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# The VMS/MSP Landscape

*Speakers:*

**Bryan Peña, SVP, Contingent Workforce Strategies, CCWP, Staffing Industry Analysts**

**Elizabeth Rennie, Global Workforce Solutions Research Director,
CCWP, Staffing Industry Analysts**

**Richard Snider, Vice President – Channel Partnerships, DCR Workforce**

**November 9, 2017
10 am PST**

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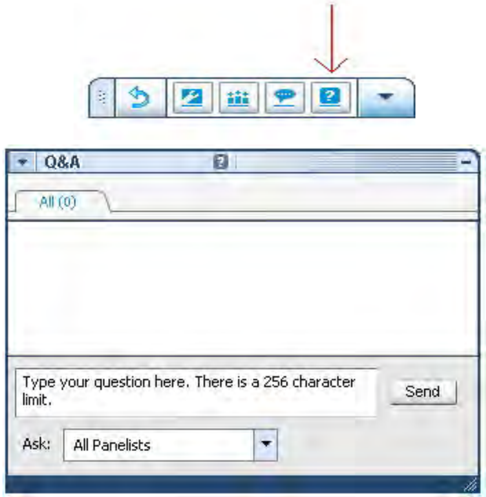


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| *Editorial* | Staffing Industry Review; CWS GLOBAL DAILY NEWS | CWS 3.0 CONTINGENT WORKFORCE STRATEGIES |
| *Certification & Training* | Certified Contingent Workforce Professional | CCWP Statement of Work Expert |

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IMPERIAL BRANDS
THOMSON REUTERS
DELL
Lilly
gsk GlaxoSmithKline
Nationwide
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ups
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# Your Guide to all things Council.....

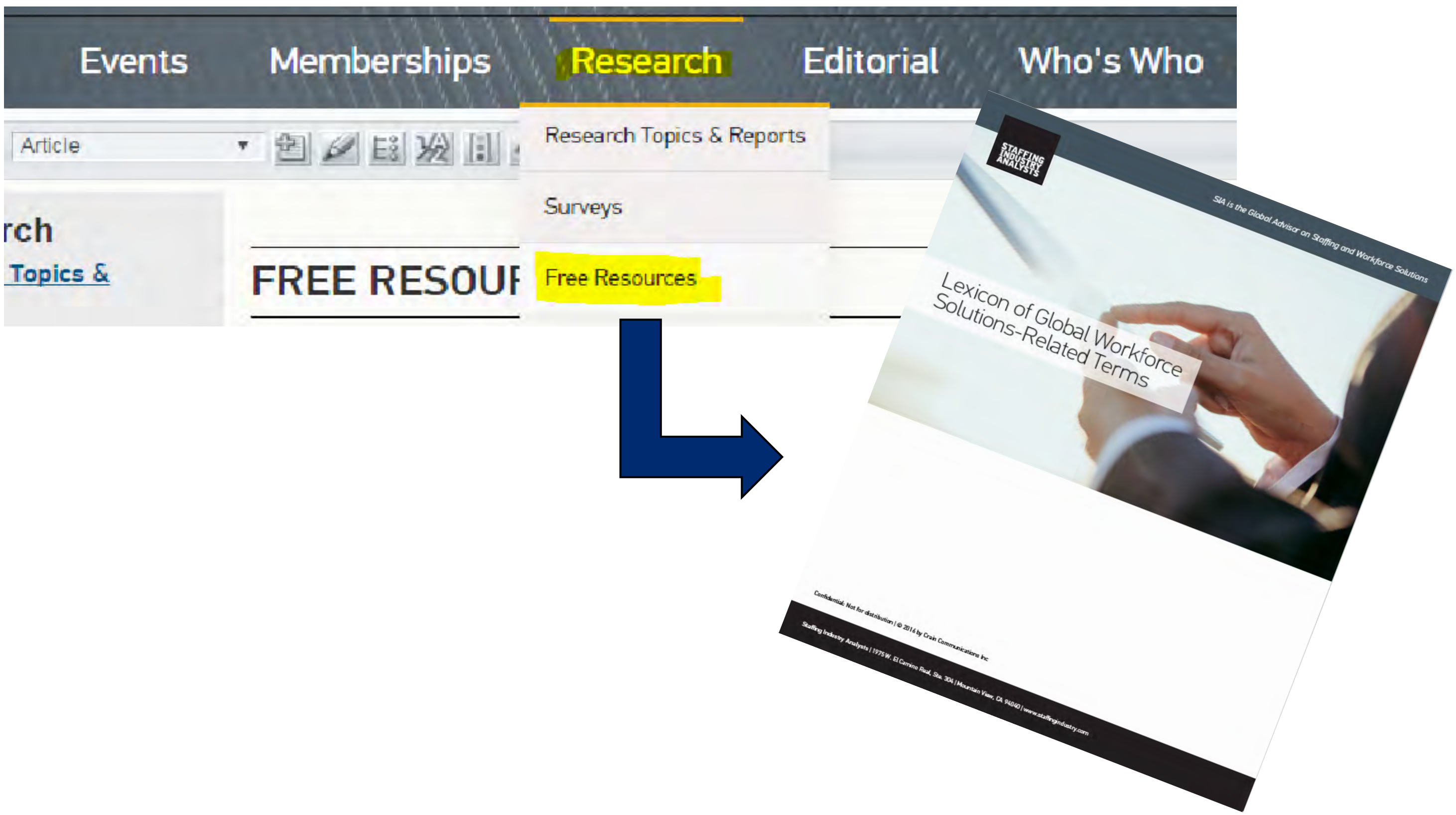

### What is Council Membership?

The Contingent Workforce Strategies (CWS) Council is a business intelligence and advisory service for corporate buyers of contingent labor. Key benefits of membership include:

- **Research Toolkit:** Access to research reports, tools and templates that are summarized in our CWS Council Research Agenda.

*Download www.staffingindustry.com*

# Looking for help with terminology?



# Today's speakers…

Bryan Peña, SVP, Contingent Workforce Strategies, CCWP, SIA

Elizabeth Rennie, Global Workforce Solutions Research Director, CCWP, SIA

Richard Snider, Vice President – Channel Partnerships, DCR Workforce

# More about Richard...

SMART TRACK

Richard Snider, Vice President – Channel Partnership, DCR Workforce

- 18 years experience in MSP and Staffing
- Analyst assigned to evaluate DCR within *"Innovations in VMS"* report
- Six Sigma Black Belt
- Runner, Thinker, and usually caffeinated

# A Changing Workplace...

- MSP/VMS or other Contingent Workforce Programs within 80-90% of Large Companies
- Technology and innovations enabling the mid-market to benefit from managed programs
- Self Service, Self Sourcing becoming more prevalent
- Companies seeking capabilities to integrate and to make business processes streamlined
    - HRIS (Workday, SuccessFactors, UltiPro, etc.)
    - Timekeeping (Kronos, Time America, etc.)
    - Purchasing (EdgeVerve, Ariba, Coupa, etc.)
    - SOW Management on-board VMS
    - Freelance, Gig, Independent Contractor networks and opportunity matching
    - Third-Party Talent, Compensation and Analytics system integration

# Before we get started…..

**Vendor Management System (VMS)** - An Internet-enabled, often Web-based application that acts as a mechanism for business to manage and procure staffing services (temporary help as well as, in some cases, permanent placement services) as well as outside contract or contingent labour. Typical features of a VMS include order distribution, consolidated billing and significant enhancements in reporting.

**Managed Service Provider (MSP)** — A company that takes on primary responsibility for managing an organisation's contingent workforce program. Typical responsibilities of an MSP include overall program management, reporting and tracking, supplier selection and management, order distribution and often consolidated billing.

# Not to be confused with…

Staffing Industry Analysts'
**Workforce Solutions Ecosystem**




*Source: Workforce Solutions Ecosystem 2017 Update*

# A brief History of VMS

**Vendor Management Systems** emerged in the late 80s early 90s from the VOP – Vendor On Premises concept

With the advent of the internet more purchasing spend was managed through e-business and online auctions

**PeopleNet** at Ford Motor Company was the first true VMS, circa 1995

# VMS Options

| Own VMS | Third-party VMS | Other Technology | No Technology |
|---|---|---|---|
| Proprietary in-house built technology | Either directly from a VMS Vendor or via an MSP that utilizes a VMS | Existing Infrastructure(s) that provide VMS like functionality but not robust enough to be classified as a VMS | Paper, pdfs<br>Spreadsheets |

# Polling Question

Which of the following describes your VMS Strategy?

- Currently leveraging a VMS
- Don’t have one in place but are evaluating within the next two years
- Don’t have one and currently no plans

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*Now released…..*

## MSP Market Developments

- Part 1: Drivers, Innovations & Geographical Capability ✓
- SOW Maturity by Geography ✓
- Part 2: Market Sizing ✓
- Part 3: Market Differentiators ✓

## VMS Market Developments

- Part 1: Drivers, Innovations & Geographical Capability ✓
- Part 2: Market Sizing ✓
- Part 3: Market Differentiators

## TTA Market Developments ✓

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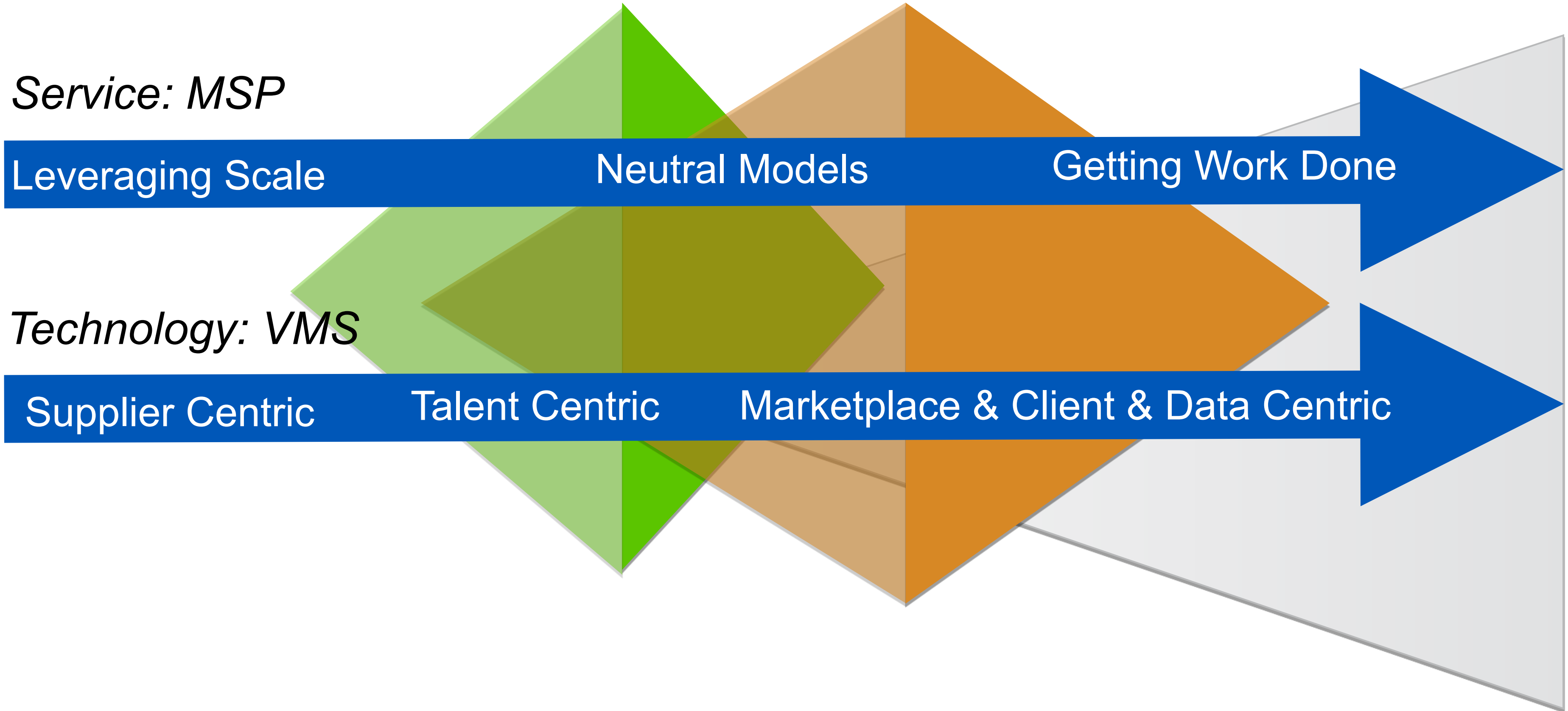
# Contingent Workforce Solution Program Trends

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Source: VMS Market Development Part 1 2017

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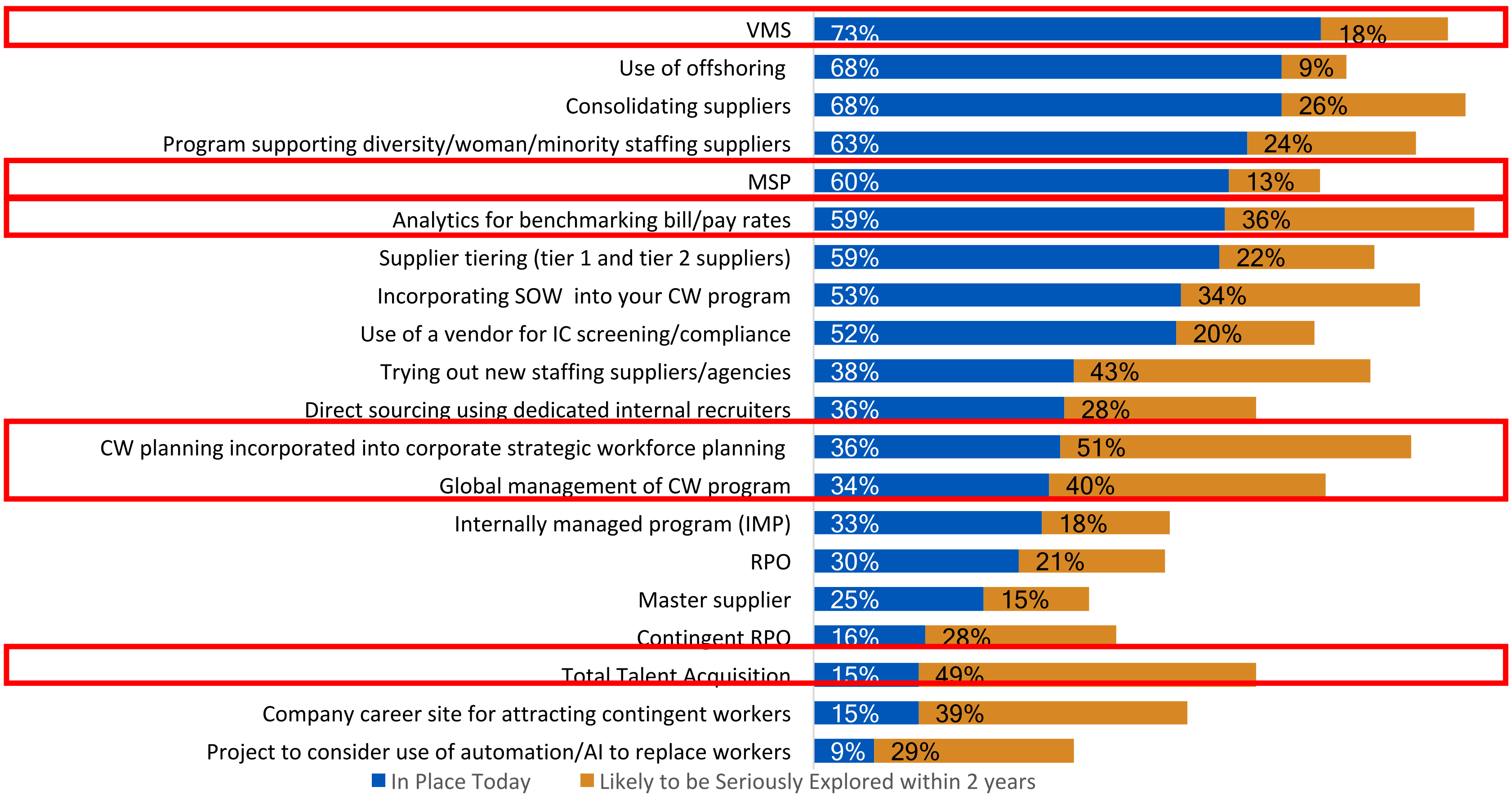
# “Which of the following are currently in place in your organization, or are likely to be seriously explored within two years?

*Source: WF Solutions Buyers Survey 2017 – Global Trends in supplier management strategies – Initial Insights (Regions Consolidated)*

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# Top Drivers of VMS Growth

| Buyer Challenges | VMS Focus |
|---|---|
| Minimising Risk | On/Off Boarding with Worker Classification and Rate Visibility |
| Increasing Costs | Strategic Sourcing Insights |
| Increasingly Complex Operations and Supplier Relationships | Improved Supplier Management & Optimization and Process Efficiency |
| Speed of Change | Better Decisions with Supplier and Requisition Optimization |



*Source: VMS Market Development Part 1 2017*

# VMS Investment Trends

- User experiences, mobile enablement
- Reporting, analytics and benchmarks
- Increased automation and processes
- Integration, middleware and APIs
- Statement of Work enhancements
- Supplier management improvements
- Direct sourcing and talent pools
- Industry solutions
- Time and expense
- Security
- Wider TTA offering
- Direct sourcing / pools

*Source: VMS Market Development Part 1 2017*

# Case Study 1: Better manage overtime costs

| Challenge | Solution | Result |
|---|---|---|
| A manufacturer of automotive compressors using contingent labor for **light industrial** tasks.<br><br>Due to production order fluctuations, they need to continuously **reschedule their operations and labor requirements**. | VMS Light Industrial solution installed including **XRM Time Clock** at plant sites with a two-way **integration** between the clock and the XRM VMS portal.<br><br>Features include shift scheduling, labor pool maintenance, quick fill, event recording and mobile apps created a highly **streamlined and automated contingent worker process** | Accurate and timely labor cost visibility<br><br>**Reduced Time to Fill 20%**<br><br>Improved Fill Rate 15%<br><br>**Reduced OT spend by 30%**<br><br>Reduced invoice error rate by 30% |

*Source: XRM Solutions*

*Source: VMS Market Development Part 1 2017*

# Case Study 2: Integrated solutions

## Challenge

Lack of skilled resources to meet customer needs. **Difficulty finding highly specialized talent** in particular locations. Excessive contingent workforce **costs** due to **unknown market rates, process inefficiencies, rogue spend**, ....

## Solution

IQN Compass **VMS platform for contingent and SOW** workers plus Genesys talent clouds. **Direct access to Genesys talent clouds for accelerated time-to-fill** and creating a virtual bench of pre-vetted workers.

Within five days of using Genesys for the Texas hiring event, ~500 possible candidates targeted via an aggregated sourcing strategy

## Result

**Streamlined** end-to-end workflows for sourcing, managing and offboarding contingent workers. **Automated** approvals, distribution, submission, selection and negotiation. **Reduced time-to-fill** and costs for contingent talent.

*Source: VMS Market Development Part 1 2017*

*Source: Beeline*

# Case Study 3: Actionable reporting insights

## Challenge

A pharmaceuticals client didn't have a way to **track** the cost of **expenses** across the organization, and wanted to better manage, track and reduce these costs.
The CIO requested **visibility into the expenses** of their $200M + program

## Solution

Expense **thresholds** were implemented and the MSP created a **monthly dashboard** which provided visibility into the expenses, which resulted in **actionable insights** to better manage those expenses.

The Outlier Tracking report shows expenses by month and categorizes expenses that are **outliers** within those thresholds

## Result

Prior to the threshold and dashboard implementation, monthly expenses were ranging from **7.3% to 10.8% of total spend**.

After implementation in Q4 2015, monthly expenses were ranging from **4.9% to 6.7% of total spend.**



*Source: VMS Market Development Part 1 2017*

*Source: PRO Unlimited*

# Case Study 4: Integrations To Streamline

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## Challenge

A consumer products company was working with a MSP with **multiple systems & manual processes**. Many of the reports were performed **off-line**. Plus, timekeeping was on **legacy systems which relied heavily on manual tracking**. Lastly, **time approvals became a weekly task** of tracking down missing time and manager approvals
The CIO requested **visibility into the expenses** of their $200M + program

## Solution

In conjunction with MSP, DCR built a platform that works as a service to accommodate numerous integrations, API management & EDI management in less than 4 weeks for all business processes from discovery to implementation. The new electronic timekeeping system along with DCR's Smart Track now automates all processes for onboarding, timekeeping, invoicing, etc, with the added benefit of mobile.

## Result

Missing time reduced by **50% in first 4 weeks**.
Mobile approvals **improved manager satisfaction**.
New processes **eliminated 4 manual processes.**
**Significant cost savings** by reducing the need for software & integration resources.



*Source: DCR Workforce*

# Top Drivers of MSP Growth

| Buyer Challenges | MSP Focus |
| --- | --- |
| Minimising Risk of Non Compliance | On/off Boarding with CW Audits and Rate Compliance Visibility |
| Unmanaged costs Relating to Significant Spend | Cost Control |
| Drive for Cost Efficiencies and Improved Performance | Closer Supplier Management with access to Benchmark Rates |
| Sourcing Hard to Find Talent | Developing New Sourcing Models |
| Speed of Change and Large Ramp ups of Worker Volumes` | Agility to Support Peaks and Troughs of CW needs |



*Source: MSP Market Development Part 1 2017*

# Polling Question

Which of the following describes your PRIMARY MSP Strategy?

- Vendor Neutral MSP
- Master Supplier
- Hybrid MSP
- Internally Managed MSP
- Don’t have one but are evaluating within the next two years
- Don’t have one and currently no plans

# MSP Investment Trends

- Contingent talent pool management and direct sourcing offerings
- Analytics, benchmarking and predictive demand management
- SOW capability and offerings
- Increased automation and process enhancements
- Geographical expansions and localisations
- Contractor engagement
- Total talent offerings

Source: MSP Market Development Part 1 2017

# Case Study 1: Regulatory Compliance

| Challenge | Solution | Result |
|---|---|---|
| A global technology and manufacturing company required a solution that would ensure **external suppliers' eligibility** based on **legal requirements** in **three** Middle East countries: the United Arab Emirates (UAE), Saudi Arabia and Qatar. | An **supplier qualification** solution **mapped** supplier licensing requirements for each country to client locations. Included review and approval of SOWs, validation of licensing and credentials, & supplier/ worker on- and off-boarding. **An automated process for distributing SOW** requests to all suppliers that can legally provide services to the specified geographical location. | **Decreased risk** by establishing an auditable "**System of Record**" by instituting **standard agreements** and tracking supplier credentials. **Increased efficiency** due to consistent use of standard engagement templates (e.g. SOW |



*Source: MSP Market Development Part 1 2017*

*Source: TAPFIN*

# Case Study 2: Capturing SOW Spend

| Challenge | Solution | Result |
| --- | --- | --- |
| The bank was looking to the wider market for a view of best practice for outsourcing its services procurement function. The service covers the entire operations-focused statement of work requirements for **all business units**. | SOW services included the **creation and running of RFx processes**. Maintaining SOW vendor capability matrices, tracking SOW milestones & deliverables, consolidated billing/payment, headcount tracking, on/offboarding, sourcing vendors. Also included helping managers select questions, agreeing **appropriate cost/quality weightings, supporting the RFx scoring process.** | **By Q3 2016, managing nearly USD 34M of annualized spend with an average of 80 open projects at any one time.** Spend under management is forecast to at least double by the Q3 2017 as further business areas come into scope |

*Source: AGS*

*Source: MSP Market Development Part 1 2017*

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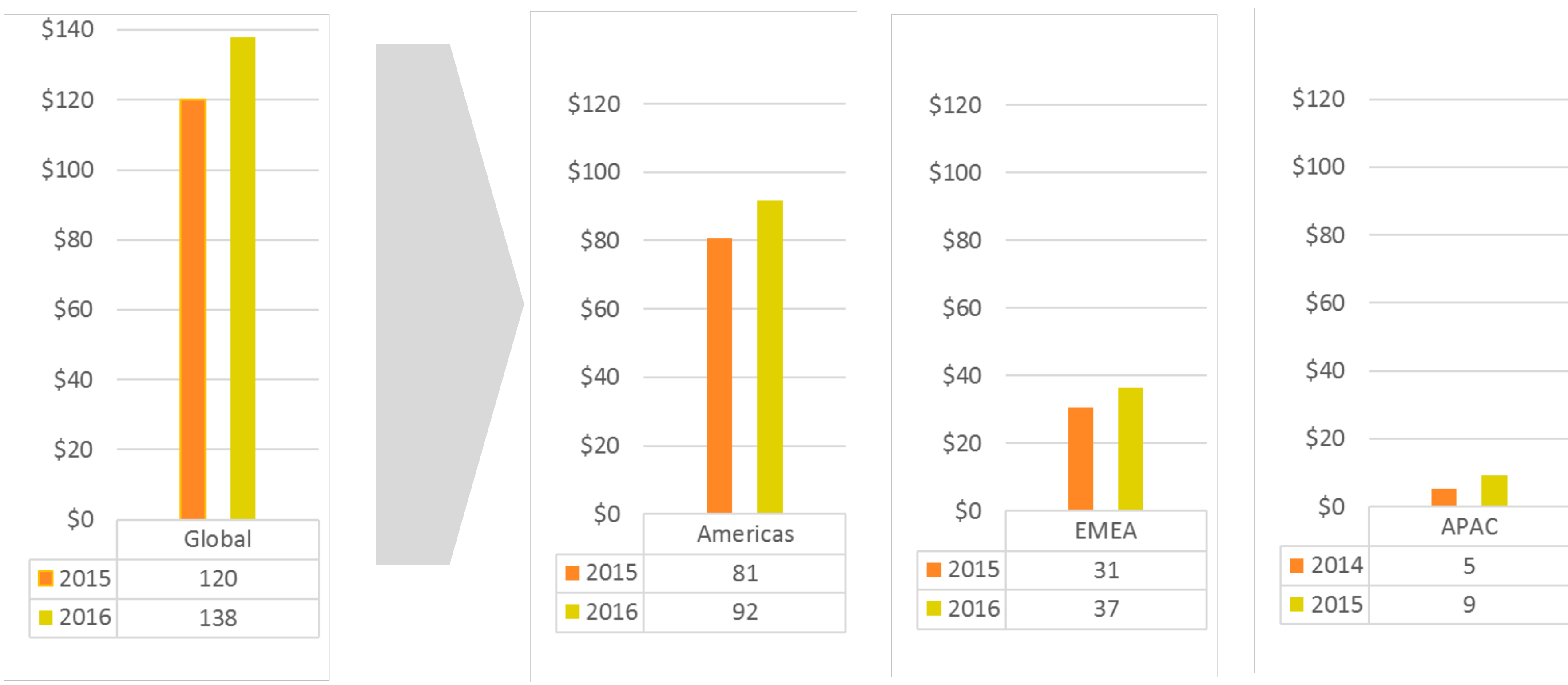
# VMS Market Size and Growth

*VMS Global Market Spend by Region 2016 (USD billions)*

**Growth +15%** **+12%** **+16%** **+43%**




Source: VMS Market Development Part 2 2017

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# MSP Market Size & Growth

## *MSP Global Market Spend by Region 2016 (USD billions)*

**Growth: +11%** **+8%** **+14%** **+26%**

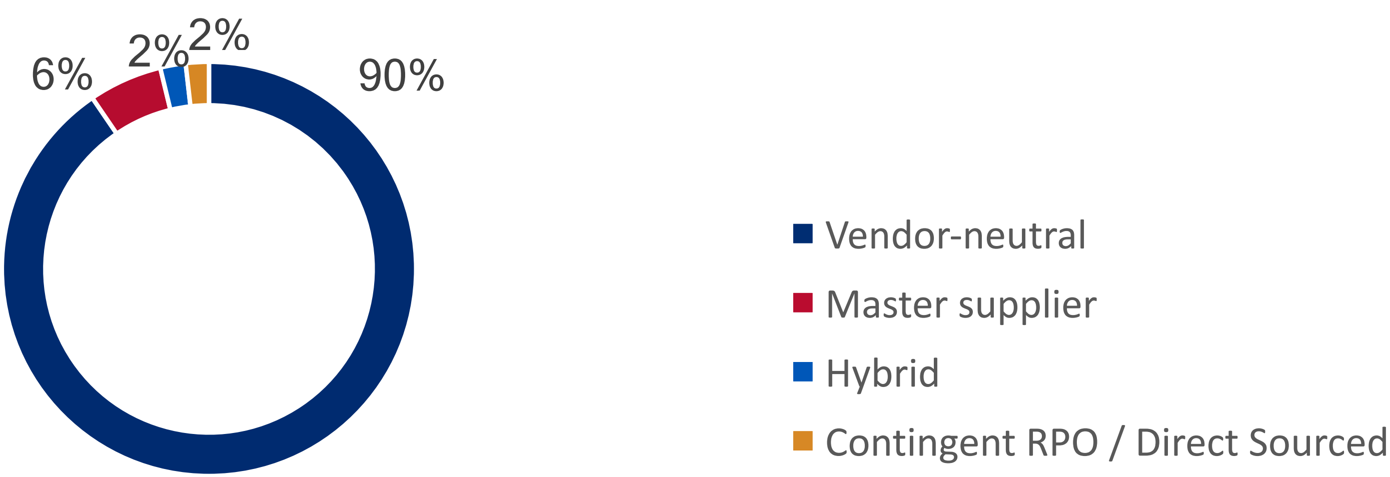

| | Global | Americas | EMEA | APAC |
|---|---|---|---|---|
| 2015 | $105 | $65 | $33 | $8 |
| 2016 | $117 | $70 | $37 | $10 |



*Source: MSP Market Development Part 2 2017*

# Most Popular VMS Models

*Share of VMS Global Market Spend by Work Arrangement 2016*

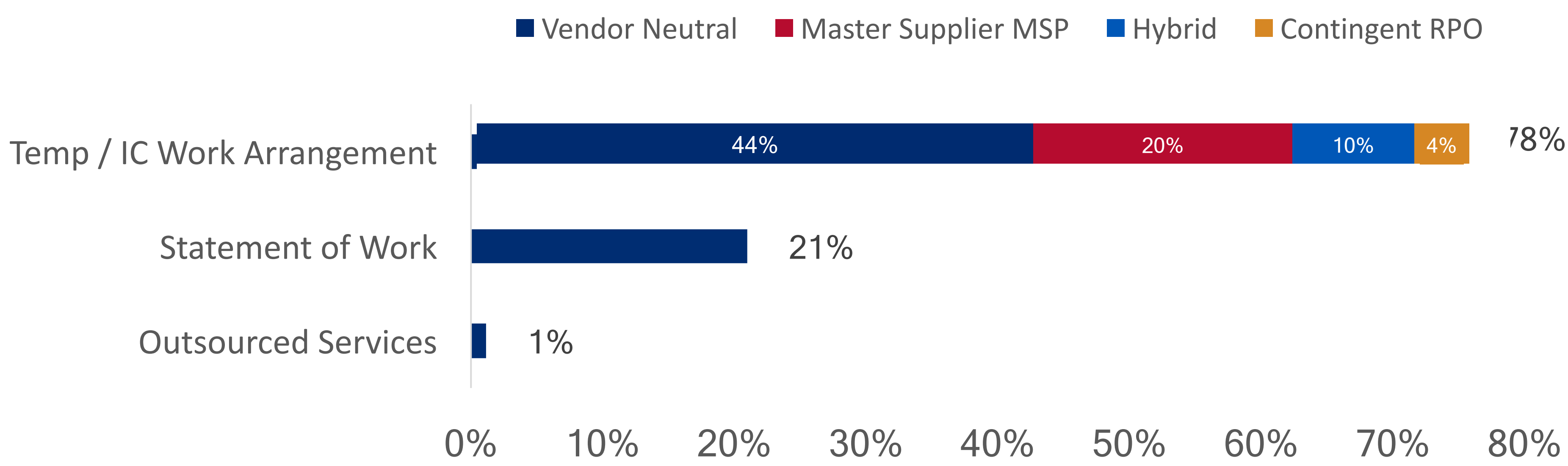






*Source: VMS Market Development Part 2 2017*

# Most Popular MSP Models

*Global MSP Market by Work Arrangement & Sourcing Model 2016 (% of spend)*

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*Source: MSP Market Development Part 2 2017*

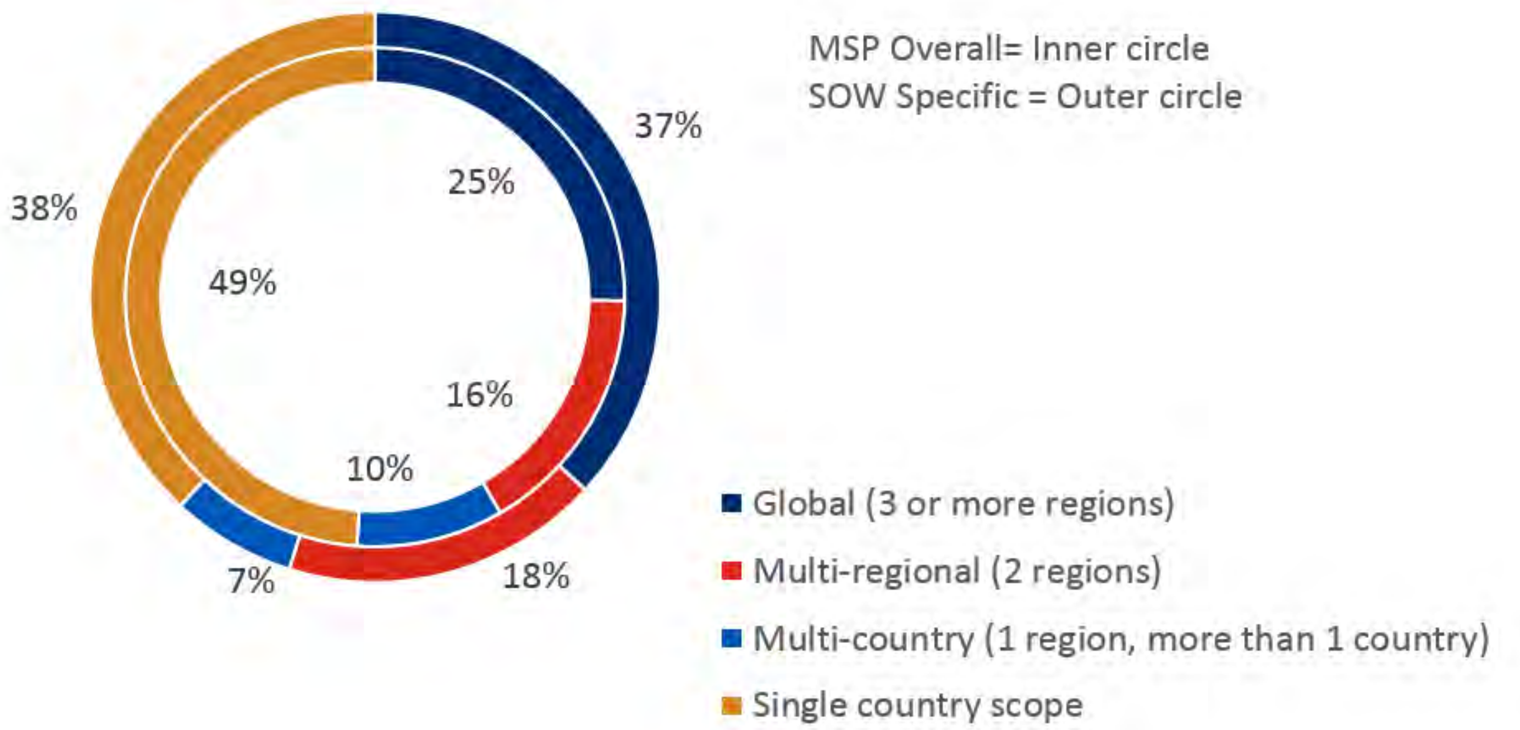
# Polling Question

Is Statement of Work spend in your program?

- Program currently includes SOW
- Not currently but considering within the next two years
- Doesn’t include and not considering

# SOW Spend by Geographical Scope

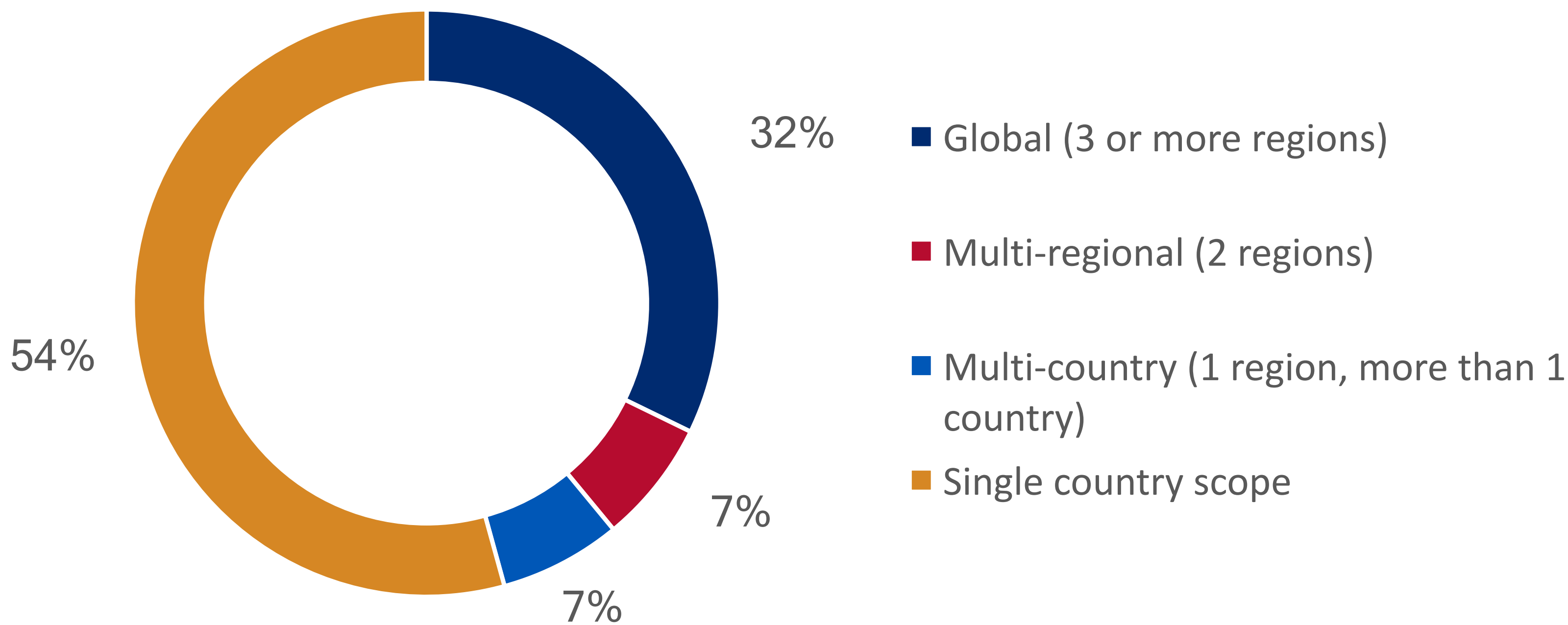
*MSP Market by Geographical Scope (share of spend)*




*Source: SOW Maturity by Geography 2017*

# VMS Market Size by Geographical Scope

*VMS Market by Geographical Scope (% of spend)*

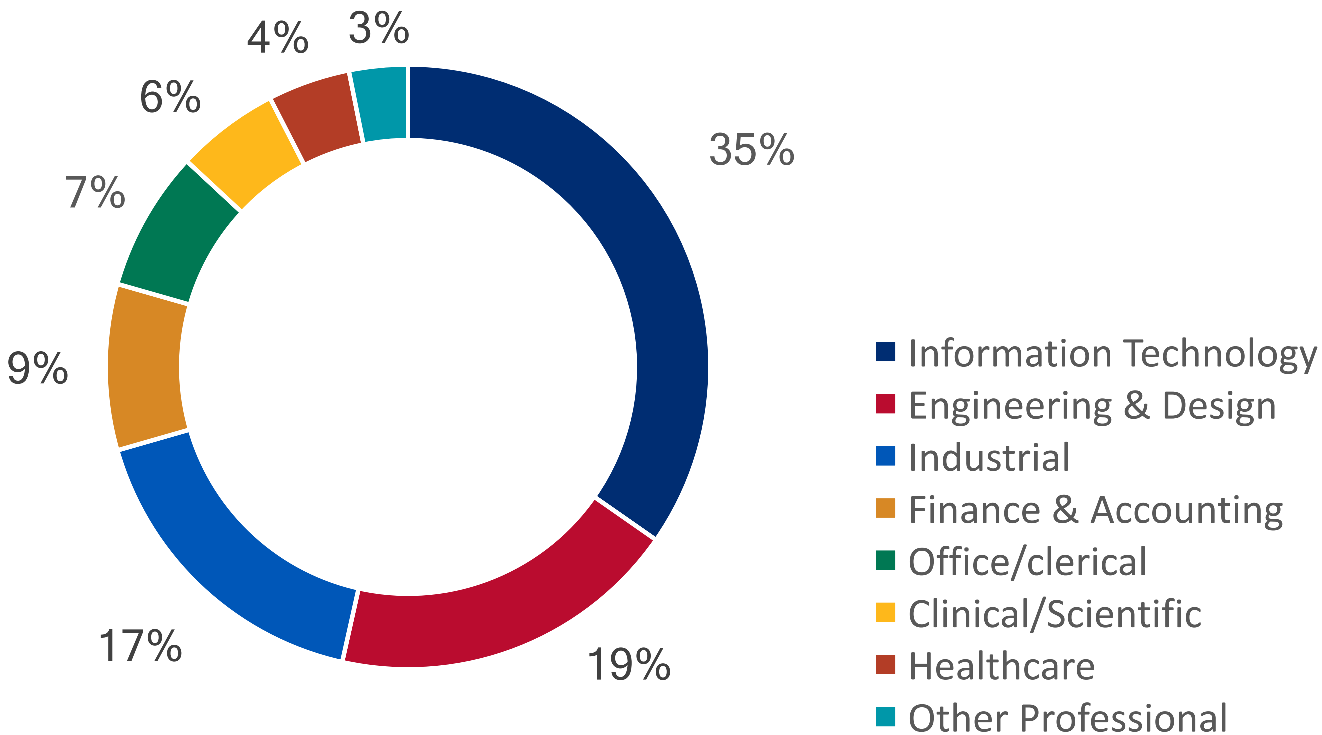





*Source: VMS Market Development Part 1 2017*

# VMS Occupation Breakdown

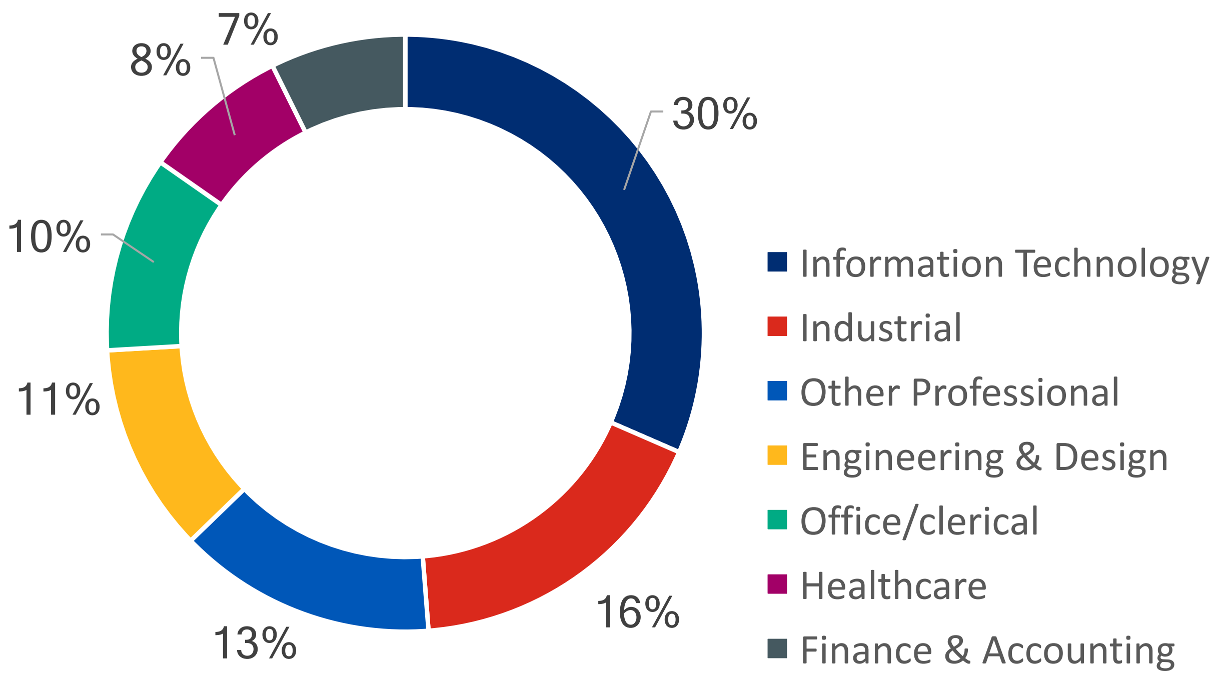
*VMS Market by Occupational Skill Category (% of spend)*




*Source: VMS Market Development Part 2 2017*

# MSP Occupation Breakdown

*MSP Market by Occupational Skill Category (% of spend)*




*Source: MSP Market Development Part 2 2017*

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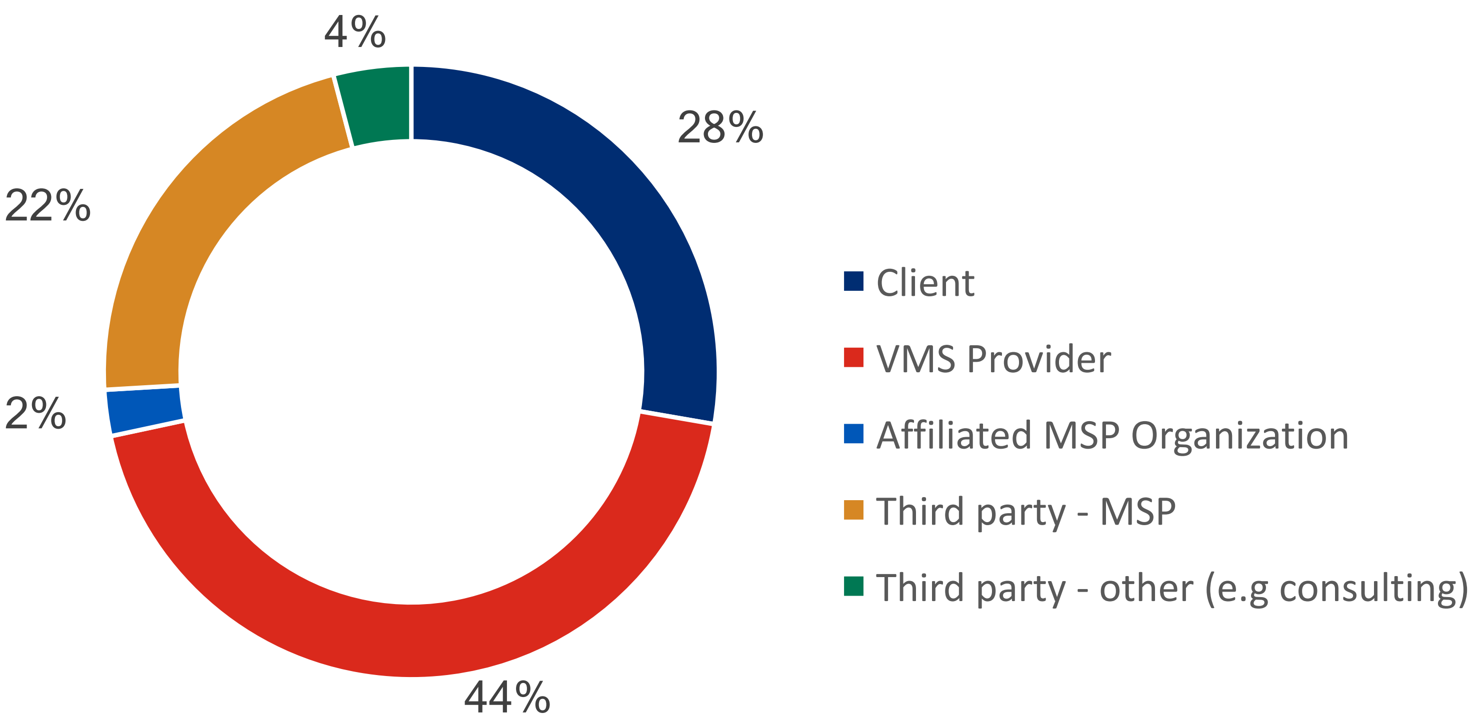
# Share of Implementation Effort

*VMS Market by Organizational Share of Implementation Effort*

*(share of days effort)*

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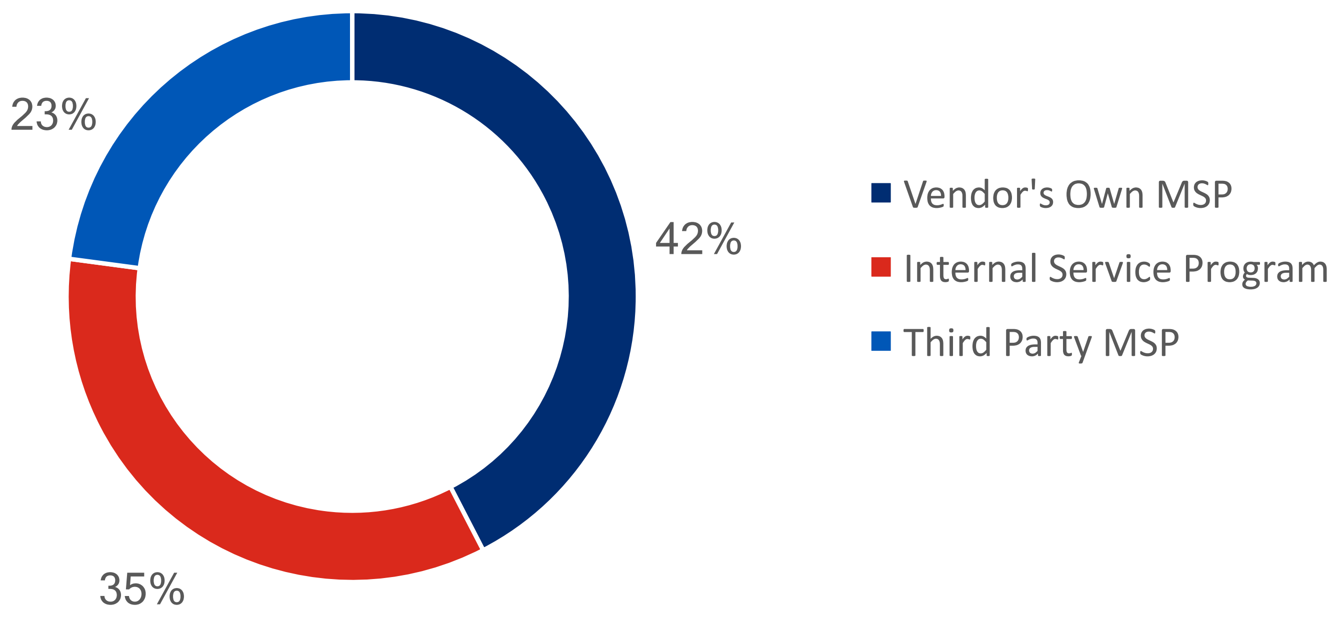
*Source: VMS Market Development Part 2 2017*

# How to Service? - Build or Buy?

*VMS Market by Platform Type 2016 (share of worker volumes)*

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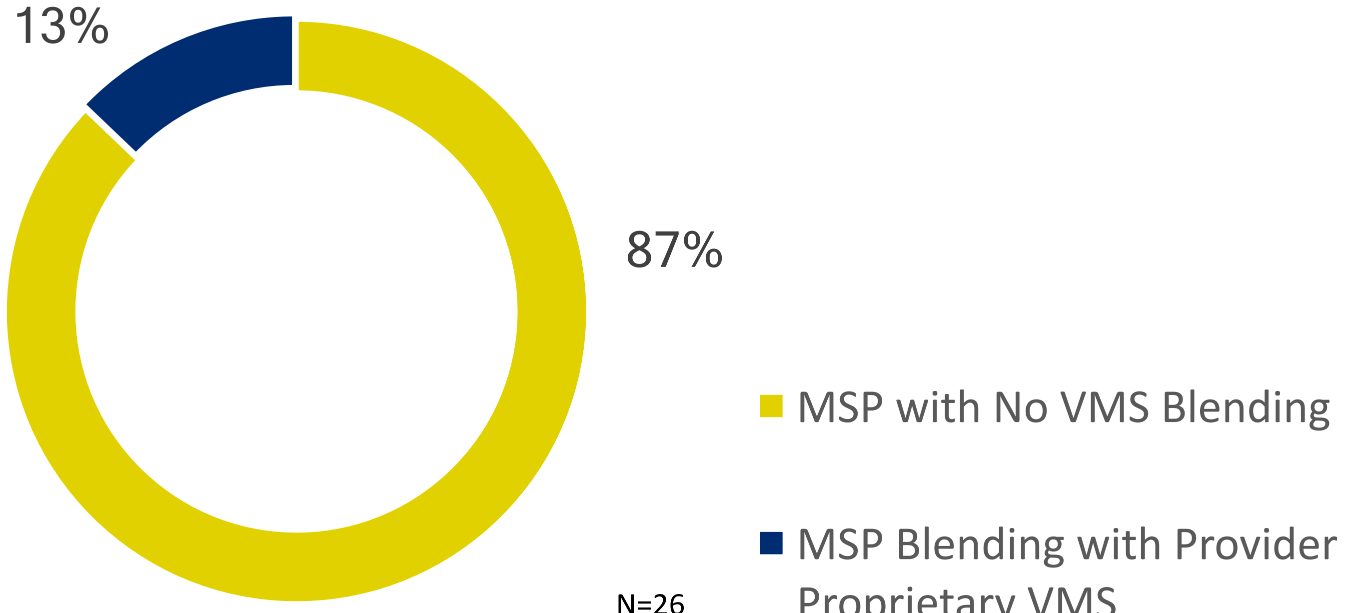
*Source: VMS Market Development Part 2 2017*

# VMS Blending with MSP

*MSP Providers delivering services with Proprietary VMS (by worker volume)*

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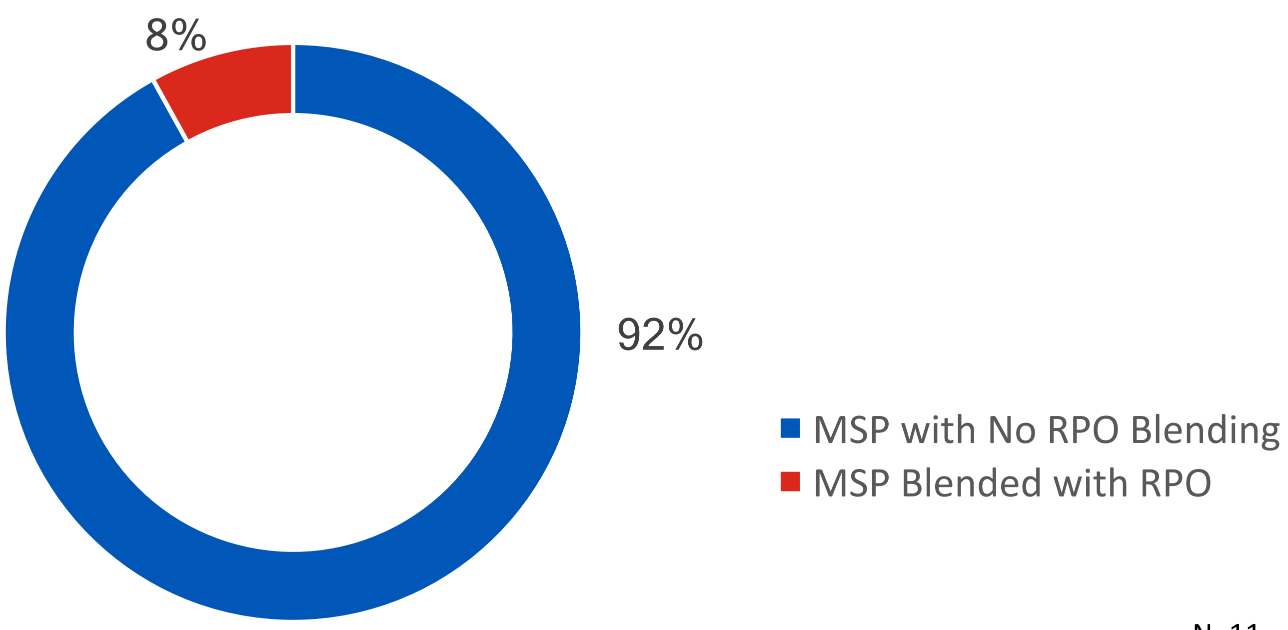
*Source: MSP Market Development Part 2 2017*

# RPO Blending with MSP

*MSP services blended with RPO services (by share of workers)*

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*Source: MSP Market Development Part 2 2017*

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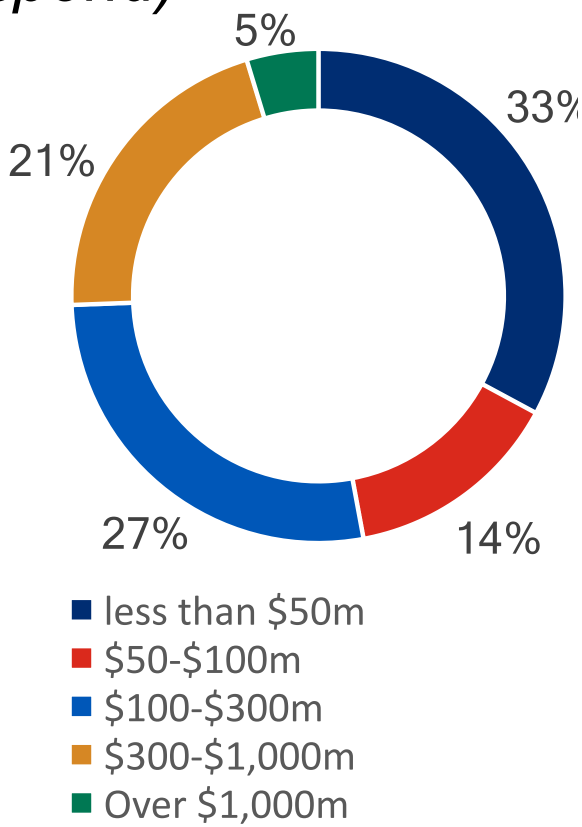
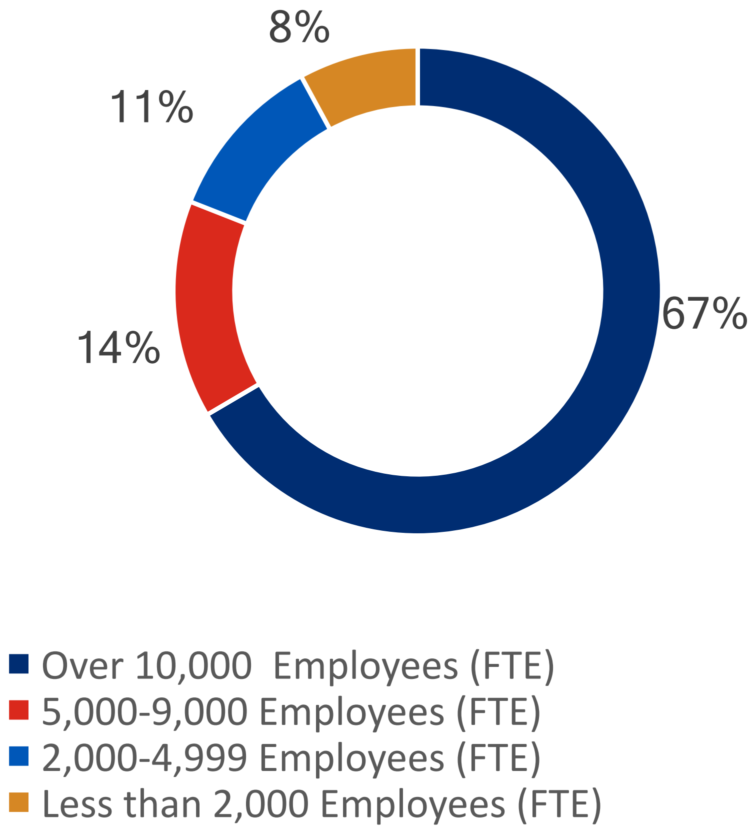
# MSP Buyer Profile

*MSP Market by Buyer FTE Headcount Size & Spend Size (share of spend)*

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*Source: MSP Market Development Part 2 2017*

# Polling Question

Does your program include RPO?

- Program currently includes RPO
- Not currently but considering within the next two years
- Doesn’t include and not considering

# Types of VMS Vendors

**Pure Play**

- Lumesse
- Candex
- PeopleFluent
- Shortlist
- DCR Workforce
- PIXID
- Beeline
- DirectSkills
- Nétive

**ERP Affiliations**

- SAP Fieldglass (SAP)
- Provade (Oracle)
- Ramco*

**Staffing/MSP Affiliations**

- Work Nexus (Superior Group)
- iSymphony*
- XRM Solutions (Acro)
- PRO Unlimited*
- Connecting-Expertise (Recruit)
- Pride One*
- 3StorySoftware (Hays)
- Econometrix (Manpower)
- Shiftwise (AMN)
- Medefis (AMN)
- Agile1*
- Brainnet*

*Name of affiliation company is the same



*Source: VMS Market Development Part 1 2017*

# High Level VMS Provider Capability

| | Number Serviced | | | Regions Targeting | | | |
|---|---|---|---|---|---|---|---|
| **Vendor** | Countries | No. Countries with Full Invoicing | Languages | Americas | Europe | Middle East/ Africa | Asia Pacific |
| **Extensive Geographical Experience (more than 50 country presence)** | | | | | | | |
| | 117 | 107 | 14 | ✶ | ✶ | ✶ | ✶ |
| | 100+ | N/A | 18 | ✶ | ✶ | ✶ | ✶ |
| | 86 | 33 | 10 | ✶ | ✶ | ✶ | ✶ |
| | 77 | 0 | 20 | ✶ | ✶ | ✶ | ✶ |
| **Expanding Geographical Experience (50 or less country presence, more than 10)** | | | | | | | |
| DCR Workforce | 44 | 44 | 12 | ✶ | ✶ | ✶ | ✶ |
| | 34 | 34 | 5 | ✶ | | | |
| | 28 | 26 | 1 | ✶ | ✶ | ✶ | |
| | 23 | 21 | 2 | ✶ | | | |
| | 22 | 22 | 8 | ✶ | ✶ | ✶ | ✶ |
| | 17 | 13 | 12 | ✶ | ✶ | | |
| **Emerging Geographical Experience (10 country presence)** | | | | | | | |
| | 8 | 1 | 3 | ✶ | | | ✶ |
| | 9 | 4 | 6 | ✶ | (x) | | ✶ |



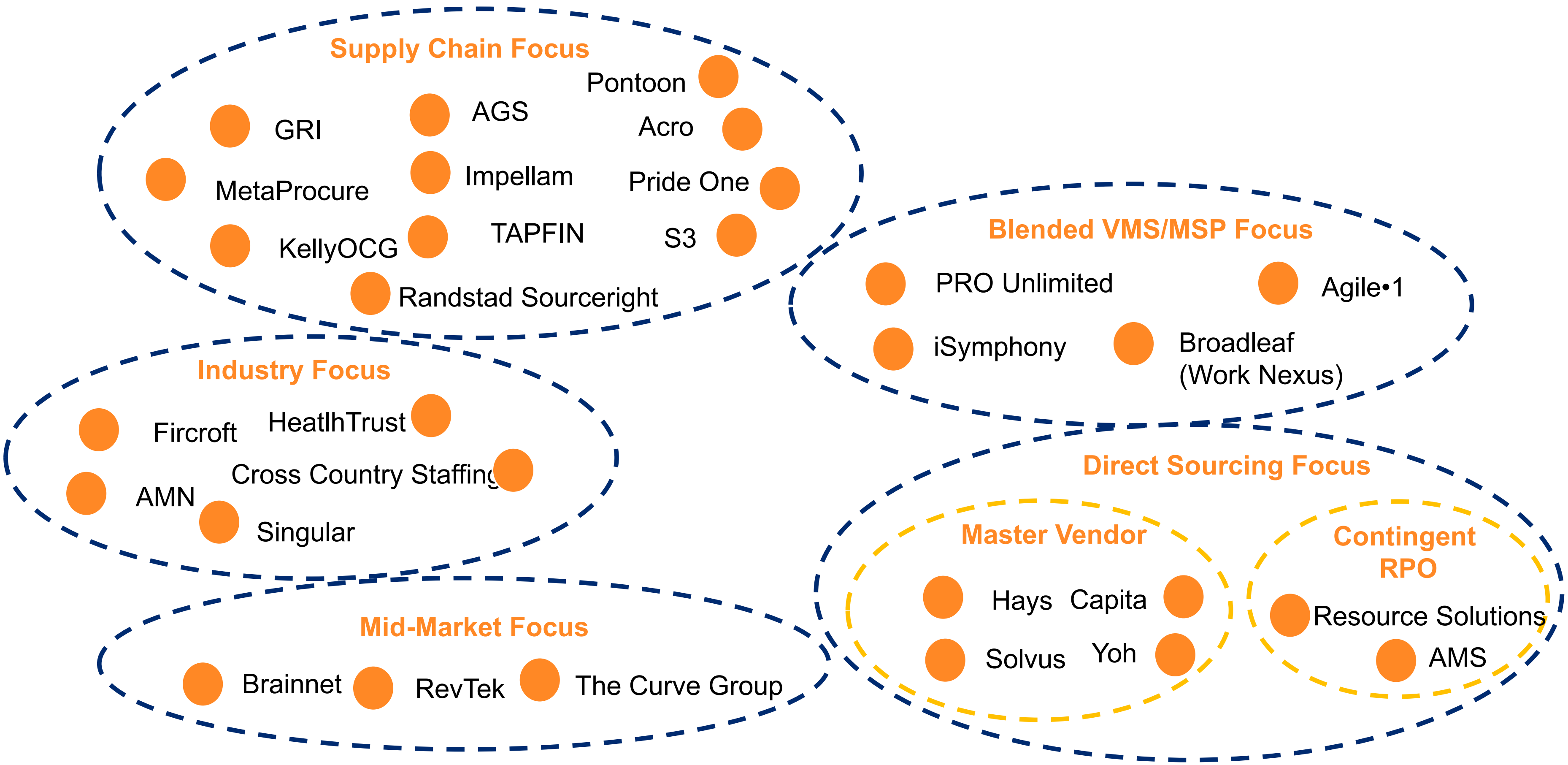
*Source: VMS Market Development Part 1 2017*

# High Level VMS Provider Capability

| | Number Serviced | | | | Regions Targeting | | | |
|---|---|---|---|---|---|---|---|---|
| **Vendor** | Countries | No. Countries with Full Invoicing | Languages | Americas | | Europe | Middle East/ Africa | Asia Pacific |
| | | 6 | 7 | 4 | ✶ | ✶ | | ✶ |
| | | 6 | 6 | 3 | | ✶ | | |
| | | 4 | 4 | 3 | | ✶ | | |
| | | 4 | 4 | 1 | ✶ | | ✶ | ✶ |
| | | 2 | 0 | 1 | ✶ | | | ✶ |
| | | 1 | 1 | 1 | | ✶ | | |
| | | 1 | 1 | 1 | | ✶ | | |
| | | 1 | 1 | 1 | | ✶ | | |

*Source: VMS Market Development Part 1 2017*

# Types of MSP Provider




*Source: MSP Market Development Part 1 2017*

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# High Level MSP Provider Capability

| | Number Serviced/Supported Today | | | Primary Regions Targeting | | | |
|---|---|---|---|---|---|---|---|
| **Vendor** | Countries | No. Countries with Full Billing | No. of Languages | Americas | Europe | Middle East/ Africa | Asia Pacific |
| **Extensive Geographical Experience (more than 30 MSP country experience)** | | | | | | | |
| | 107 | | 20 | ✶ | ✶ | ✶ | ✶ |
| | 72 | 60 | 16 | ✶ | ✶ | ✶ | ✶ |
| | 70 | 40 | | ✶ | ✶ | ✶ | ✶ |
| | 76 | 16 | 13 | ✶ | ✶ | ✶ | ✶ |
| | 64 | 32 | 10 | ✶ | ✶ | ✶ | ✶ |
| | 64 | 29 | 8 | ✶ | ✶ | ✶ | ✶ |
| | 50 | N/A | N/A | ✶ | ✶ | ✶ | ✶ |
| | 43 | 43 | 18 | ✶ | ✶ | ✶ | ✶ |
| **Expanding Geographical Experience (MSP country experience between 10 and 30 countries)** | | | | | | | |
| | 26 | 21 | 25 | ✶ | ✶ | | ✶ |
| | 25 | 14 | 12 | ✶ | ✶ | | |
| | 22 | 20 | 3 | ✶ | ✶ | | ✶ |
| | 10 | 10 | 9 | ✶ | ✶ | | |
| | 12 | 12 | 3 | ✶ | | | |

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*Source: MSP Market Development Part 1 2017*

# High Level MSP Provider Capability

| | Number Serviced/Supported Today | | | Regions Targeting | | | |
|---|---|---|---|---|---|---|---|
| Vendor | Countries | No. Countries with Full Billing | No. of Languages | Americas | Europe | Middle East/ Africa | Asia Pacific |
| **Emerging Geographical Experience (10 or less MSP country experience)** | | | | | | | |
| | 9 | 9 | 10 | ✶ | (x) | | ✶ |
| | 8 | 8 | 4 | ✶ | ✶ | | ✶ |
| | 8 | 6 | 3 | ✶ | ✶ | ✶ | ✶ |
| | 6 | N/A | N/A | ✶ | ✶ | | |
| | 4 | 4 | 2 | ✶ | | | |
| | 3 | 0 | N/A | ✶ | ✶ | ✶ | ✶ |
| | 2 | 2 | 2 | | ✶ | | |
| | 1 | 1 | 1 | | ✶ | | |

(x) = clients being served in this region, although there is no local vendor presence.

N/A = not available



*Source: MSP Market Development Part 1 2017*

# Time for your questions…

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# Research discussed in today's webinar:

VMS Market Development Part 1 2017 - Drivers, Innovations & Geographical Capability

VMS Market Development Part 2 2017 Market Size and Growth

MSP Market Development Part 1 2017 - Drivers, Innovations & Geographical Capability

MSP Market Development Part 2 2017 Market Size and Growth

MSP Market Development Part 3 2017 – Differentiators

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Workforce Solutions Ecosystem 2017 Update

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