CONCURRENT SESSION: ADAPTATION

Contingent Workforce Technologies – from VMS to ATS, HRIS to Online Staffing and Everything in Between

Moderator: Jason Ezratty, President, Brightfield Strategies

Panelists:
- Jim Halling, Senior Associate, Brightfield Strategies
- Ed Hidalgo, Senior Director, Staffing, Qualcomm Inc.
- Barry Olson, President, HireGenics

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“New Workforce Strategies for a Global Economy”
Thu, 9/12 | 10:45 AM – 12:00 PM | Keynote Session

Grade (Please circle one):  A   B   C   D   F

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The Ascent of Contingent Workforce
Related Technologies
What is an Applicant Tracking System (ATS)?

- Initial Focus: Standardize & Automate Hiring Practices
- Now Best Known for Recruitment Toolset
  - Job Board Harvesting
  - Candidate Search & Match
- Fragmented Market with Variety of Functional Extensions
  - Onboarding & Off-boarding
  - Drug & Background
  - Assessment Testing
  - Video Interviewing
  - Social Media
ATS Market Overview

- **Market Leaders:**
  - Kenexa (acquired by IBM in 2012 for $1.3B)
  - Taleo (acquired by Oracle in 2012 for $3.4B)
  - Bullhorn (acquired in 2012 by Vista Equity Partners)

- **Current Market Size:** ~$1.2 billion
What is a Vendor Management System (VMS)?

- Manages talent acquired from suppliers
- Shares DNA from eProcurement (P2P) & HR Systems
- Primary Solution Components:
  - Supplier Profiling & Management
  - Sourcing & Requisitioning
  - Talent On & Off-boarding
  - Timekeeping, Invoicing & Bill-pay
VMS Market Overview

- Market Leaders:
  - Fieldglass
  - Beeline
  - IQNavigator

- Current Market Size: ~$250 million
- Transaction Volume: ~$90 billion in spend under management
VMS Competitive Landscape
by Spend Under Management
Global MSP and VMS spend

- MSP: $80 Billion
  - Temp/contract: $60 Billion
  - SOW: $10 Billion
  - Outsourced: $10 Billion

- VMS: $90 Billion
  - Temp/contract: $80 Billion
  - SOW: $10 Billion

- 30% of MSP is outside US
- 70% of MSP is US

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What is a Human Resource Information System (HRIS)?

- Initial Focus: Centralize static employee data (SSN, employee ID, contact information, job title, pay rate, organizational and other demographic information)
- HRIS Has Evolved to HRMS – Human Resources Management System and may incorporate:
  - Payroll
  - Benefits Administration
  - Time and Attendance
  - Employee evaluation / performance
  - Workforce Planning
  - Learning and Development
  - ATS
  - Other
HRIS / HRMS Market Overview

- Market Leaders:
  - Kronos
  - Sage Software
  - SAP
  - Peoplesoft (acquired by Oracle in 2004 for $10.3B)
  - Ceridian
- Current Market Size: ~$3.0 Billion+
- Transaction Volume: ~$8.1 Trillion+ in spend under management
Crises of Identity

- VMS as Catalog Procurement System?
- VMS Handling Direct Hire Transactions?
- ATS Handling Competitive Bid Contingent Requisitions?
- HRIS Handling Contingent Workers?
- VMS Handling Full Time Employees?
- RPO handling MSP Responsibilities?

(Responding to Threats From Each Other, As Well as Others)
Human Capital Management:
One Version of the Truth
Historic Visions of The Future
Workforce Evolution: The Lines Are Blurring

The Supplied Workforce Is Growing Larger and Closer To The Employed Workforce . . .

and the traditional organizational management model is evolving.
Workforce Evolution: The Lines Are Blurring

The Supplied Workforce Is Growing Larger and Closer To The Employed Workforce . . . and the traditional organizational management model is evolving.
Workforce Mix: The Glass Will Be Half Full

- 50% of the American workforce will be non-employee workers by 2020 (SIA, HCI) or even 2015 (MIT)
- Oil and Water becomes . . .
Workforce Mix: The Glass Will Be Half Full

- 50% of the American workforce will be non employee workers by 2020 (SIA, HCI) or even 2015 (MIT)
- Oil and Water becomes . . . a blended Workforce Milkshake
The Convergence of the “Two” Workforces: How Will Technology Respond?
The Broader Workforce: Seven “Future” States...

- Workforce Decision Support Functionality
- Universal Requisition Management
- Standardized On Boarding
- Integrated Talent Management Systems
- Single Source Measurement, Reporting and Analytics
- Holistic Workforce Planning
- Enhanced Workforce Management

How Will Technology Respond?
Questions for Ed...

- How did you navigate your insource vs outsource decisions for MSP services and VMS/ATS technologies?
- What is it about Qualcomm, as an organization, that makes your job easier and/or harder?
- Can you articulate the bottom line value your program brings to Qualcomm?
Enterprises Run on “Alphabet Soup”
## No Longer a “Rows and Columns” World

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Tool Convergence Must Address These and More

- Business Continuity
- Virtual Workforce
- Data Security
- Legislation
- Litigation
- Audit
- Big Data
- Cost Reductions
- Mobility
- Regional Regulations
- Data Privacy
Questions for Barry...

- What was the original impetus driving the advent of the VMS/MSP?
- Has the space evolved the way you originally forecast? What are the biggest differences?
- What do you see as the big looming threat? What potential disruptor could shatter our assumptions of where things are headed?
Thank you, now please join the conversation!

Please ask questions or contribute comments

- (please wait for microphone and remember that these sessions are being recorded)
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