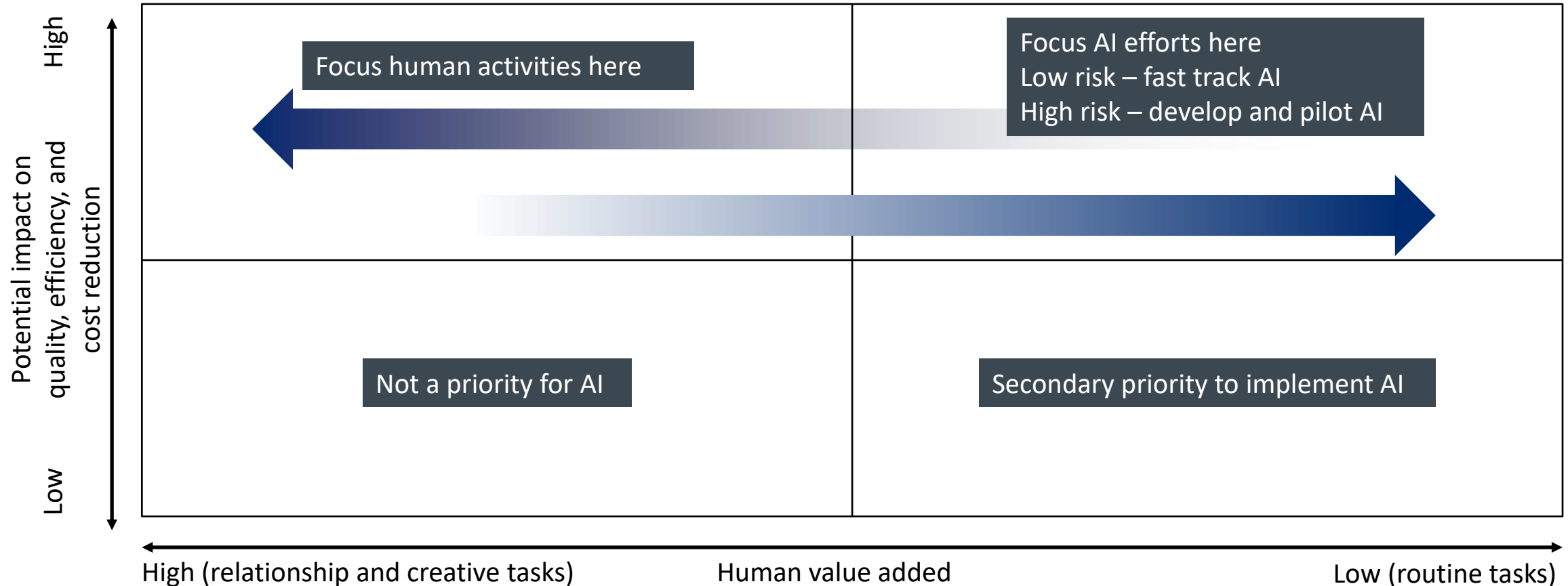


What percent of your organization's contingent workforce spend is sourced directly (no staffing supplier is used)?
Median Results



AI Prioritization Framework

Prioritizing AI Implementation by task



Source: SIA, *The Future of AI in Staffing*

Evolution of VMS and MSP Capabilities, Solutions and Innovations



**Enhanced
Integrations to IT
Ecosystem**

**Expanding
Spend Portfolio
Management Expertise**

**MSP
Proprietary
Tech**

**Direct CW Talent
Operation Models**



**CW Program
Management**

**Leveraging
AI & Process
Automation**

**Workforce & Market
Intelligence
Platforms**

**Expanding Process
Enabling Tech
Stack**

Best Practices in Managing the Evolution



- Enhance One's Knowledge Pipeline to Drive Innovative Q,E,C,R Performance
- Re-Imagine Current CW Program Strategies and Missions to Embrace New Contingent Workforce Innovations and Capabilities

Best Practices in Managing the Evolution



- Be Assertive in Leveraging AI & Automation Opportunities Today, Not Tomorrow
- Leverage Partnerships to Accelerate Adoption of Emerging Trends and Enhanced Levels of Contingent Workforce Competitive Advantage

Time for your questions...



Thank you for your sponsorship...



Yunojuno



SIA MEMBER RESOURCES



- [CW Program Business Case Template](#)
- [The Global Gig Economy - 2022 Edition](#)
- [Best Practices in Contingent Diversity, Equity & Inclusion](#)
- [Direct Sourcing Best Practices](#)
- [MSP Global Landscape and Differentiators 2022](#)
- [VMS Global Landscape & Differentiators 2022](#)
- [Lexicon of Global Workforce-Related Terms](#) (complimentary)

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Founded in 1989, SIA is the global advisor on staffing and workforce solutions. Our proprietary research covers all categories of employed and non-employed work including temporary staffing, independent contracting and other types of contingent labor. SIA's independent and objective analysis provides insights into the services and suppliers operating in the workforce solutions ecosystem including staffing firms, managed service providers, recruitment process outsourcers, payrolling/compliance firms and talent acquisition technology specialists such as vendor management systems, online staffing platforms, crowdsourcing and online work services. We also provide training and accreditation with our unique Certified Contingent Workforce Professional (CCWP) program.

Known for our award-winning content, data, support tools, publications, executive conferences and events, we help both suppliers and buyers of workforce solutions make better-informed decisions that improve business results and minimize risk. As a division of the international business media company, Crain Communications Inc., SIA is headquartered in Mountain View, California, with offices in London, England.

For more information: www.staffingindustry.com

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