

W Staffing Industry Analysts
WEBINARS

14 December 2017 | 7 am PDT/10 AM EDT/15:00GMT

2017, Lessons for CW Managers

Speakers:

Bryan Peña, CCWP, SVP, Contingent Workforce Strategies

Stephen Clancy, CCWP, Director, Contingent Workforce Strategies, Knowledge & Research

Frank Enriquez, CCWP, Sr. Manager, Contingent Workforce Strategies & Research

Dawn McCartney, CCWP, Sr. Director, Contingent Workforce Strategies & Research

Peter Reagan, CCWP, Director, Contingent Workforce Strategies & Research
(EMEA & APAC)

Audio Controls

- **Listen through your computer** by turning on your speakers after you log into the event. Sound will be coming through this icon:



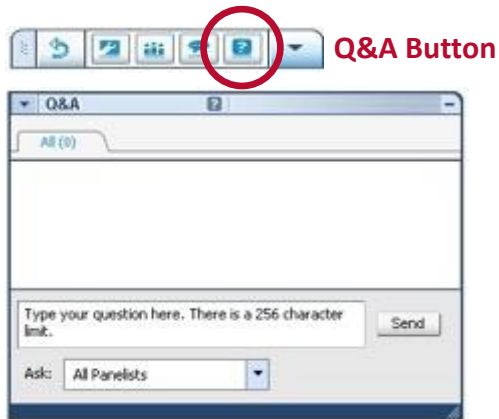
- **Do not** close this audio broadcast box.
- **To increase the volume of sound coming through your computer** speakers adjust the sound bar on the audio Broadcast box shown above.
- If you continue to have trouble, please submit your need for assistance in the Q&A section.

PLEASE NOTE:

You may dial into the call: US +1 650-479-3208 or UK +44-203-478-5287 or AUS +61-28518-1925 then enter access code 669 037 227. Please contact the Webex host or memberservices@staffingindustry.com if you need assistance. The presentation with audio will be sent 48 hours after the webinar.

Questions?

- Questions may be submitted at any time during the presentation. To submit a question:



- Click on the Question Mark icon (?) on the floating toolbar (as shown above).
- This will open the Q&A window on your system only.
- Type your question into the small dialog box and click the Send Button.

The slides will be sent to all registrants 48 hours post webinar.

PLEASE NOTE:

You may dial into the call: US +1 650-479-3208 or UK +44-203-478-5287 or AUS +61-28518-1925 then enter access code 669 037 227. Please contact the Webex host or memberservices@staffingindustry.com if you need assistance. The presentation with audio will be sent 48 hours after the webinar.

Staffing Industry Analysts Product Overview

	Products & Services for Suppliers	Products & Services for Buyers
<i>Research & Advisory</i>		
<i>Events</i>	   	   
<i>Editorial</i>		 
<i>Certification & Training</i>		

Links to SIA Free Resources

Editorial Publications:

Get a glimpse into the world of Staffing Industry Analysts' research.

- [SIA Daily News](#)- Our Daily News covers the world of staffing, workforce solutions and related topics locally and globally.
- [CWS 3.0](#)- The only publication that focuses on the world of contingent labour and contingent workforce management news. Published by Staffing Industry Analysts, it is delivered weekly to buyers of staffing services.
- [SIA Lexicon](#)- The SIA Lexicon of Global Contingent Workforce Related Terms helps your team and your clients speak the same language when it comes to staffing and workforce solutions definitions.
- [SIA Staffing Stream](#)- Contribute and learn from The Staffing Stream, the SIA moderated blog designed just for staffing and workforce solutions professional advice, stories and topics.
- Know what's happening in your staffing segment and beyond. SIA delivers four Staffing Segment Reports focused on the [IT, Engineering](#), [Healthcare](#) and [Industrial](#) segments.
- [SI Review Magazine](#)- Get best practices, advice & opinions from the experts in the field. Published eight times a year.

[*The Human Cloud, the Gig Economy & the Transformation of Work*](#)

[*Artificial Intelligence and Talent Acquisition: Beyond the Hype*](#)

[*Measuring the Gig Economy*](#)

[*Total Talent Management*](#)

[*Workforce Solutions Ecosystem - Report*](#)

[*Global RPO Directory*](#)

[*What's in the Contingent Worker Bill Rate*](#)

[*Global Readiness Indicator*](#)

Learn more about becoming a CWSC Member!

www.staffingindustry.com/cws-council |  @SIAnalysts



INTELLIGENCE FOR REAL RESULTS

The Contingent Workforce Strategies (CWS) Council is a business intelligence and advisory service for corporate buyers of workforce solutions.

As a CWS Council Member, you have access to a wide range of regional research with content most relevant to your business, including:

- VMS/MSP
- Globalisation
- RPO best practices
- SOW management strategies
- Workforce planning and talent management
- Programme benchmarking

Learn More at www.staffingindustry.com/cws-council

CWS Council Members (partial public list)

STAFFING
INDUSTRY
ANALYSTS



Today's Speakers

Bryan Peña, CCWP, SVP, Contingent Workforce Strategies

Stephen Clancy, CCWP, Director, Contingent Workforce Strategies, Knowledge & Research

Frank Enriquez, CCWP, Sr. Manager, Contingent Workforce Strategies & Research

Dawn McCartney, CCWP, Sr. Director, Contingent Workforce Strategies & Research

Peter Reagan, CCWP, Director, Contingent Workforce Strategies & Research
(EMEA & APAC)





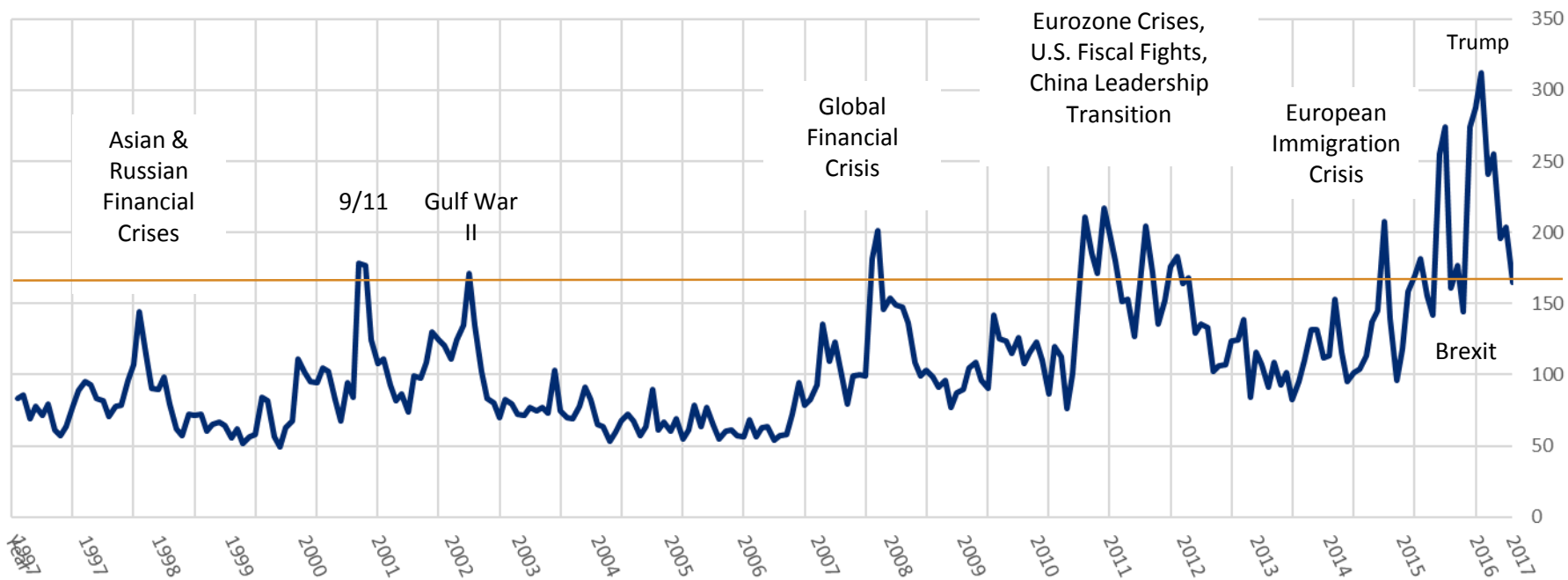
A close-up photograph of a graduation tassel. The tassel is made of black braided cord and hangs from a black graduation cap. A gold-colored charm with the year '2017' is attached to the tassel. The background is blurred, showing other graduates in caps and gowns.

2017



**UNCERTAINTY
AHEAD**

Global Economic Policy Uncertainty Index



Source: www.PolicyUncertainty.com.

The New Normal

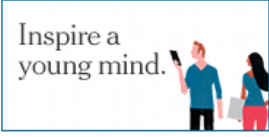
- Political Instability
- Economic Uncertainty
- Technological Change
- Workforce Constraints
- Social Unrest
- Demographic Change
- Climate Change





A Higher Profile View of Gig Work





The New York Times

Wednesday, August 9, 2017 | Today's Paper | Video | 63°F | Dow -0.17%

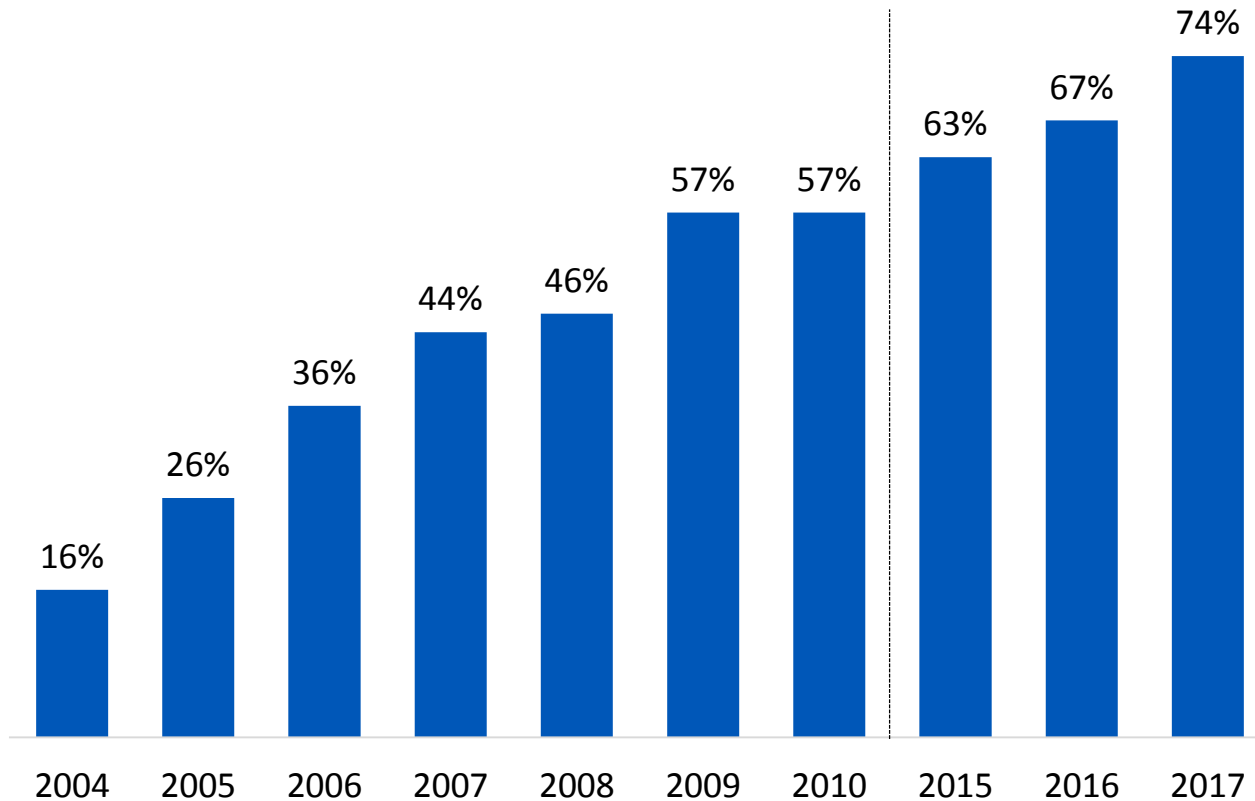
Sponsor a student subscription. Triple your impact, for a limited time.

- ACROSS**
- 1 Some undergrad degs.
 - 4 Plans nefariously
 - 9 Rout
 - 13 "That's a shocker"
 - 16 ___ number
 - 17 Labor market short on long-term work
 - 18 Gunn of "Breaking Bad"
 - 19 3-year-old in 2015 sports news
 - 21 "Sorta"
 - 22 Ahead of, old-style
 - 23 Like pawns and puppets

- DOWN**
- 1 N.Y.C. racetrack, informally
 - 2 Level
 - 3 Learned
 - 4 Doggy

1	B	S	S					4	P	L	O	T	S		9	D	R	U	B
13	J	H	A	D	N	O	I	D	E	A					16	C	E	L	L
17	G	I	G	E	C	O	N	O	M	Y					18	A	N	N	A
19	A	M	E	R	I	C	A	N	P	H	A	R	O	A	H				
				21	I	S	H					22	E	R	E				
23	U	S	E	D					26	P	L	A	Y	M	A	K	E	R	
32	P	E	R	E	S	T	R	O	I	K	A				35	E	L	O	
36	P	R	E				37	C	H	A	P	L	I	N		38	F	I	N
39	E	T	C			40	L	A	T	E	E	D	I	T	I	O	N		
42	D	A	T	A	E	N	T	R	Y					44	A	R	T	Y	
				45	I	R	K						46	U	R	L			
48	T	S	A	R	A	L	E	X	A	N	D	E	R	I		54	S	L	O
57	V	E	R	B				58	E	X	O	P	L	A	N	E	T	S	
59	P	A	I	N				60	S	E	X	P	I	S	T	O	L	S	
61	G	R	A	B				62	S	C	O	T	T			63	S	L	O

Share of respondents spending majority of time on CW-related responsibilities



Time spent on CW by company size

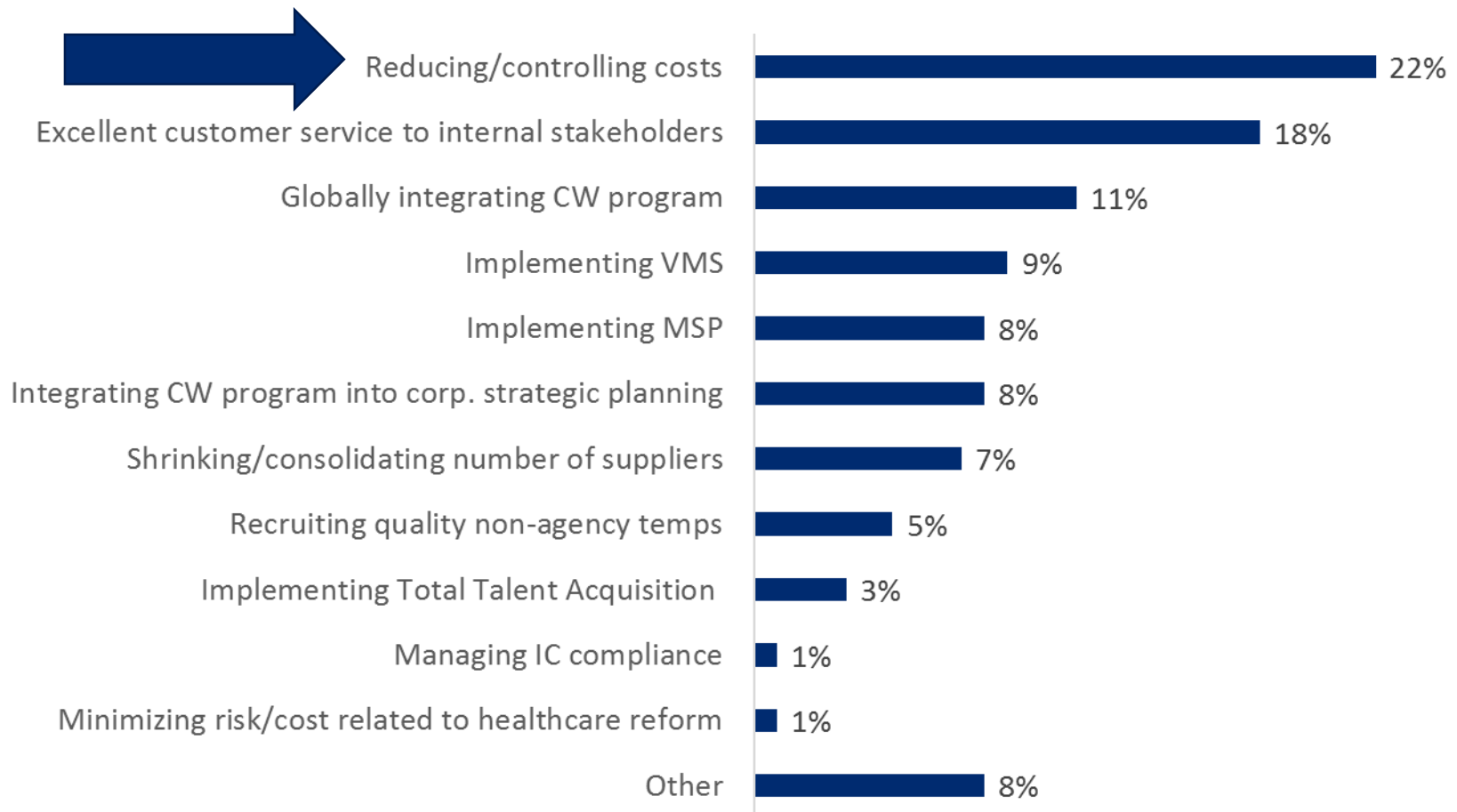
Share of participants noting percentage of time they spend on CW-related responsibilities, by company size

	50% or more of time	100% of time	
Small (1,000-9,999 FTEs)	67%	20%	N=30
Medium (10,000-49,999 FTEs)	71%	39%	N=66
Large (50,000+ FTEs)	82%	43%	N=44
All companies	74%	36%	N=140

Top priority for CW programs in 2017

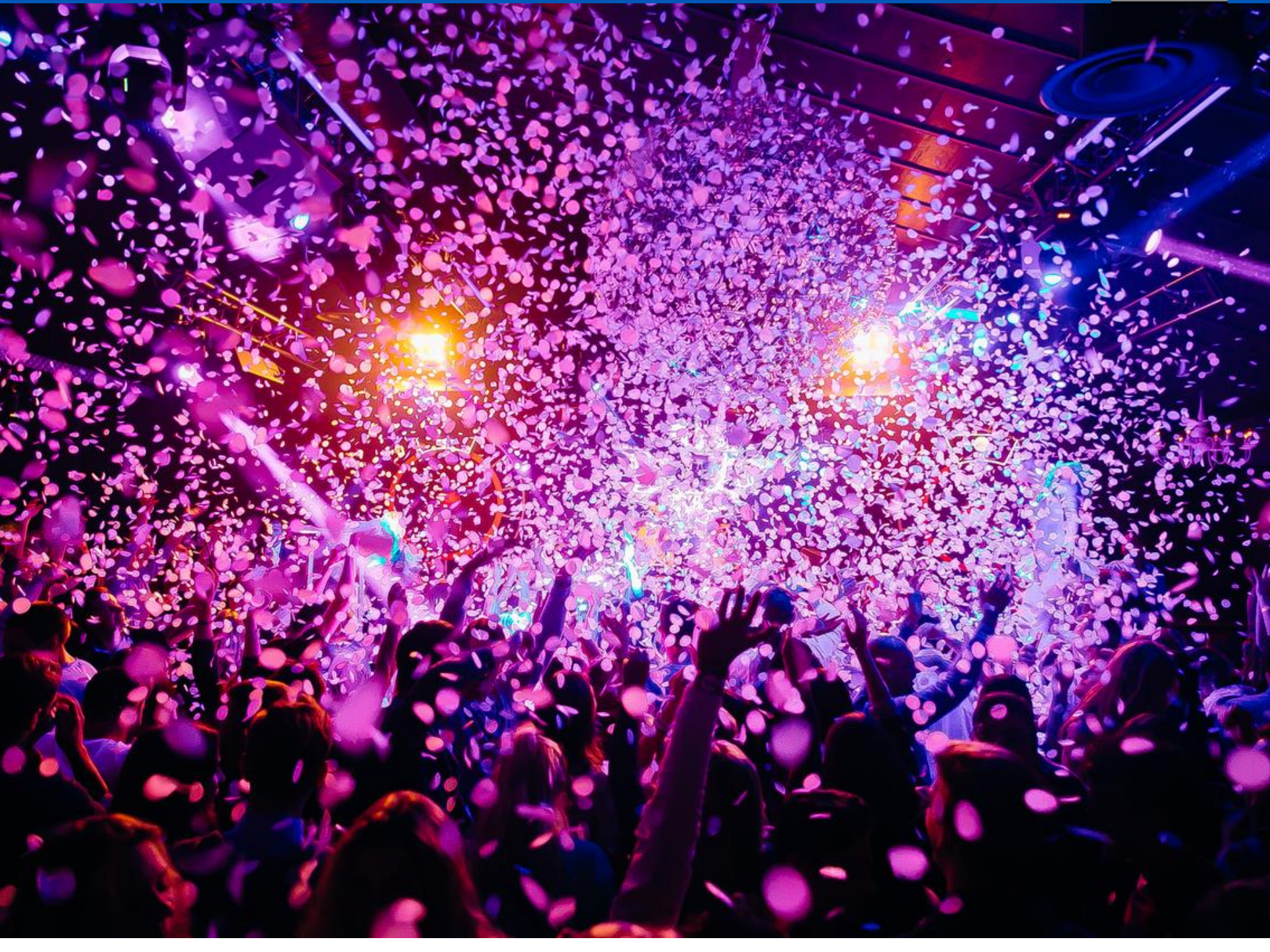


Top priority for CW programs in 2017



Question

Do we see this changing anytime soon?

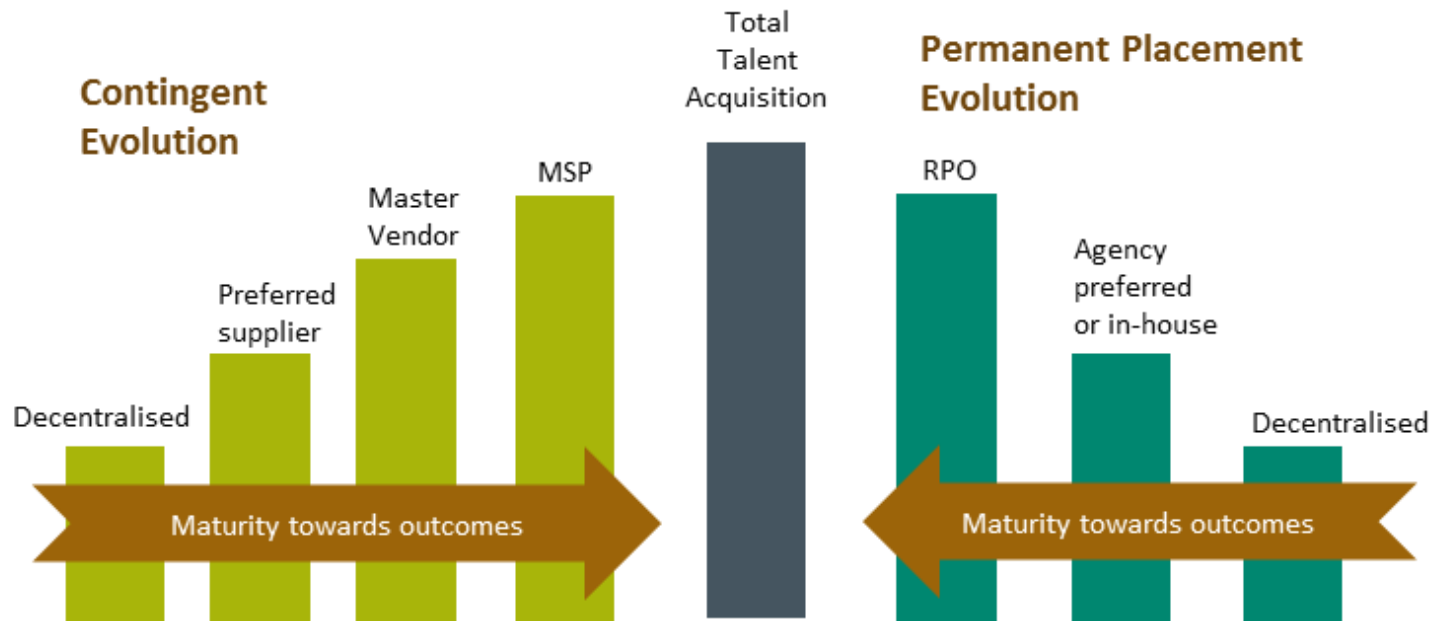


Definition

Total Talent Management (aka Total Workforce Management)

An emerging model of talent or workforce management that includes an organization's management of "permanently hired" workers as well as "contingent" workers (see Talent Management, Contingent Work/Workforce). Spurred by organizational bifurcation and the rising importance of contingent workers, this model seeks to integrate the respective management of "permanent hire" and "contingent" workforce by HR and Procurement functions. While Total Talent Management is a term that tends to be used by hiring organizations, RPOs have begun using the term "Blended Workforce Management" to refer to the same concept, but provided as an outsourced service by an RPO. Total Talent Management is Staffing Industry Analysts' preferred descriptor for this phenomenon/development. (See: RPO, Blended Workforce.)

Evolution of Procurement Models Supporting Talent Outcomes



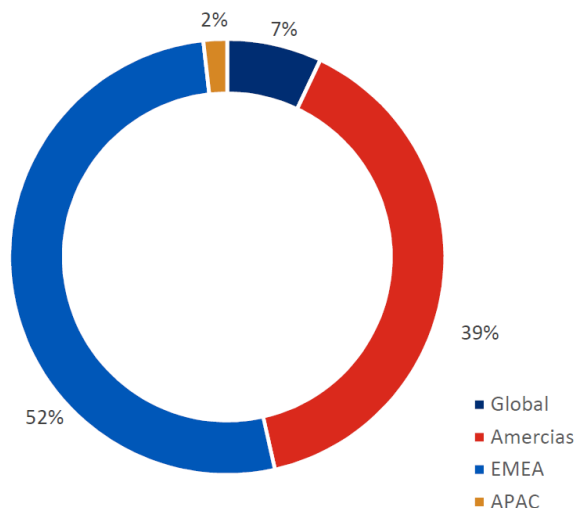
FLEXIBILITY v STABILITY

Definition

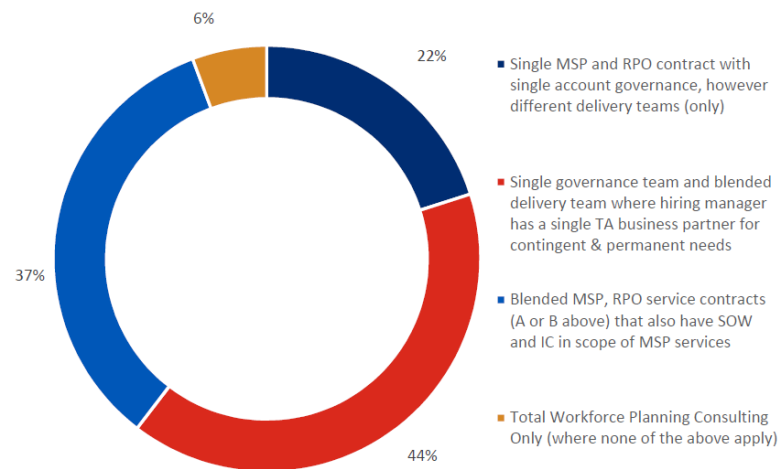
Total Talent Acquisition

An emerging model for Talent Acquisition, subsumed within the concept of Total Talent Management and therefore encompassing acquisition of both “permanent hire” and “contingent talent.” Total Talent Acquisition refers not only to the operational approaches to sourcing, recruiting, and engaging talent, but also to higher level strategic considerations of structuring or managing the talent supply chain (i.e., decision about outsourcing, sourcing geographies, etc.).

TTA Market by Regional Scope (number of contracts)



TTA Market Size by Scope of Service (number of contracts)



Total Talent Acquisition

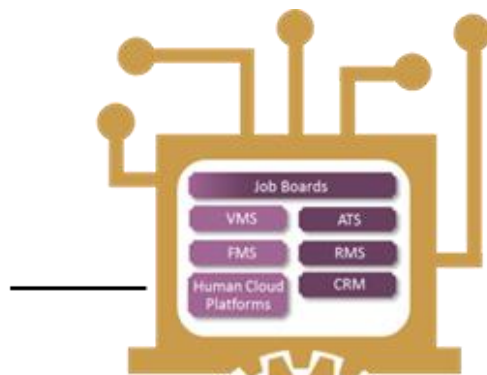
21%

53%

21% in place today - 53% Looking to explore within 2 years

Total Talent Acquisition

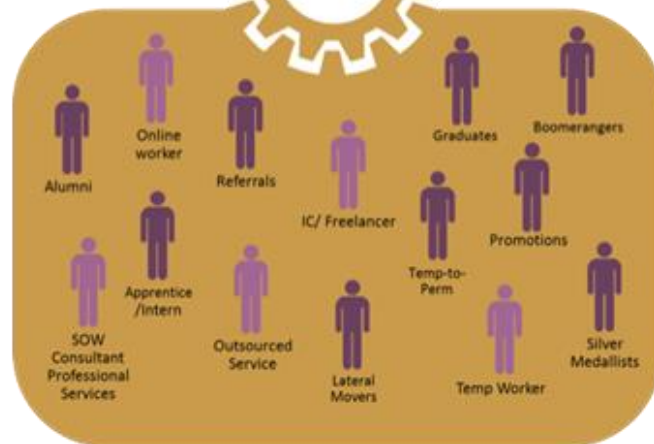
Integrated Talent Acquisition Technology



Unified approach to sourcing, recruiting, and engaging talent with higher level strategic considerations of structuring or managing the talent supply chain



One **Talent Pool** for both Employed and Non-Employed Talent providing better visibility and facilitating more efficient lateral moves across the Workforce

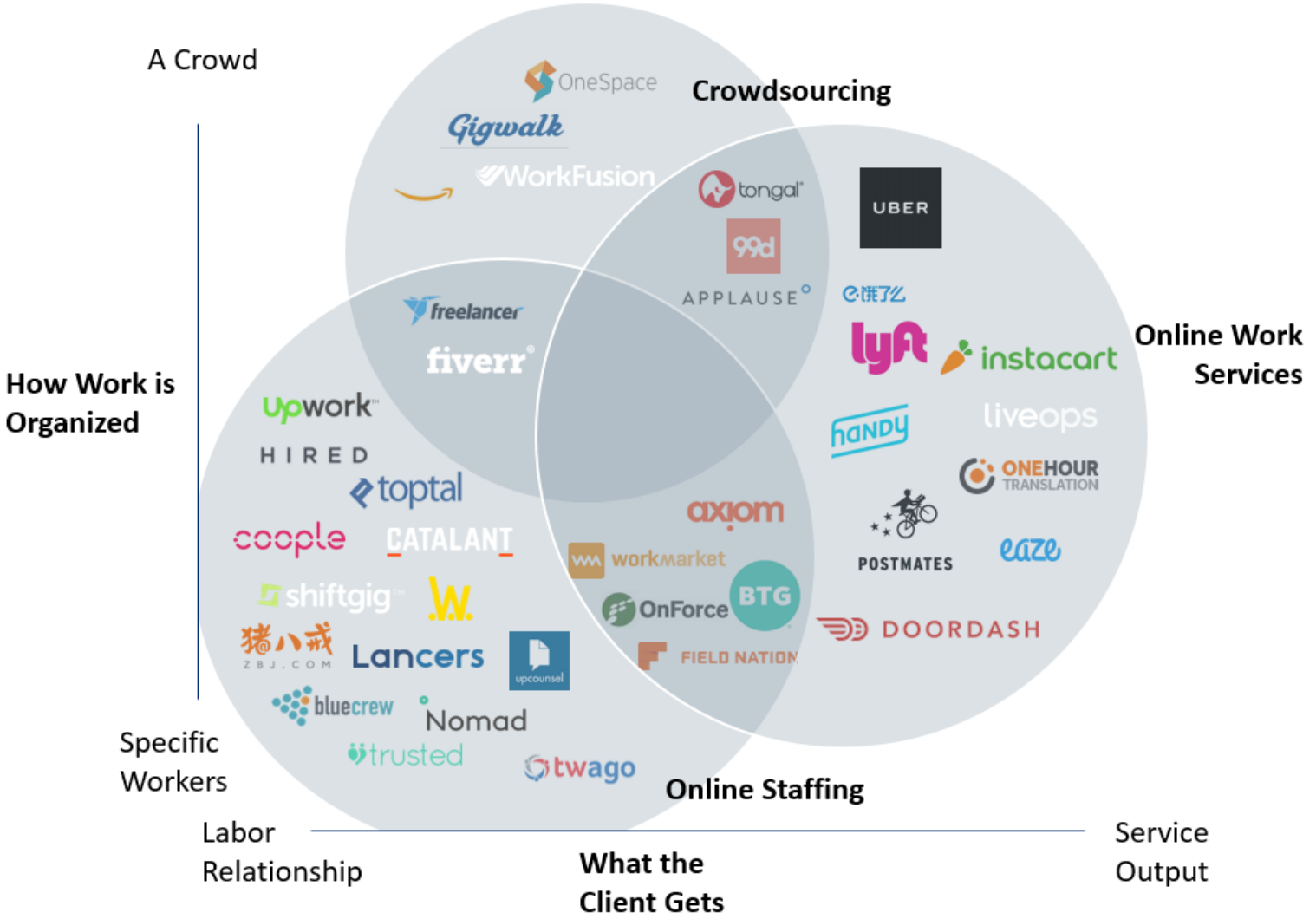


Question

TTA? What does this mean for the industry?



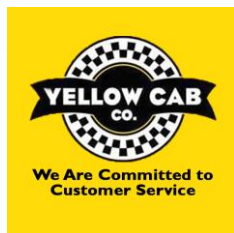
Human Cloud Business Models



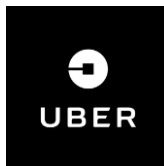
Gig Platforms Disrupting Intermediaries?



REAL ESTATE



VS.





Question

***How will the human cloud effect
the workforce in 2018?***





SOW

SOW

SOW

SOW

S

Definition: Statement of Work (SOW)

- A document that captures the work products and services, including, but not limited to: the work activities and deliverables to be supplied under a contract or as part of a project timeline. **In contrast to a typical temp or contingent work arrangement which is billed based on time worked, SOW agreements are usually billed based on a fixed price deliverable or for hitting specific milestones.** Like typical contingent arrangements, they may also be billed based on time, including arrangements where there is a time-based billing that is capped at some “not to exceed” level for time and materials .

Companies are Using More

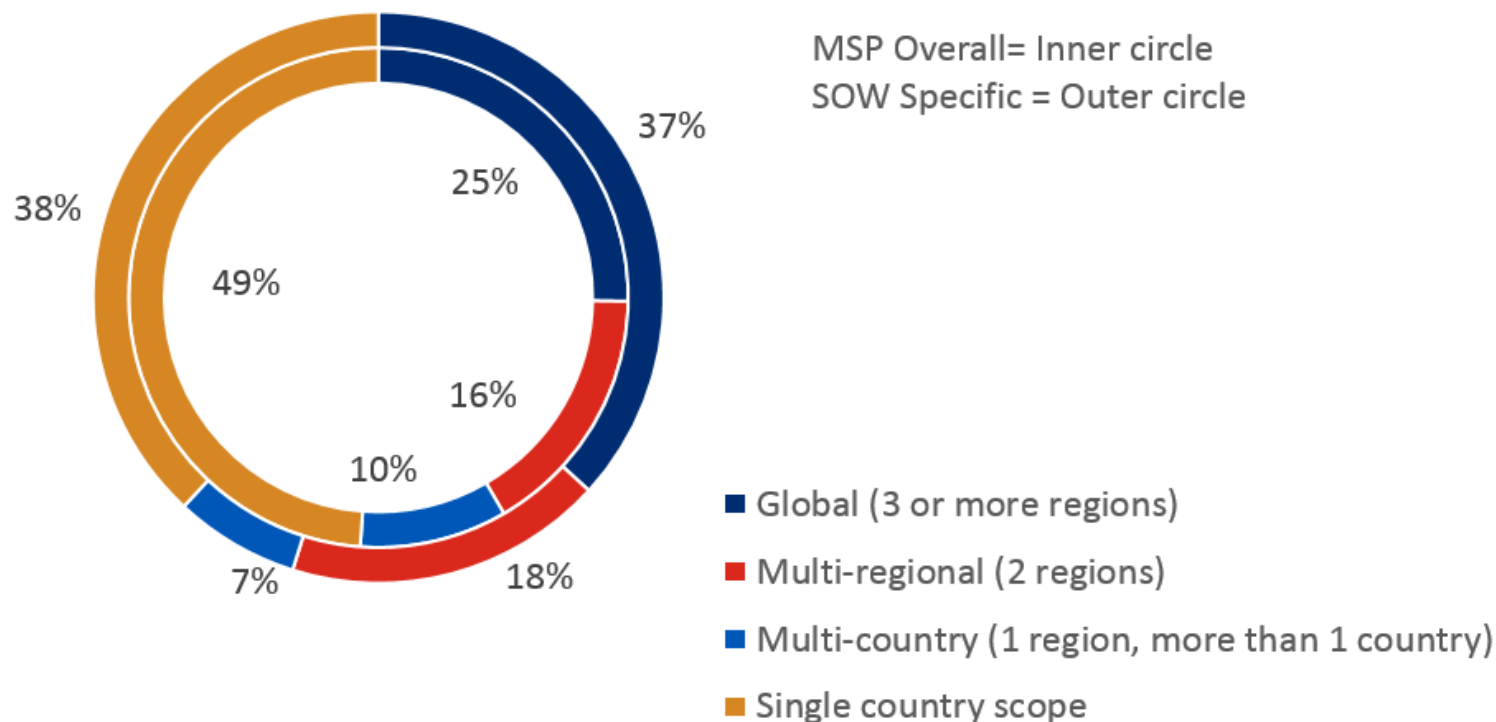
How will the following employee types change as a share of your total labor force over the next 10 years?

	Significant decrease	Moderate decrease	About the same	Moderate increase	Significant increase	Net increase - decrease
Outsourced workers	4%	4%	42%	39%	10%	41%
SOW consultants	2%	12%	33%	40%	14%	39%
Freelancers	3%	8%	47%	33%	10%	32%
Agency temporary workers	6%	14%	36%	36%	7%	23%
Internal temporary workers	6%	9%	57%	21%	7%	13%
Independent contractors	9%	17%	38%	28%	7%	9%
Part-time employees	5%	10%	63%	19%	2%	7%
Full-time employees	8%	36%	37%	15%		-24%

N=180

SOW Spend by Geographical Scope

MSP Market by Geographical Scope (share of spend)



SOW Continues to Grow as a Significant Classification Spend Managed in CW Programs

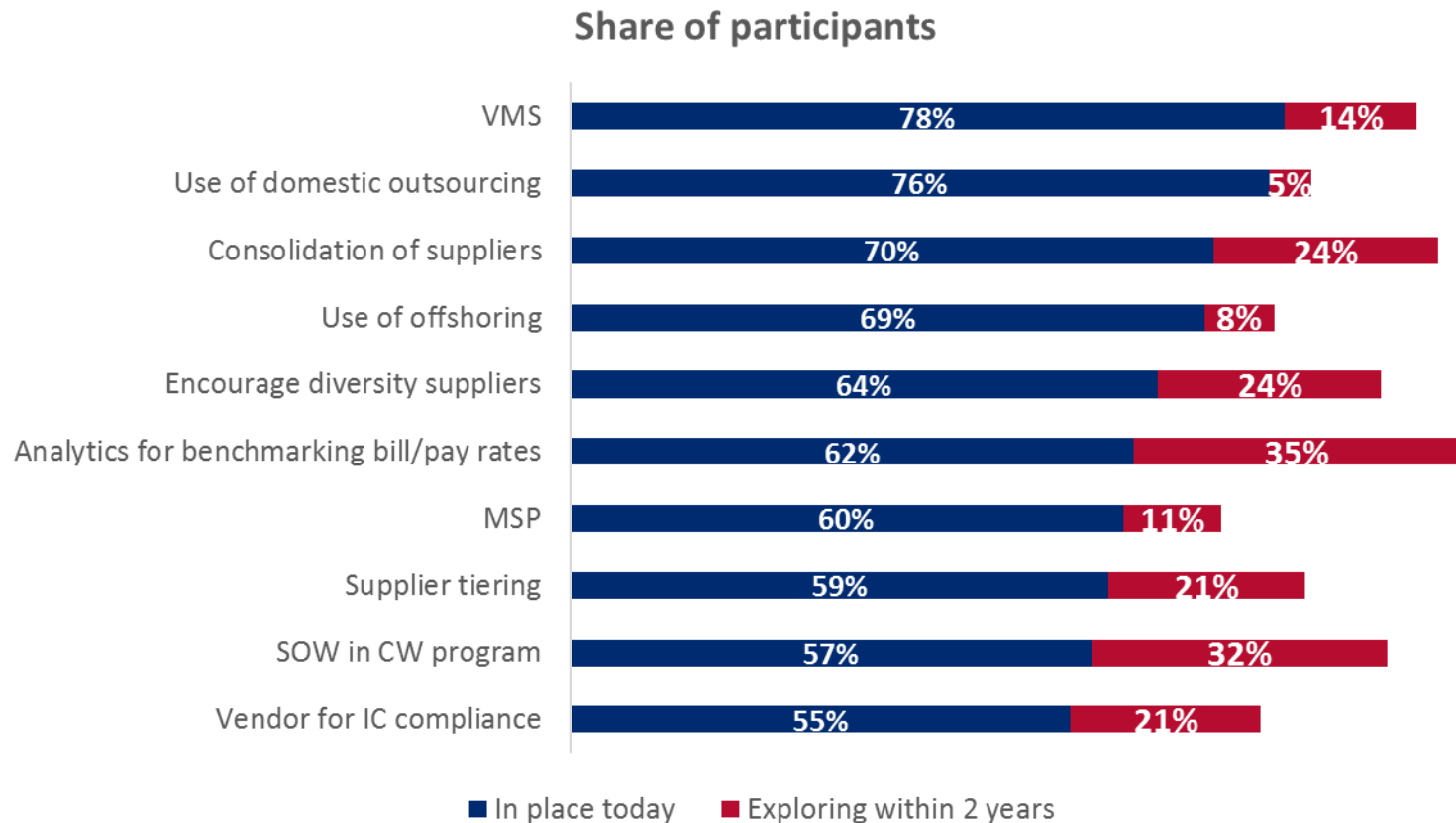


Question

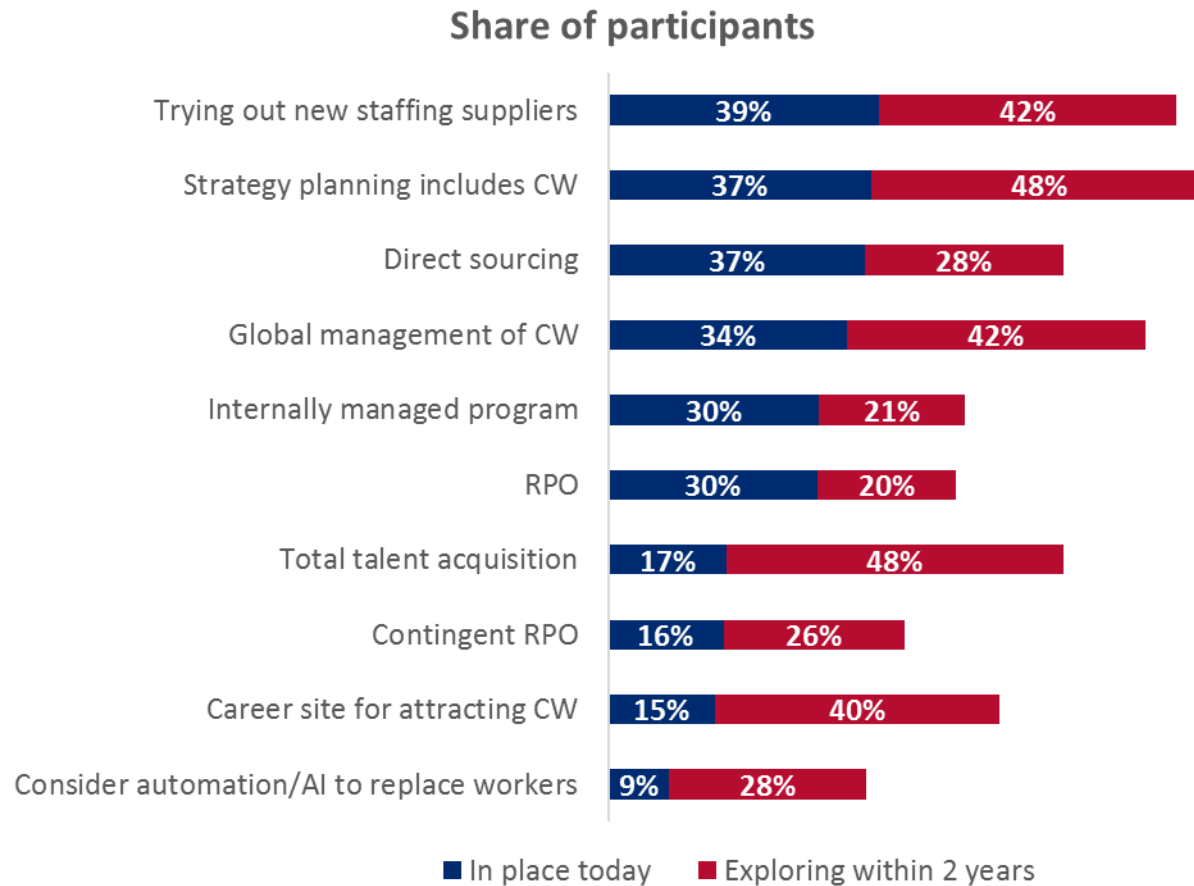
What do program managers need to consider when implementing SOW in 2018?



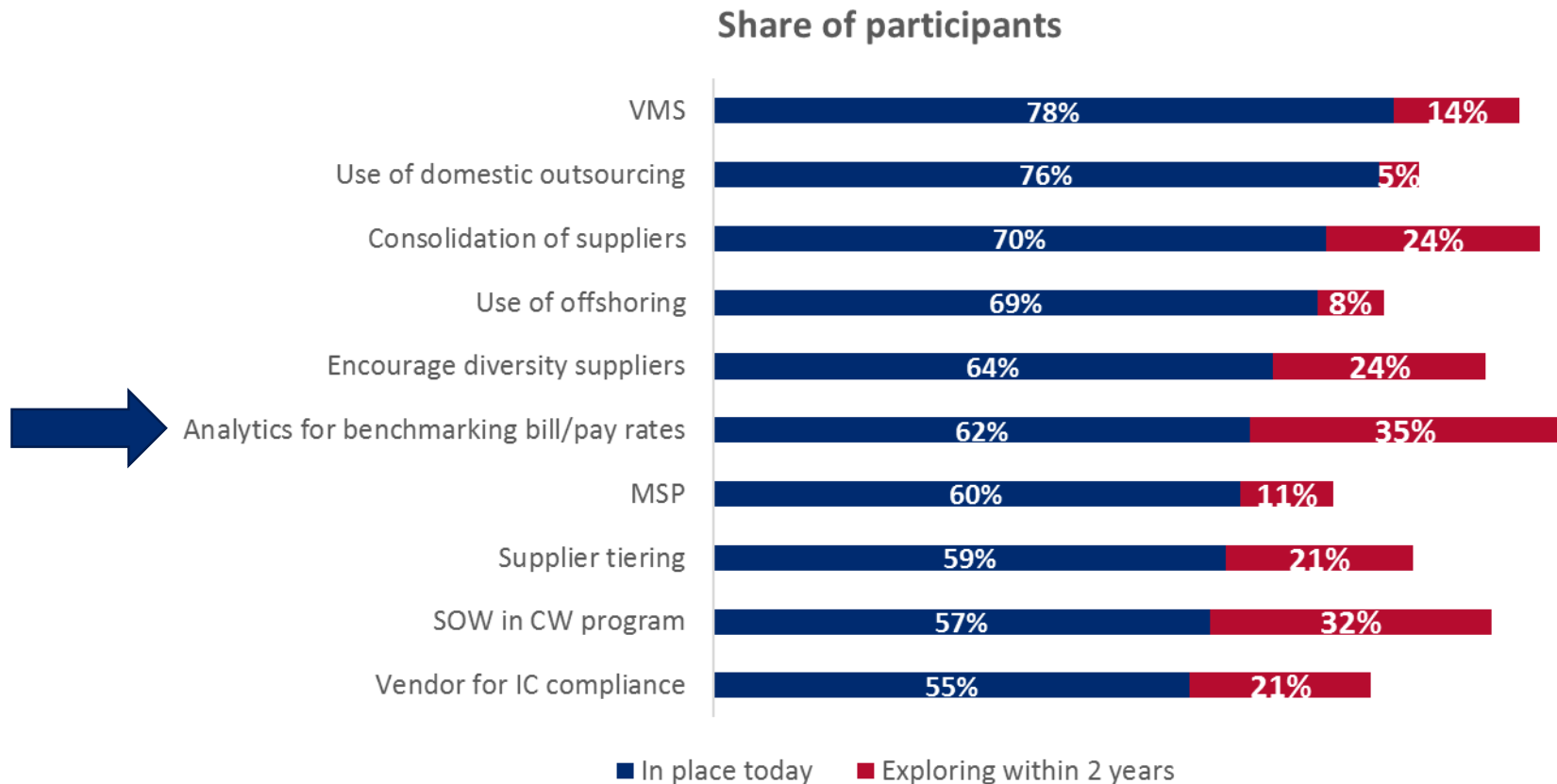
Supplier management strategies



Supplier management strategies (continued)



Supplier management strategies



Question:

What do managers need to consider in 2018 when looking at analytics and rates?

legislate
(LT.) to bring
from LEGISLATION (idea
legislation (idea
laws, enactment
legislative (idea
having the po
assembly. 3. o
word
ative a

Some Key Legislation-EU

- Apprenticeship Levy in the UK
- IR35 in the UK
- General Data Protection Regulation in Europe
- Cyber Security Laws in China



Some Key Legislation-NA

- ACA
- Salary History Ban
- Criminal Background Checks/Ban the Box
- Paid Sick Leave
- Immigration/H1B's



Question

How can program managers prepare for all these legislative changes? Where should they start?

CY 2018: Year of the Risk Assessment Audit, Planning & Management

A Risk Assessment Matrix

IMPACT	High	Medium Risk Share	High Risk Avoid & Reduce
	Low	Low Risk Accept	Medium Risk Reduce
		Low	High
		PROBABILITY	



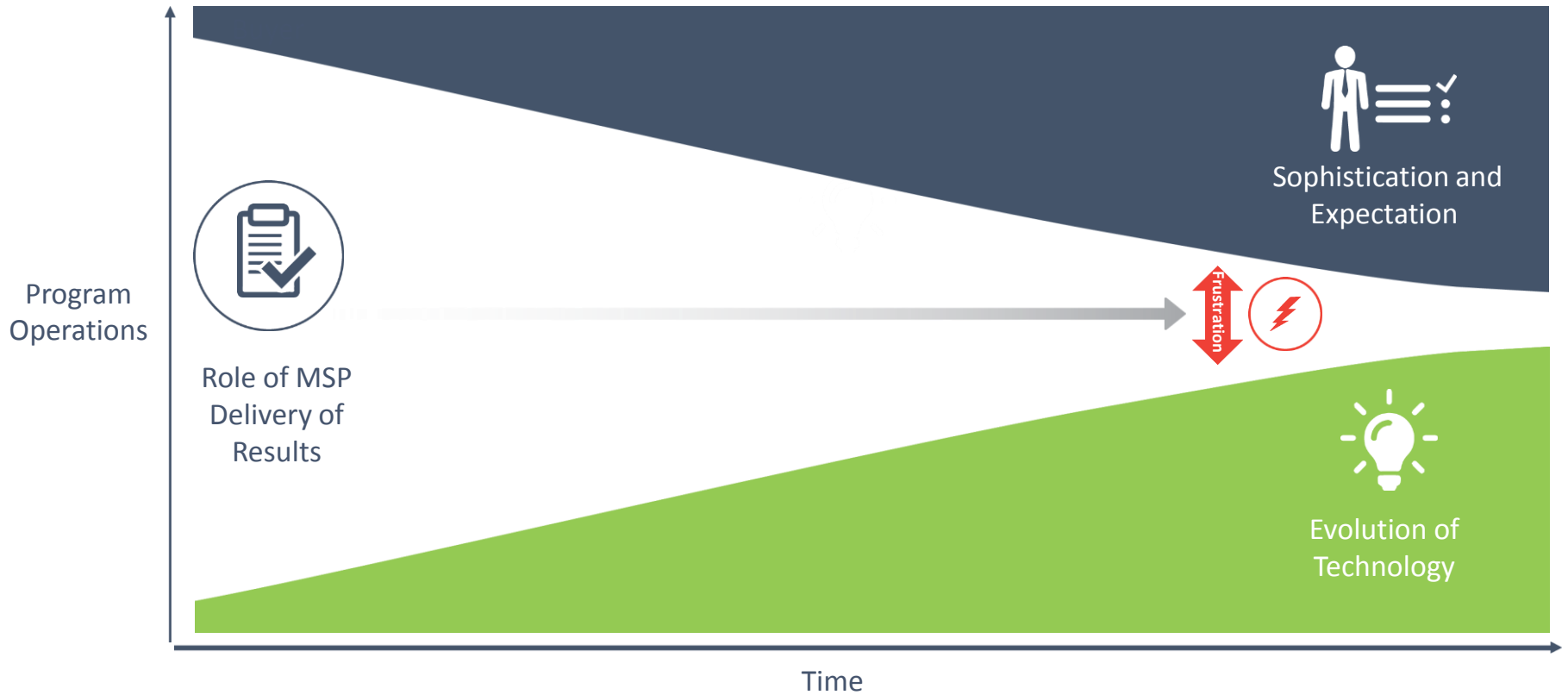
OLD

NEW

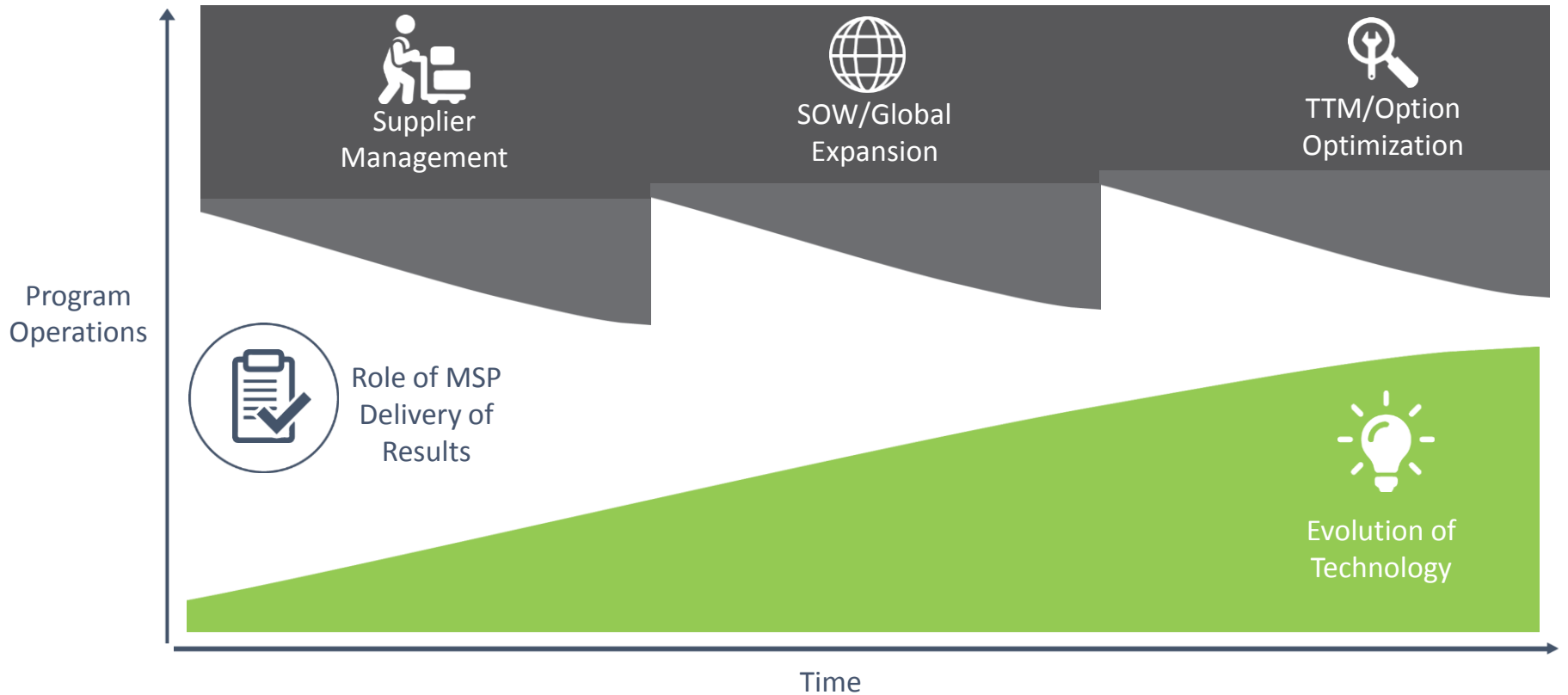
WAY



Role of MSP is Compressed



Role of MSP is Compressed

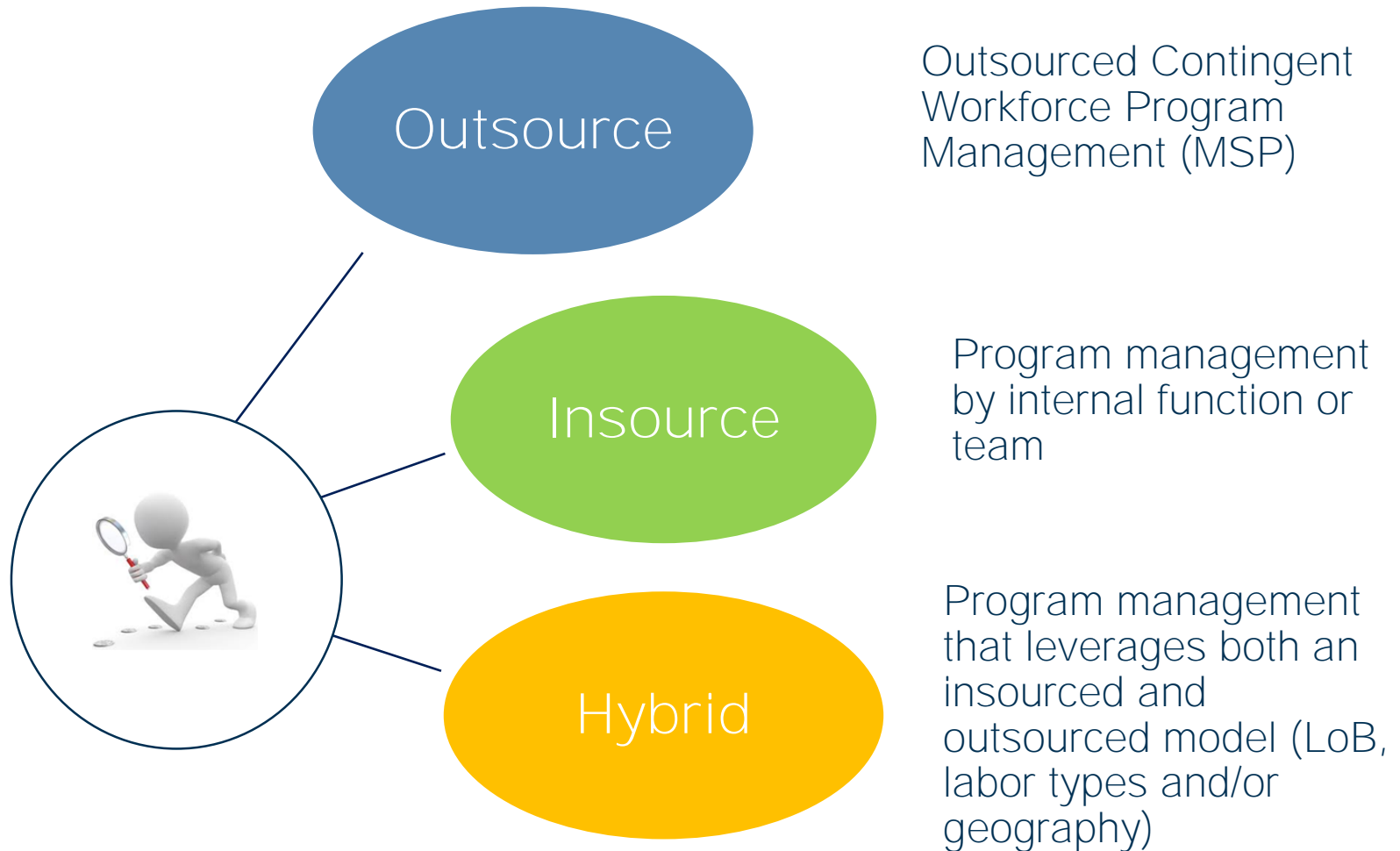


Question:

What are some of the changes we can expect in 2018 in the MSP/VMS Marketplace?

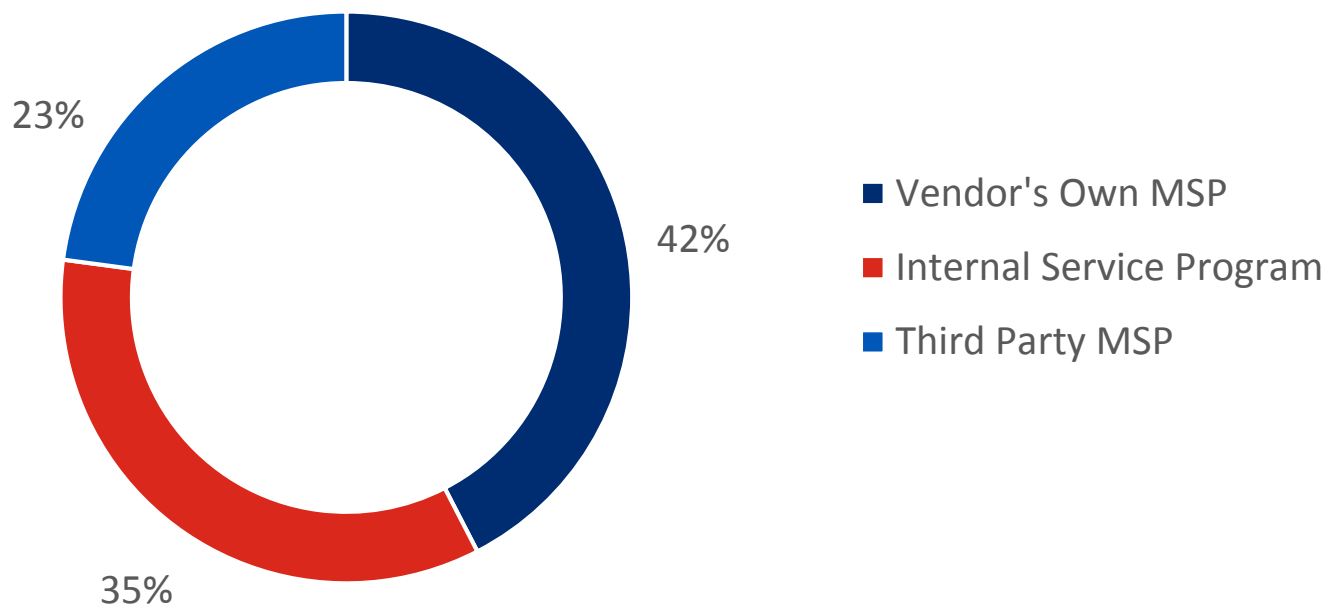


CWM Program Model Options



How to Service? - Build or Buy?

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



N=16

Trend in internal management

Has your organization brought your CW program “in house” in the last year (among those with external MSP, n=96)?

13% of participants said “Yes”

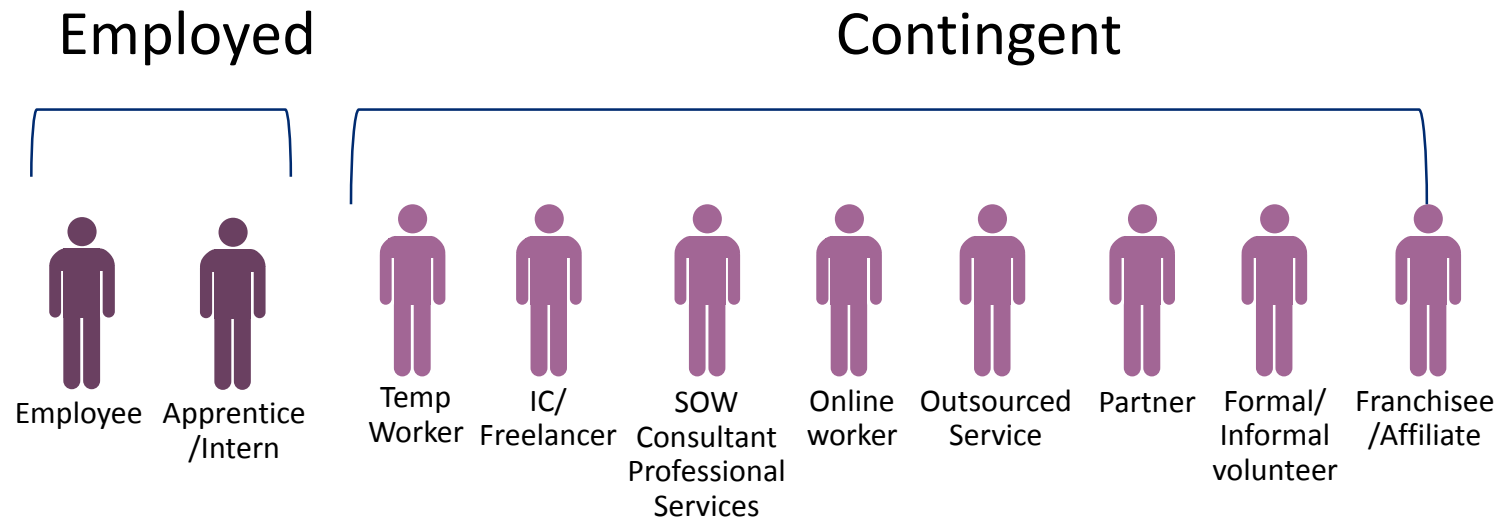
14% said, “No, but we plan on doing so in the next several years.”

74% said, “No, and we do not plan on doing so in the next several years.”

Question:

In 2018 will internally managed programs continue to be a growing trend? How risky is this approach?

OR one of these?



THE TRANSFORMATION OF THE HUMAN RESOURCE FUNCTION: RESOLVING THE TENSION BETWEEN A TRADITIONAL ADMINISTRATIVE AND A NEW STRATEGIC ROLE

Michael Beer

Introduction

There is little question that human resource management is undergoing profound change. The industry draws to a close. What are the new realities? Where is human resource management heading?

business units, and borders; (2) employee commitment to continuous improvement; (3) general management and leadership competence; (4) creativity and entrepreneurship; and (5) open communication will have to be developed. To acquire these capabilities corporations are struggling to realign their organizations and their human resource policies. Notions of a new competitive realities. Notions of a new competitive revolution is underway.

Competition, globalization, and continuous change in markets and technology are the principal reasons for the transformation of human resource management.

... these the source...
... age (Beer & Eisenstat, 1996; Farhalad, 1994; Ulrich & Lake, 1990). Farhalad, 1994; Ulrich & Lake, 1990). Farhalad, 1994; Ulrich & Lake, 1990).
... er levels of (1) coordination across functions, ...
... Human Resource Management, Spring 1997, Vol. 36, No. 1, Pp. 49-56

Human Resource Management, Spring 1997, Vol. 36, No. 1, Pp. 49-56
© 1997 by John Wiley & Sons, Inc.

tion is em...
In such an organizational manner. More importantly, organizations will have to employ a number of capabilities and advance the source of their competitive advantage (Beer & Eisenstat, 1996b; Hamel & Prahalad, 1994; Ulrich & Lake, 1990). Farhalad, 1994; Ulrich & Lake, 1990). Farhalad, 1994; Ulrich & Lake, 1990). Farhalad, 1994; Ulrich & Lake, 1990).
er levels of (1) coordination across functions.

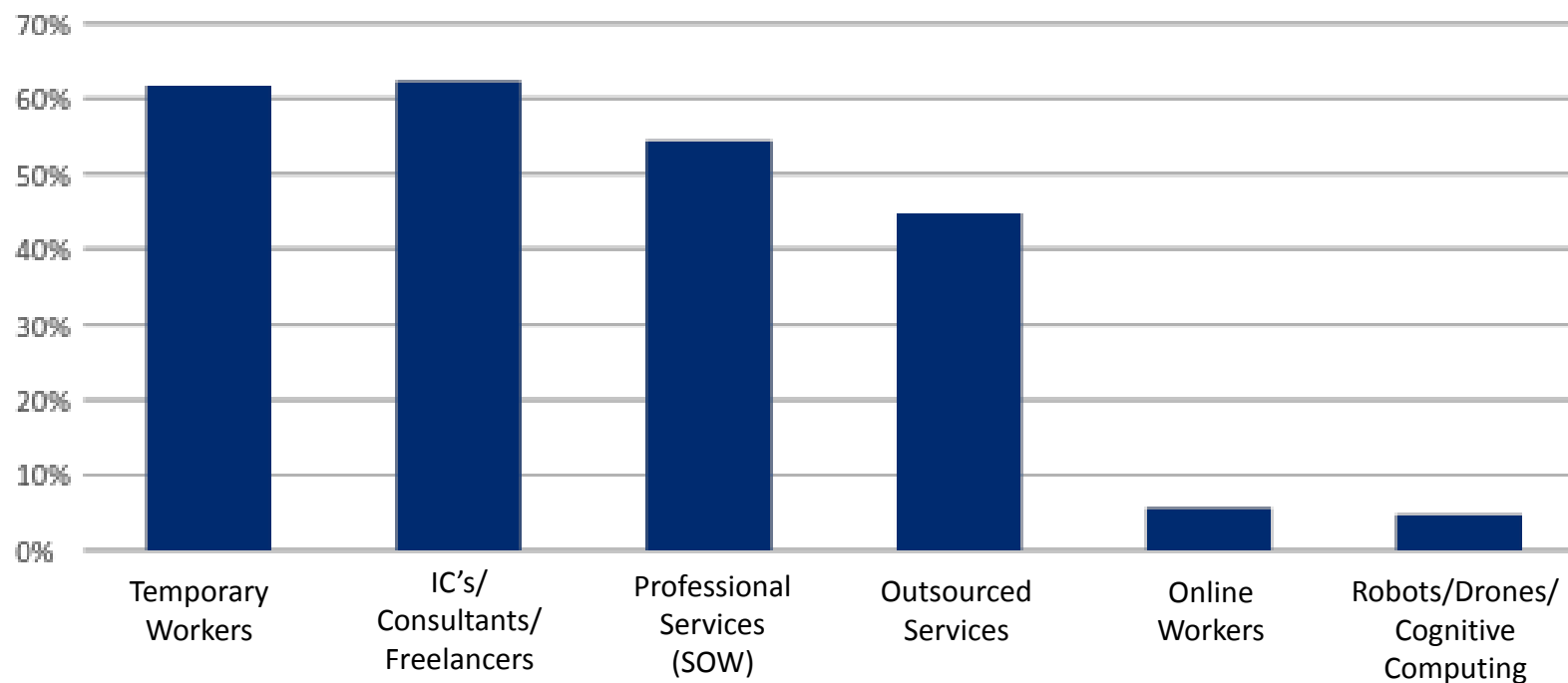
not yet run its course in the US many companies are discovering that downsizing is not enough. The implementation of new organizational behavior. Leaner organizations are not necessarily more effective. In fact recent research suggests that when cost reduction is

run its course in the US, many companies are discovering that downsizing is not enough.

CCC 0090-4848/97/010049-08

Work Performed by Non-Employed Resources

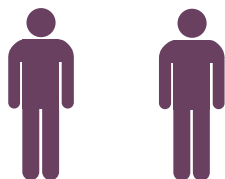
Based on what you know, which of the following TYPES of workers did work on behalf of your company/organization during 2014? (non-employed responses)



OR one of these?

Employed

Contingent



Employee Apprentice
 /Intern



Temp
Worker



IC/
Freelancer



SOW
Consultant
Professional
Services



Online
worker



Outsourced
Service



Partner



Formal/
Informal
volunteer



Franchisee
/Affiliate



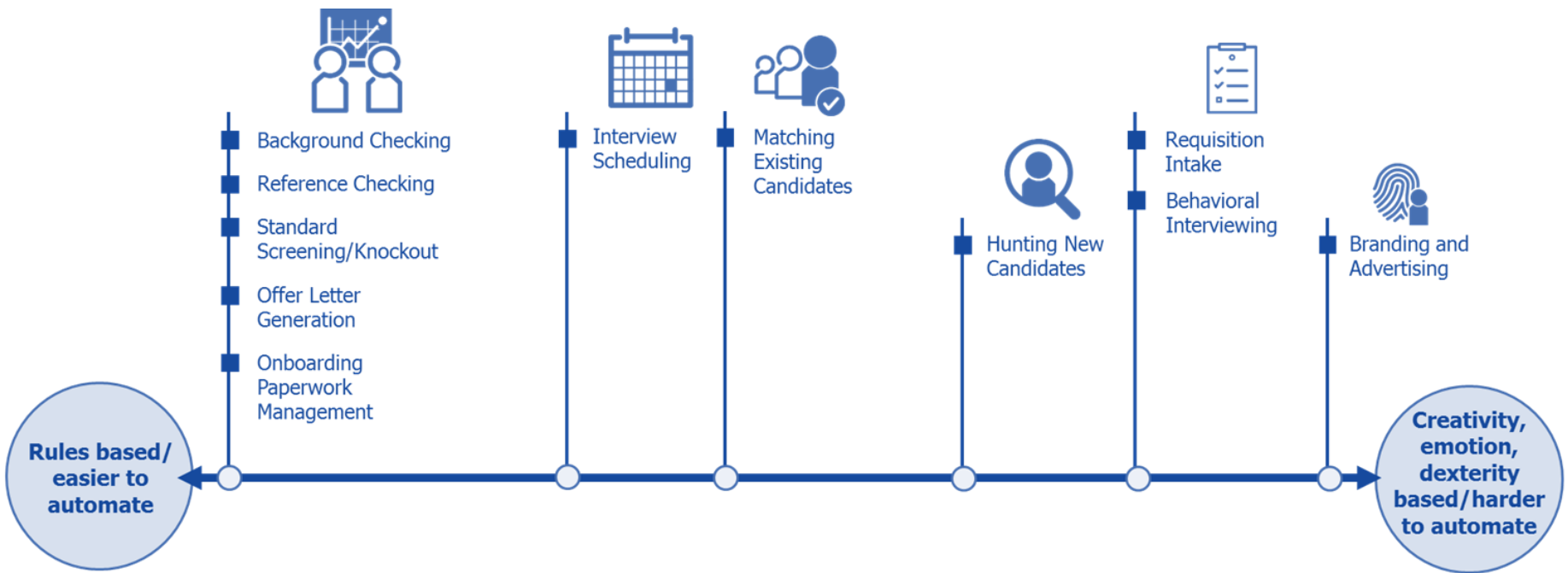
Robot
Drone/AI

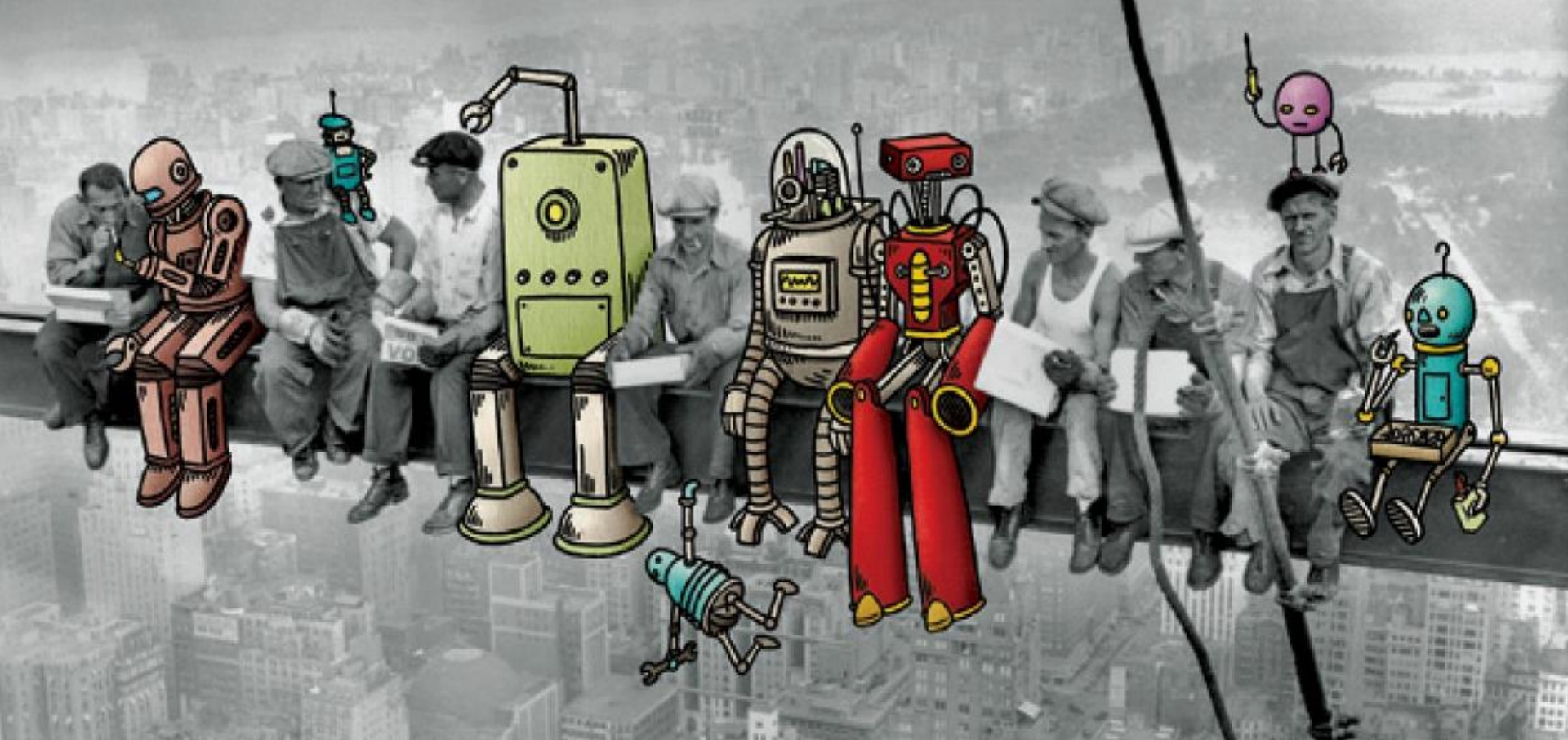
Rise of the Machines

Staffing Segment	Probability of Computerization
Office/Clerical	0.814
Industrial	0.796
Commercial	0.802
Finance & Accounting	0.845
Clinical/Scientific	0.413
Marketing/Creative	0.364
Other Professional	0.346
IT	0.278
Legal	0.275
Education	0.252
Healthcare	0.242
Engineering/Design	0.233
Professional/Specialty	0.327
TOTAL TEMPORARY STAFFING	0.719

63% of all temporary agency jobs susceptible to replacement over the next 10 to 20 years

Recruiting Tasks





- What does it mean for jobs in 2018?
- What does it mean for your suppliers in 2018?
- What does it mean for HR and Procurement in 2018?

Parting Thoughts.....

***What should program managers
pay the most attention to in 2018?***

Time for Your Questions



SIA research associated with today's webinar:

[Artificial Intelligence and Talent Acquisition: Beyond the Hype](#)

[Lexicon of Global Workforce-Related Terms](#)

[MSP Market Developments](#)

[The Human Cloud, the Gig Economy & the Transformation of Work](#)

[Total Talent Management](#)

[VMS Market Developments](#)

[Workforce Solutions Buyers Survey Initial Insights – Americas](#)

[Workforce Solutions Buyers Survey 2017 - Trends in management strategies and priorities](#)



Industry Insights from the Comfort of Your Own Office!

Upcoming Webinars:

Workforce Solutions EMEA: January 11

Services Procurement Americas: February 15

Workforce Solutions CWS EMEA: March 15

Workforce Solutions Americas: April 12

Total Workforce Optimization EMEA: May 10

The slides will be sent to all registrants 48 hours post webinar.

Register for the complimentary webinars at:

www.staffingindustry.com/webinars





Visit the website for complete list of classes.
www.staffingindustry.com/certification
+44(0) 207 194 7759 |  @SIACCWP #CCWP

Invest in your future. Today.

The CCWP accreditation programme is designed to elevate the status of HR, procurement, MSP solution providers, staffing providers and others who manage contingent staffing programmes. **Register Today!**

CCWP PARTNERS



**STAFFING
INDUSTRY
ANALYSTS**

STAFFING
INDUSTRY
ANALYSTS



CCWP
Statement
of Work
Expert

Visit the website for complete list of classes.

www.staffingindustry.com/certification

+44(0) 207 194 7759 |  @SIACCWP #CCWP

NEW!

Expand Your Expertise. Now.

Demonstrate your knowledge in SOW management to your company and clients when you become certified.

SOW Management Expert class will help you:

- Navigate the complexity of this opportunity.
- Increase the relevance of your contingent workforce programme to your company & clients.
- Elevate your knowledge and career.



CCWP PARTNERS



AgileOne

CHARTER



HAYS
Talent Solutions
Intelligent Resourcing



CHARTER



CHARTER

**STAFFING
INDUSTRY
ANALYSTS**



24-26 April, 2018 | Royal Lancaster Hotel | London |  @CWSSummit @SIAGigE

Join your peers in London for **CWS Summit**, the premier conference for HR & procurement professionals across Europe, followed by the European launch of SIA's newest event: **Collaboration in the Gig Economy**. This new award-winning conference brings together staffing suppliers, workforce solutions buyers, VMS, MSP & RPO providers, suppliers to staffing and gig economy/human cloud companies in a forum geared toward optimising the talent supply chain.

Register now at www.cwssummitwe.eu





STAFFING
INDUSTRY
ANALYSTS

About Staffing Industry Analysts

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

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

For more information: www.staffingindustry.com

For global coverage across the workforce solutions ecosystem, follow us  @SIAResearch and connect via   

salamat Dakujem teşekkür ederim
GRACIAS ASANTE TAK SUWUN
धन्यवाद TAKK hvala salamata
HVALA mersi ليزج اركش
Ευχαριστώ 감사합니다 kiitos merci
GRAZZII DANKE GRAZAS TAKK MAHALO
Paxmet Thank You arigato
kiitos ARIGATO takk
SUWUN धन्यवाद HVALA
MERCi teşekkür ederim GRAZIE DAKUJEM
mahalo GRACIAS kiitos hvala
ありがとう DANKE GRAZAS TAKK
Благодарам TAKK ASANTE 多謝 salamata SUWUN
grazie спасибо SALAMAT
gracias