

ASSESSING THE GROWING THREATS TO TRADITIONAL STAFFING

THREATENING DEVELOPMENTS

Growing Skills Gap

Replacements = Retiring Workers

SKILLS GAP

Retirement, poorly trained replacements, restrictive immigration - lost revenue in a growing number of industries.

Articles: SIA / Deloitte

Human Cloud & Gig Economy

FULL-TIME

FREELANCER

Emergence of the Gig-Economy and new On-line Platforms/ Human-Cloud are compressing margins, while increasing competition for skilled workers.

Articles: SIA / The Research Platform / Time / Salon

Process Outsourcing/ Talent Acquisition Technology

CHOICE
TEAMWORK
SEEK PEOPLE
SUBCONTRACT
OUTSOURCE
INDIVIDUALITY
SUPPORT
RESUME

Middle-market clients are severing relationships with independents and retaining VMS/MSP/RPO and other outsourcing/off-shoring vendors to reduce cost.

Article: SIA

Big-Data/A.I. /Robotics

Accelerating adoption of Big Data, AI/Machine Learning algorithms/robotics eliminating/modifying existing jobs.

Articles: SIA / Deloitte / McKinsey / NPR

IMPACT OF CHALLENGES

Growing Skills Gap

Human Cloud & Gig Economy

Process Outsourcing/ Talent Acquisition Technology

Big-Data/A.I. /Robotics

INDUSTRIAL/TECH/MEDICAL POSITIONS

CHANGE

63% of temp revenue

SOURCE: SIA

SHARING, GIG OR ON-DEMAND ECONOMY

CHANGE

44%, or 90 million of U.S. Adults have participated in these arrangements

SOURCE: TIME

SIA 2014 BUYERS SURVEY

VMS

CHANGE

Used by 71% of firms. Another 26% of firms considering adoption 2015-2017.

POSITIONS AUTOMATED OR MODIFIED (OCCUPATIONS)

CHANGE

Estimated 60% occupations to have 30%+ constituent activities automated between 2016-2026.

SOURCE: DELIOTTE

MANUFACTURING / ENGINEERING OPENINGS

CHANGE

60% unfilled from 2015-2025

SOURCE: DELOITTE UNIVERSITY PRESS

ON-LINE STAFFING

\$2.8 to \$3.5 Billion spend in 2014

SOURCE: SIA

MSP

CHANGE

Used by 66% of firms. Another 18% of firms considering adoption 2015-2017.

POSITIONS AUTOMATED OR MODIFIED (KNOWLEDGE WORKERS)

CHANGE

9% of Worldwide Knowledge Workers between 2016-2026.

SEE PAGE 5 OF STUDY

IC COMPLIANCE

CHANGE

Used by 62% of firms. Another 20% of firms considering adoption 2015-2017.

POSITIONS AUTOMATED OR MODIFIED (TOTAL WORKFORCE)

CHANGE

47% of Worldwide Total Workforce between 2016-2026.

SEE TABLES

SOW

CHANGE

Used by 59% of firms. Another 31% of firms considering adoption 2015-2017.

POSITIONS AUTOMATED OR MODIFIED (MOST AT RISK)

CHANGE

Estimated 63% of Staffing Industry segments most at risk (Finance/Accounting, Office/ Clerical, Industrial).

SOURCE: SIA

OFF-SHORING

CHANGE

Used by 47% of firms. Another 21% of firms considering adoption 2015-2017.

RPO

CHANGE

Used by 46% of firms. Another 23% of firms considering adoption 2015-2017.

HRO

CHANGE

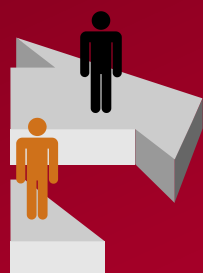
Used by 33% of firms. Another 22% of firms considering adoption 2015-2017.

HOW DOES YOUR STAFFING STACKUP?

Estimate % of your services exposed to each of the following threats.



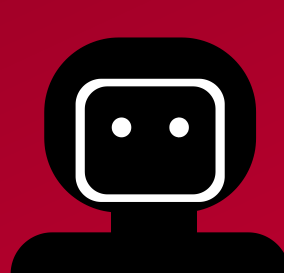
% of Your Revenue



% of Your Revenue



% of Your Revenue



% of Your Revenue

USE THIS LINK TO DETERMINE WHICH POSITIONS ARE AT RISK

ACTION STEPS

Growing Skills Gap

Human Cloud & Gig Economy

Process Outsourcing/ Talent Acquisition Technology

Big-Data/A.I. /Robotics

Focus on segments with qualified & accessible talent

Be sure recruiting criteria is appropriate for tasks to be performed

Help client determine competitive compensation

Use AI + social + recognition of changing worker preferences to attract & match talent

Work with clients/educators to develop training & apprenticeship programs

Develop H1B capabilities/ partnerships to supplement US education deficiencies

Offer superior matching of quality & skilled personnel with pay sufficient to assure task competition/client/ worker satisfaction

Develop, acquire, or partner to enhance efficiency/effec tiveness of your services

Shift to **positions** performing difficult to code tasks requiring creativity, social intelligence, perception & deep tacit knowledge of social environment/ cultural context

Provide task restructuring & training services

Specialize in Human/AI/Robotics augmentation professionals & training