

Concurrent Session: *Get Practical*

20 Big Ideas from Staffing Industry Analysts

Speaker:

- **Jon Osborne**, VP, Strategic Research, Staffing Industry Analysts
josborne@staffingindustry.com



March 16-19, 2015
Orlando, FL

Don't forget to provide feedback

20 Big Ideas from Staffing Industry Analysts



Bad



Fair



Ok



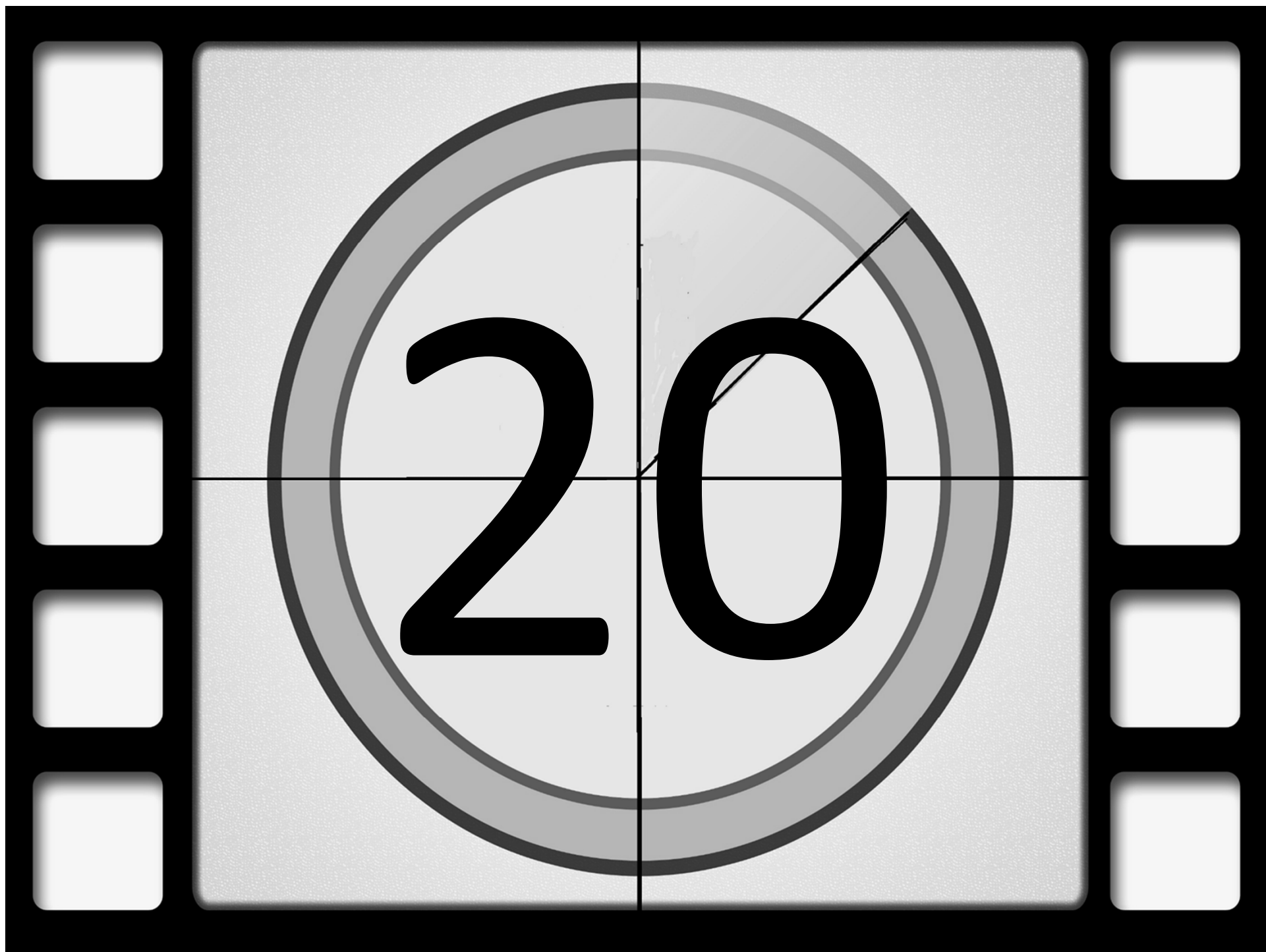
Good



Excellent!

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The most under-served big skill shortage is...

| | Registered Nurses | Software Developers | Engineers | ? |
|-------------------|-------------------|---------------------|-----------|-----------|
| Unemployment Rate | 2.1% | 2.5% | 1.7% | 1.6% |
| Employment | 3 Million | 1 Million | 2 Million | 1 Million |

The most under-served big skill shortage is...

| | Registered Nurses | Software Developers | Engineers | <i>Farm Managers?!</i> |
|-------------------|-------------------|---------------------|-----------|------------------------|
| Unemployment Rate | 2.1% | 2.5% | 1.7% | 1.6% |
| Employment | 3 Million | 1 Million | 2 Million | 1 Million |



Shortage of U.S. farmers reaching epidemic proportions: USDA official

[Print](#)[Email](#)

April 12, 2012 3:00 pm

(0) Comments

ALBUQUERQUE, N.M. (AP) — An epidemic of sorts is sweeping across U.S. farmland, says USDA Deputy Secretary Kathleen Merrigan.

It has little to do with the usual challenges, like drought, rising fuel and feed prices or crop-eating pests.

U.S. farmers and ranchers are getting older and there are fewer people standing in line to take their place.

New Mexico has the highest average age of farmers and ranchers of any state at nearly 60 years old, and neighboring Arizona and Texas aren't far behind. Nationally, the latest agricultural census figures show the fastest growing group of farmers and ranchers are those over age 65.



Iowa Farmer Today



7°
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Shortage of Farmers Creates 'Dangerous Situation' for U.S.

BY MARK KOBA

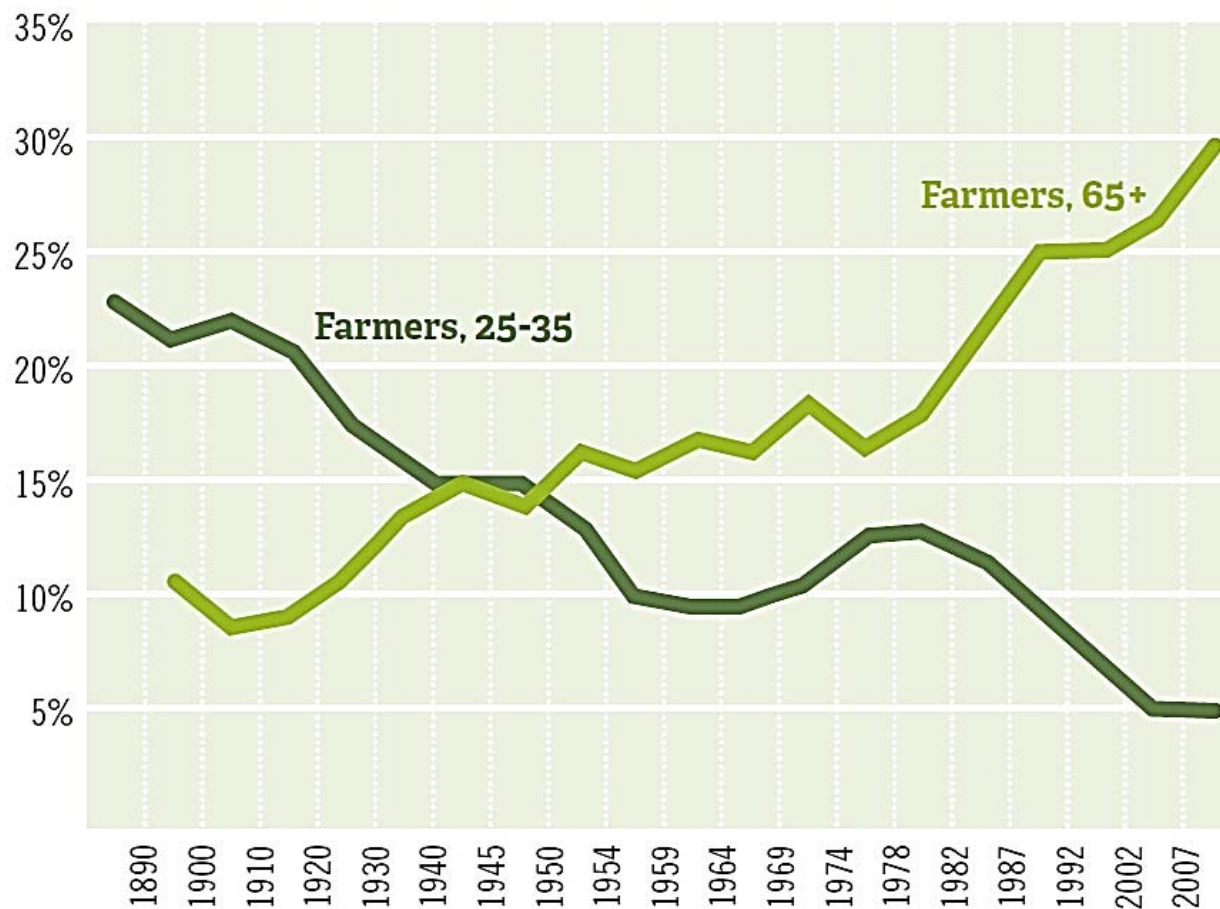
Farming has always been a hard life. It's a livelihood held hostage by the whims of Mother Nature and fickle consumers.

Now you can add the high cost of doing business to the list of things scaring young Americans away from agriculture, and it's raising concerns that the nation will soon face a dearth of growers.

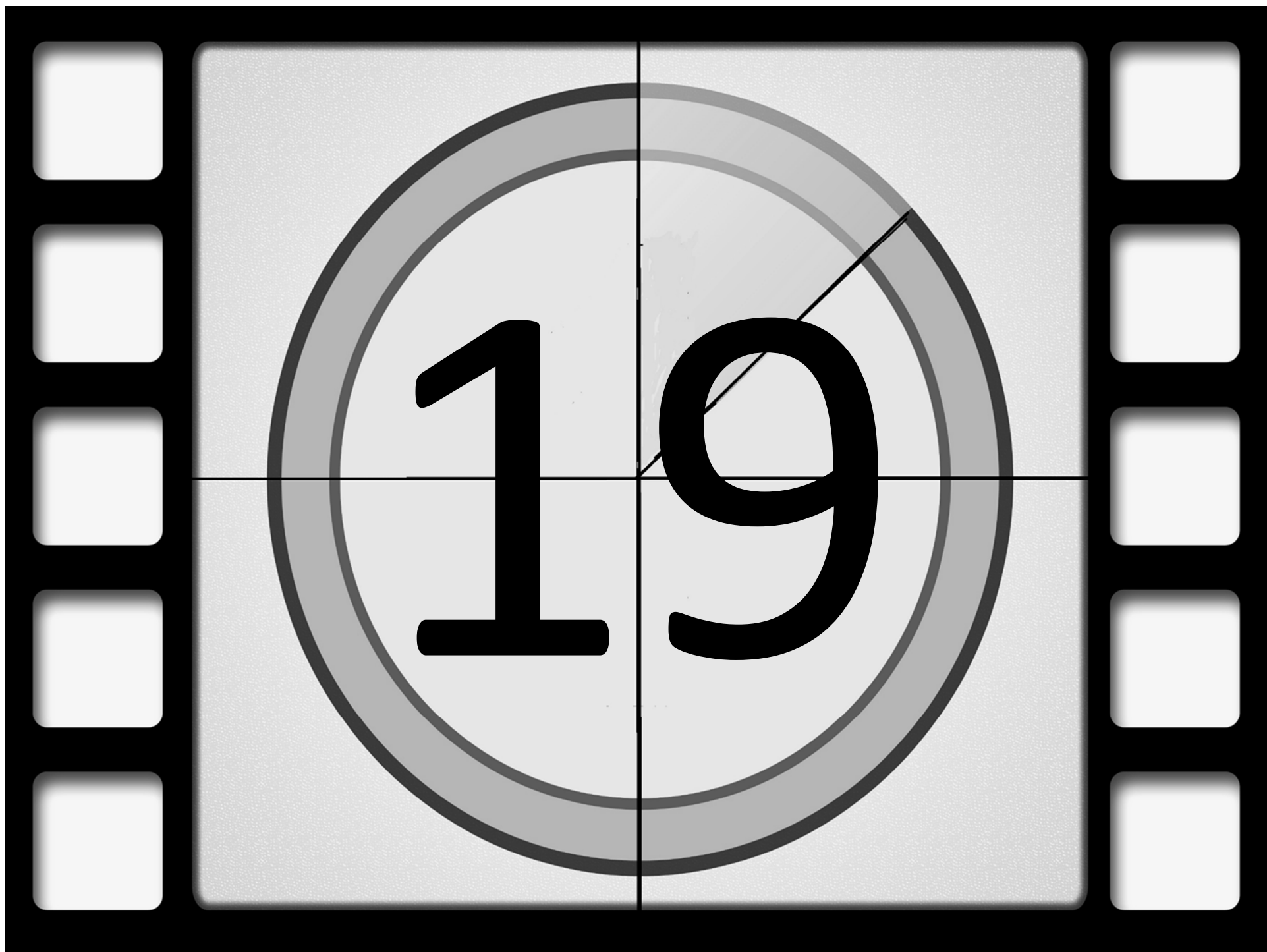
old, and neighboring Arizona and Texas aren't far behind. Nationally, the latest agricultural census figures show the fastest growing group of farmers and ranchers are those over age 65.

The most under-served big skill shortage is...

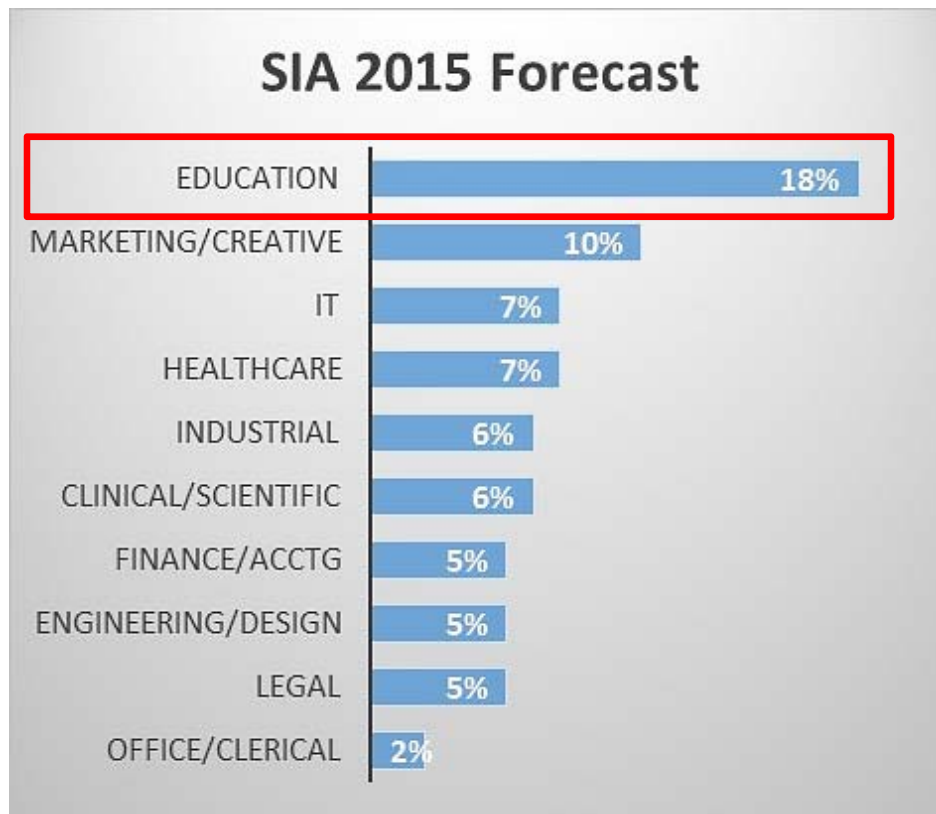
PERCENTAGE OF FARMERS OVER 65
AND BETWEEN THE AGES OF 25-35, 1890-2007 (USDA)



Source: USDA



Fastest-growing temp segment: Education Staffing



“Kelly Educational Staffing continued to fuel strong growth **with revenue growth of more than 50% year-over-year** in the quarter and record-setting revenue of more than \$200 million for the full year.

–Carl Camden, Kelly Services, 4Q14 Earnings Conference Call, 1/29/15

Some school systems outsourcing search for substitute teachers

By John Dyer | GLOBE CORRESPONDENT FEBRUARY 06, 2014

Early in the morning, before thousands of children arrive at schools throughout Boston's suburbs, administrators make calls to find hundreds of substitute teachers.

It's no easy task.

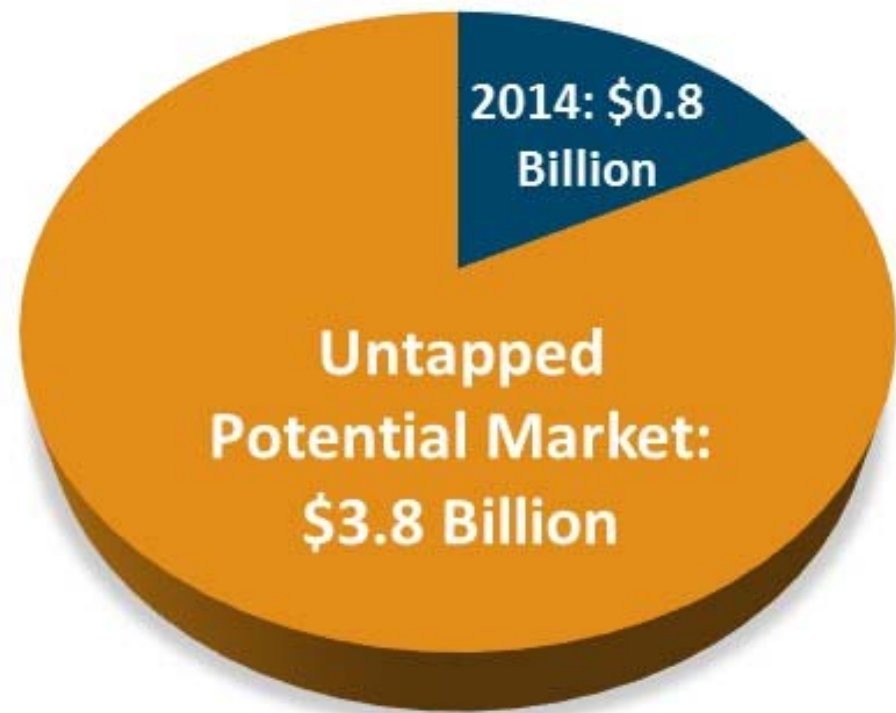
"Usually we're scrambling," said Framingham School Superintendent Stacy Scott. "Getting subs with frequency and quality has been an ongoing challenge. Schools ask for a handful. They get a fraction."

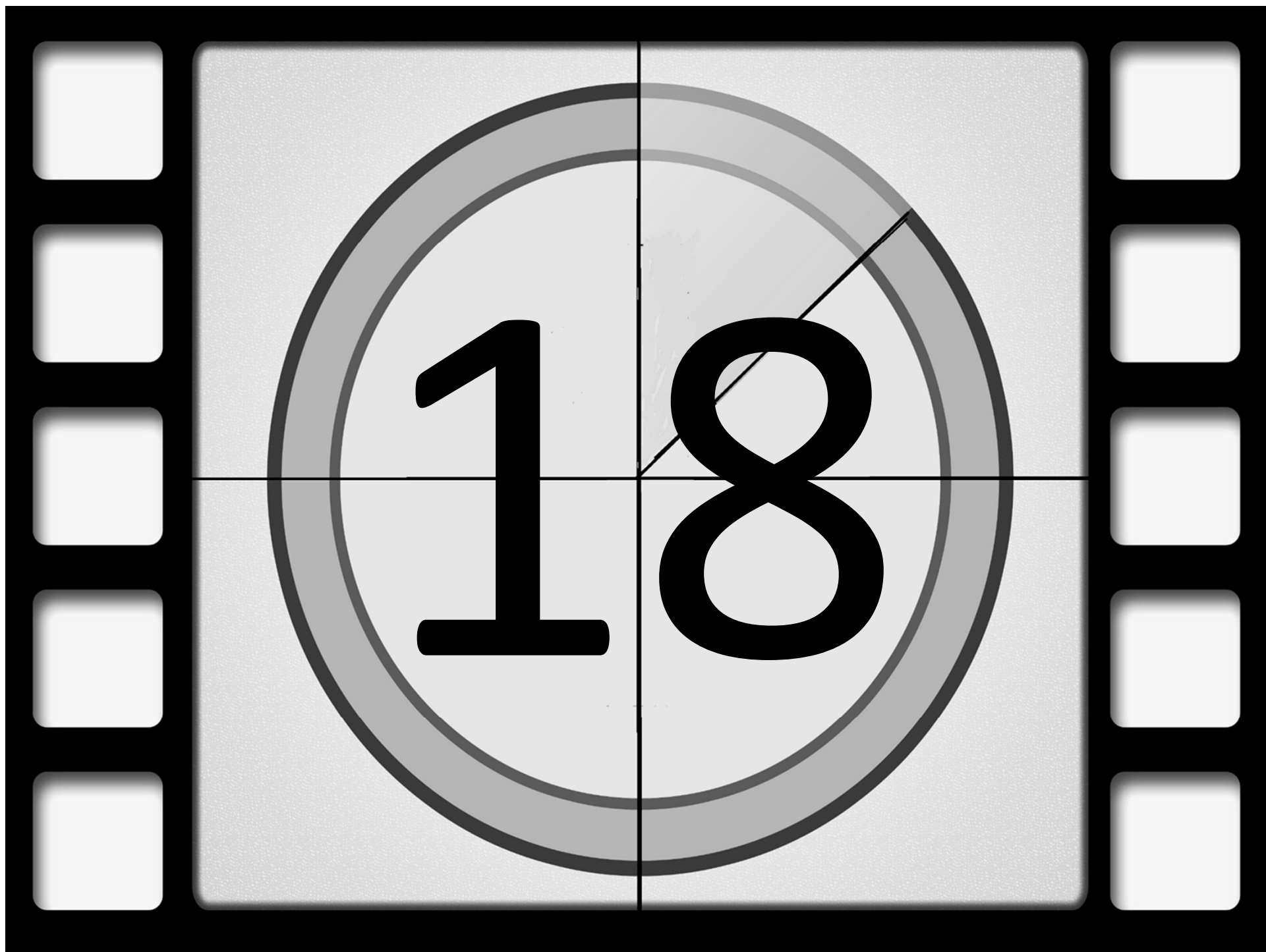
Framingham requires 30 to 60 substitute teachers a day to fill absences among its pool of around 800 educators, said Scott. Sometimes he knows ahead of time which teachers will be out — on maternity leave, for example. Others call in sick at the last minute.

Either way, telephoning prospective substitutes at the end of the day or in the wee hours of the morning is labor intensive. Administrators usually can't fill every empty slot, so other staff members wind up covering for their colleagues. Special education teachers who work with disabled children and others add a layer of complexity to the job, too.

Current penetration of potential U.S. market for K12 substitute teacher staffing: just 17%

| Potential annual K-12 market | \$4.6 billion |
|---------------------------------|---------------|
| Education temp staffing in 2014 | \$0.8 billion |
| Penetration in 2014 | 17% |





Not just K1-12, opportunity for staffing in colleges as well—temp and/or IC management

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Making Adjuncts Temps -- Literally

August 9, 2010
by **Scott Jaschik**

Last year, a small community college in Michigan **considered a plan to stop employing adjuncts** and to have a temporary services agency instead do the formal hiring. The idea was to save the college money and also to save the adjuncts from contributing to a retirement system in which few of them would ever vest. Although only a few dozen adjuncts might have been affected, the idea drew widespread criticism from faculty groups nationally and the college's board split on the matter, and put the idea on hold.

Now another community college in Michigan -- Washtenaw Community College -- is planning to move ahead with a similar plan, and this will involve hundreds of adjuncts. The

Not just K1-12, opportunity for staffing in colleges as well—temp and/or IC management



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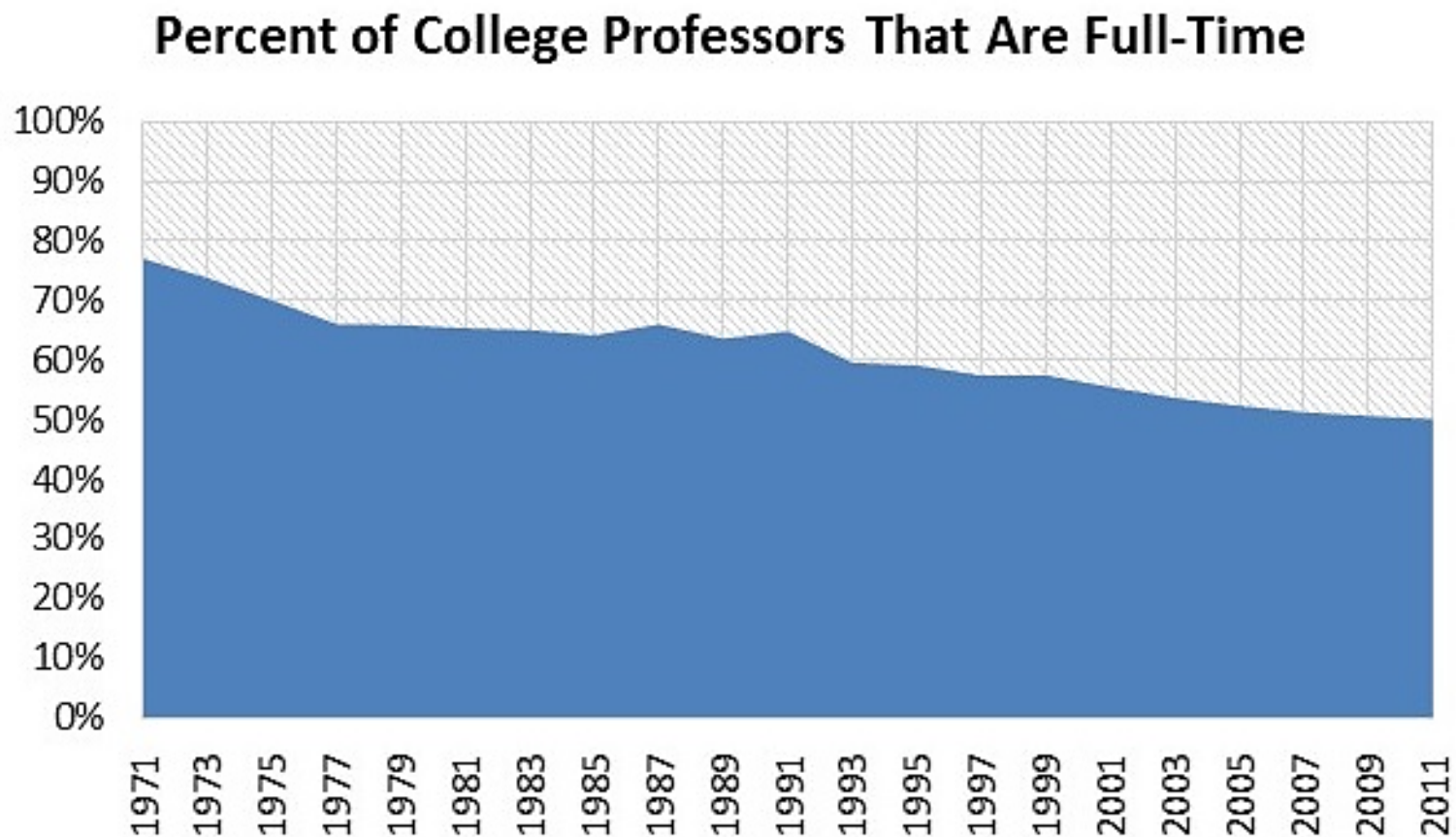
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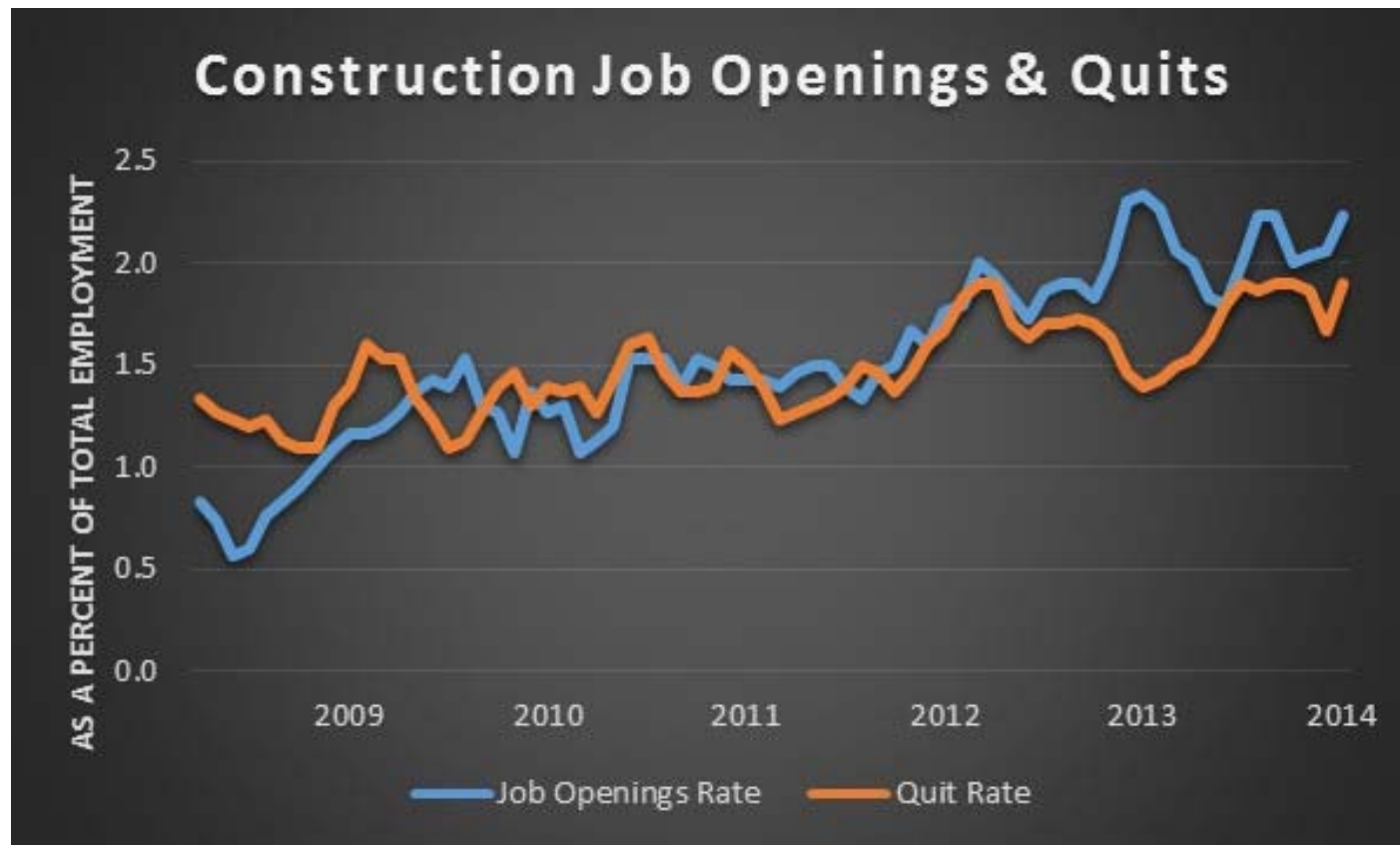
Not just K1-12, opportunity for staffing in colleges as well—temp and/or IC management



Source: The College Board



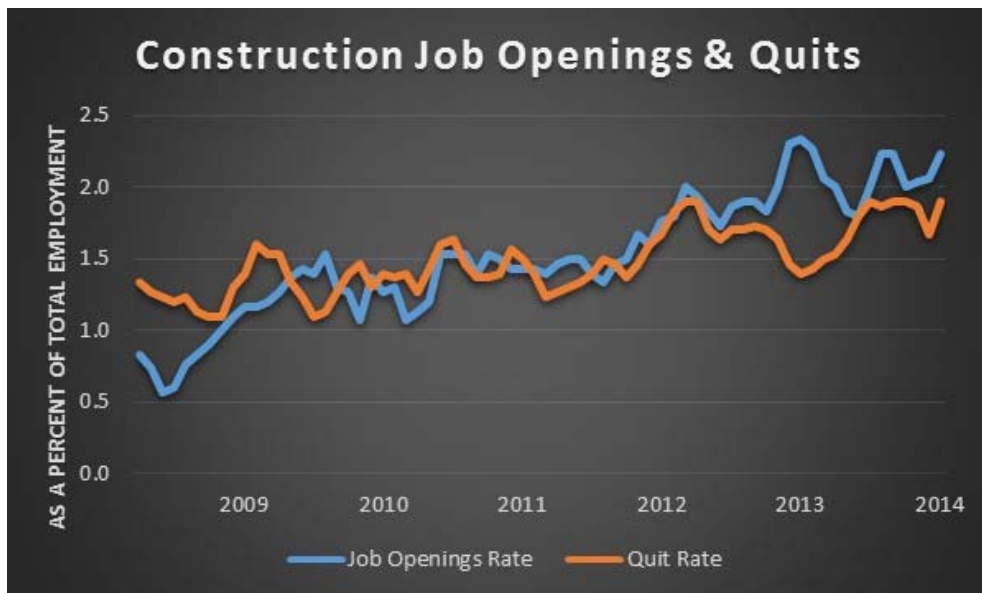
Construction coming back strong...



Source: Bureau of Labor Statistics and Staffing Industry Analysts

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Construction coming back strong...



Best Long-Term Job Outlook

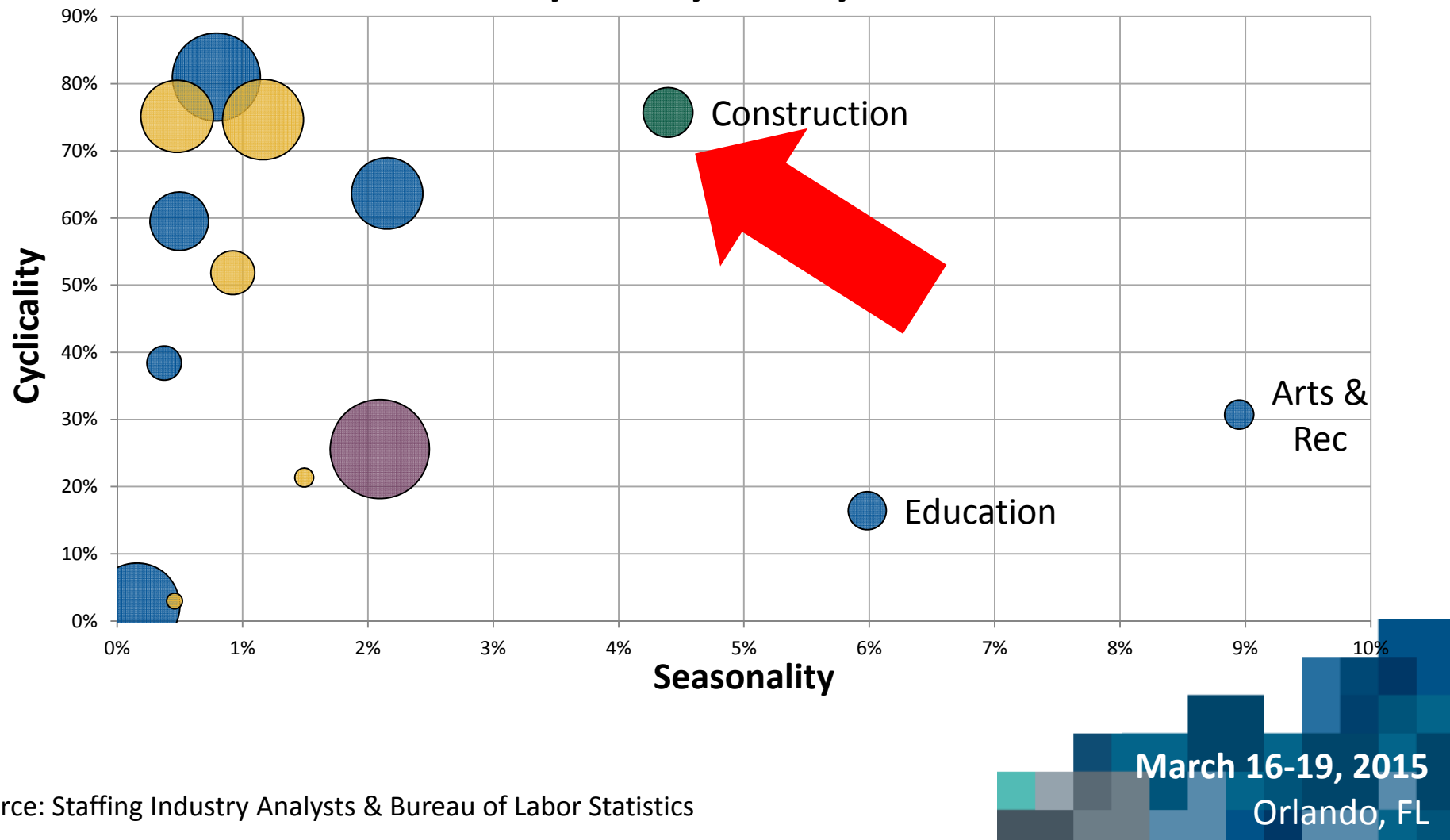
- #1 Healthcare Support
- #2 Healthcare Practitioners
- #3 Construction**
- #4 Personal Care & Service
- #5 Computer & Math

Source: Bureau of Labor Statistics and Staffing Industry Analysts

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Construction: Both cyclical & seasonal

Seasonality and Cyclicity of Industries



Where Construction is Picking Up Now

Y/Y change in new residential building permits

| | Jan-2015 | Jan-2014 | Change |
|--|----------|----------|--------|
| Urban Honolulu, HI | 499 | 43 | 1060% |
| Kahului-Wailuku-Lahaina, HI | 178 | 28 | 536% |
| Odessa, TX | 169 | 45 | 276% |
| Winston-Salem, NC | 276 | 86 | 221% |
| Little Rock-North Little Rock-Conway, AR | 391 | 128 | 205% |
| San Jose-Sunnyvale-Santa Clara, CA | 865 | 313 | 176% |
| Seattle-Tacoma-Bellevue, WA | 2410 | 881 | 174% |
| San Diego-Carlsbad, CA | 767 | 322 | 138% |
| Reno, NV | 173 | 78 | 122% |
| Fresno, CA | 228 | 106 | 115% |
| Los Angeles-Long Beach-Anaheim, CA | 2803 | 1306 | 115% |
| Gulfport-Biloxi-Pascagoula, MS | 130 | 62 | 110% |
| New York-Newark-Jersey City, NY-NJ-PA | 3285 | 1673 | 96% |
| Sacramento-Roseville-Arden-Arcade, CA | 494 | 256 | 93% |
| Cape Coral-Fort Myers, FL | 674 | 373 | 81% |

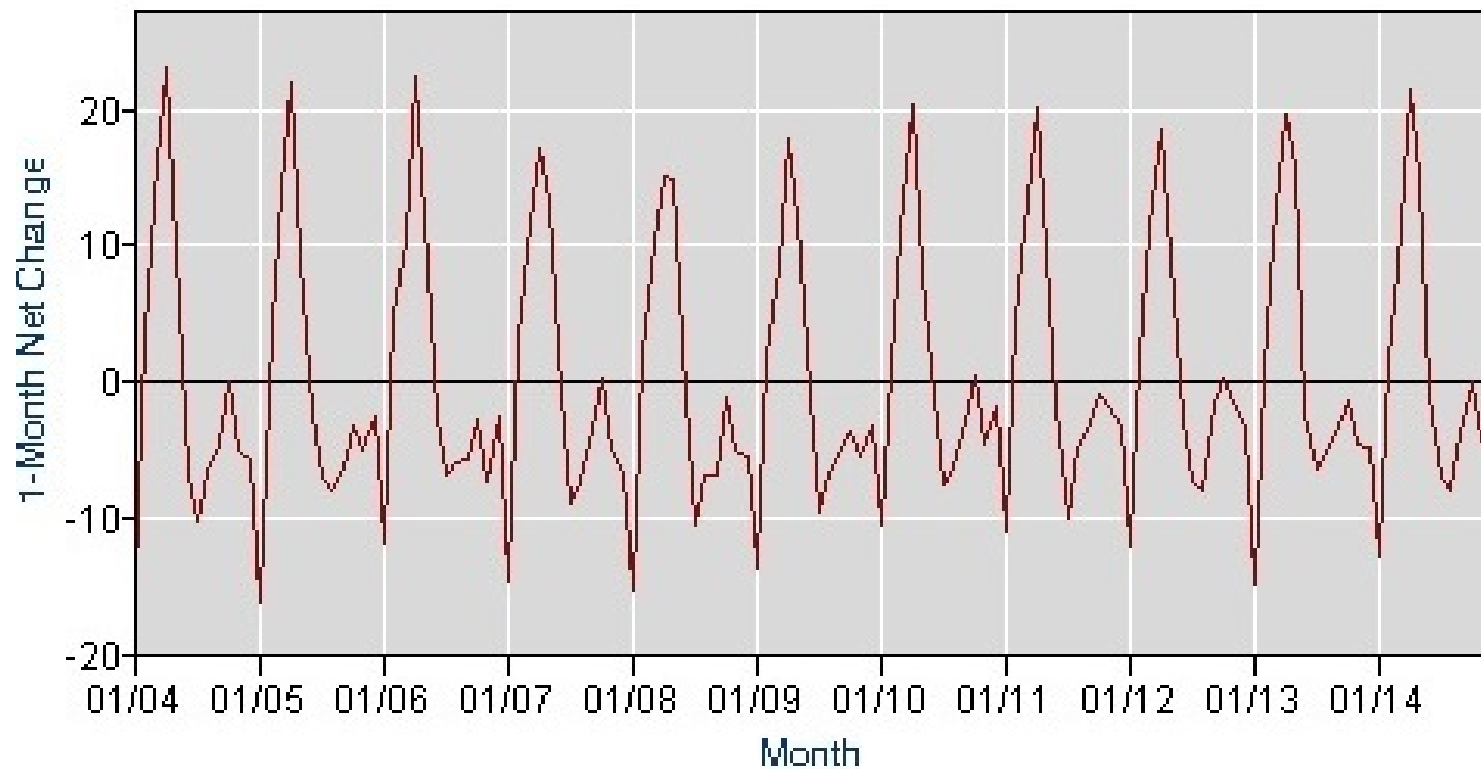
Source: U.S. Census Building Permits Survey


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Who's hiring right now? Garden supply stores.

Garden supply stores / Monthly change in employment



Source: Bureau of Labor Statistics and Staffing Industry Analysts

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Who else is hiring right now?

Sectors hiring in March/April

| |
|---|
| Sports teams and clubs |
| Spectator sports |
| Golf courses and country clubs |
| RV parks and campgrounds |
| Landscaping services |
| Nursery, garden, and farm supply stores |
| Lawn and garden equipment and supplies stores |
| Highway, street, and bridge construction |
| Racetracks |
| RV parks and recreational camps |
| Marinas |
| Scenic and sightseeing transportation |
| All other specialty trade contractors |
| All other amusement and recreation industries |
| Landscape architectural services |
| Amusement parks and arcades |

Percent of temporary
labor purchased for
seasonal reasons...

21%

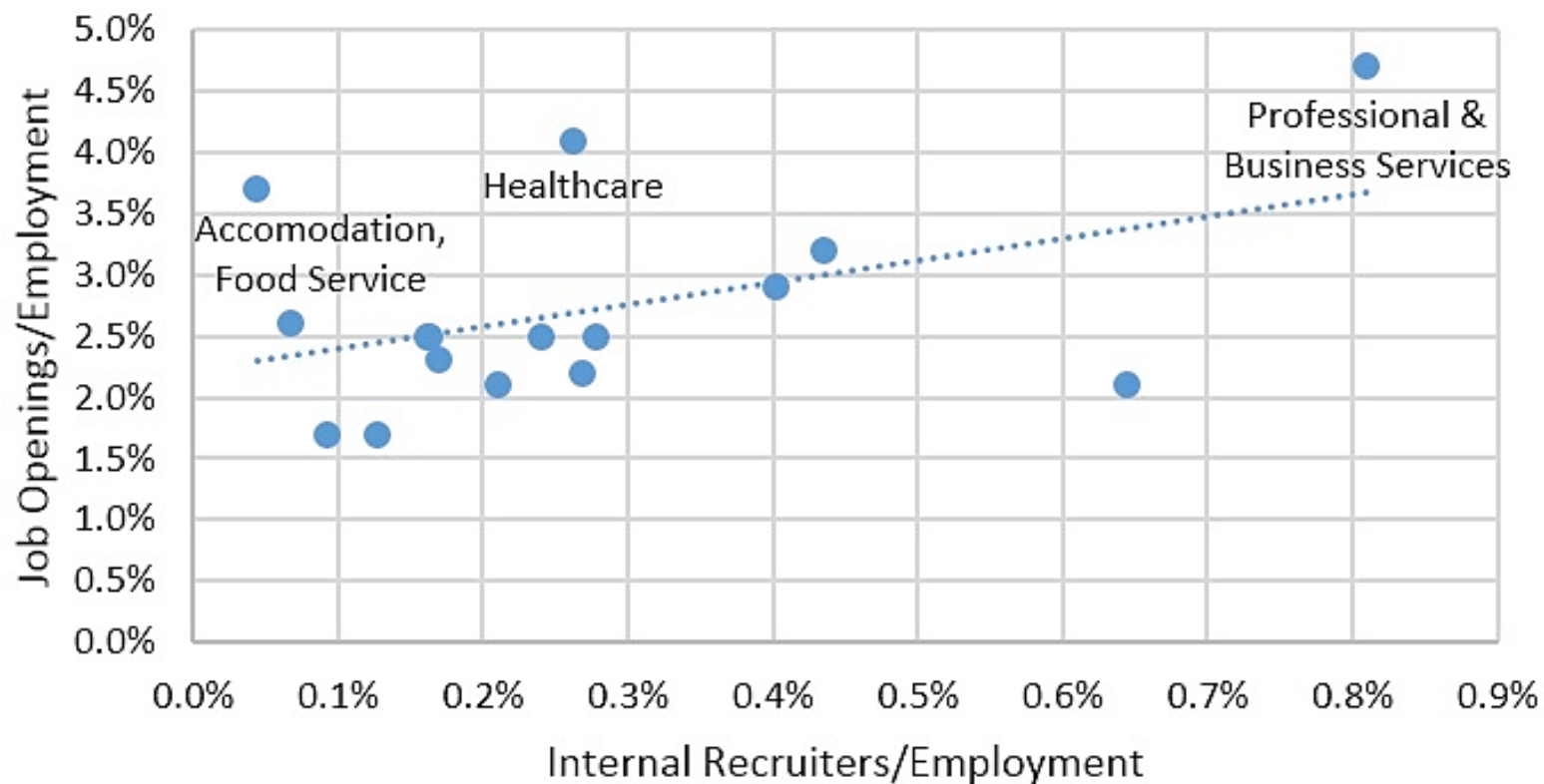
Source: Bureau of Labor Statistics and Staffing Industry Analysts





Three sectors that need perm recruiting help

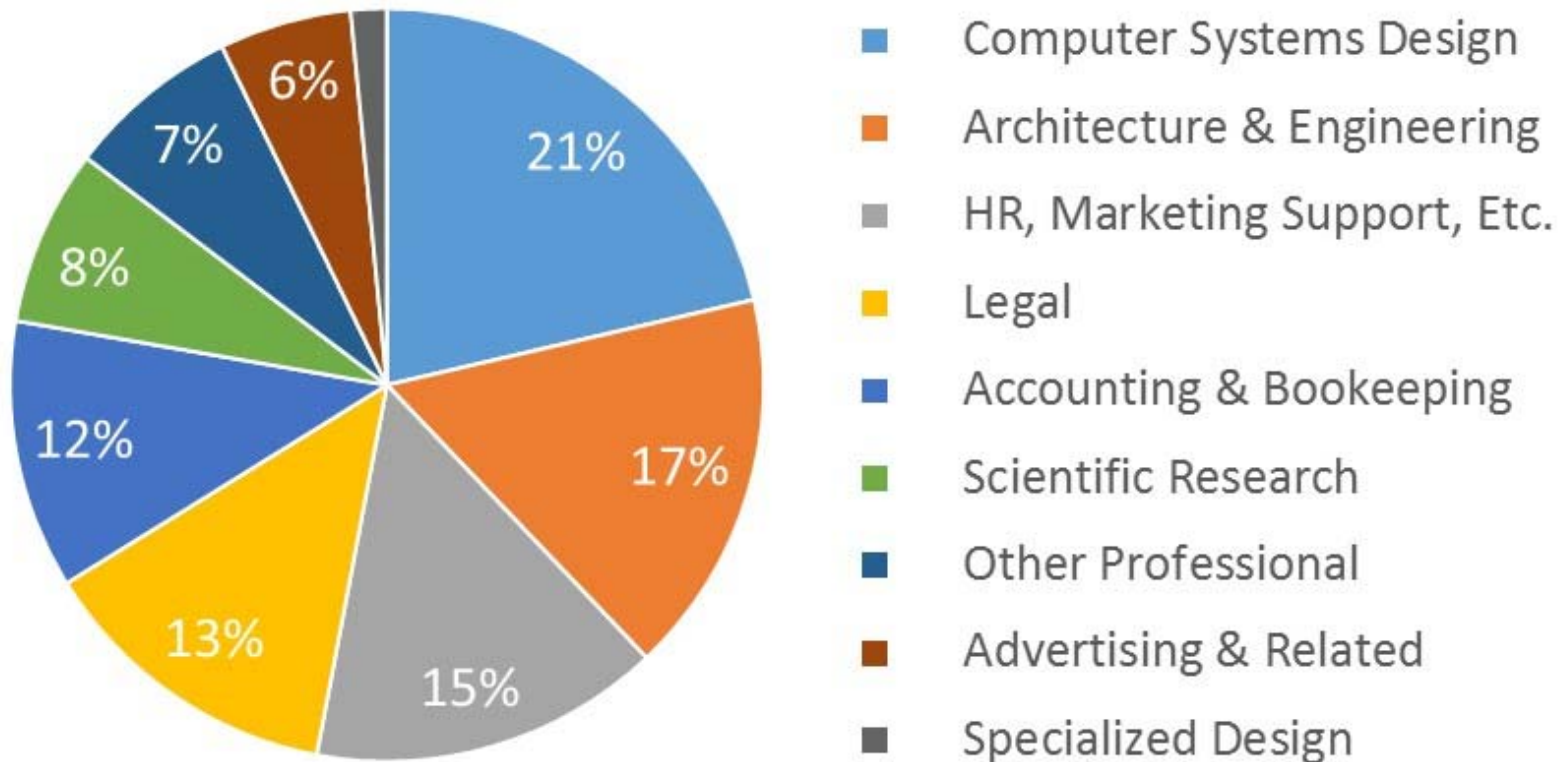
Internal Recruiting Intensity vs. Job Openings



Source: Bureau of Labor Statistics and Staffing Industry Analysts

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What's in professional & business services?

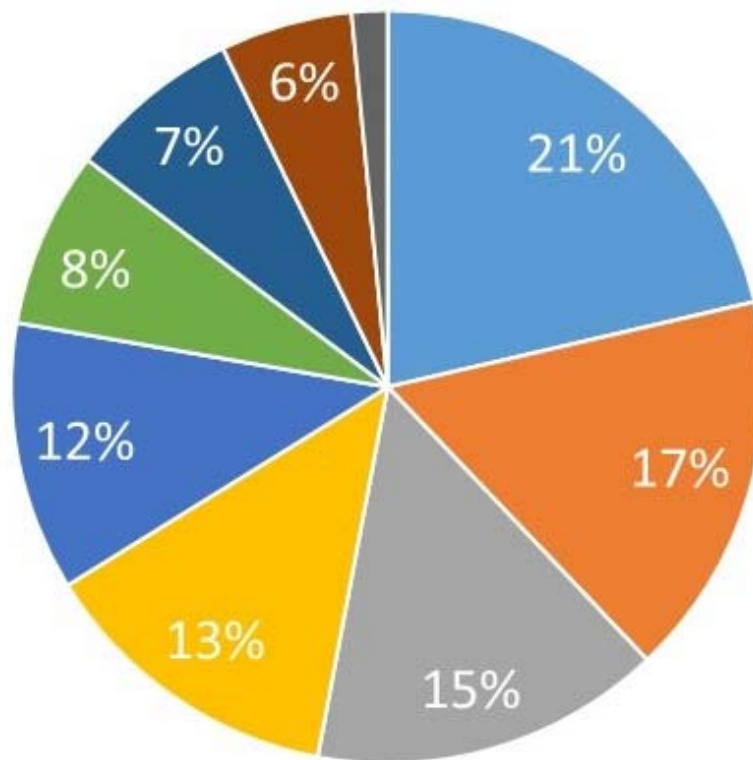


Source: Bureau of Labor Statistics and Staffing Industry Analysts

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What's in professional & business services?

Y/Y Change in Employment



- Computer Systems Design **+4.6% !**
- Architecture & Engineering **+3.6% !**
- HR, Marketing Support, Etc. **+6.2% !**
- Legal
- Accounting & Bookkeeping **+6.4% !**
- Scientific Research
- Other Professional
- Advertising & Related **+3.5% !**
- Specialized Design **+5.1% !**

Source: Bureau of Labor Statistics and Staffing Industry Analysts





Is it time to move up the value chain?

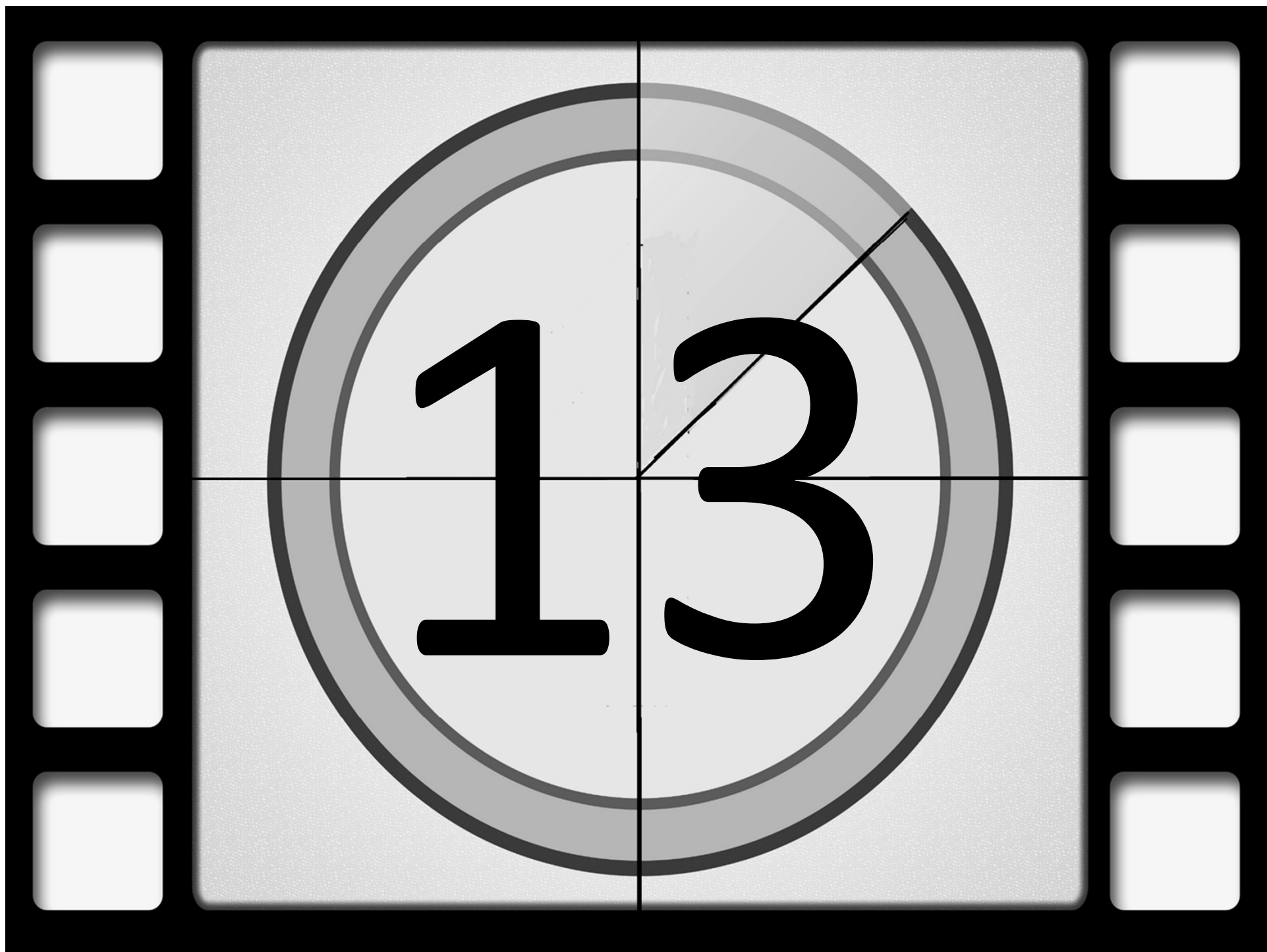
Buyers: Over the next ten years will you be using more or less of the following?



Is it time for SOW/project-based work?

Percent of staffing firms planning to generate more (or less) revenue from the following selected sources

| | More | Less | Projection |
|--|------|------|--------------------|
| Online staffing | 12% | 1% | Increased emphasis |
| SOW/solutions (your firm responsible for deliverable) | 15% | 3% | Increased emphasis |
| Recruitment Process Outsourcing (RPO) | 8% | 1% | Increased emphasis |
| Retained search | 4% | 2% | Unchanged |
| Direct-to-consumer (e.g., home healthcare, plumbers, etc.) | 2% | 1% | Unchanged |
| Other: PEO/Payrolling/VMS fees/MSP fees/Other | 6% | 5% | Unchanged |
| Independent contractor management/classification | 3% | 3% | Unchanged |
| Ongoing services outsourcing (e.g. janitorial, landscaping) | 1% | 2% | Unchanged |
| Temporary help (conventional) | 4% | 19% | Decreased emphasis |
| Direct hire/perm placement | 8% | 24% | Decreased emphasis |



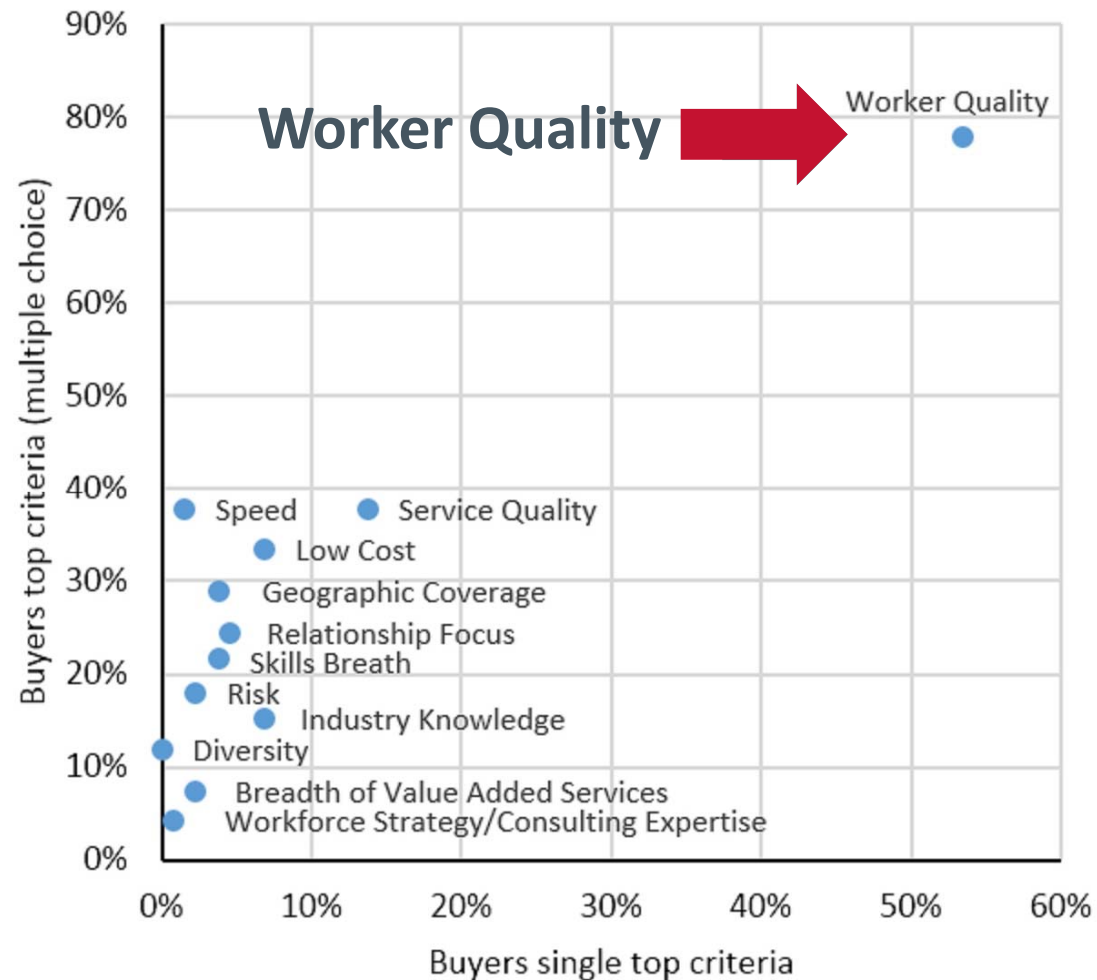
In your company's sales and marketing efforts, which of the following is most emphasized?



Source: 2014 Staffing Company Survey

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Top buyer criteria for selecting suppliers



Source: 2014 Contingent Buyer Survey

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A few suggestions about selling quality...



- Make sure you *have* quality workers—ask buyers to rate temps?

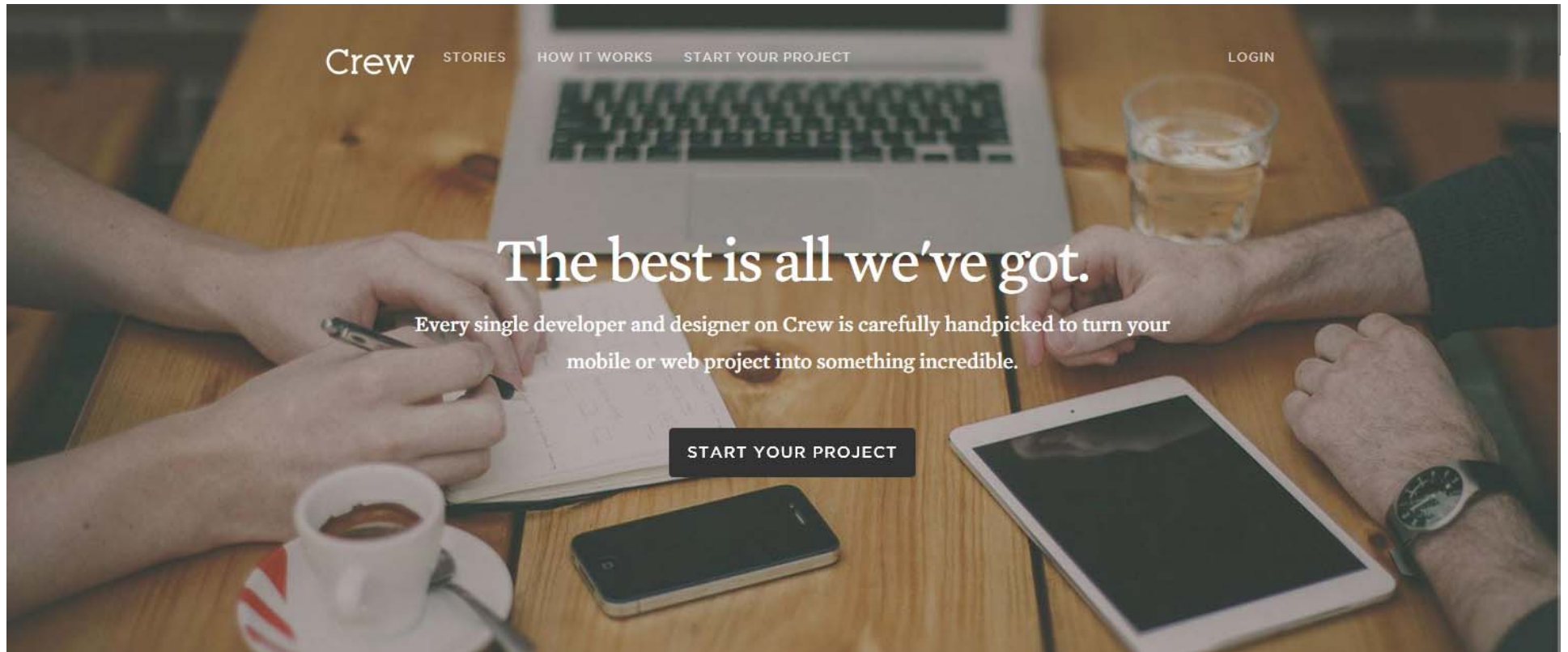


- Create a culture of quality—it's what you have and what you sell



- Make sure your website says you have high quality workers

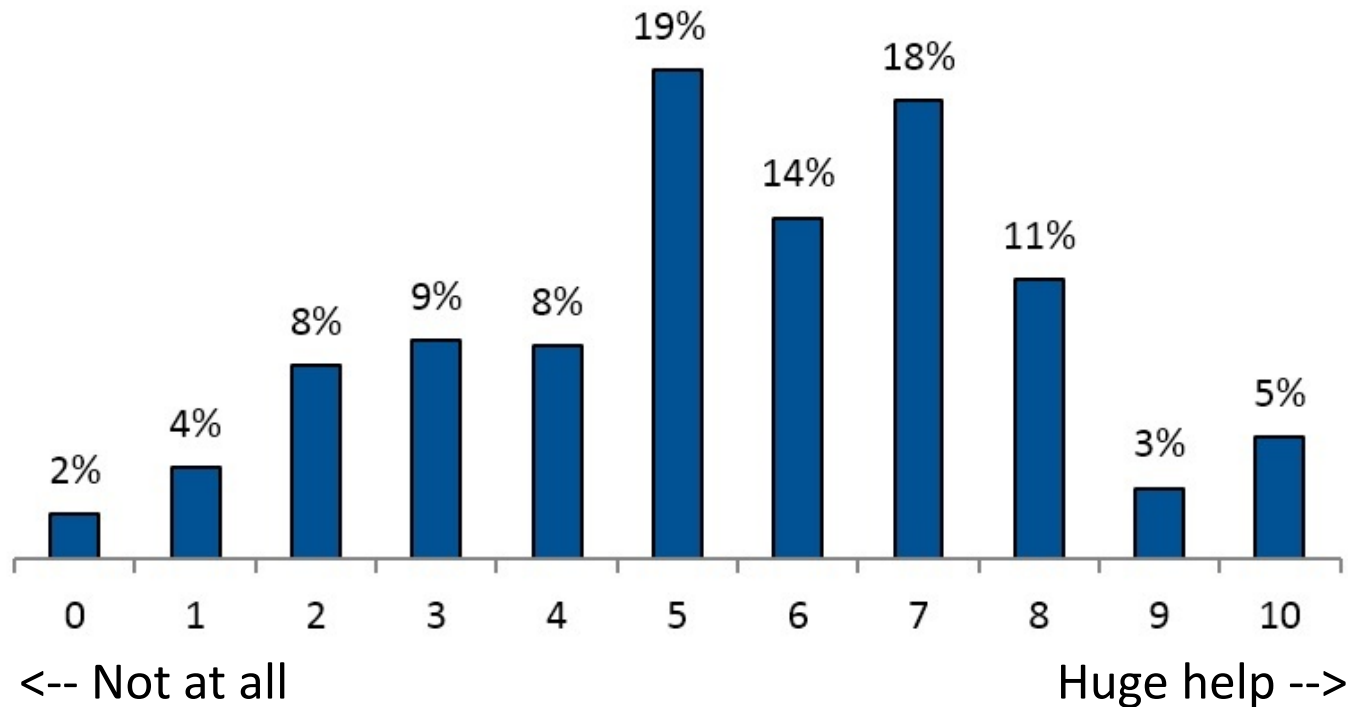
What good messaging about quality looks like...





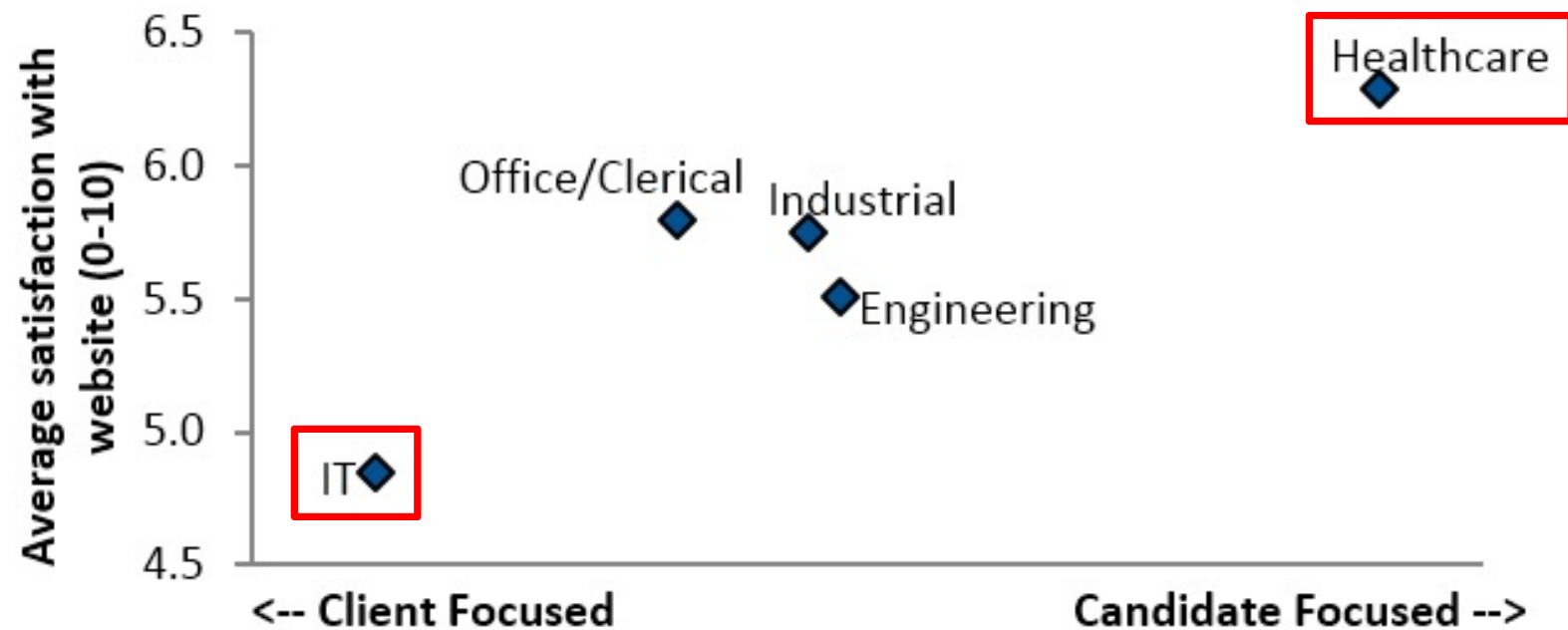
Average staffing firm website score: “Meh...”

To what degree would you say your current website contributes to your business success?



Candidate-focused sites score higher

Average satisfaction with website as a function of audience focus



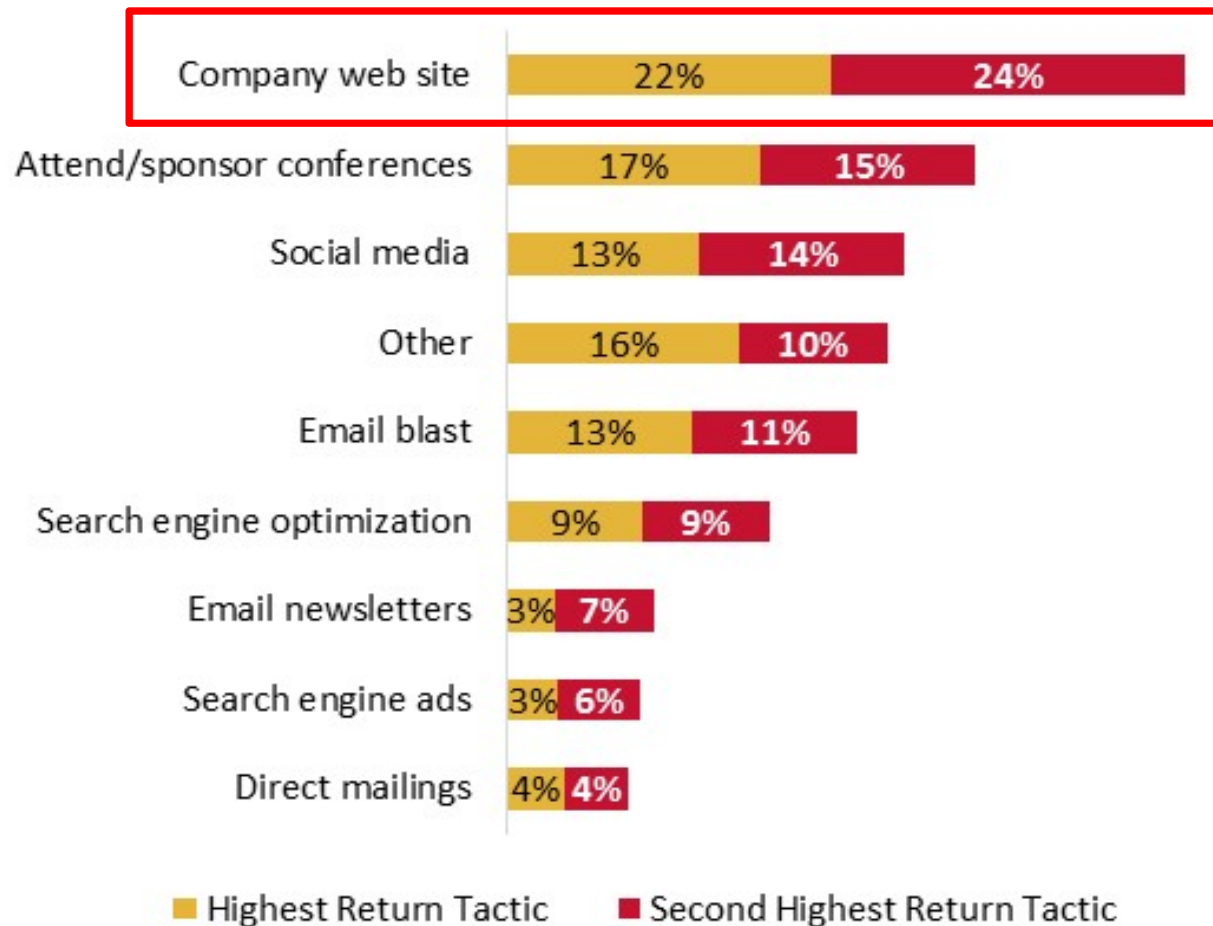
Website features help, especially SEO optimization

| Satisfaction among respondents whose websites had the following features: | | | | |
|---|--------------------|-----------------------------|-----------------------------------|-------|
| Your website has the following features: | Percent that do it | Average for those who do it | Average for those who don't do it | Diff. |
| Actively tracks and updates SEO | 50% | 6.5 | 4.7 | 1.7 |
| Job board | 85% | 5.8 | 4.4 | 1.4 |
| Job board optimized for mobile devices | 43% | 6.4 | 5.0 | 1.4 |
| Optimized for mobile devices | 50% | 6.3 | 4.9 | 1.4 |
| A regularly updated blog | 46% | 6.3 | 5.0 | 1.3 |
| Social feed buttons | 73% | 5.9 | 4.7 | 1.2 |
| A CMS | 43% | 6.2 | 5.0 | 1.1 |
| The option to comment on blogs, social forums, etc. | 38% | 6.2 | 5.1 | 1.1 |
| A feature for clients to request staff | 50% | 5.8 | 5.3 | 0.5 |

Source: 2013 Staffing Company Survey

Here's why your website matters—*highest ROI*

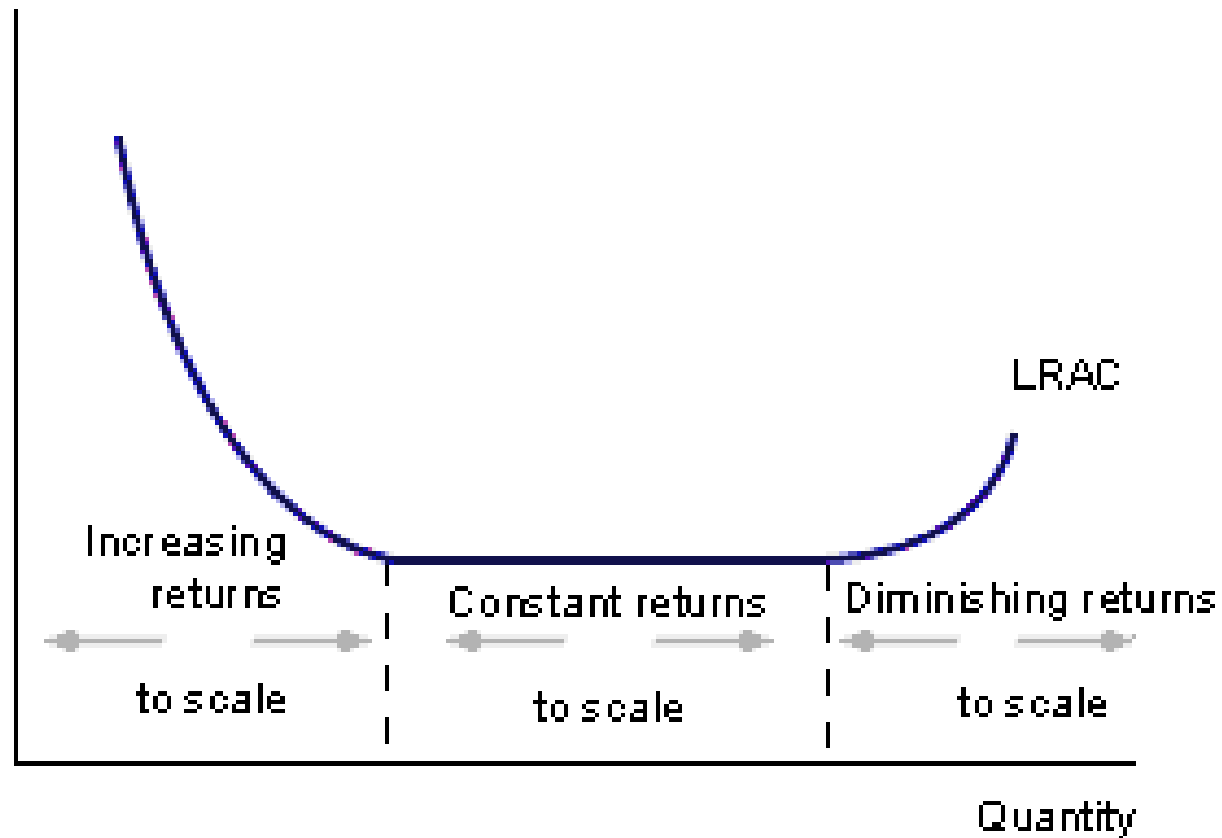
Which marketing tactics would you say have the highest return on spend/effort?



Source: 2013 Staffing Company Survey



Diseconomies of scale? What's that?



Diseconomies of scale? What's that?

AMERICAN BANKER | **BANKTHINK** INFORMED OPINION

Wednesday, January 7, 2015 | as of 4:11 PM ET

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Where Are the Economies of Scale We Were Promised?

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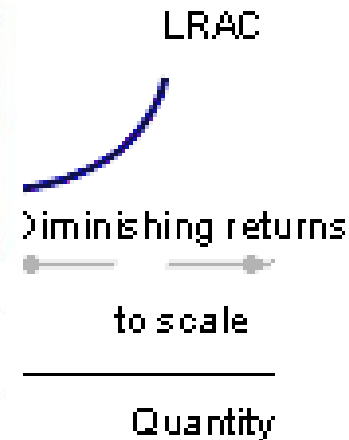
JPMorgan Chase (JPM) is the largest U.S. bank by assets, with \$2.39 trillion at the end of the first quarter. Its most recent quarterly noninterest expense to average assets ratio was 2.67%, according to SNL Financial LC. Overhead to average assets was 2.84% in the first quarter of 1995, when JPMorgan's predecessor, Chemical Banking Corp., had \$185 billion in assets. Since then, assets have increased by 1,100% but OH/AA fell



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JPMorgan's predecessor, Chemical Banking Corp., had \$185 billion in assets. Since then, assets have increased by 1,100% but CH/AA fall



Diseconomies of Scale in US Public Transport Bus Operations: 1997

| Number of Buses | Cases | Cost per Vehicle Mile |
|-----------------|-------|-----------------------|
| 1,000 & Over | 7 | \$82.97 |
| 500-999 | 15 | \$69.55 |
| 250-499 | 17 | \$68.60 |
| 100-249 | 49 | \$52.09 |

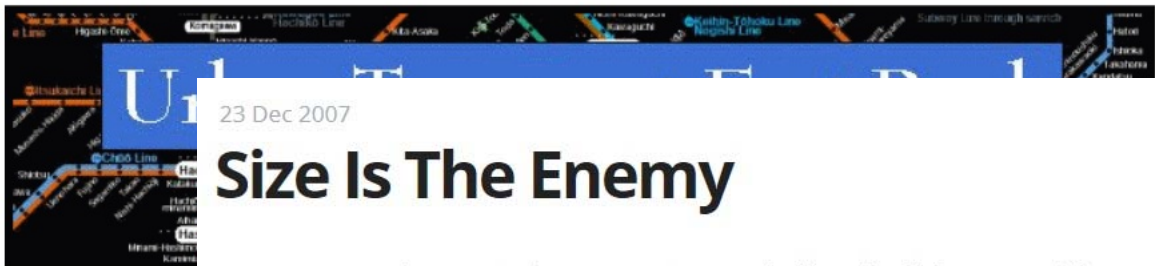
Calculated from National Transit Database.



Seven Reasons Why Banks Are Selling

Quantity

Diseconomies of scale? What's that?



23 Dec 2007









Size Is The Enemy

Steve Yegge's latest, [Code's Worst Enemy](#), is like all of his posts: rich, rewarding, and *ridiculously freaking long*. Steve doesn't write often, but when he does, it's a doozy. As I [mentioned a year ago](#), I've started a cottage industry mining Steve's insanely great but I-hope-you-have-an-hour-to-kill writing and condensing it into its shorter form points. So let's begin:


1. Steve began writing a multiplayer game in Java, [Wyvern](#), around 1998. If you're curious what it looks like, see fan screenshots [one](#) and [two](#).
2. Over the last 9 years, Wyvern has grown to 500,000 lines of Java code.
3. Steve realized that it is impossible for a single programmer to singlehandedly maintain and support half a million lines of code. Even if you're Steve Yegge.

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Quantity

Diseconomies of scale? What's that?

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Giants at the gate: On the cross-section of private equity investment returns

Abstract

We examine the determinants of private equity returns using a newly constructed database of 7,500 investments worldwide over forty years. The median investment IRR (PME) is 21% (1.3), gross of fees. One in ten investments goes bankrupt, whereas one in four has an IRR above 50%. Only one in eight investments is held for less than 2 years, but such investments have the highest returns. The scale of private equity firms is a significant driver of returns: investments held at times of a high number of simultaneous investments underperform substantially. The median IRR is 36% in the lowest scale decile and 16% in the highest. Results survive robustness tests. Diseconomies of scale are linked to firm structure: independent firms, less hierarchical firms, and those with managers of similar professional backgrounds exhibit smaller diseconomies of scale.

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Banking Corp., had \$185 billion in assets. Since then, assets have increased by 1,100% but OH/AA fell



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Giants at the investment re

Abstract

We examine the determinants of investments worldwide over for fees. One in ten investments gr eight investments is held for les scale of private equity firms is a number of simultaneous investi lowest scale decile and 16% in are linked to firm structure: inde similar professional background

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Banking Corp., had \$185 billion in assets. Since then, assets have increased by 1,100% but OH/AA fell

The More Centralized the Government, the Lower the Approval Rating

Widening Gap in Views of Federal, State and Local Governments



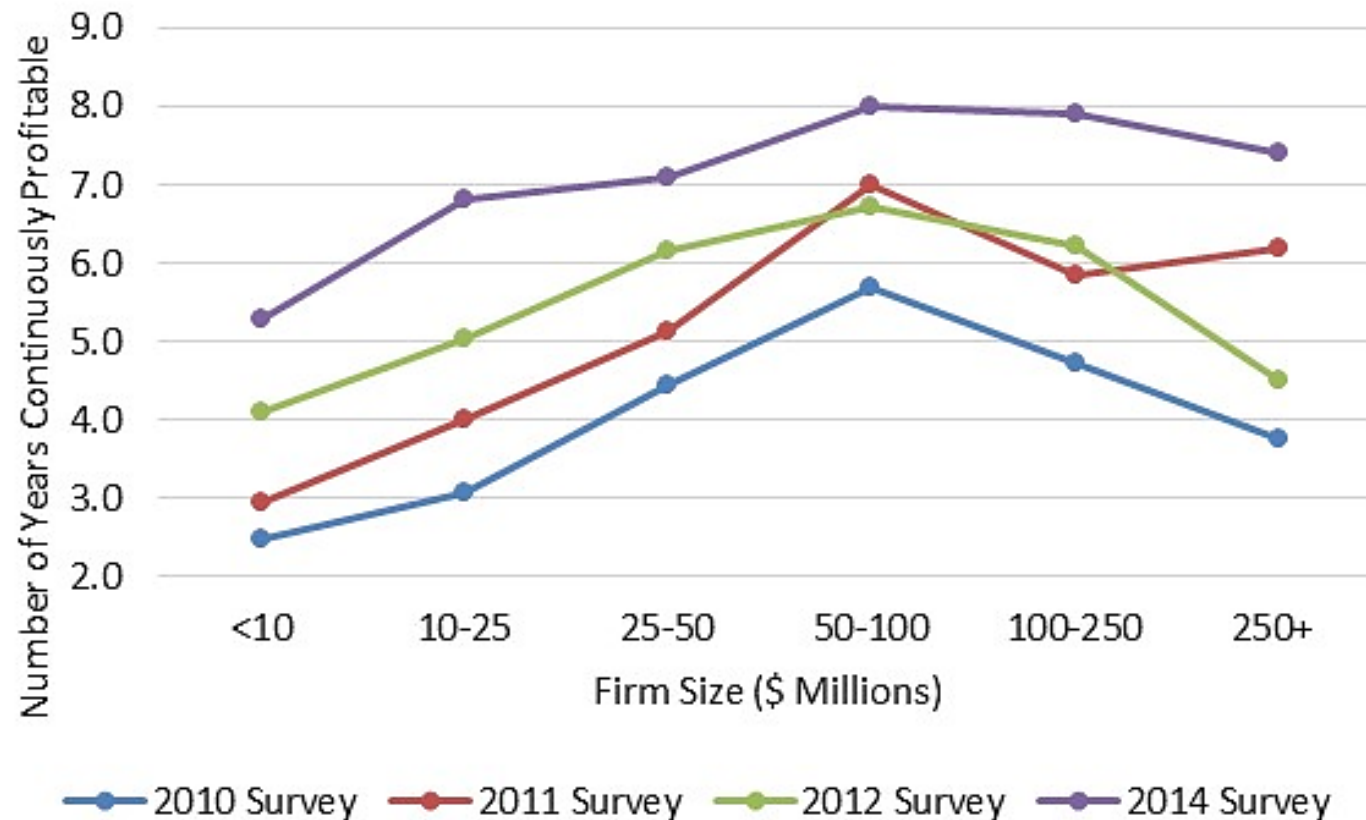
| Year | Your local govt | Your state govt | The federal govt in Washington |
|------|-----------------|-----------------|--------------------------------|
| 1997 | 68 | 66 | 38 |
| 2001 | 66 | 64 | 38 |
| 2013 | 63 | 57 | 28 |

PEW RESEARCH CENTER March 13-17, 2013.

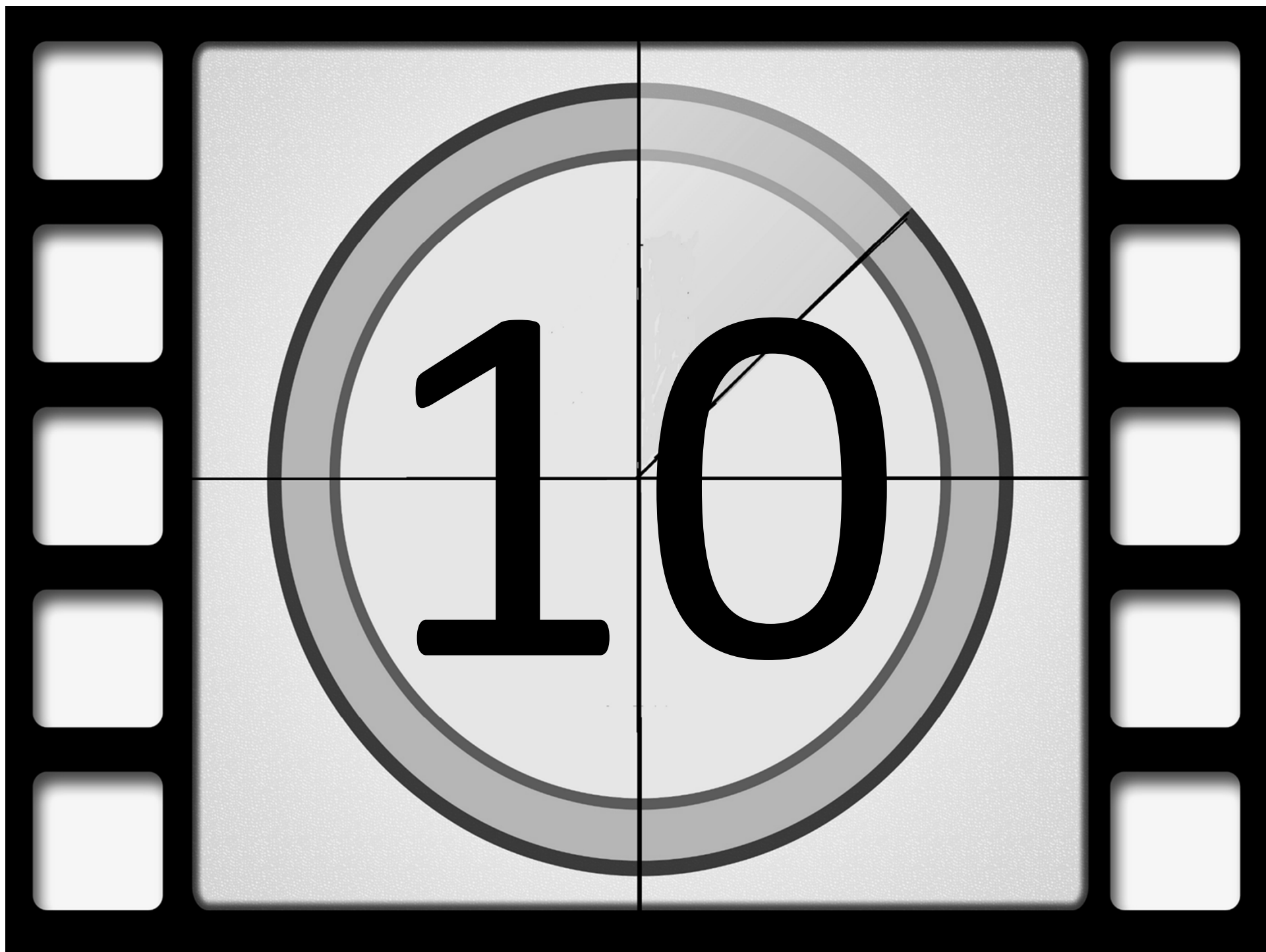
A [recent study by the Pew Research Center](#) found an interesting relationship between government approval ratings and degree of government centralization in the U.S. Apart from the period around the 911 terrorist attack, when centralized government in Washington D.C. was popular, local government has generally received the highest approval rating, followed by state government, with national government at the bottom, and typically by a wide margin. Makes sense.

There are diseconomies of scale in elected government, for three reasons. First, the smaller the electorate the more each individual vote counts. One vote among

Consistency of profitability as a function of firm size



Source: 2014 Staffing Company Survey



We asked staffing firm executives:

What's the single best strategic or tactical decision your firm has ever made?



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Best strategic or tactical decision...

- #1** • Stay segment focused
- #2** • Diversify client base
- #3** • Hire the right people
- #4** • Outsource/offshore recruiting and/or back office functions

Does it stabilize profitability to be diversified by industry or segment? Not really...

Average number of years of consistent profitability, diversified firms vs. concentrated firms

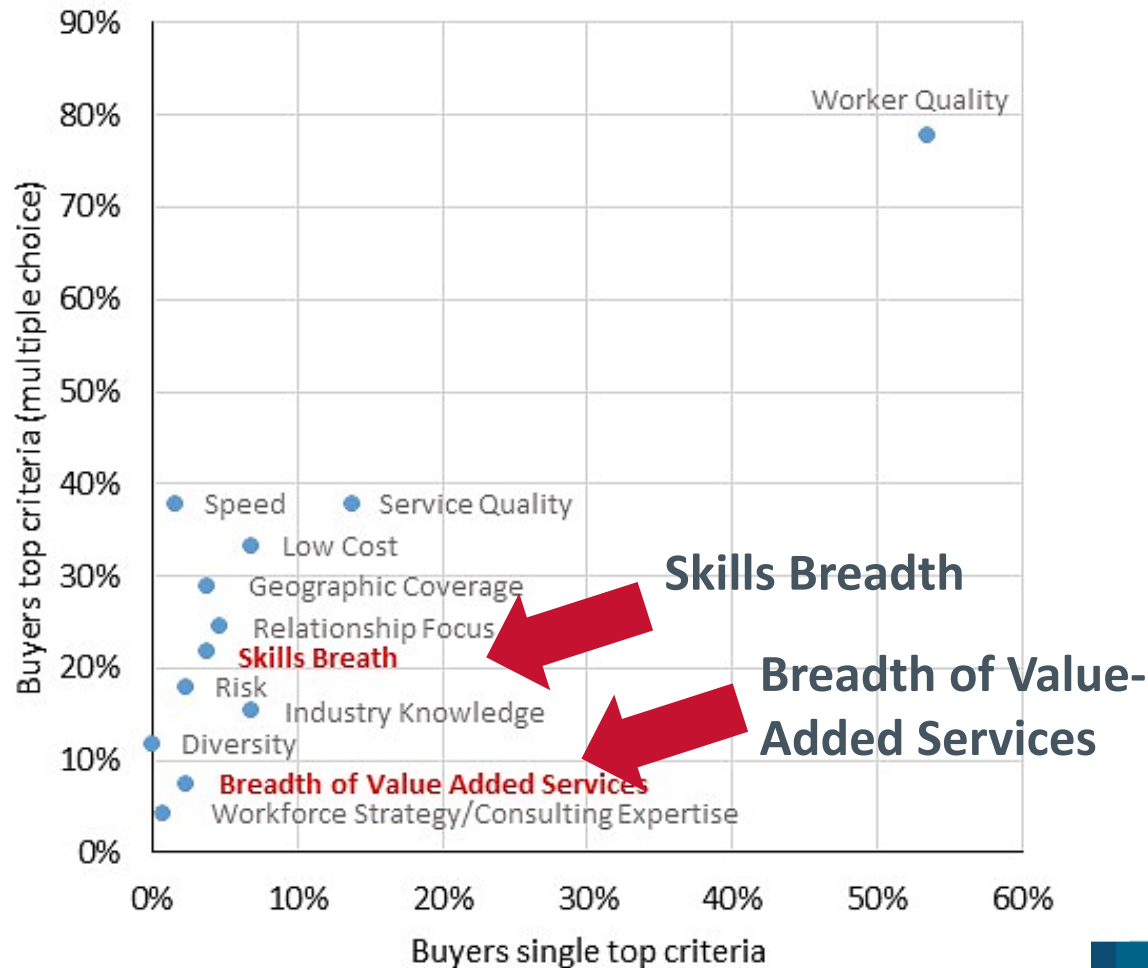
| 2014 | Diversified | Concentrated | Difference |
|-------------|-------------|--------------|------------|
| By segment | 7.2 | 6.6 | 0.6 |
| By industry | 6.9 | 6.5 | 0.4 |

| 2012 | Diversified | Concentrated | Difference |
|-------------|-------------|--------------|------------|
| By segment | 6.9 | 7.1 | -0.2 |
| By industry | 7.1 | 7.2 | -0.1 |

Source: 2014 Staffing Company Survey


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But don't buyers prefer one-stop shopping?
Not much.



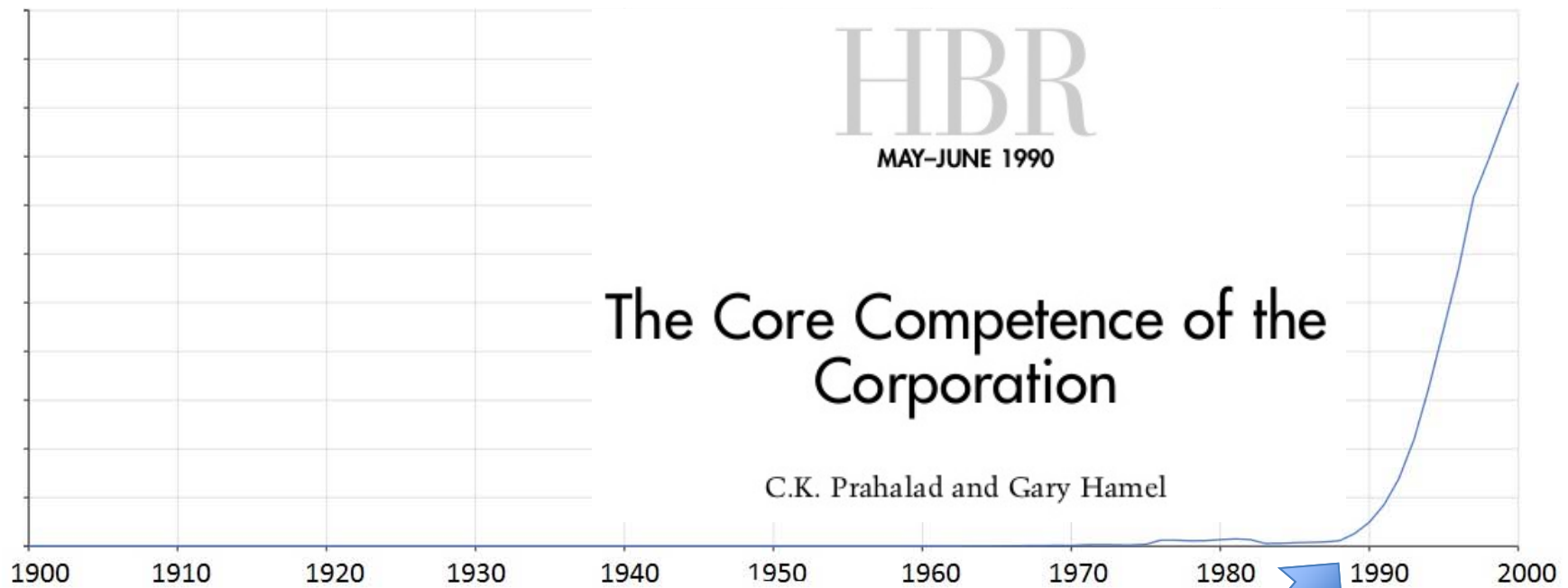
Source: 2014 Contingent Buyers Survey

March 16-19, 2015
Orlando, FL



Idea of core competency takes off...

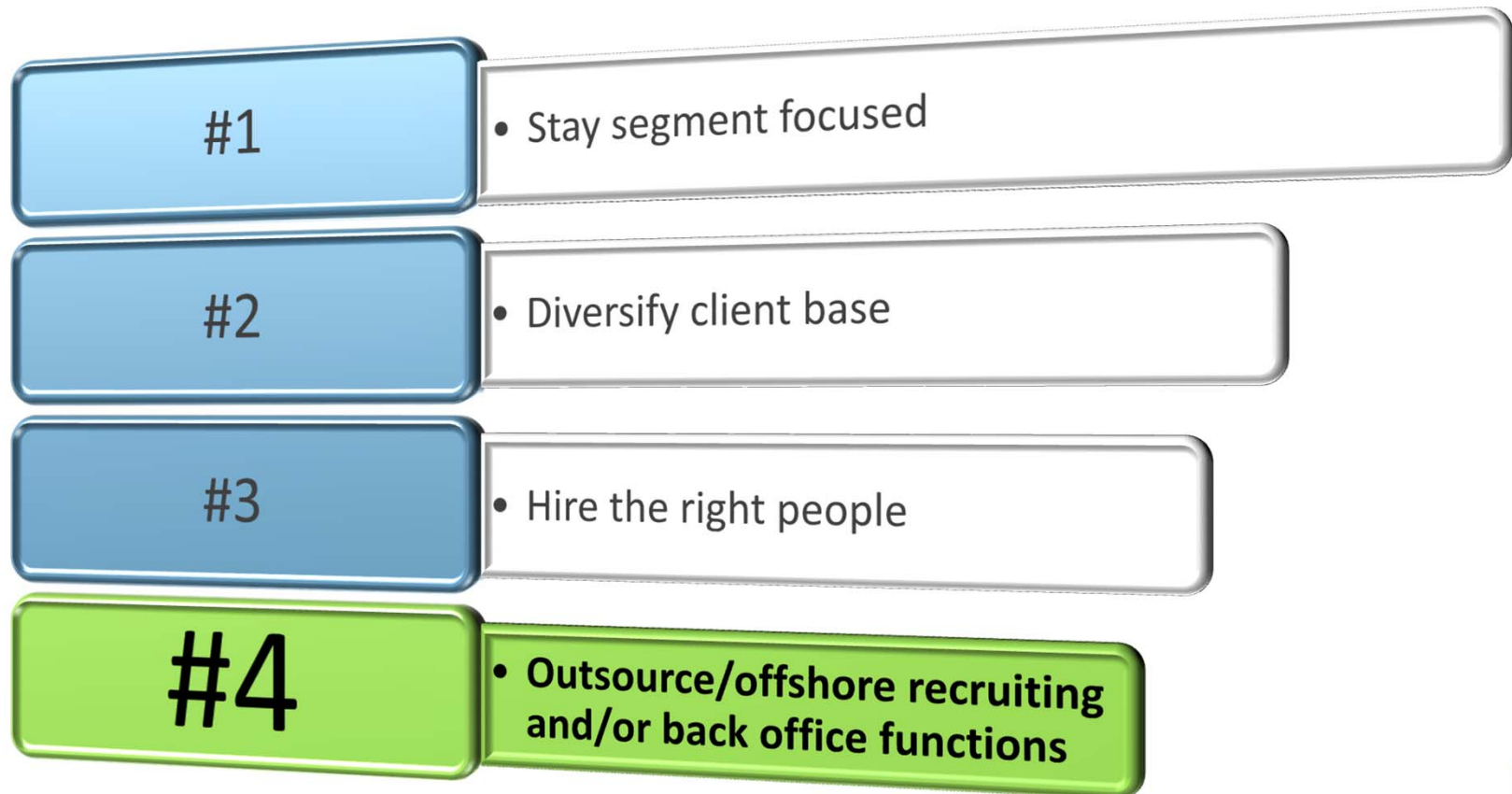
Google books Ngram Viewer



Source: Google Ngram Viewer, Harvard Business Review

March 16-19, 2015
Orlando, FL

Another best strategic or tactical decision...





The next step beyond recruiting: “just in time education”



« I have never learned this much development in such a condensed period of time. »

EDWARD KIM

The next step beyond recruiting: “just in time education”





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THE WALL STREET JOURNAL. ≡

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8:08 pm ET
Mar 28, 2014

DEFENSE

Problem for American Industry: A Good Welder is Hard to Find

ARTICLE

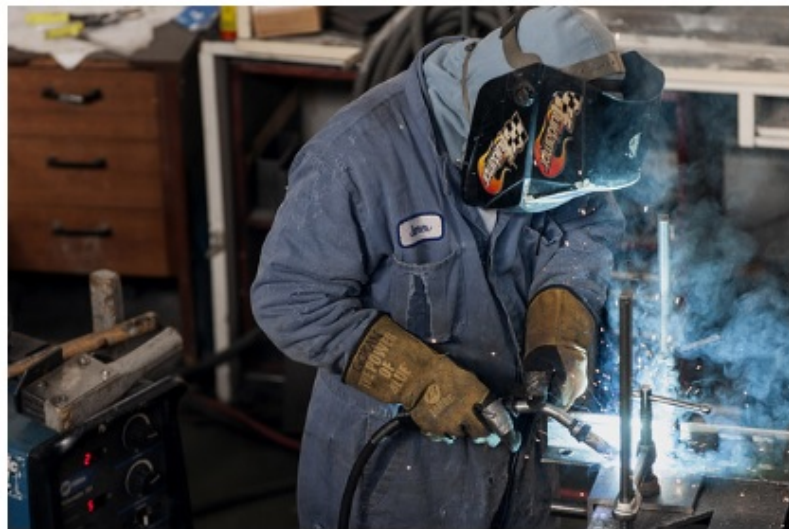
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BUSINESS DEFENSE EMPLOYMENT FED FEDERAL RESERVE INDUSTRIAL JOBS

Email

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By DOUG CAMERON [CONNECT](#)



— Bloomberg News

The nation's 390,000-odd welders are becoming policy pin-ups, sparking debate on issues ranging from labor market dynamics to the health of the military-industrial base. The pay's not bad, either.

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— Bloomberg News

The nation's 390,000-odd welders are becoming policy pin-ups, sparking debate on issues ranging from labor market dynamics to the health of the military-industrial base. The pay's not bad, either.

FOX NEWS

On the Job Hunt: Machinists in High Demand

By Claudia Cowan · Published December 15, 2011 · FoxNews.com

f 341

t 90

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America's economy was forged by machinists. But today, a quarter of the nation's welders, engineers and steelworkers are getting ready to retire. And as budget-strapped school districts cut shop classes, fewer young people are

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Mar 28, 2014

Problem
Good W

ARTICLE

BUSINESS DEFEN

Email Print

There's A Huge Shortage Of Truck Drivers In America – Here's Why The Problem Is Only Getting Worse



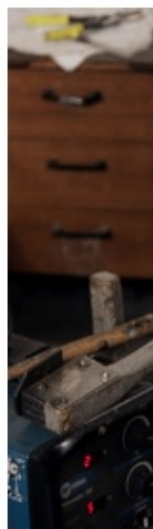
MAMTA BADKAR

AUG. 4, 2014, 11:32 AM



60,768

68



— Bloomberg News

The nation's 390,000 truck drivers are not bad, either.

America is experiencing a shortage of truck drivers.

The American Trucking Associations (ATA) estimates that the U.S. is short 30,000 truck drivers. Factors driving the shortfall include regulations, relatively low pay, and the fact that



AP Photo/Ingrid Barrentine

inists

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DEBATE
:15

autoplay videos

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are

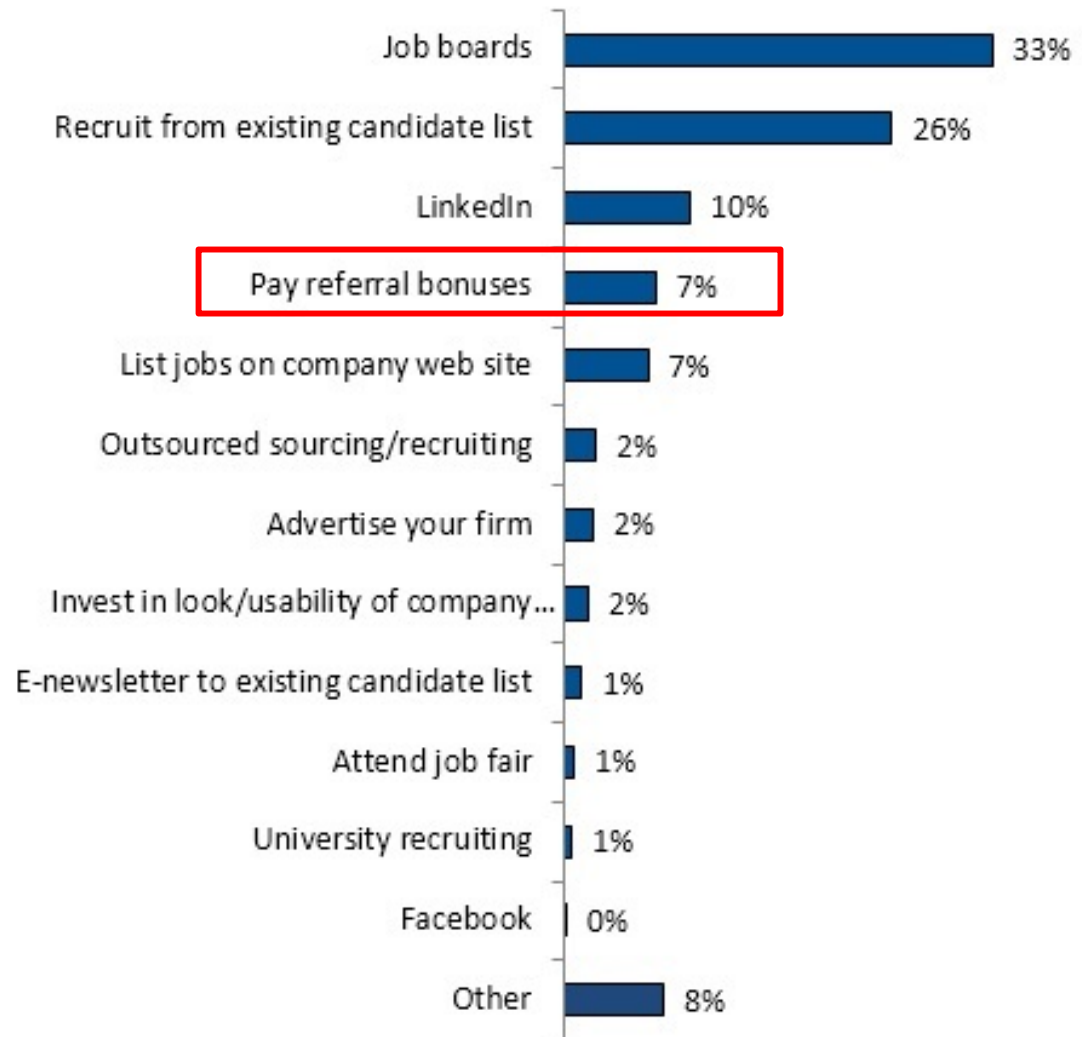
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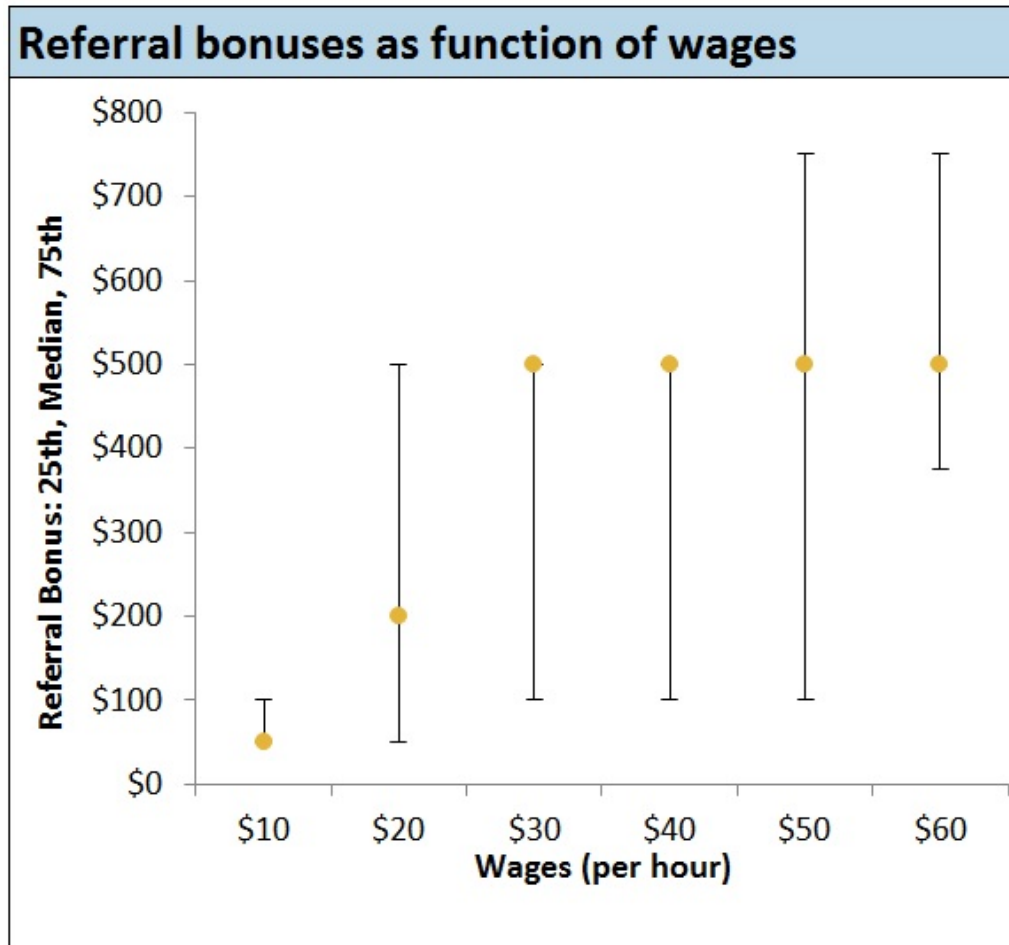
A surprise result from our staffing company survey...referral fees among top temp recruiting tactics

Source: 2013 Staffing Company Survey

Of the following temporary worker recruiting tactics, which one would you say has the highest bang-to-buck return on spend/effort?



How much should you pay for a referral bonus?



Source: 2013 Temporary Workers Survey

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Hire globally, place locally





Parmy Olson
Forbes Staff

FOLLOW

*I cover agitators
and innovators in
mobile.*

[full bio →](#)



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FORBES 6/27/2013 @ 2:36PM | 27,932 views

Rise Of The Telepresence Robots

This story appears in the July 15, 2013 issue of Forbes.

[+ Comment Now](#) [+ Follow Comments](#)

I'm exploring the headquarters of Suitable Technologies in Palo Alto, Calif., passing leather couches, paintings and large indoor plants. Only I'm not really here; I'm on a laptop at my desk in downtown San Francisco, roughly 30 miles away. Using some lightweight software, I'm controlling a Beam, a motorized stand with a 17-inch flat screen that displays my face.

The screen sits at a 5-foot-2-inch median between a standing and sitting human, or what Suitable calls "locals." Suitable CEO Scott Hassan walks up to me to say hello, fist-bumps the screen, then invites me on a

6

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Technology Quarterly: Q1 2013 ▾

Forbes ▾

Telepresence robots

Your alter ego on wheels



Parmy Olson
Forbes Staff

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I cover agi
and innov
mobile.
full bio →



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Robotics: Remotely controlled telepresence robots let people be in two places at once. But they look a bit goofy, and raise security concerns

Mar 9th 2013 | From the print edition



TODAY'S most advanced videoconferencing equipment, installed in dedicated meeting rooms, delivers startlingly vivid images and sounds from afar. It can cost hundreds of thousands of dollars to equip each room, however, and in most offices many fruitful meetings happen informally, in people's offices or at the water-cooler. Now a new and radically different approach to videoconferencing is helping overcome both shortcomings. "Robotic telepresence", as the technology is known, allows people to move virtually through a distant building by remotely



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Telepresence Robots from \$350 to \$16000

economic impact, future, gadgets, internet, robotics, tablets



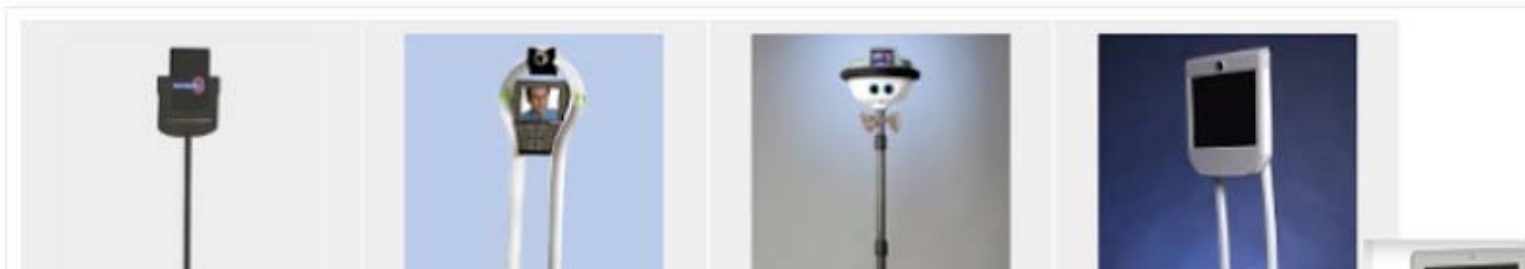
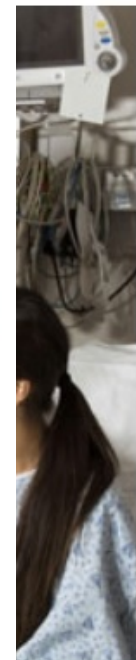
Several remote telepresence robots have come to market over the past few years, and more are on the way. Shown below are drivable remote telepresence robots from MantaroBot, Vgo, Anybots, and Suitable Technology. A lower cost non-mobile desktop alternative from Revolve Robotics, known as the "Kubi," is shown at the right.

ABI Research has projected that the global market for telepresence robots is projected to reach \$13 billion by 2017.

Robot sales to consumers could quadruple to \$6.5 billion by 2017, according to New York-based ABIresearch.

once.

79



6-19, 2015
Orlando, FL

Telepresence Rob

economic impact, future, gadgets, inter



Several remote telepresence robots on the way. Shown below are drivat Anybots, and Suitable Technology. Robotics, known as the "Kubi," is sh

ABI Research has projected that the \$13 billion by 2017.

Robot sales to consumers could qu ABIresearch.



Anybots Now Offering AnyLobby Robotic Staffing Service

By Evan Ackerman

Posted 2 Feb 2012 | 14:37 GMT

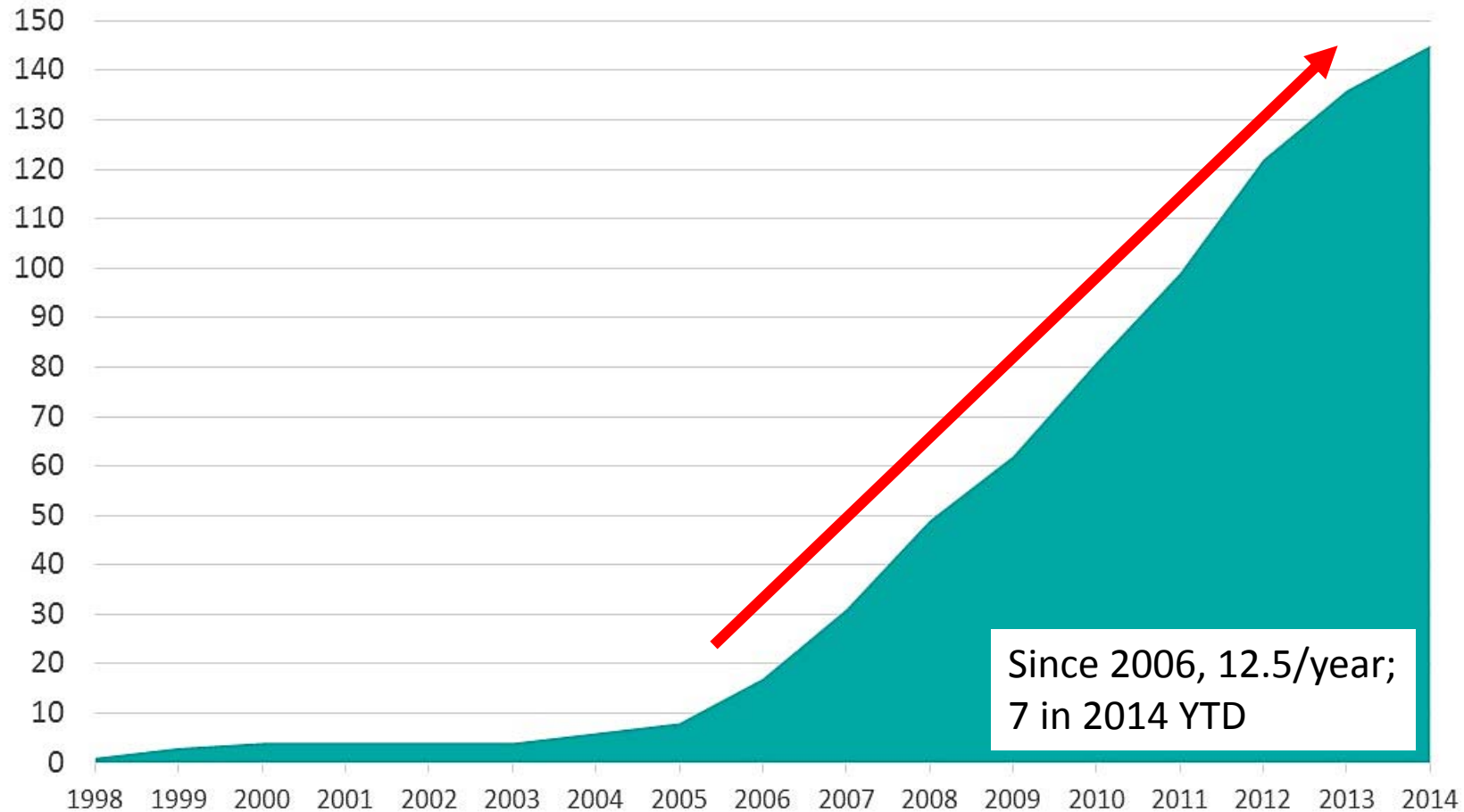
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Do you need a receptionist at your company? Are you having trouble affording another employee? Do you like spending time with robots more than humans? If you answered yes to any of these questions (or all of them), you might want to check out a brand new service being offered by Anybots called AnyLobby that will solve all your problems.



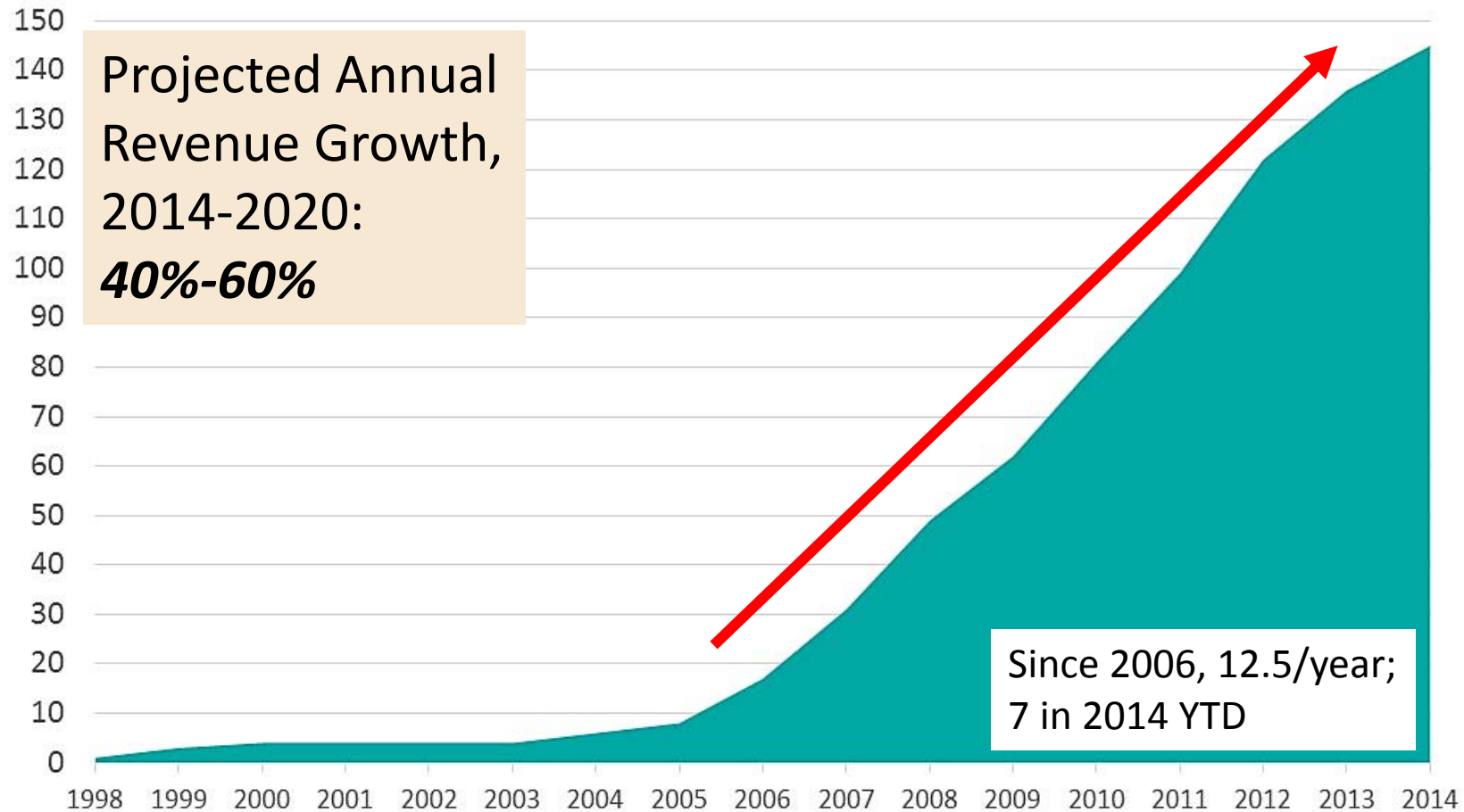
Number of online staffing firms, by year started



Source: Staffing Industry Analysts

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Number of online staffing firms, by year started

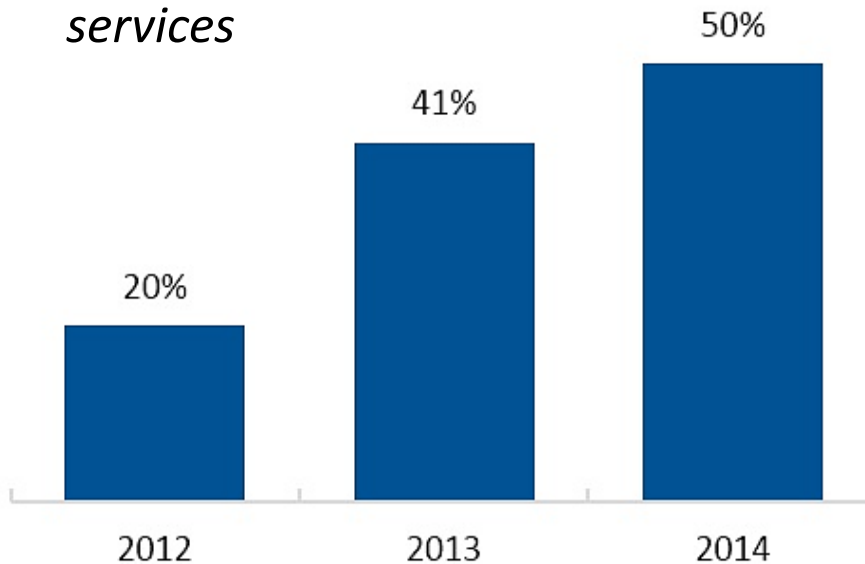


Source: Staffing Industry Analysts

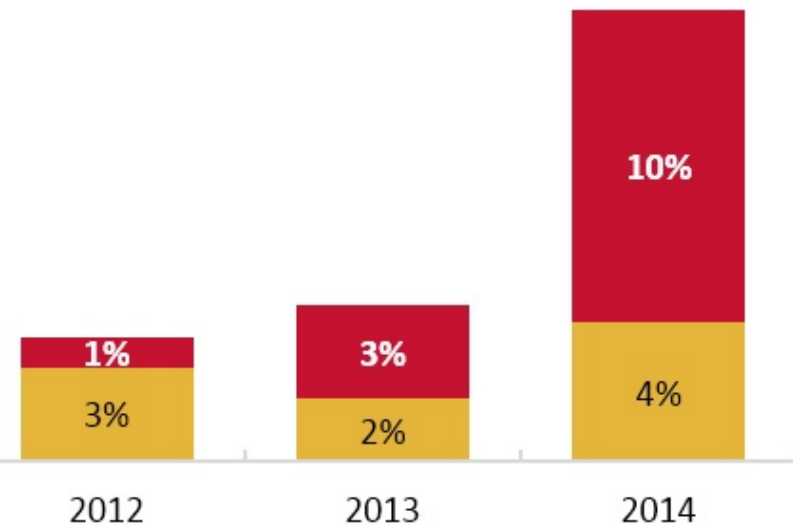
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Use and awareness of online staffing is growing rapidly among CW managers

CW manager familiarity with online staffing services



CW manager use of online staffing

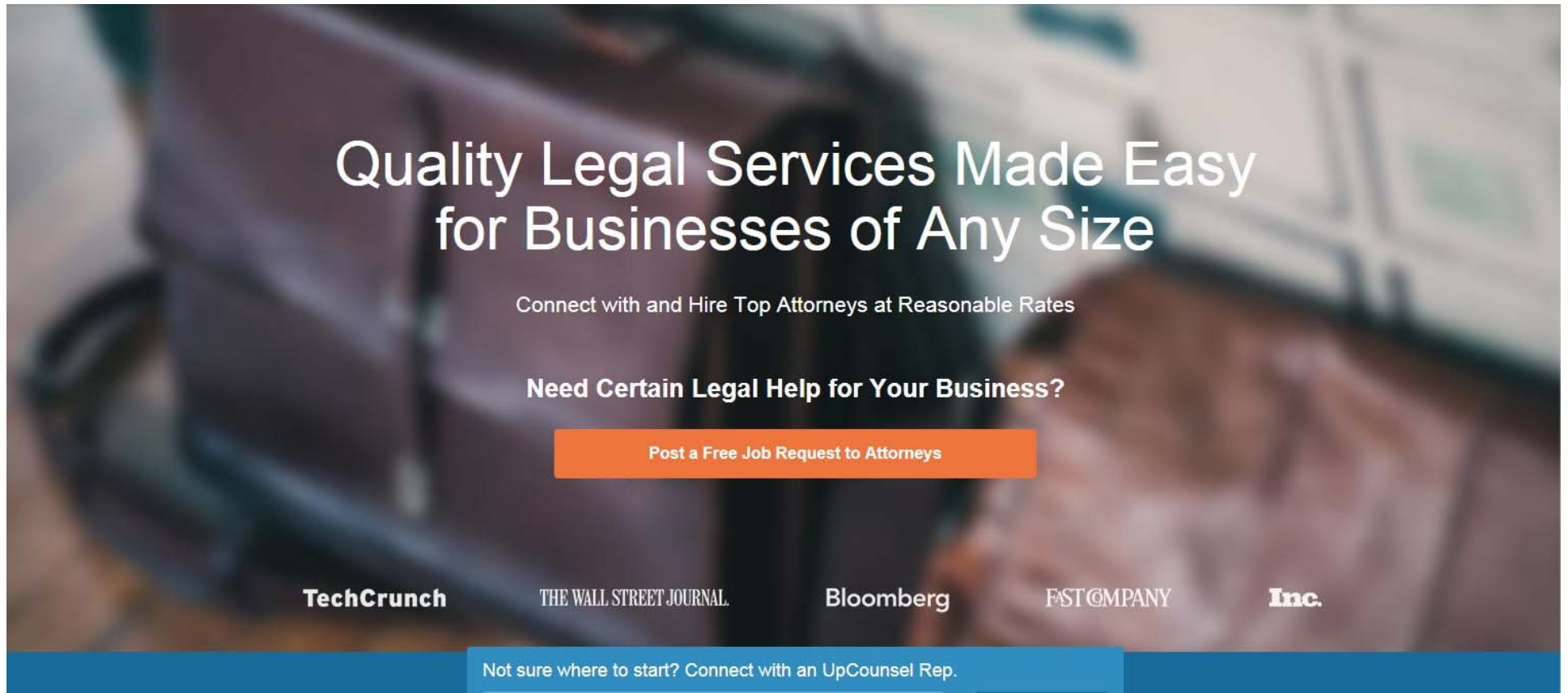


■ Currently use ■ Likely w/in 2 years

Source: 2014 Contingent Buyers Survey

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Example of niche player: Upcounsel.com

A screenshot of the UpCounsel.com website. The background is a blurred image of a person in a suit. The main heading is "Quality Legal Services Made Easy for Businesses of Any Size". Below it is the subtext "Connect with and Hire Top Attorneys at Reasonable Rates". A call to action asks "Need Certain Legal Help for Your Business?" followed by an orange button that says "Post a Free Job Request to Attorneys". At the bottom, there is a row of logos for TechCrunch, THE WALL STREET JOURNAL, Bloomberg, FASTCOMPANY, and Inc. A blue footer bar contains the text "Not sure where to start? Connect with an UpCounsel Rep.".

Quality Legal Services Made Easy
for Businesses of Any Size

Connect with and Hire Top Attorneys at Reasonable Rates

Need Certain Legal Help for Your Business?

[Post a Free Job Request to Attorneys](#)

TechCrunch THE WALL STREET JOURNAL Bloomberg FASTCOMPANY Inc.

Not sure where to start? Connect with an UpCounsel Rep.

Example of niche player: Freelancephysician.com



[HOME](#) [ABOUT](#) [SERVICES](#) [PHYSICIANS](#) [HOSPITALS](#) [CONTACT](#) [LOGIN](#)

A wide-angle, nighttime photograph of a city skyline, likely New York City, with the Empire State Building prominently in the center. The city lights are visible against a dark sky with some clouds.

WE ARE **FREELANCE PHYSICIAN**

[Learn more about us](#)





Example of niche player: Nabbesh.com

The **#1** destination to hire
freelance talent on demand

Hire Talent
Post a Freelance job

Get Hired
Become a Freelancer



 [Leave a message](#)



4

The image is a black and white graphic of a film strip frame. The frame is a thick black border containing a series of white rectangular sprocket holes on both the left and right sides. In the center of the frame is a large, bold, black number '4'. This number is superimposed on a light gray circular background. The circle is defined by a thick, dark gray border. A thin black crosshair, consisting of a vertical and a horizontal line, intersects at the center of the circle. Additionally, a thin black diagonal line extends from the center towards the upper right edge of the circle.

Blurring of distinction between home and office...



INVESTING 2/18/2015 @ 2:26PM | 18,942 views

One In Five Americans Work From Home

A growing number of Americans are working from home. Whether they are self-employed entrepreneurs running small accounting services, or telecommuting for multinational consulting firms, some 30 million of us work from a home office at least once a week. And that number is expected to increase by 63% in the next five years, according to a study by the [Telework Research Network](#).

An estimated three million American professionals never step a foot in an office outside of their own home and another 54% say they are happier that way.

Blurring of distinction between home and office...


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[stock tickers](#)

Work from home soars 41% in 10 years

[Facebook](#) [Twitter](#) [LinkedIn](#)

INVESTING 9/18/2013 9:26PM | 18,945 views

One In Five Americans

A growing number of Americans are work they are self-employed entrepreneurs run services, or telecommuting for multinational 30 million of us work from a home office a that number is expected to increase by 63% according to a study by the [Telework Rese](#)

An estimated three million American prof in an office outside of their own home and happier that way.



About four million more Americans work from home than did in 1999, a new report says.

The number of Americans working from home has soared 41% in the last decade.

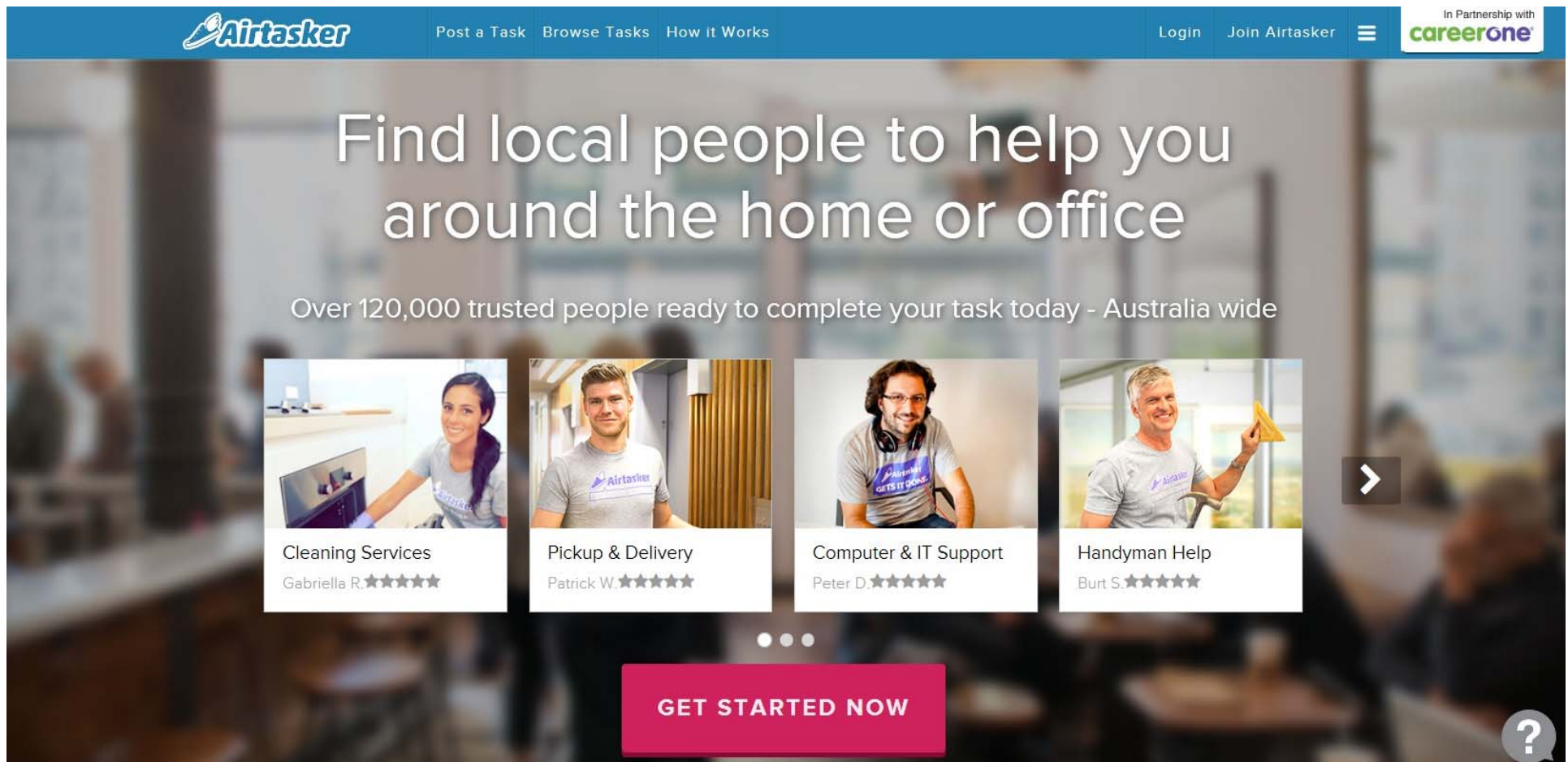
About 13.4 million people currently work from home in the United States, according to a Census Bureau report out Thursday. That's about four million more Americans since 1999.

Sponsored Links

[LifeLock® Official Site](#)
 LiveLifeFree™. Confidently. Get LifeLock Identity Theft Protection.

The availability of high-speed internet and services like Skype, that allow for at-home virtual meetings, has made working from home easier.

Why not sell to the consumer market as well?




The screenshot shows the Airtasker website homepage. At the top is a blue navigation bar with the Airtasker logo, links for 'Post a Task', 'Browse Tasks', and 'How it Works', and buttons for 'Login' and 'Join Airtasker'. A 'careeronone' partnership logo is on the right. The main content area has a blurred background of people working. It features the headline 'Find local people to help you around the home or office' and a sub-headline 'Over 120,000 trusted people ready to complete your task today - Australia wide'. Below this are four task cards: 'Cleaning Services' by Gabriella R. (5 stars), 'Pickup & Delivery' by Patrick W. (5 stars), 'Computer & IT Support' by Peter D. (5 stars), and 'Handyman Help' by Burt S. (5 stars). A pink 'GET STARTED NOW' button is at the bottom center. A right arrow and a help icon (question mark) are also visible.


Airtasker Post a Task Browse Tasks How it Works Login Join Airtasker In Partnership with **careeronone**

Find local people to help you around the home or office


Over 120,000 trusted people ready to complete your task today - Australia wide




Cleaning Services
Gabriella R. ★★★★★



Pickup & Delivery
Patrick W. ★★★★★



Computer & IT Support
Peter D. ★★★★★

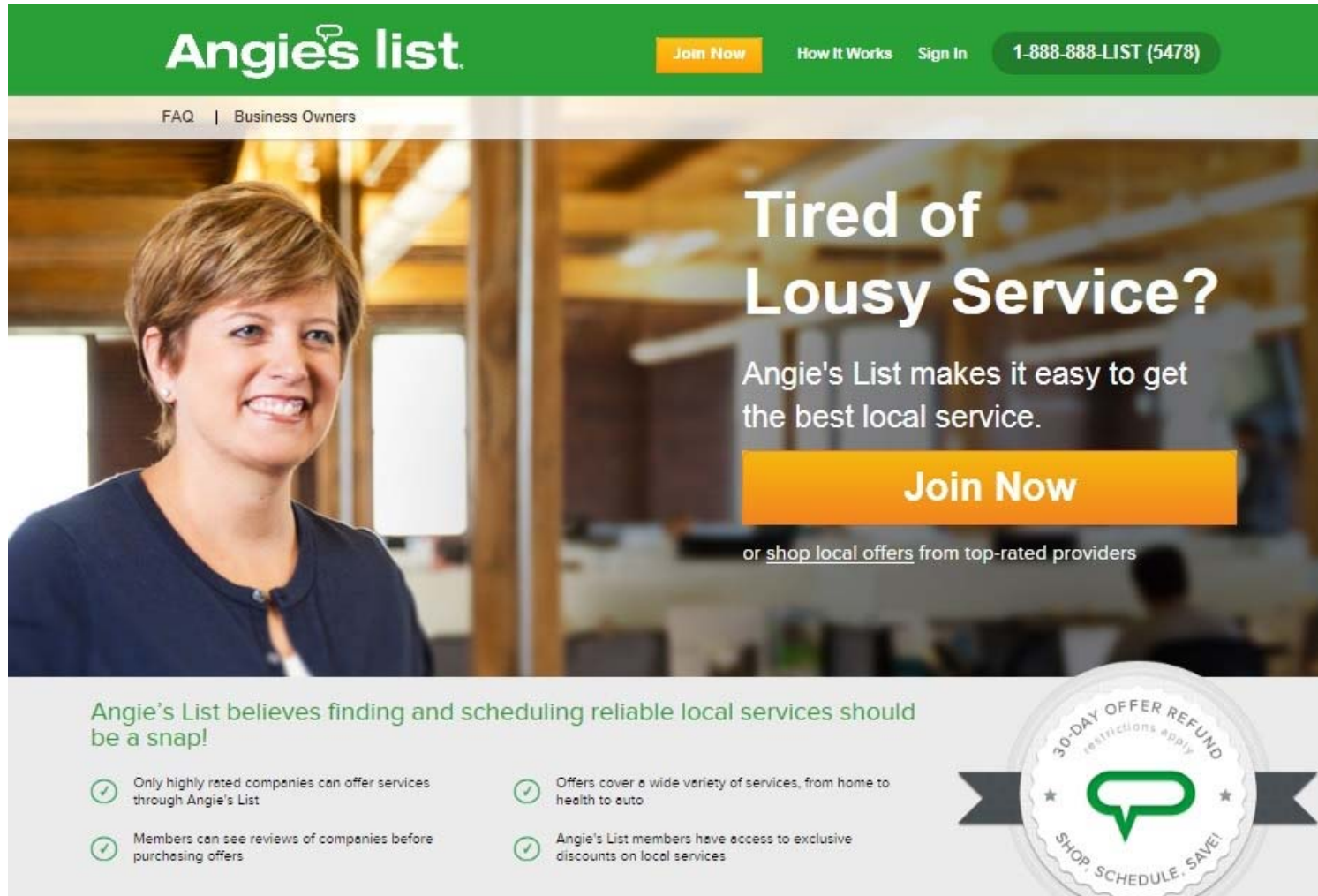


Handyman Help
Burt S. ★★★★★

GET STARTED NOW

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Angieslist.com just became a staffing firm...



Angie's list. Join Now How It Works Sign In 1-888-888-LIST (5478)

FAQ | Business Owners

Tired of Lousy Service?

Angie's List makes it easy to get the best local service.

Join Now

or [shop local offers](#) from top-rated providers

Angie's List believes finding and scheduling reliable local services should be a snap!

- Only highly rated companies can offer services through Angie's List
- Members can see reviews of companies before purchasing offers
- Offers cover a wide variety of services, from home to health to auto
- Angie's List members have access to exclusive discounts on local services

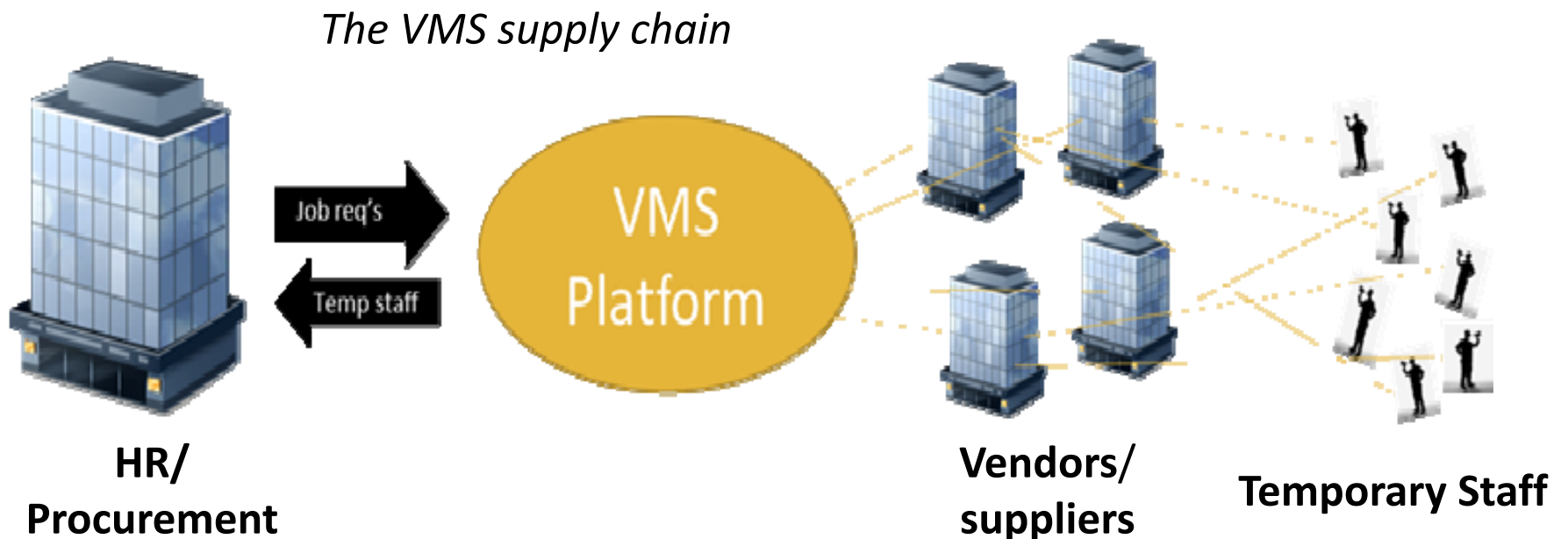
30-DAY OFFER REFUND
restrictions apply

SHOP. SCHEDULE. SAVE!

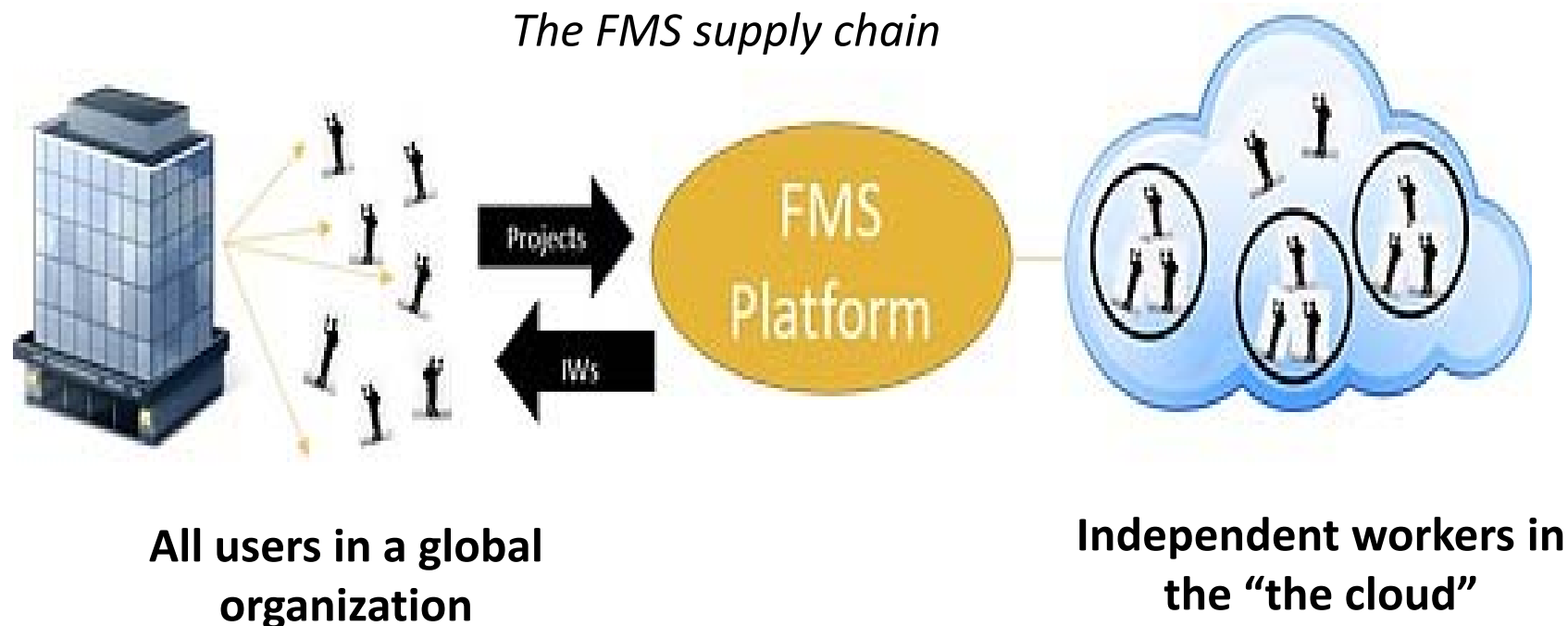
SHOP LOCAL SERVICES IN SAN FRANCISCO BAY AREA, CA [Not your city?](#)



The rise of Freelancer Management Systems



The rise of Freelancer Management Systems



Benefits: Access to pool or workers + IC compliance

The rise of Freelancer Management Systems



2011-2014

“Solopreneur” independent workers: +12.5%

Total U.S. Employment
+5.5%

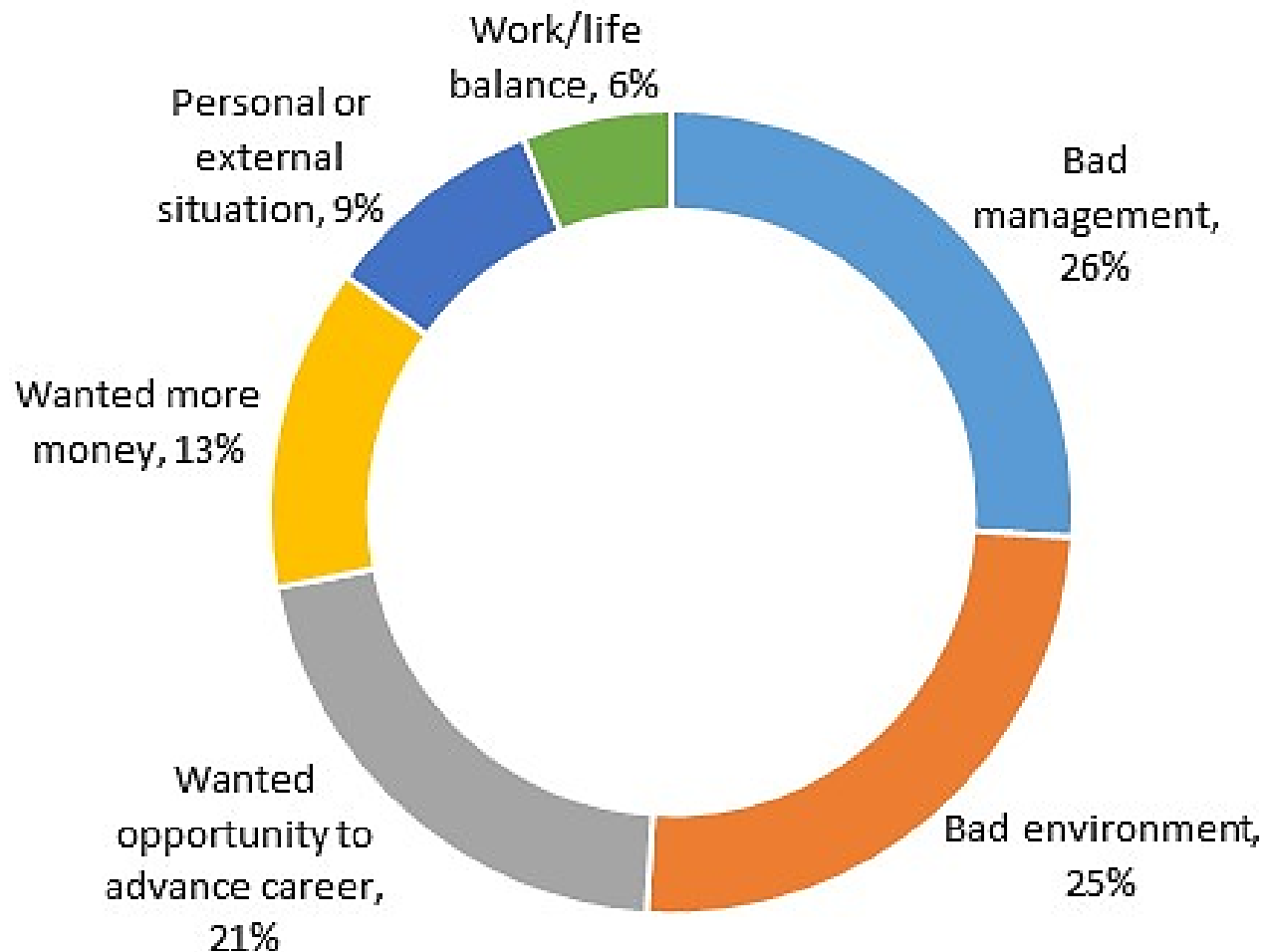
Ratio: 2:1

Source: MBO Partners & BLS

March 16-19, 2015
Orlando, FL



Internal staff—why did you leave your last job?



Source: 2013 Internal Employee Survey

Why employees stay – they like their company, and see a future in it

Sentiments that are most correlated with job attachment

| <i>Sentiment</i> | <i>Correlation Coefficient</i> |
|---|--------------------------------|
| I recommend this organization as a great place to work. | 0.72 |
| I know how I fit into the organization's future plans. | 0.67 |
| I can grow professionally and advance my career here. | 0.66 |
| This job is in alignment with my career goals. | 0.66 |
| The leaders are committed to making it a great place to work. | 0.66 |
| I enjoy doing my work. | 0.65 |
| The leaders value people as their most important resource. | 0.63 |
| The organization makes investments to make me successful. | 0.62 |

Sample internal staff turnover ratios...

| | 25 th Percentile | Median | 75 th Percentile |
|---------------------|--------------------------------|--------|--------------------------------|
| Industrial Staffing | 15.0% | 29.9% | 45.6% |
| IT Staffing | 15.1% | 21.2% | 31.3% |
| All Firms | 17.4% | 26.9% | 35.3% |

Internal staff turnover = Number of internal employees who terminated, divided by the average of (internal employees at beginning of the period) and (internal employees at the end of the period), annualized.



Ronald Coase: Why do firms exist?



A pattern in what we have talked about...

SOW/solutions
work-from-home
core-competency
diseconomies-of-scale segment-focus
outsourcing

Before...



...After



Opportunities in a disaggregated world...

Operations

- What are you doing that would be better outsourced? What are your competitors outsourcing?

Customers

- Can you play a larger outsourcing role for your customers?

Technology

- Can you be a conduit of disaggregated work?

Employees

- Why should great people work for your firm rather than on their own? How will your firm give them a productive advantage?



Don't forget to provide feedback



Rate this session by accessing the evaluation from your **Conference Mobile Community** OR tap the **iPad** screen as you exit.

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Networking Break

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