

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

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March 16-19, 2015  
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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



Home / News / Regional

## 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.





## Shortage of Farmers Creates 'Dangerous Situation' for U.S.

BY MARK KOBA

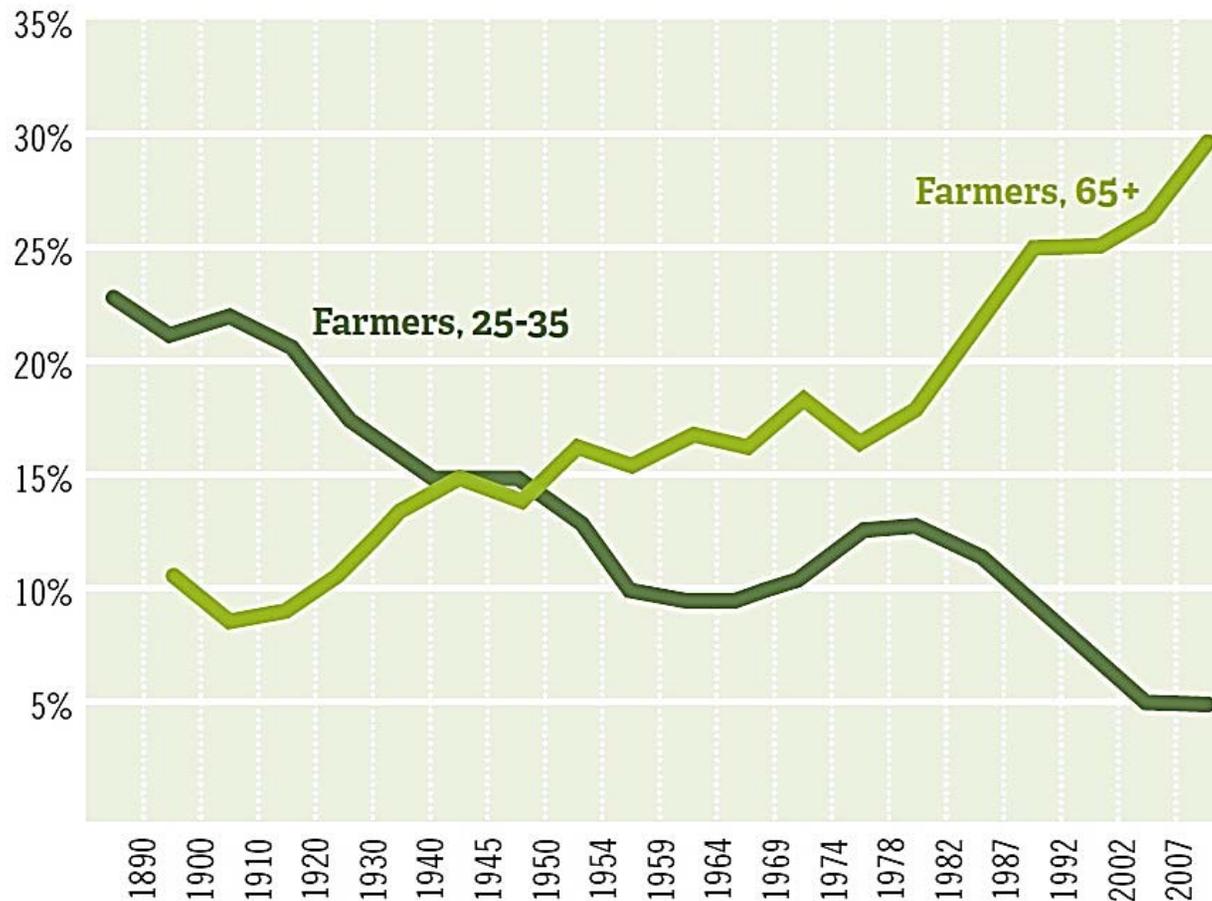
**F**arming has always been a hard life. It's a livelihood held hostage by the whims of Mother Nature and fickle consumers.

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...

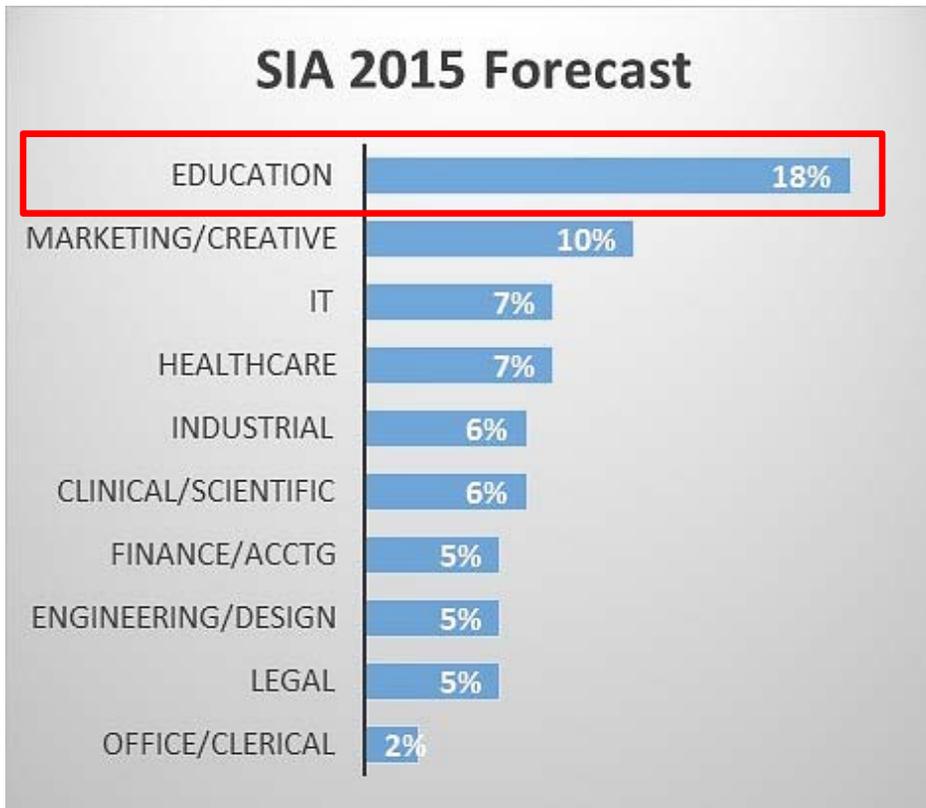
PERCENTAGE OF FARMERS OVER 65 AND BETWEEN THE AGES OF 25-35, 1890-2007 (USDA)



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.

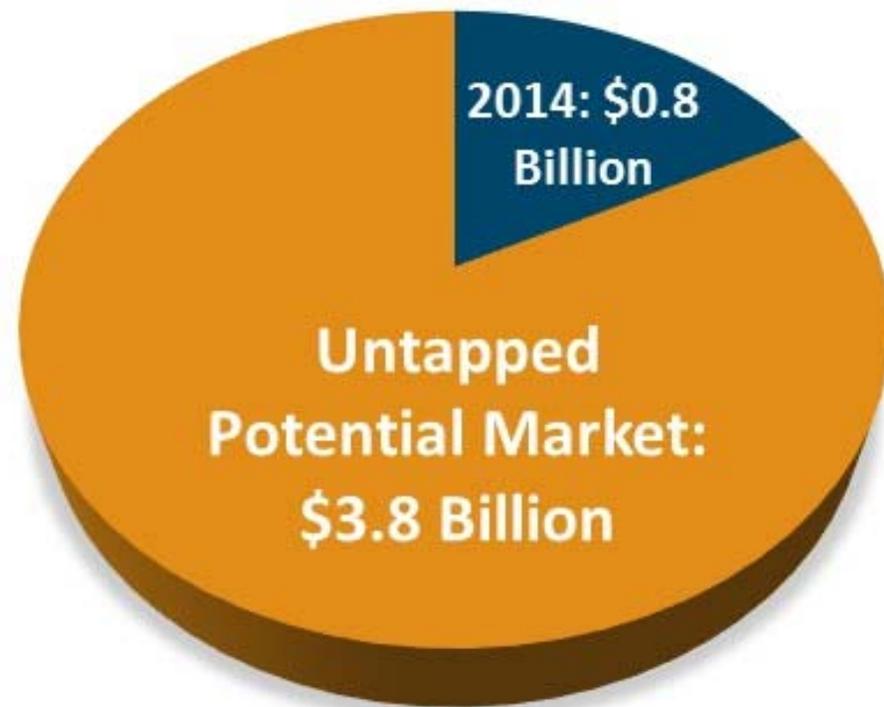
"Usually we're scrambling," said Framingham School Superintendent Stacy Scott. "Getting subs with frequency and quality has been an ongoing challenge. Schools ask for a handful. They get a fraction."

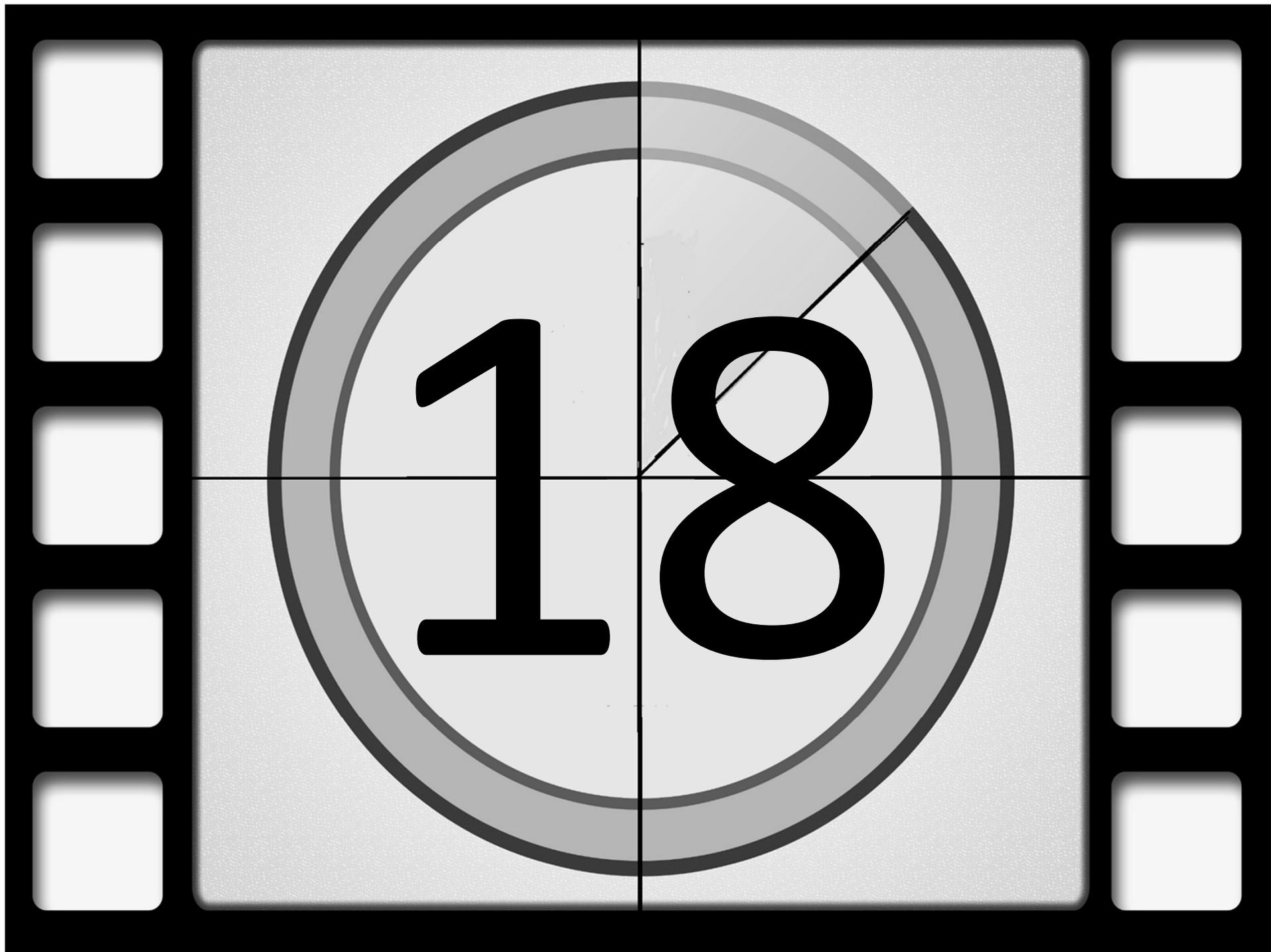
Framingham requires 30 to 60 substitute teachers a day to fill absences among its pool of around 800 educators, said Scott. Sometimes he knows ahead of time which teachers will be out — on maternity leave, for example. Others call in sick at the last minute.

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

The screenshot shows a webpage header with the logo 'INSIDE HIGHER ED' in an orange box on the left and social media icons for Android, Apple, LinkedIn, Google+, Facebook, and Twitter on the right. Below the header is a navigation bar with 'News' on the left and 'ADJUNCTS' in an orange box on the right. The main content area features the article title 'Making Adjuncts Temps -- Literally' in a large, bold font. To the left of the title is a 'PRINT' button with a printer icon and a 'RELATED' section listing several other articles. The article text begins with the date 'August 9, 2010' and the author 'by Scott Jaschik'. The first paragraph discusses a plan by a Michigan community college to stop employing adjuncts and use a temporary services agency. The second paragraph mentions that the idea drew criticism and was put on hold. The third paragraph states that another Michigan community college is planning to move ahead with a similar plan.

**INSIDE HIGHER ED**

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- Using Adjuncts, Off the Payroll
- Colleges assign adjunct hiring to a third party
- Help Wanted: Low-Cost Adjuncts
- Who Gets Bumped?
- Encouraging Faculty Retirements

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

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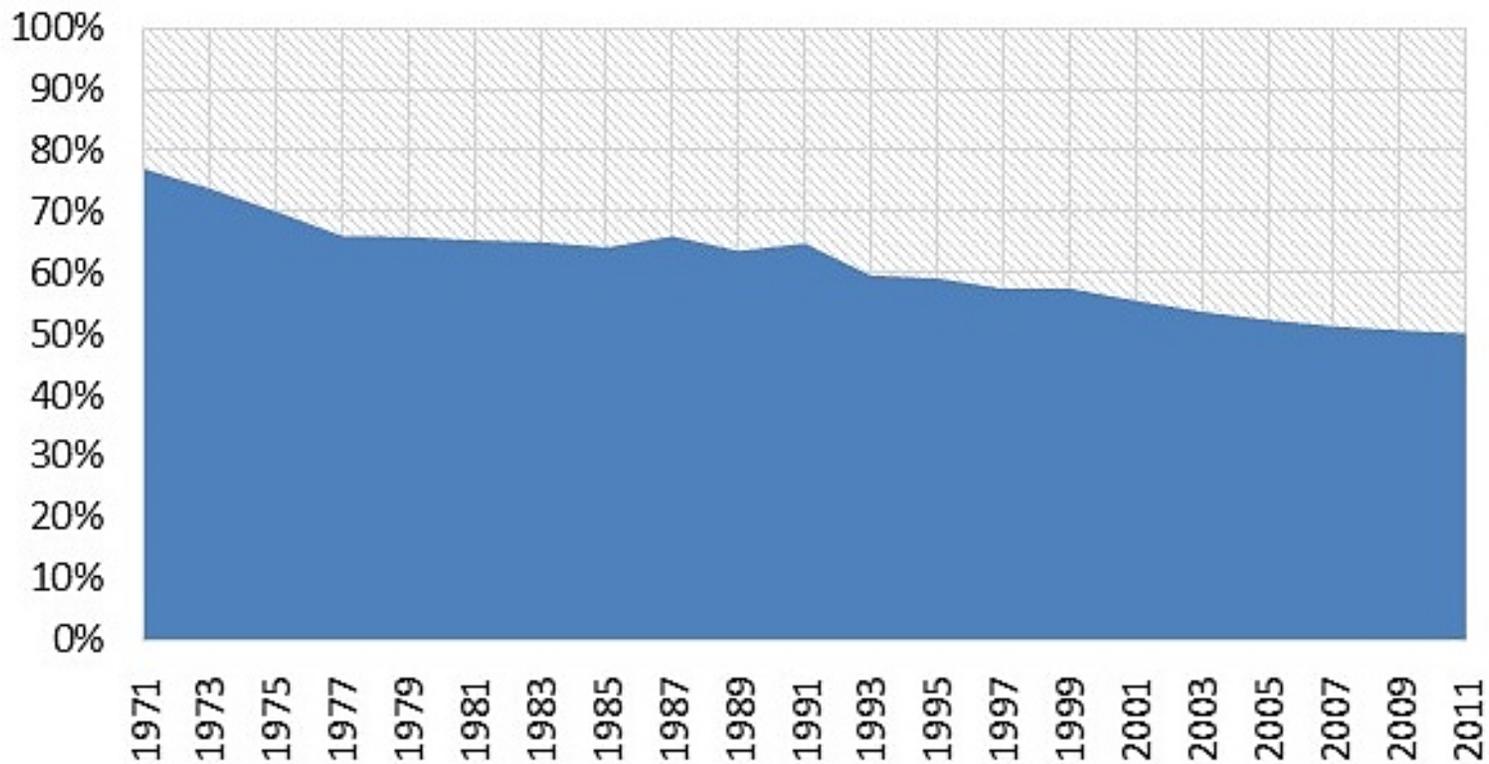
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# Not just K1-12, opportunity for staffing in colleges as well—temp and/or IC management

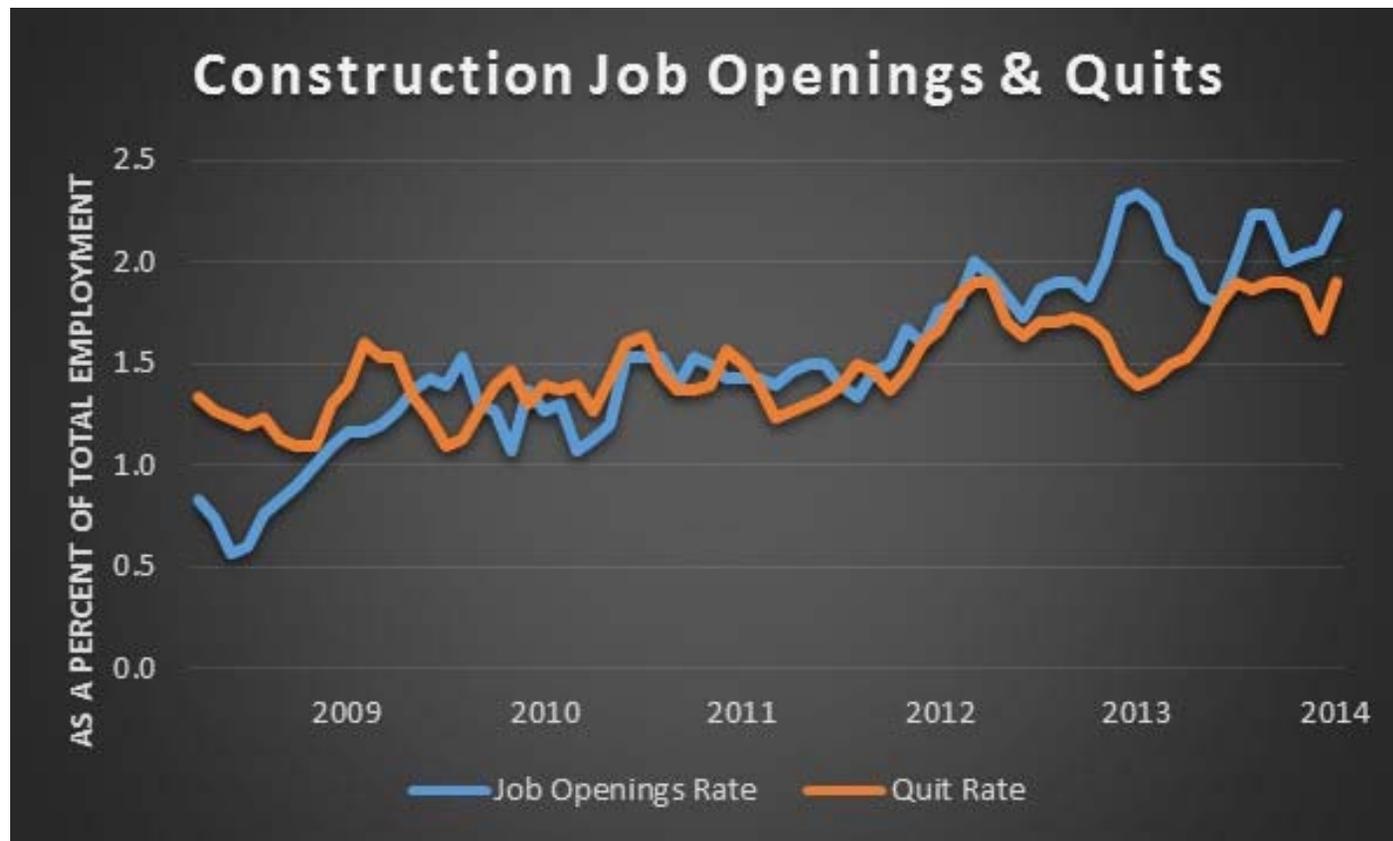
### Percent of College Professors That Are Full-Time



Source: The College Board



## Construction coming back strong...



Source: Bureau of Labor Statistics and Staffing Industry Analysts

March 16-19, 2015  
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## Construction coming back strong...



### Best Long-Term Job Outlook

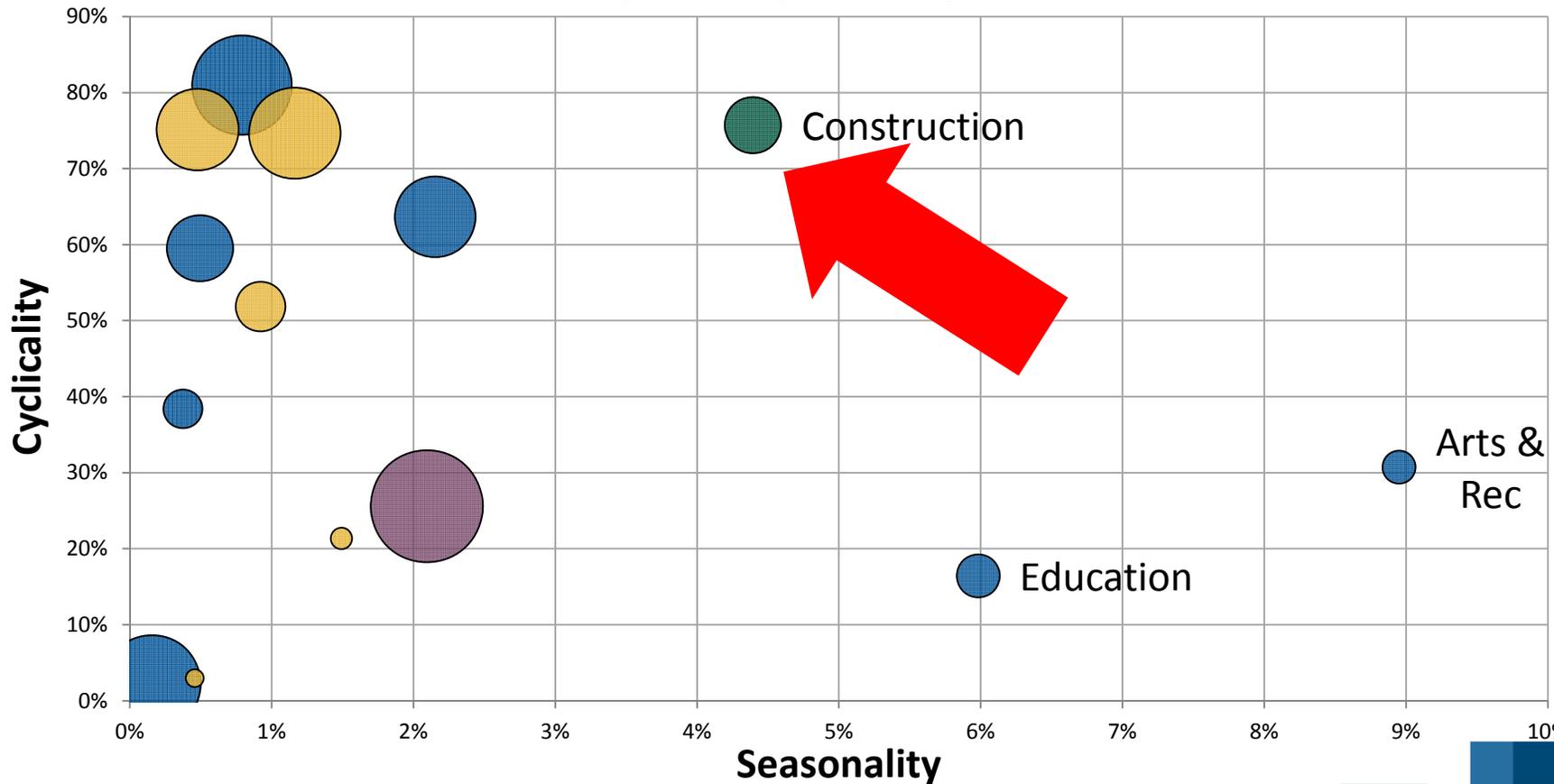
- #1 Healthcare Support
- #2 Healthcare Practitioners
- #3 Construction**
- #4 Personal Care & Service
- #5 Computer & Math

Source: Bureau of Labor Statistics and Staffing Industry Analysts

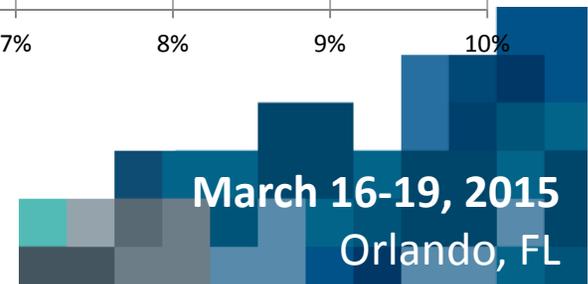


# Construction: Both cyclical & seasonal

## Seasonality and Cyclicity of Industries



Source: Staffing Industry Analysts & Bureau of Labor Statistics



# 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%

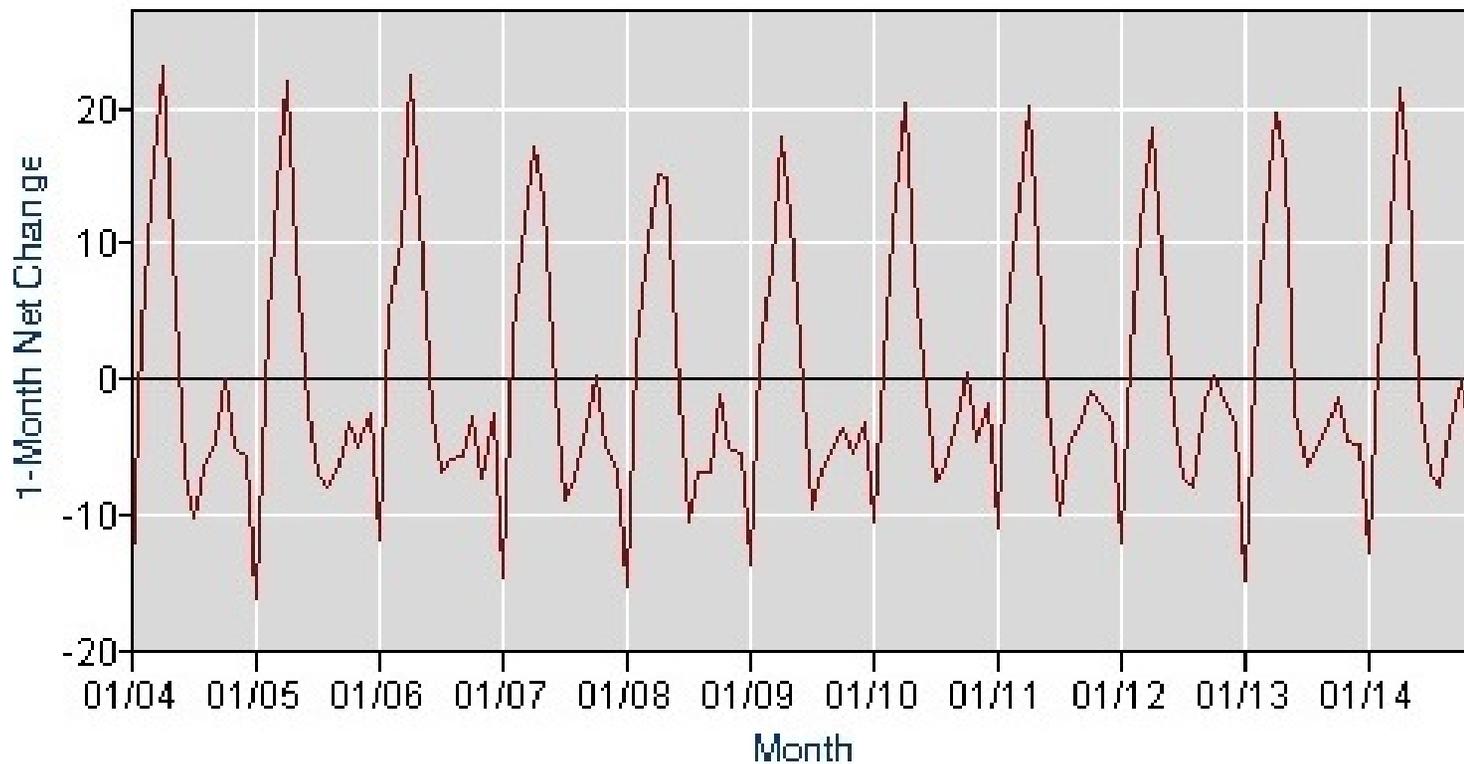
Source: U.S. Census Building Permits Survey





# Who's hiring right now? Garden supply stores.

*Garden supply stores | Monthly change in employment*



Source: Bureau of Labor Statistics and Staffing Industry Analysts



# Who else is hiring right now?

## *Sectors hiring in March/April*

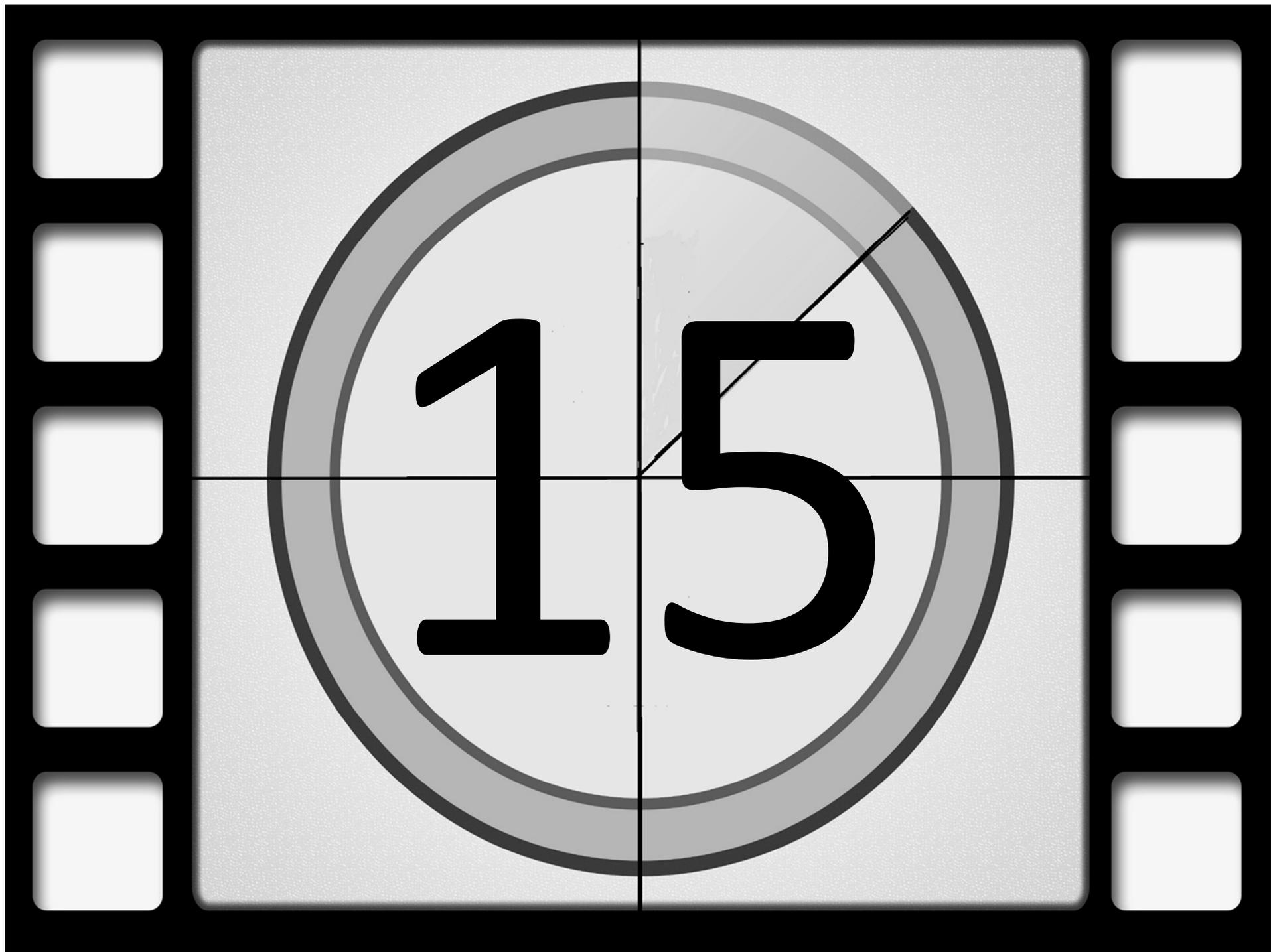
Sports teams and clubs
Spectator sports
Golf courses and country clubs
RV parks and campgrounds
Landscaping services
Nursery, garden, and farm supply stores
Lawn and garden equipment and supplies stores
Highway, street, and bridge construction
Racetracks
RV parks and recreational camps
Marinas
Scenic 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%

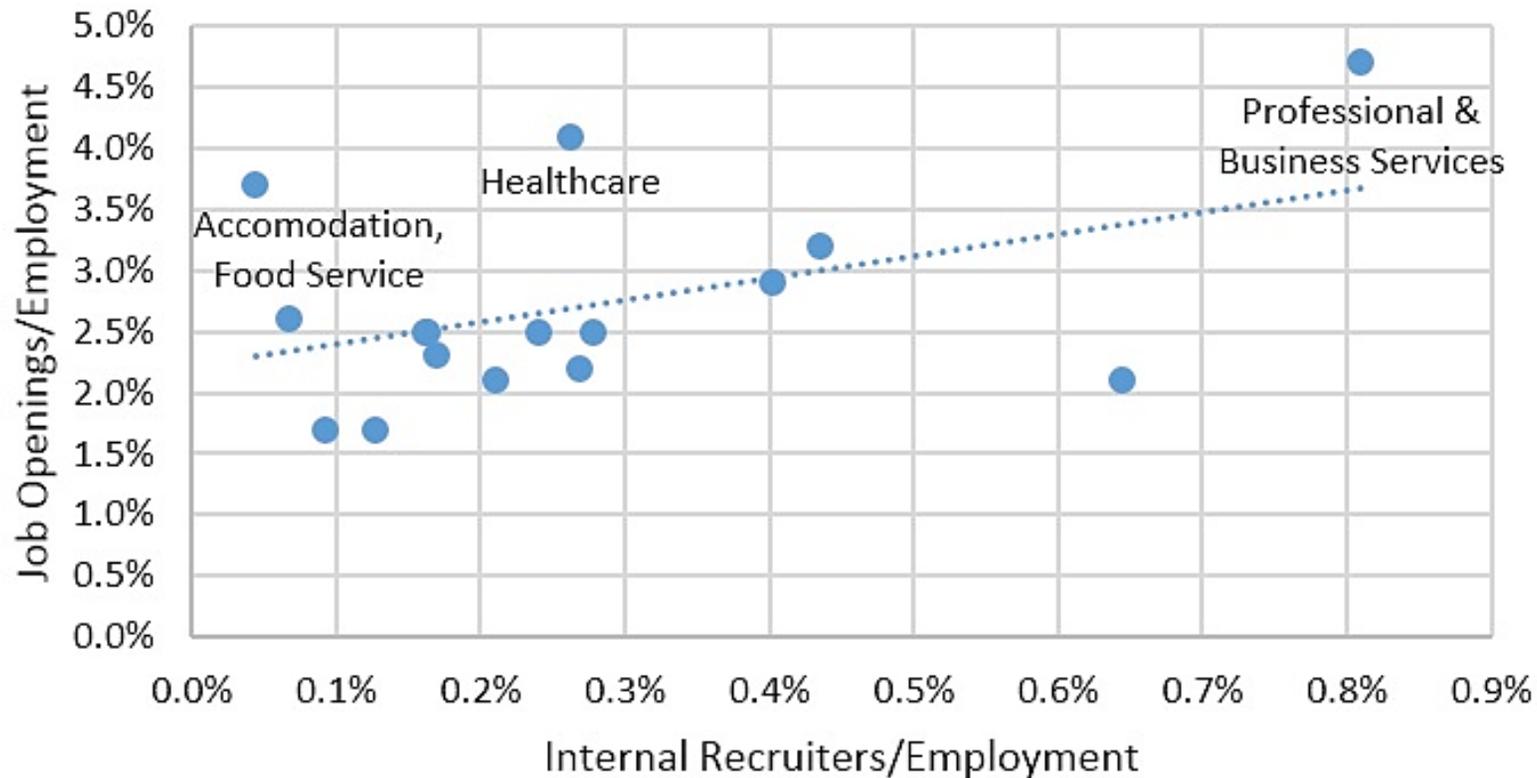
Source: Bureau of Labor Statistics and Staffing Industry Analysts





# Three sectors that need perm recruiting help

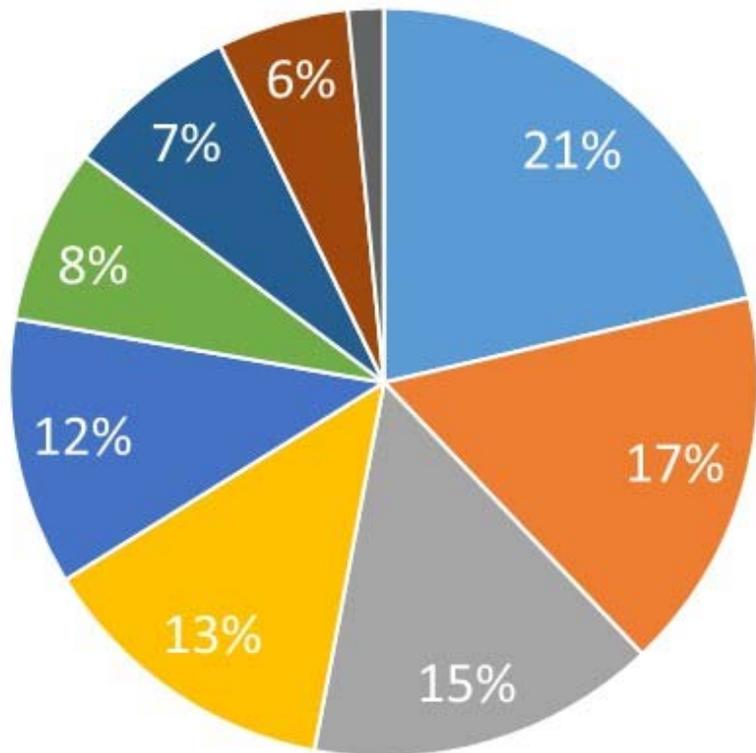
Internal Recruiting Intensity vs. Job Openings



Source: Bureau of Labor Statistics and Staffing Industry Analysts



# What's in professional & business services?



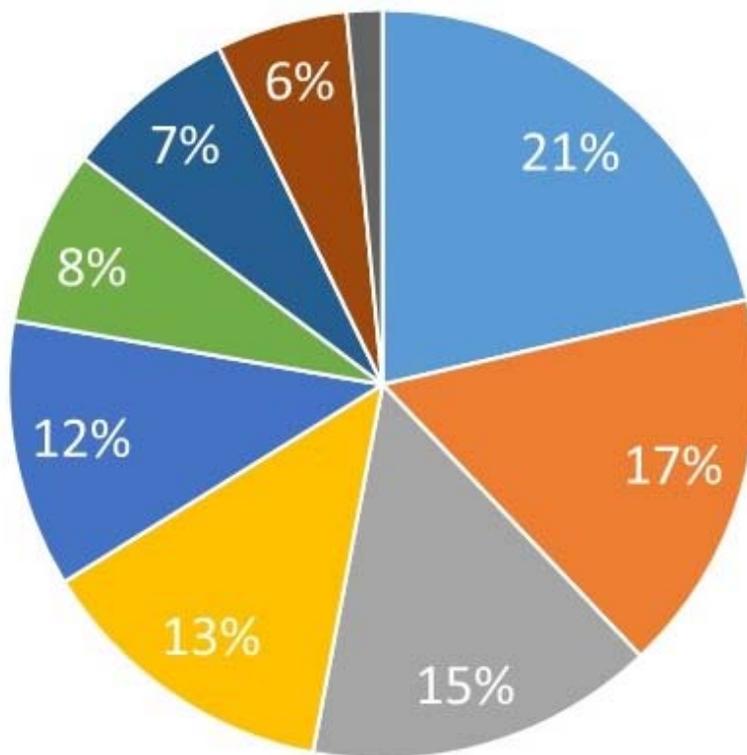
- Computer Systems Design
- Architecture & Engineering
- HR, Marketing Support, Etc.
- Legal
- Accounting & Bookkeeping
- Scientific Research
- Other Professional
- Advertising & Related
- Specialized Design

Source: Bureau of Labor Statistics and Staffing Industry Analysts



# 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?

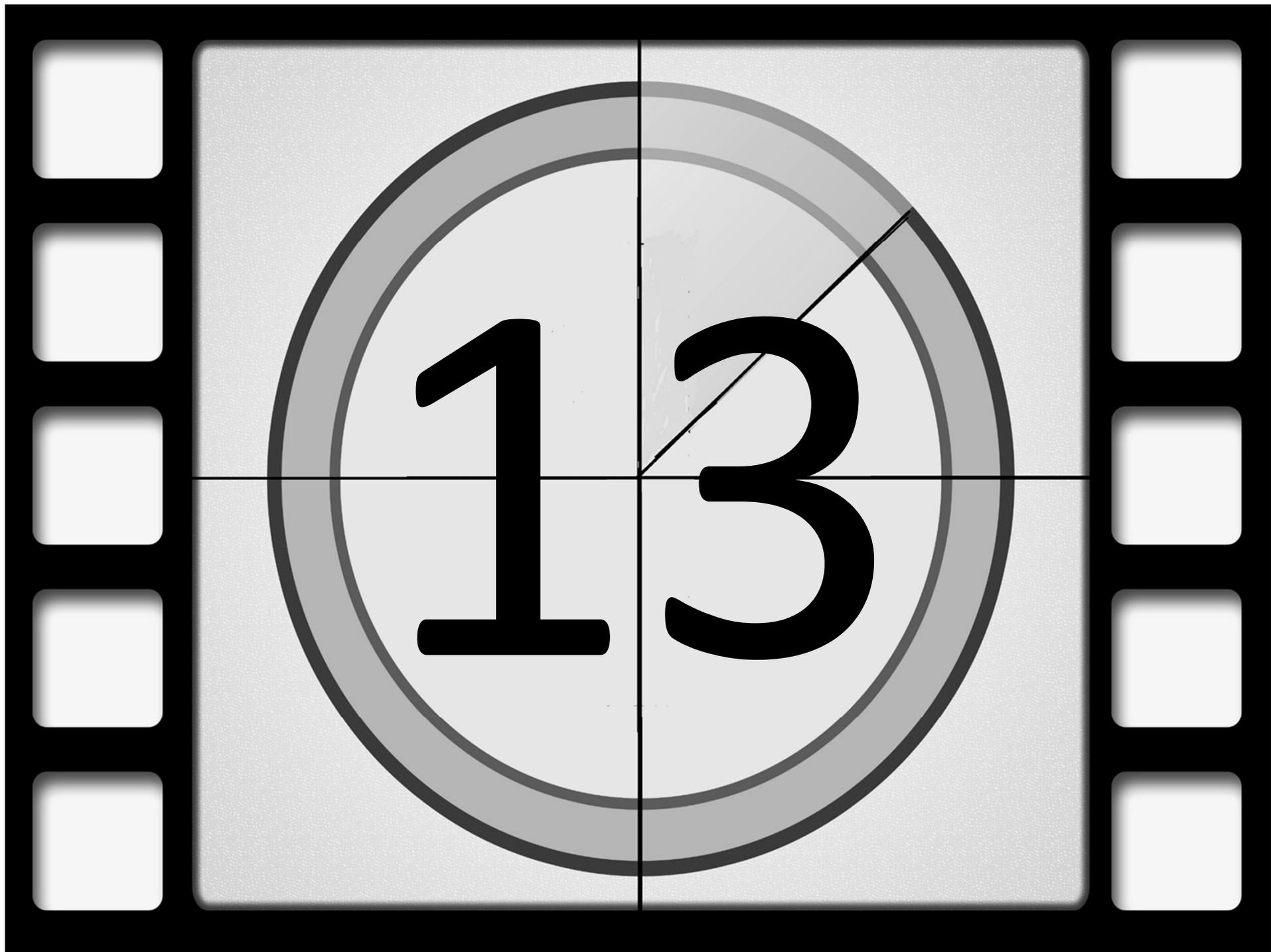
*Buyers: Over the next ten years will you be using more or less of the following?*



## Is it time for SOW/project-based work?

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

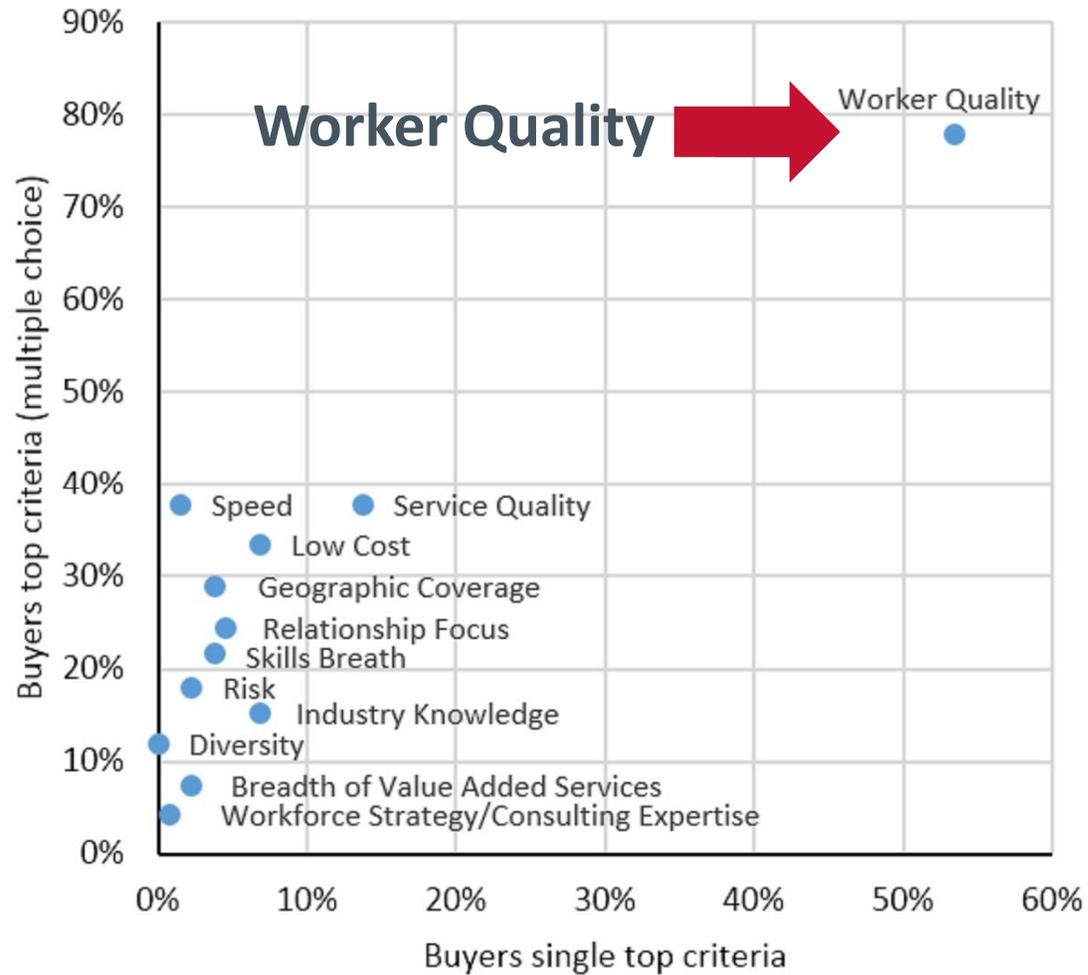
	More	Less	Projection
Online staffing	12%	1%	Increased emphasis
<b>SOW/solutions (your firm responsible for deliverable)</b>	15%	3%	Increased emphasis
Recruitment Process Outsourcing (RPO)	8%	1%	Increased emphasis
Retained search	4%	2%	Unchanged
Direct-to-consumer (e.g., home healthcare, plumbers, etc.)	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?



# Top buyer criteria for selecting suppliers



Source: 2014 Contingent Buyer Survey



## A few suggestions about selling quality...



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

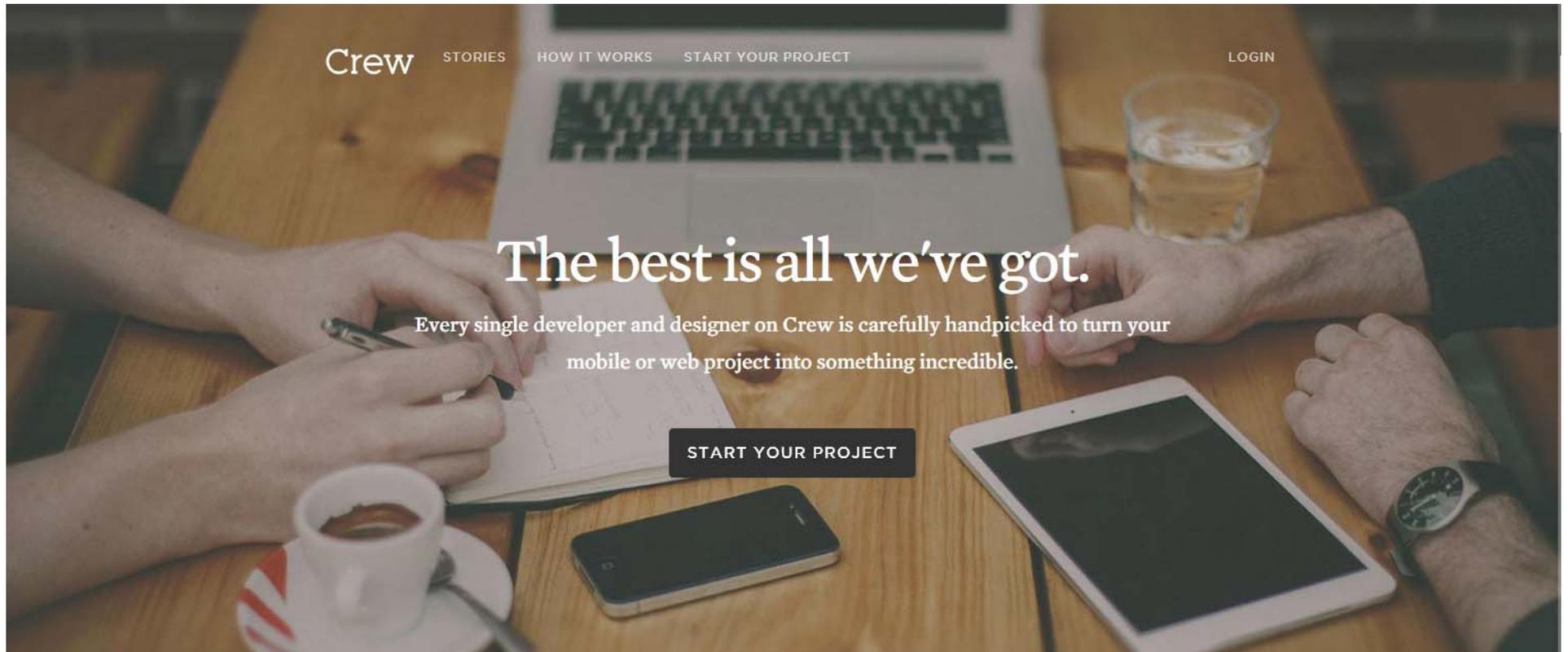


- Create a culture of quality—it's what you have and what you sell



- Make sure your website says you have high quality workers

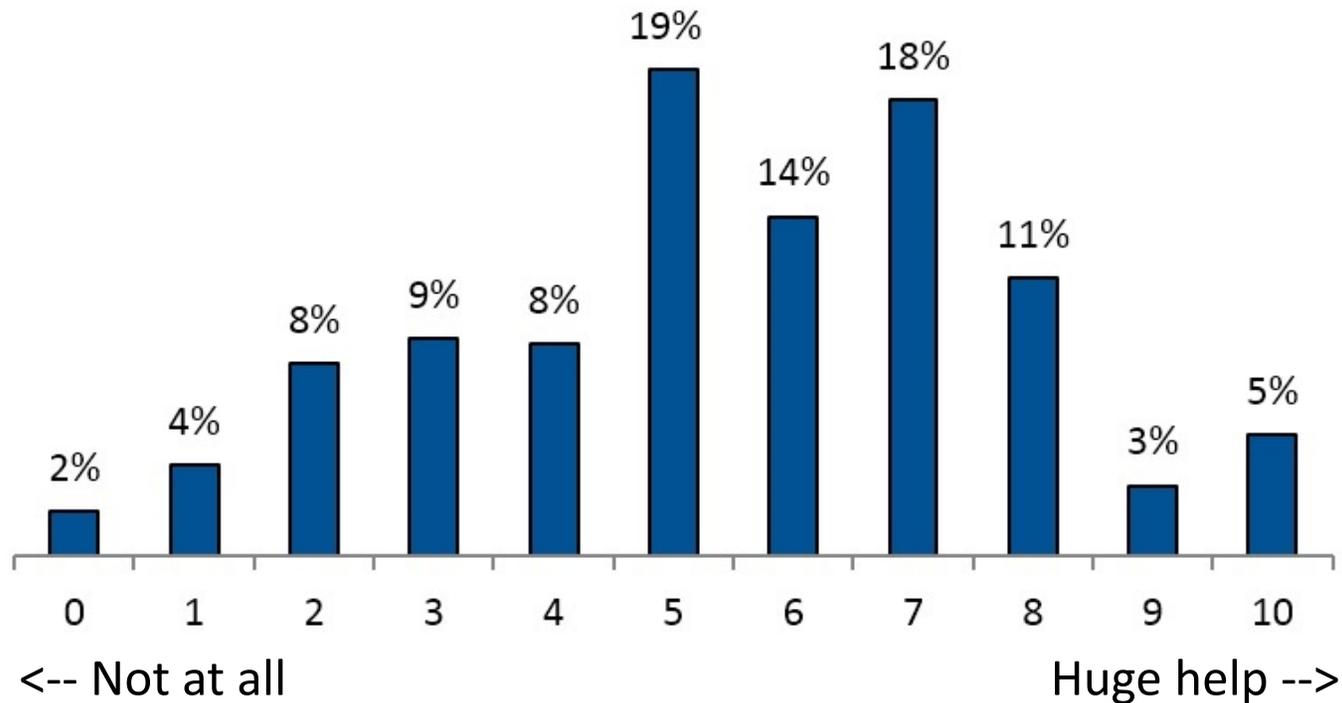
# What good messaging about quality looks like...





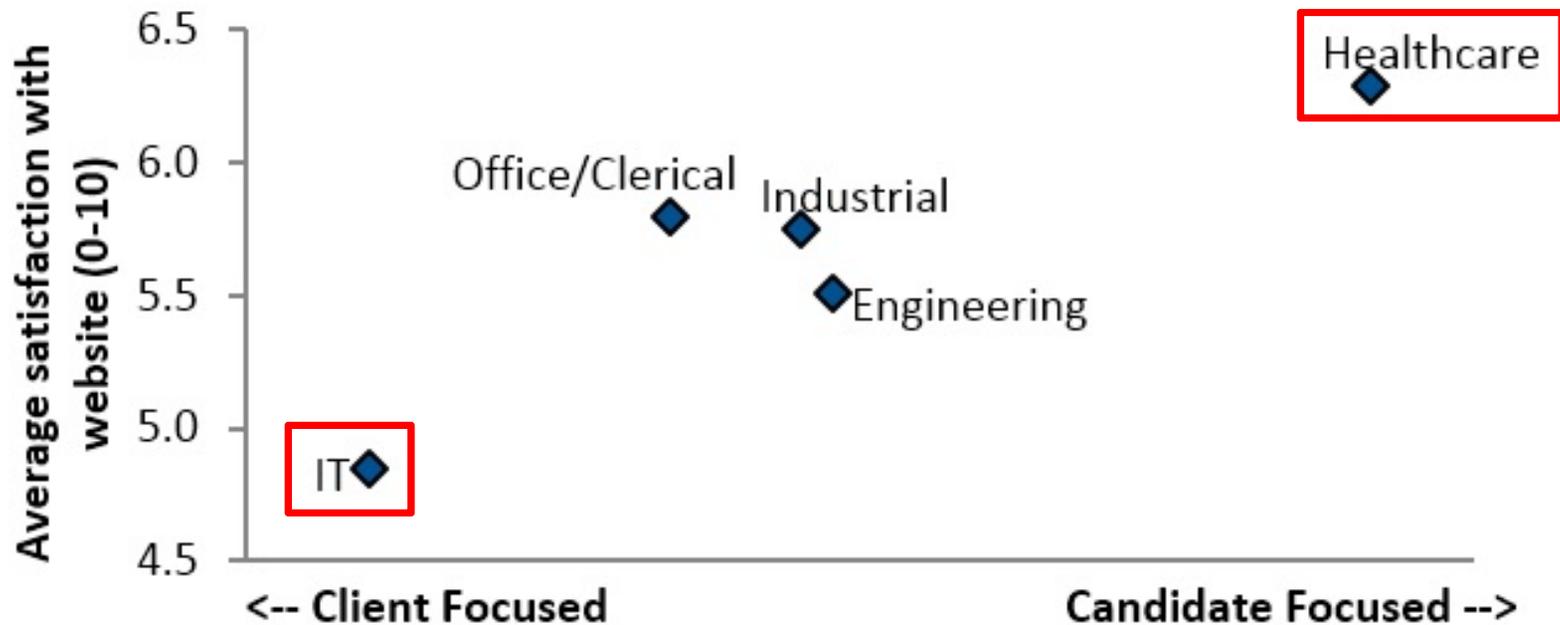
## Average staffing firm website score: “Meh...”

*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*



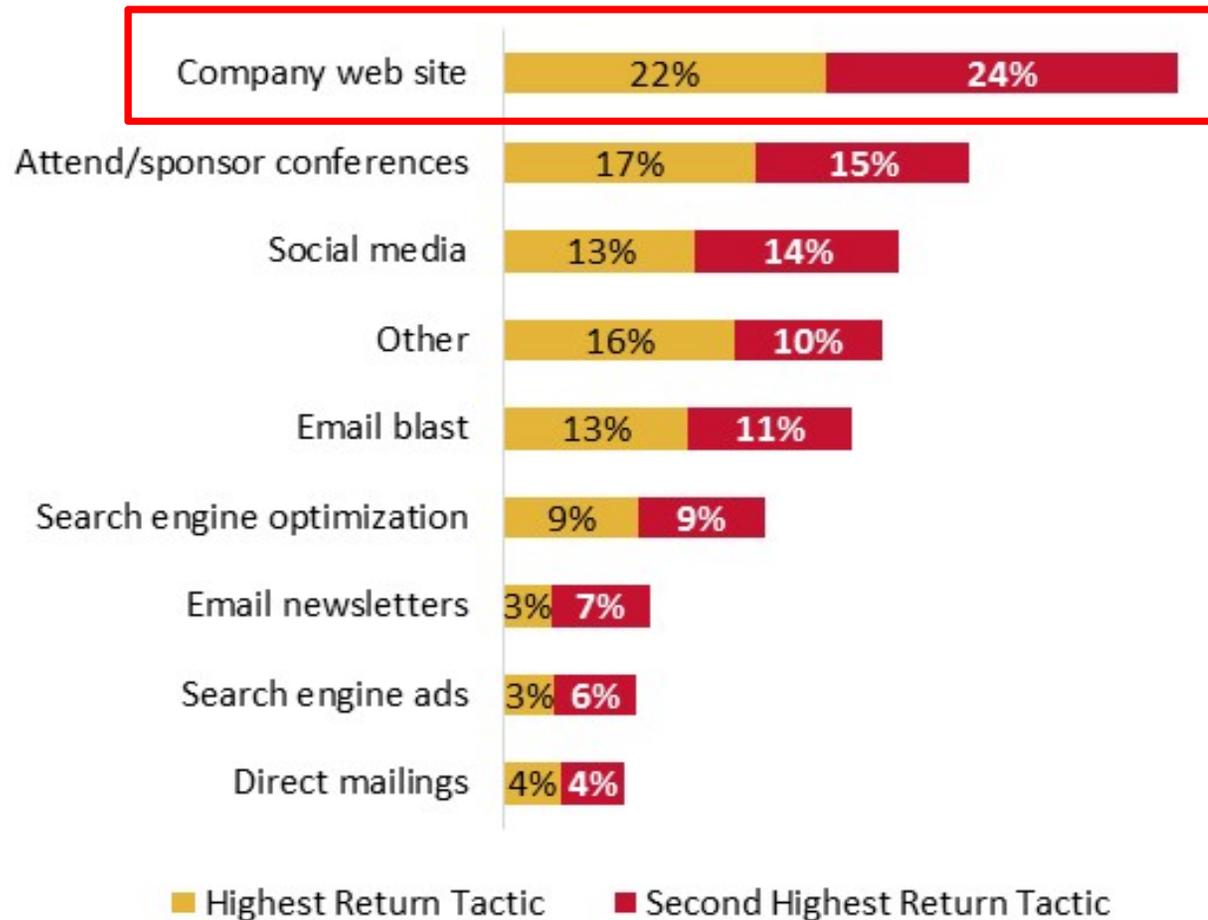
# Website features help, especially SEO optimization

<b>Satisfaction among respondents whose websites had the following features:</b>				
<b>Your website has the following features:</b>	<b>Percent that do it</b>	<b>Average for those who do it</b>	<b>Average for those who don't do it</b>	<b>Diff.</b>
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*

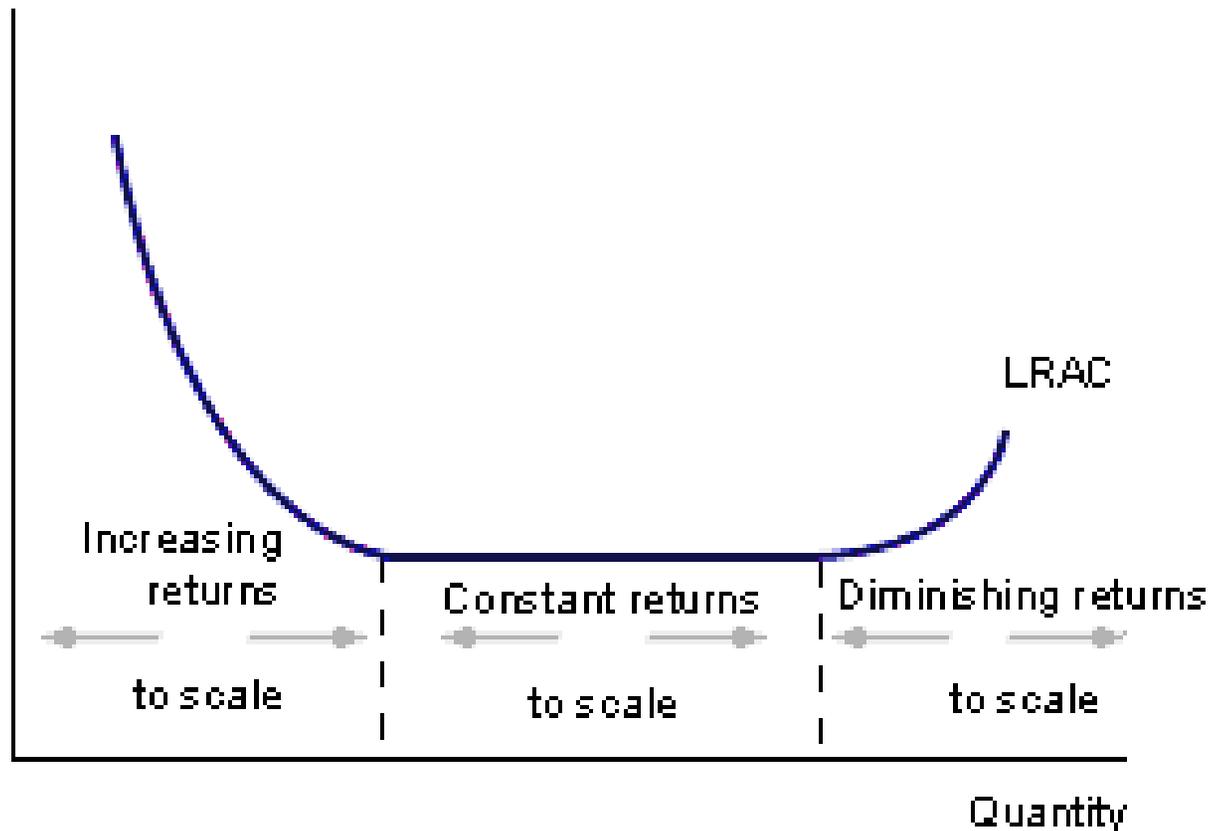
Which marketing tactics would you say have the highest return on spend/effort?



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?

HARVARD WINTERS  
JUN 6, 2013 3:00pm ET

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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 fall

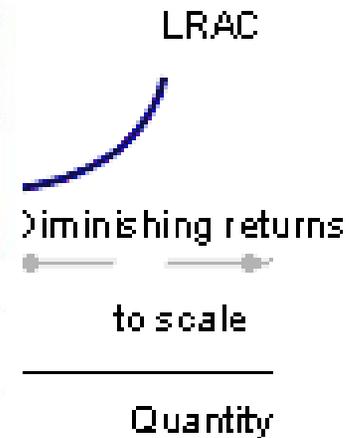


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# Diseconomies of scale? What's that?

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## Where Are We of Scale? Warnings Promised?

HARVARD WINTERS  
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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

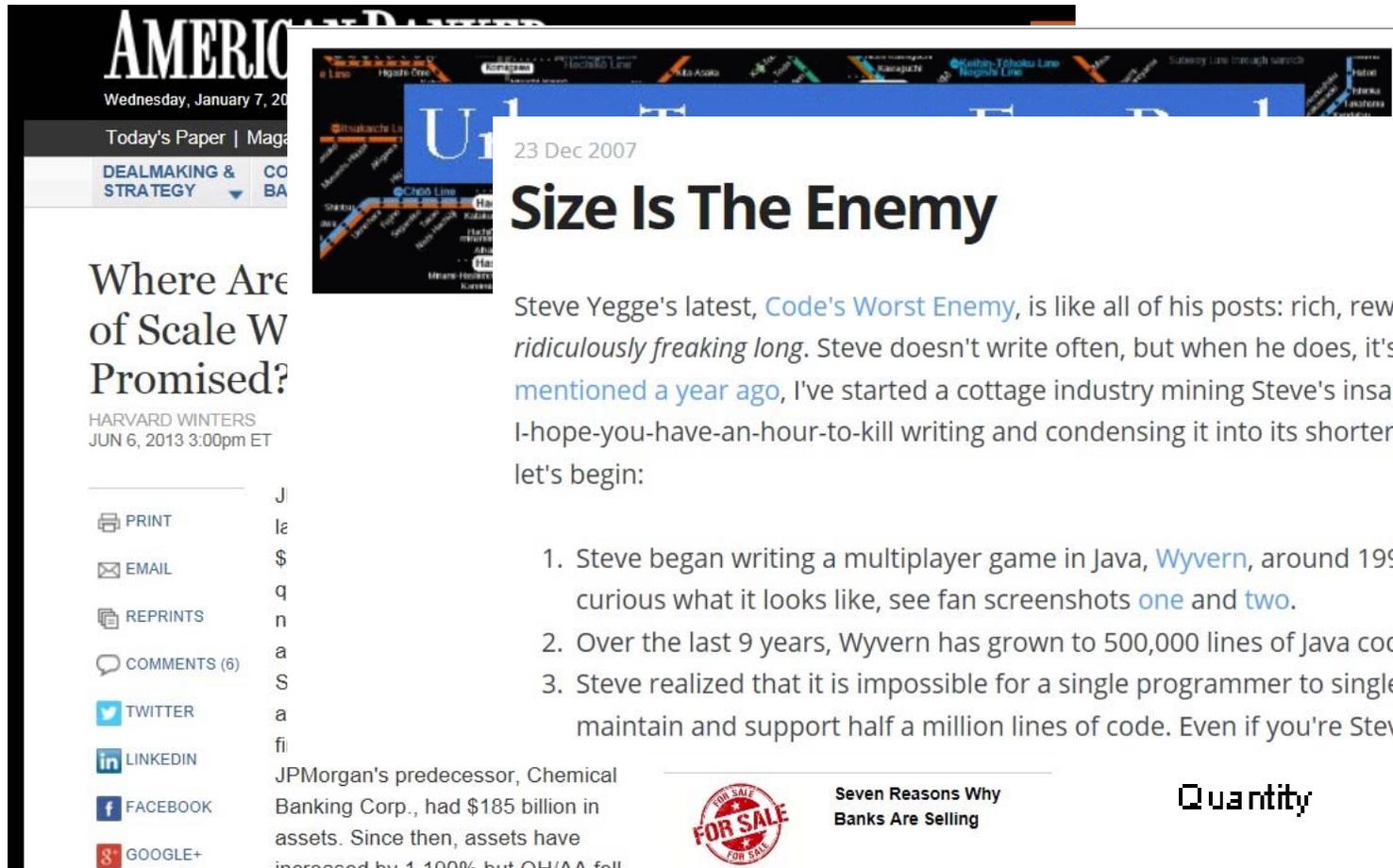
Number of Buses	Cases	Cost per Vehicle Mile
1,000 & Over	7	\$82.97
500-999	15	\$69.55
250-499	17	\$68.60
100-249	49	\$52.09

Calculated from National Transit Database.

Quantity

Seven Reasons Why Banks Are Selling

# Diseconomies of scale? What's that?



AMERICAN BUSINESS  
 Wednesday, January 7, 2014  
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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.

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


**Seven Reasons Why Banks Are Selling**

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# Diseconomies of scale? What's that?

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

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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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**Seven Reasons Why Banks Are Selling**

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# Diseconomies of scale? What's that?

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## Giants at the gate: 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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## The More Centralized the Government, the Lower the Approval Rating

**Widening Gap in Views of Federal, State and Local Governments**

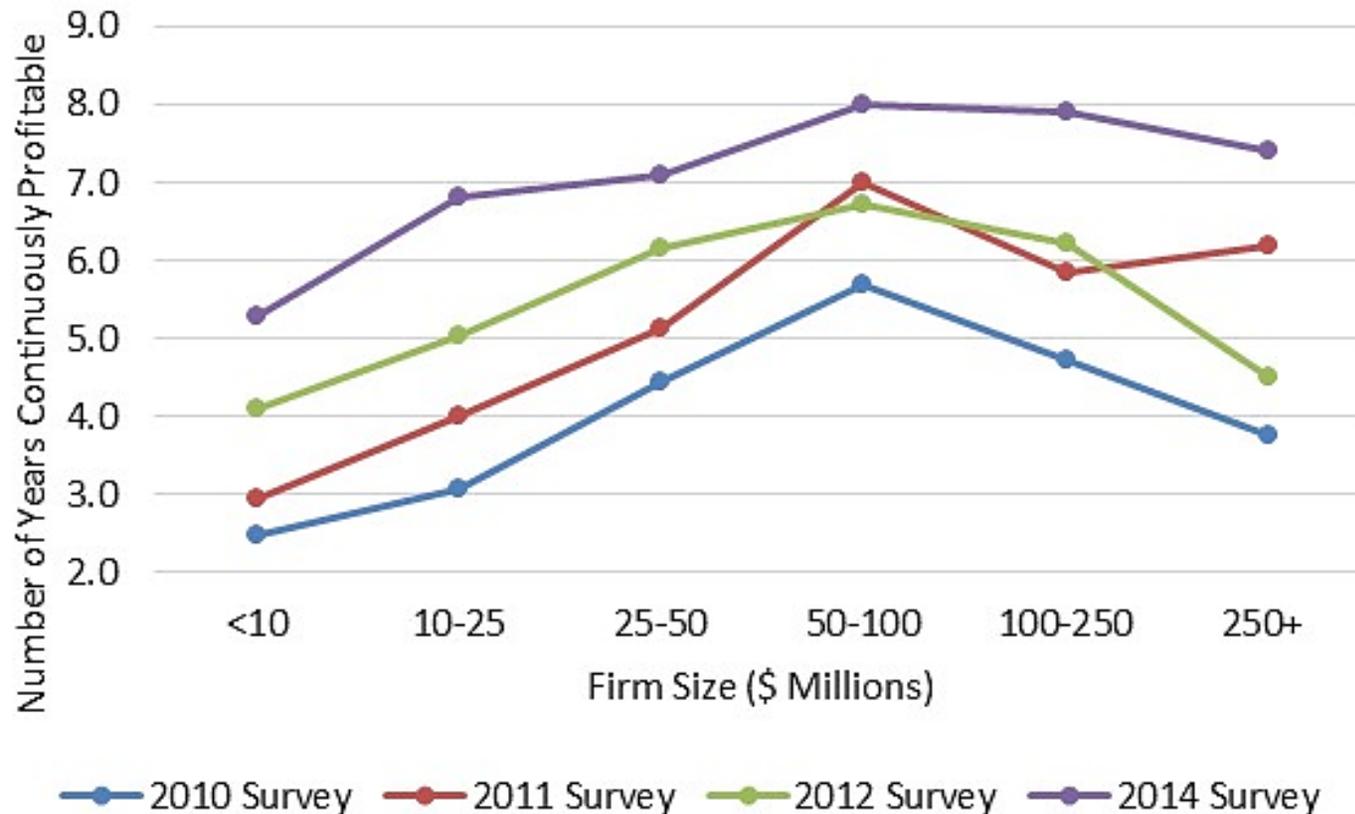
Year	Your local govt	Your state govt	The federal govt in Washington
1997	68	66	38
2001	66	63	38
2013	63	57	28

PEW RESEARCH CENTER March 13-17, 2013.

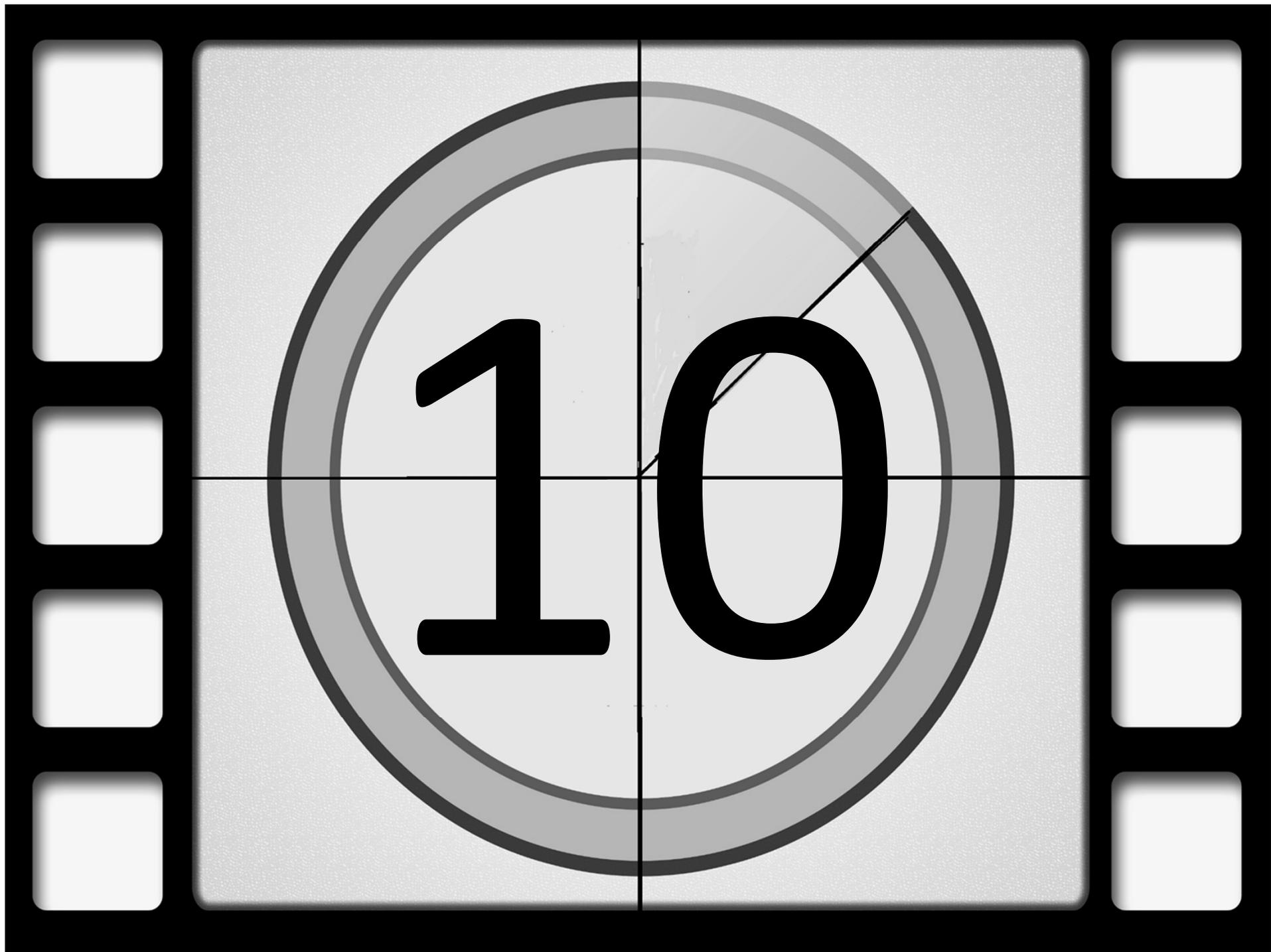
A [recent study by the Pew Research Center](#) found an interesting relationship between government approval ratings and degree of government centralization in the U.S. Apart from the period around the 911 terrorist attack, when centralized government in Washington D.C. was popular, local government 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?**

## 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*

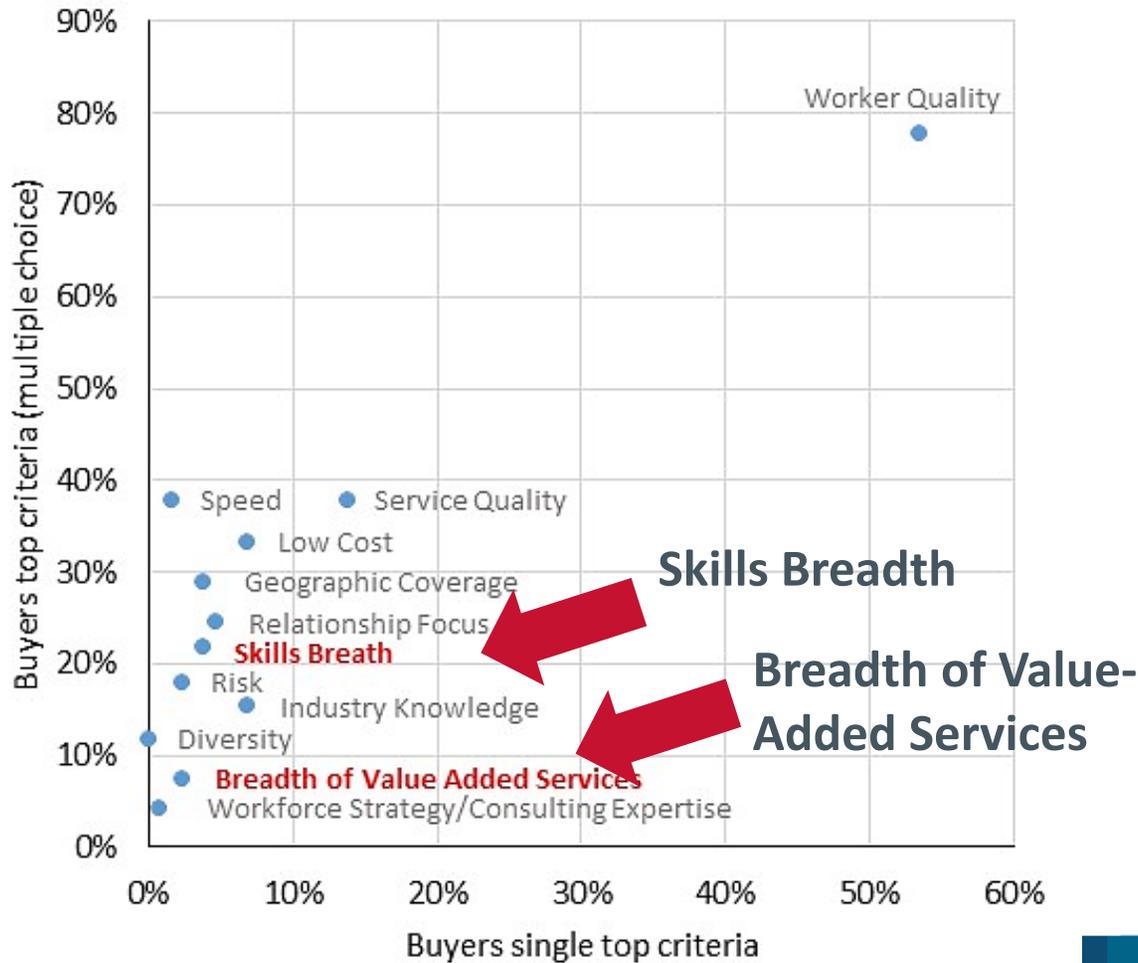
2014	Diversified	Concentrated	Difference
By segment	7.2	6.6	0.6
By industry	6.9	6.5	0.4

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



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



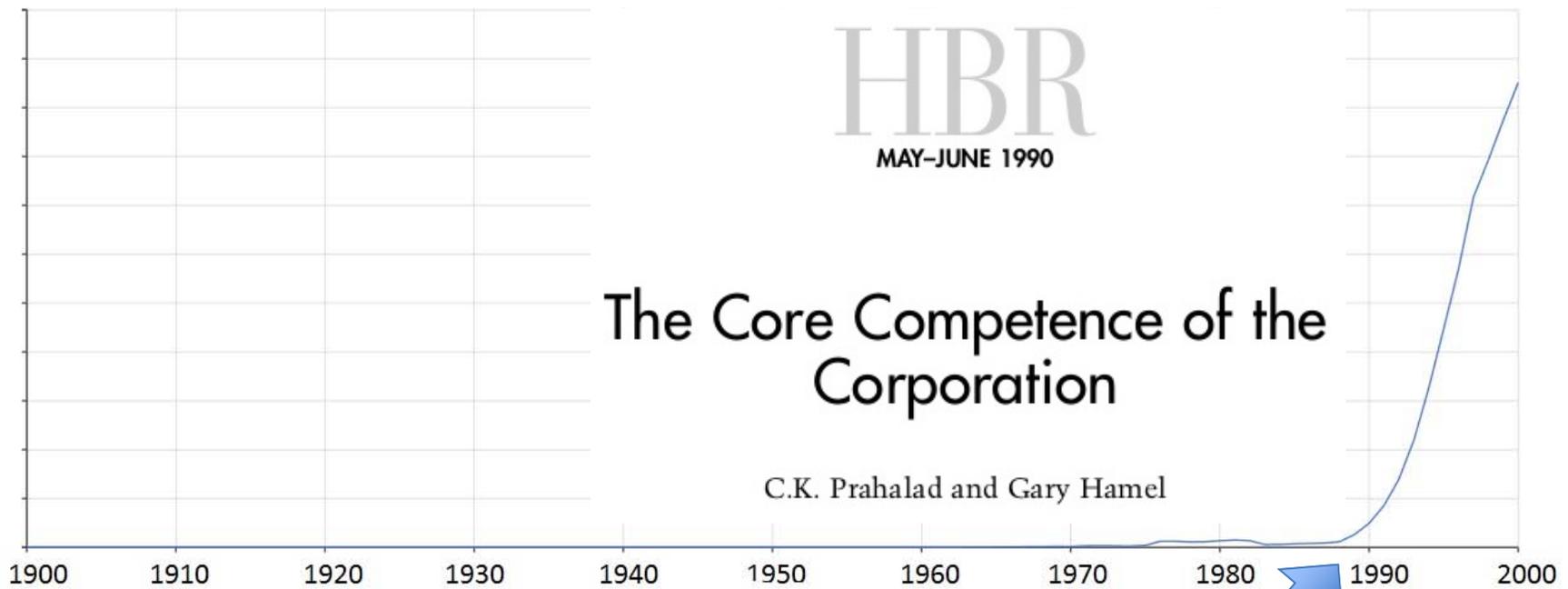
Source: 2014 Contingent Buyers Survey





# Idea of core competency takes off...

Google books Ngram Viewer



Source: Google Ngram Viewer, Harvard Business Review



## Another 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**



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



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« 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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DEFENSE

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

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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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## FOX NEWS

# On the Job Hunt: Machinists in High Demand

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

f 341 t 90



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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# 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, ranging from laborers to long-haulers, 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

90



DEBATE  
:15

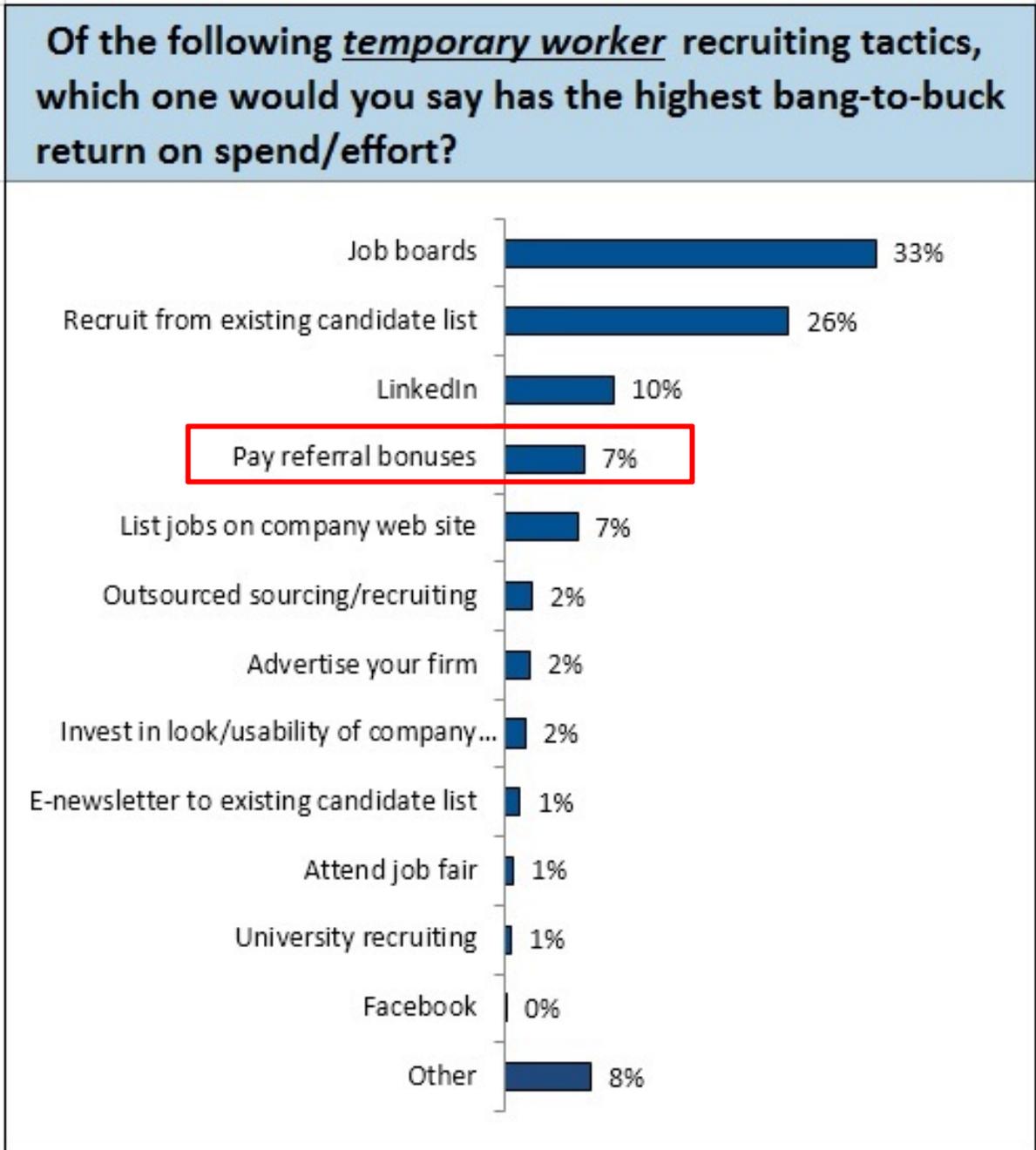
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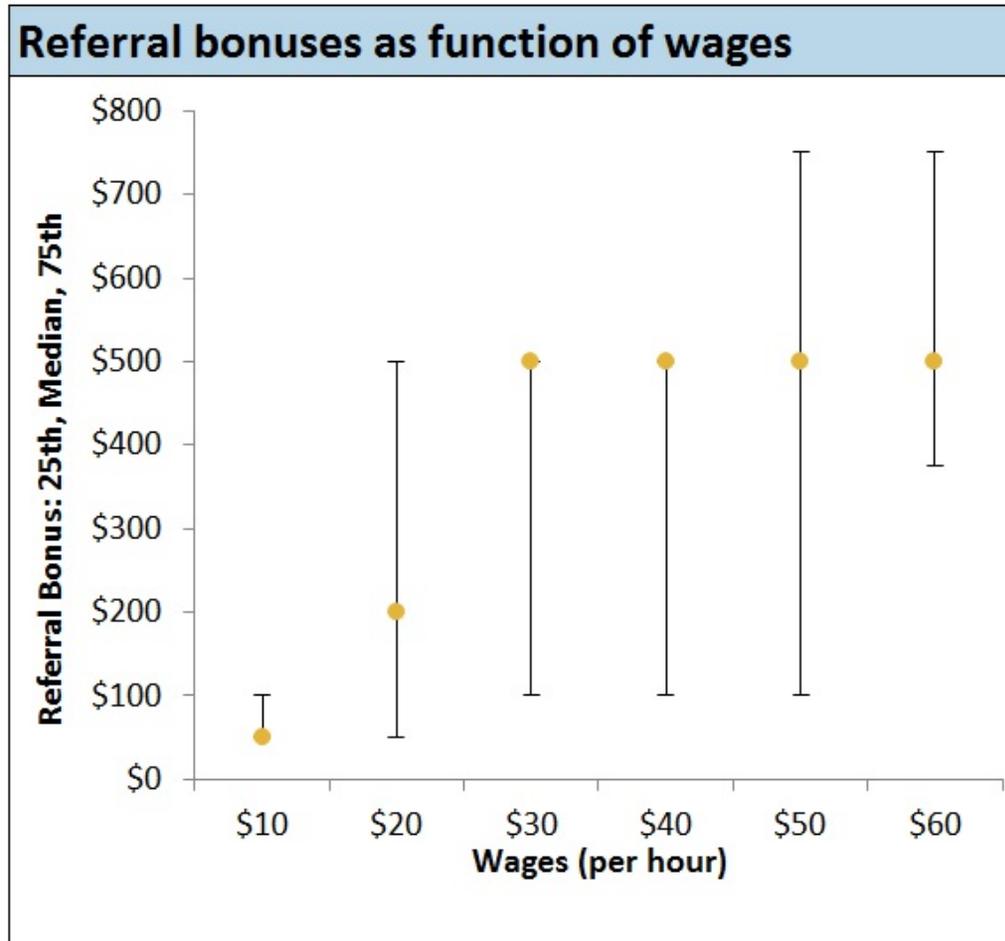
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# A surprise result from our staffing company survey...referral fees among top temp recruiting tactics



# How much should you pay for a referral bonus?



Source: 2013 Temporary Workers Survey



# Hire globally, place locally





**Parmy Olson**  
Forbes Staff

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*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.*

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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



Technology Quarterly: Q1 2013 ▾

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Telepresence robots

# Your alter ego on wheels



Parmy Olson  
Forbes Staff

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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



Tweet 79

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

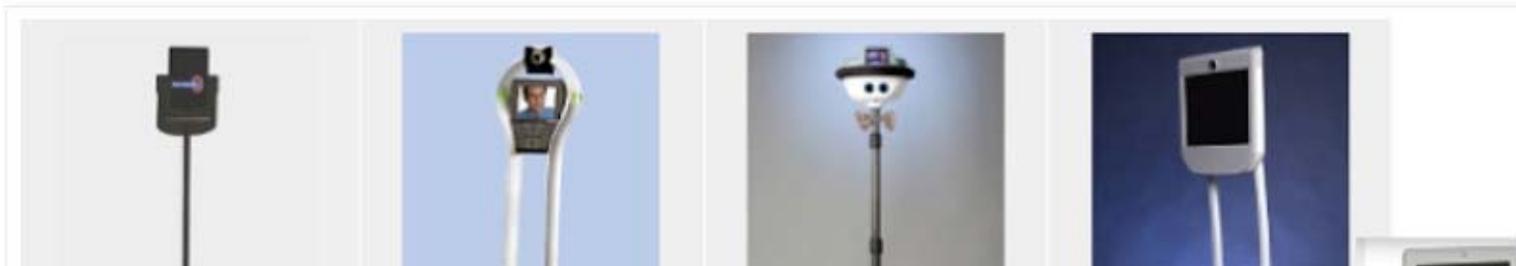
economic impact, future, gadgets, internet, robotics, tablets



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



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## 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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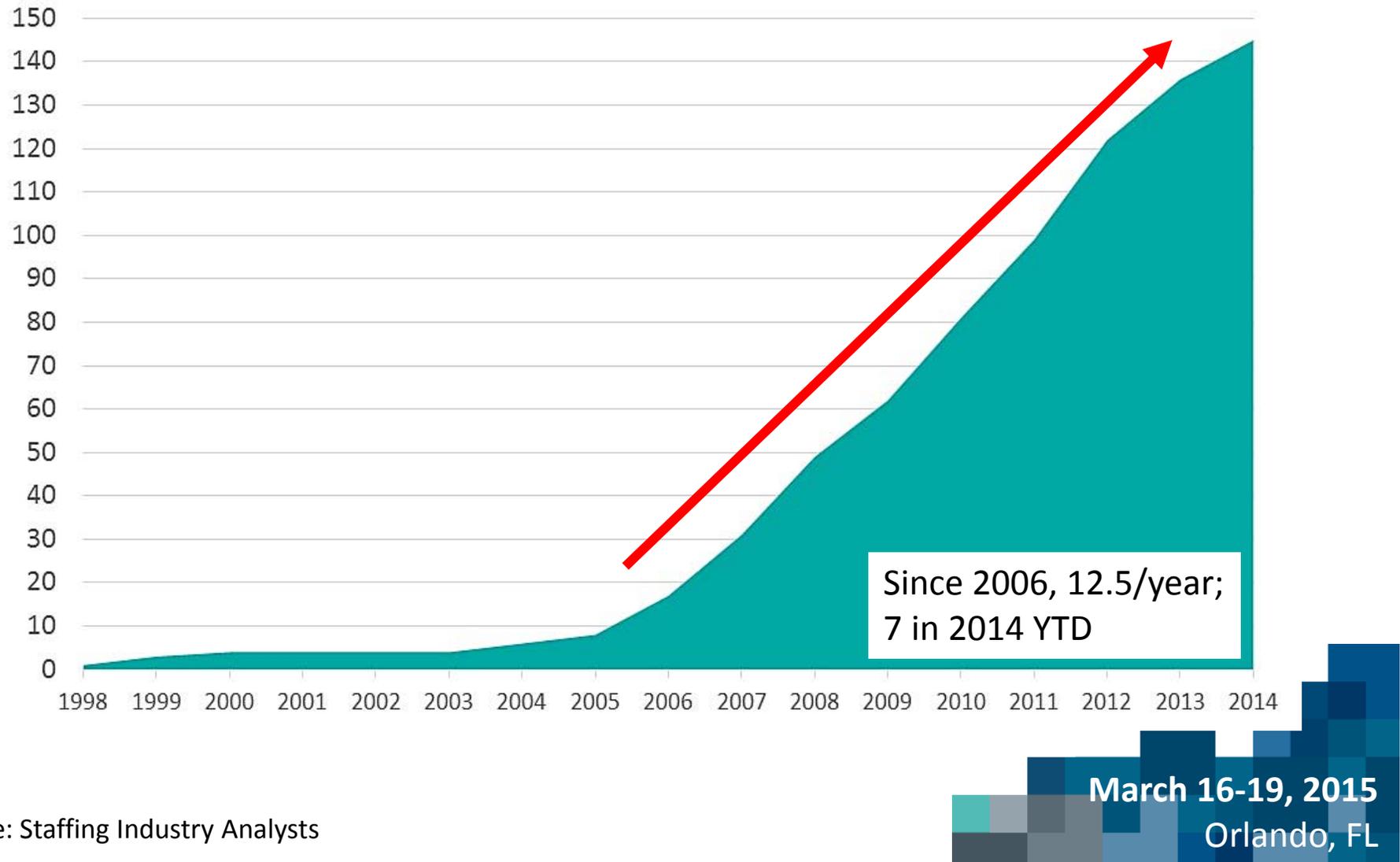


Do you need a receptionist at your company? Are you having trouble affording another employee? Do you like spending time with robots more than humans? If you answered yes to any of these questions (or all of them), you might want to check out a brand new service being offered by Anybots called AnyLobby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

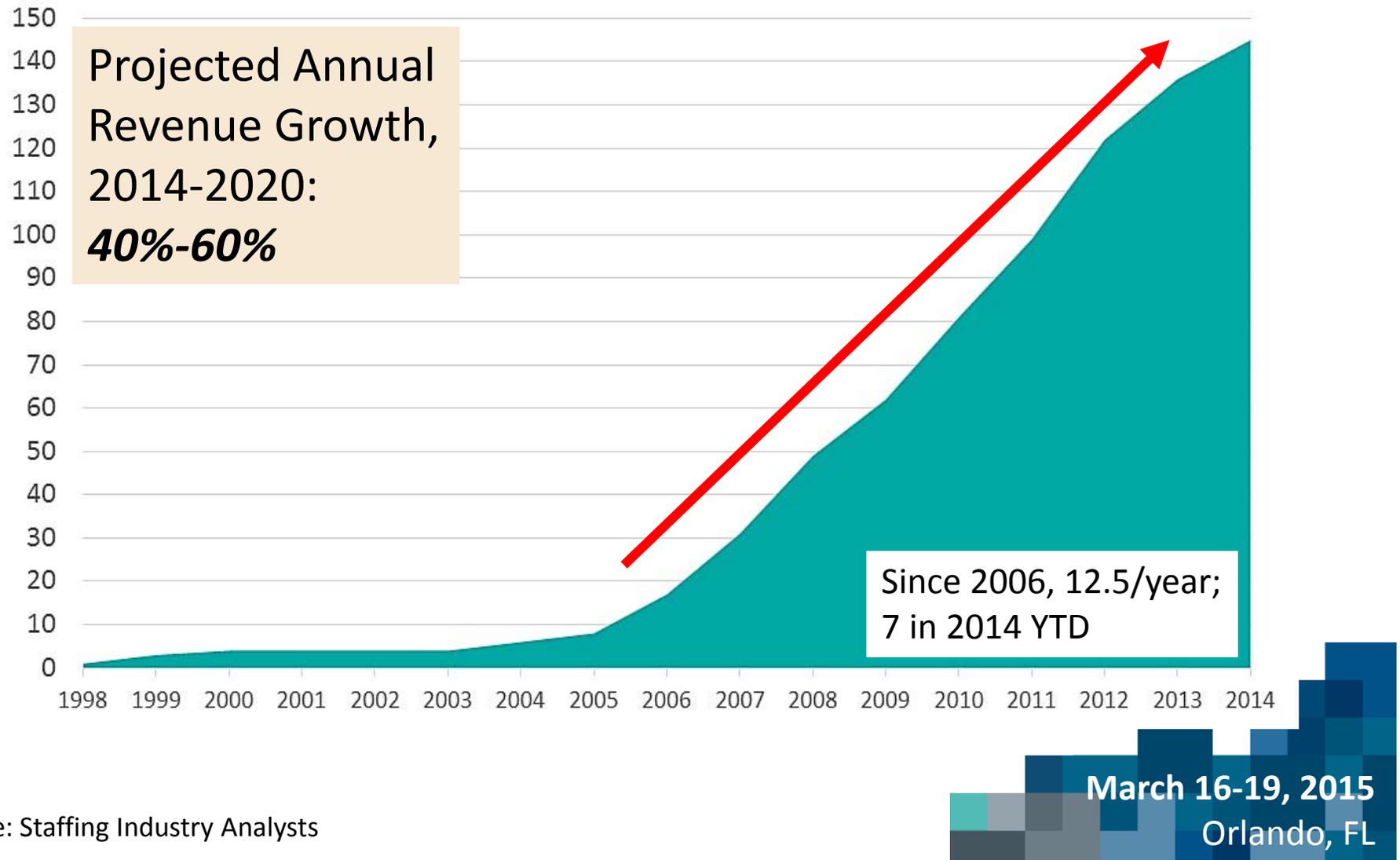




# Number of online staffing firms, by year started

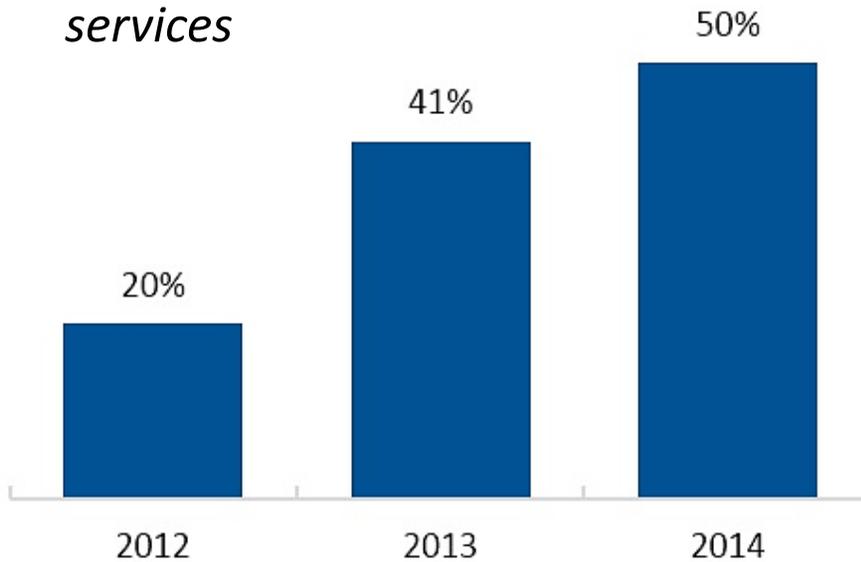


# Number of online staffing firms, by year started

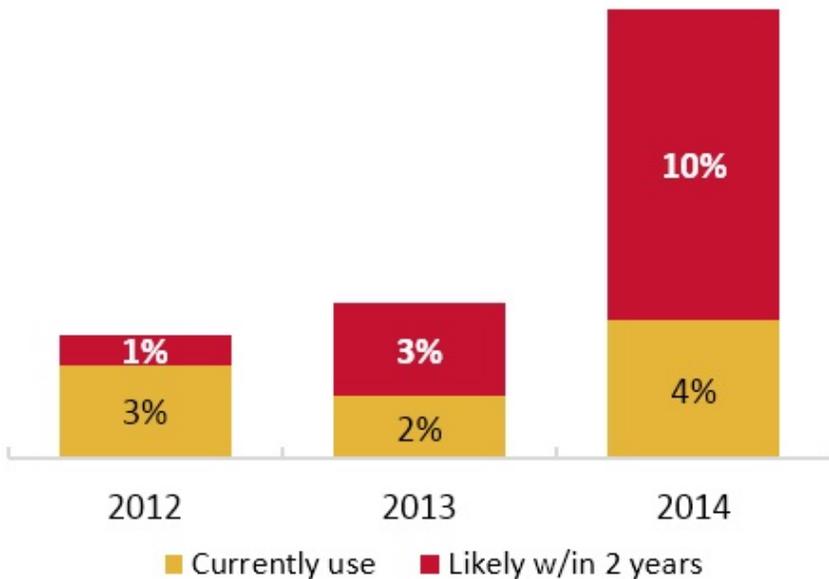


# Use and awareness of online staffing is growing rapidly among CW managers

*CW manager familiarity with online staffing services*



*CW manager use of online staffing*



Source: 2014 Contingent Buyers Survey



## Example of niche player: Upcounsel.com

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 FAST@MPANY Inc.

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

# Example of niche player: Freelancephysician.com



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A wide-angle, nighttime photograph of a city skyline, likely New York City, with the Empire State Building prominently in the center. The buildings are illuminated with lights, and the sky is a mix of dark blue and orange from the setting or rising sun.

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# Example of niche player: Nabbesh.com

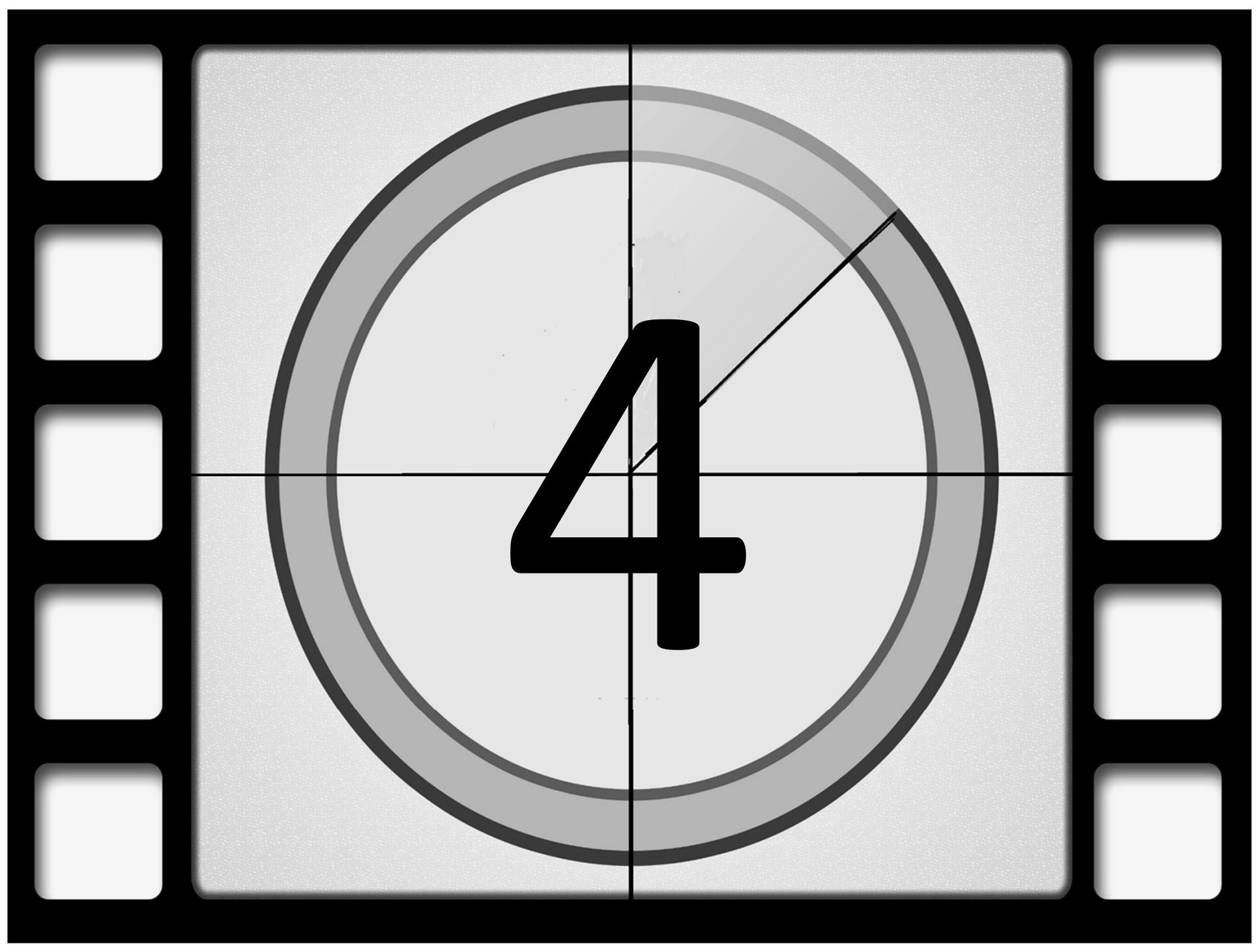
The **#1** destination to hire  
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Hire Talent  
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Get Hired  
Become a Freelancer



 Leave a message

A black and white illustration of a film strip frame. The frame is a square with a thick black border. Inside the border, there are five rectangular perforations on each side, representing sprocket holes. The central area of the frame is a light gray square. In the center of this square is a large, bold, black number '4'. The number is slightly offset to the right of the vertical center line. A thin black vertical line runs through the center of the frame, and a thin black horizontal line runs through the center of the number. A thin black diagonal line extends from the top right towards the center of the number. The overall style is minimalist and graphic.

# Blurring of distinction between home and office...



INVESTING 2/18/2015 @ 2:26PM | 18,842 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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## Work from home soars 41% in 10 years

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### 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 Link**

**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?

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

## 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. ★★★★★

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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
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- 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

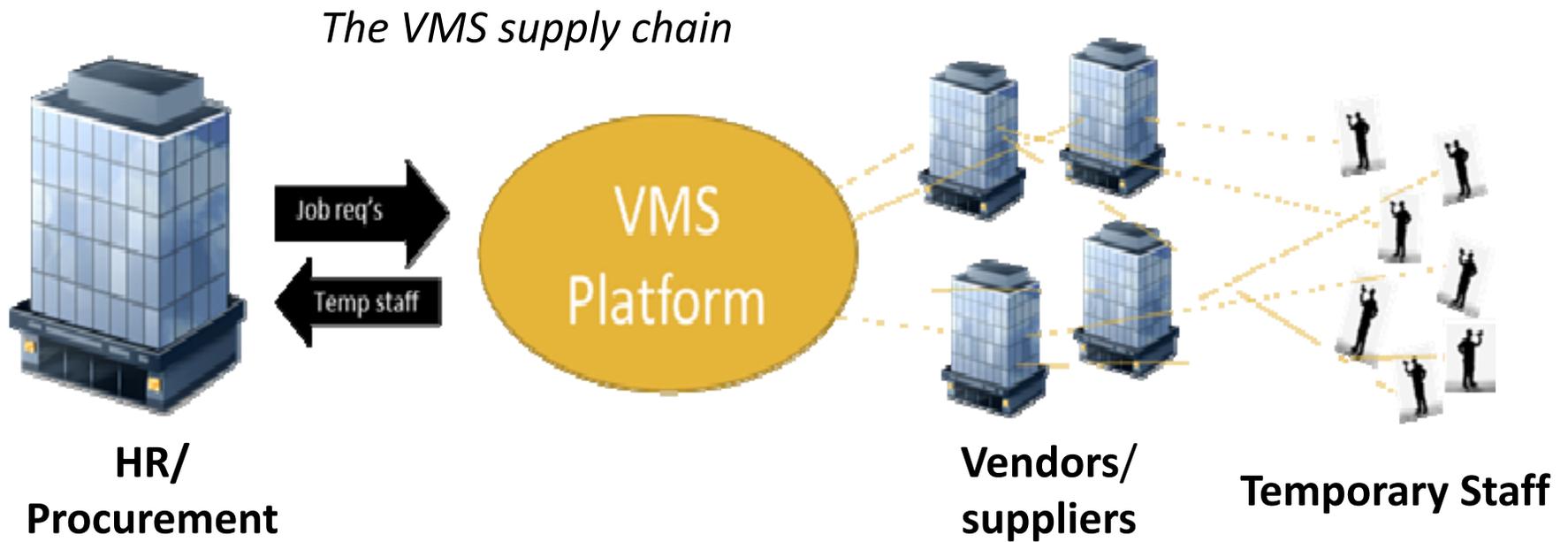
30-DAY OFFER REFUND  
restrictions apply

SHOP. SCHEDULE. SAVE!

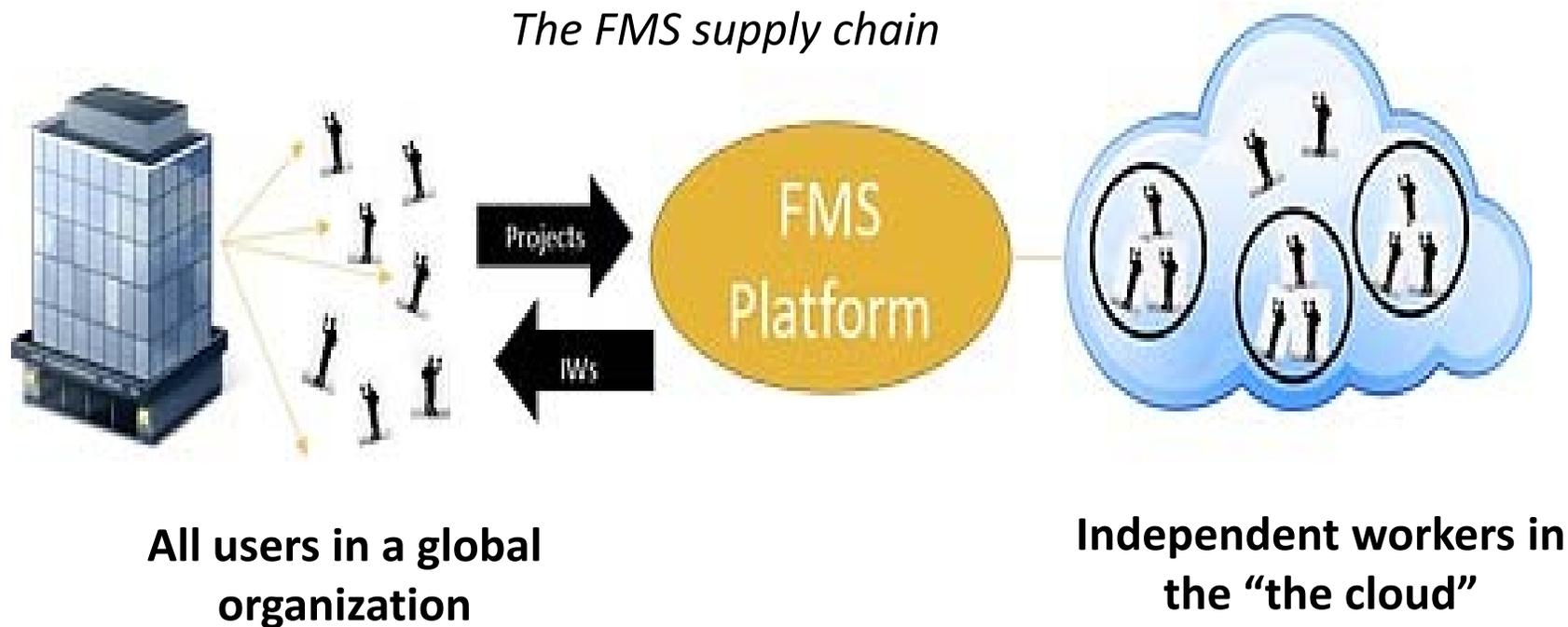
SHOP LOCAL SERVICES IN SAN FRANCISCO BAY AREA, CA Not your city?



# 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



## Survey: 63% of 20-Somethings Want to Start a Business

And with the right perspective and skills, they just might make it.



BY MINDA ZETLIN Co-author, 'The Geek Gap' [@MindaZetlin](#)



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2011-2014

“Solopreneur” independent workers: +12.5%

Total U.S. Employment +5.5%

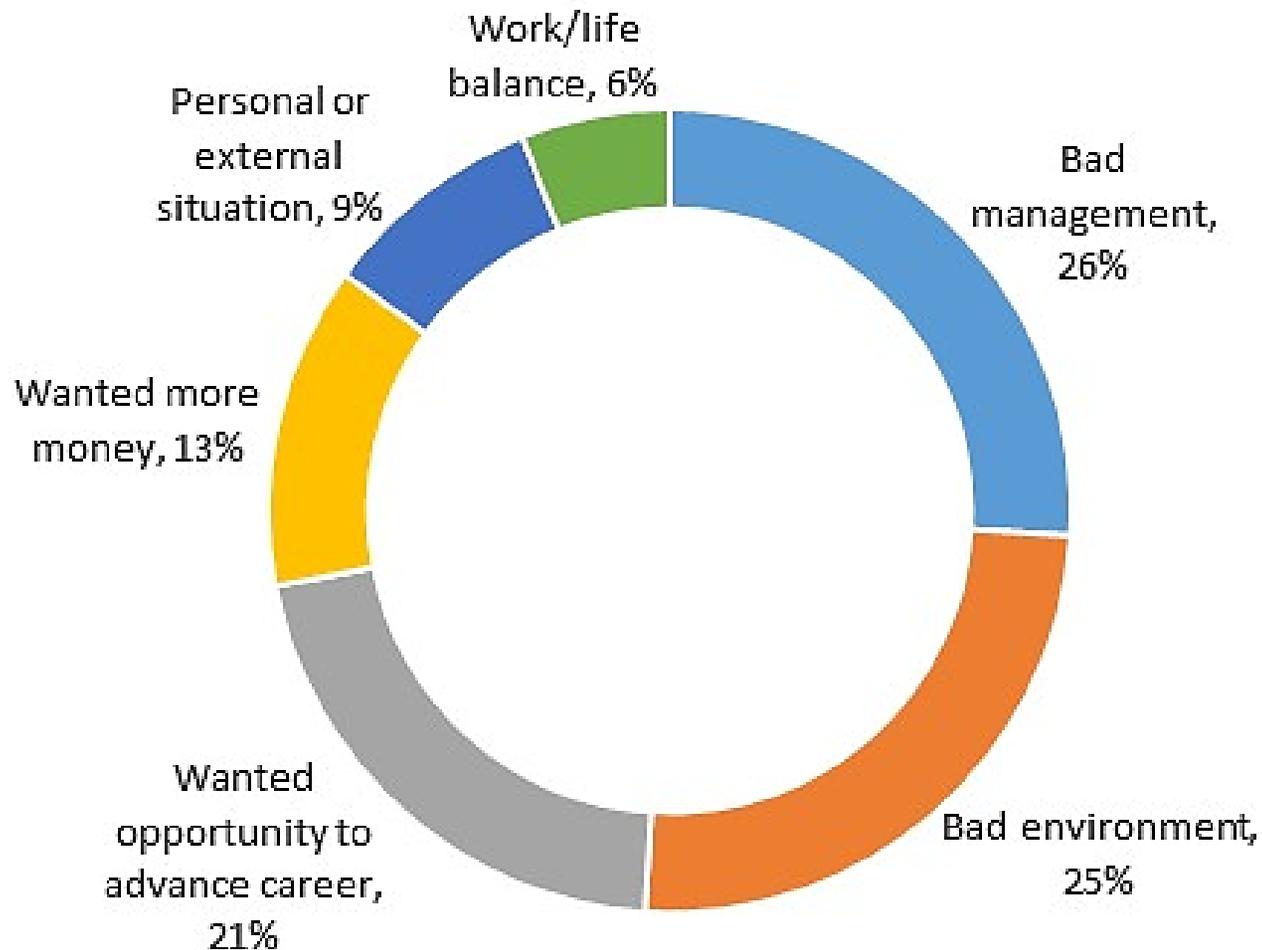
Ratio: 2:1

Source: MBO Partners & BLS

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# Internal staff—why did you leave your last job?



# 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 <sup>th</sup> Percentile	Median	75 <sup>th</sup> 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



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# Networking Break

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