

YOUR PATIENCE IS APPRECIATED...



... **LUNCH WITH HALEY** will be served shortly.



SIA EXECUTIVE FORUM RECAP

What we saw, heard and learned from this year's conference.

David Searns
Brad Smith
Susan Wurst
Ryan Maher

Today's Agenda

Keynotes | Sessions | Lessons Learned



KEYNOTES

THE NEXT GENERATION OF STAFFING

What's Changed?

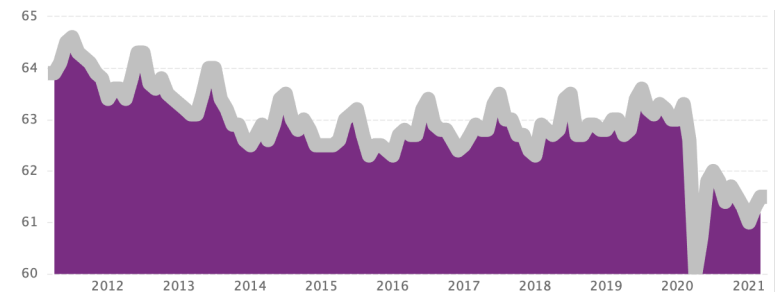
- Talent shortage to talent crisis?
- Openness to flexible work (but that appears to be declining!)
- Accelerated digital transformation
- Inflation
- New models and approaches

THE NEXT GENERATION OF STAFFING

A Talent Crisis?

- 6.3 million more jobs than workers
- The Great Retirement (labor force participation dropped for adults over 65)
- Quiet quitting (lower productivity)
- 60% more people out for illness > 1 week
- Declining immigration (down 1.8m workers)
- The U.S. workforce will slowly grow, but very slowly, over the next 25 years

People are rethinking their relationship with work!

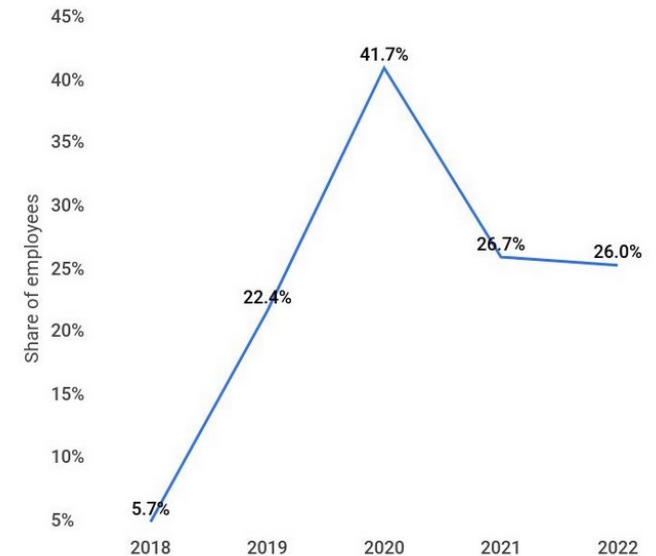


THE NEXT GENERATION OF STAFFING

Remote Work In High Demand

- 50% of job applications are for remote positions
- But only 15% of job listings are for remote jobs
- 47% of staffing industry internal staff are fully remote
- 20% of temps are working remotely... forecasted to stay at this level
- Professional contingent workers are happier, healthier, and feel more secure than traditional employees!

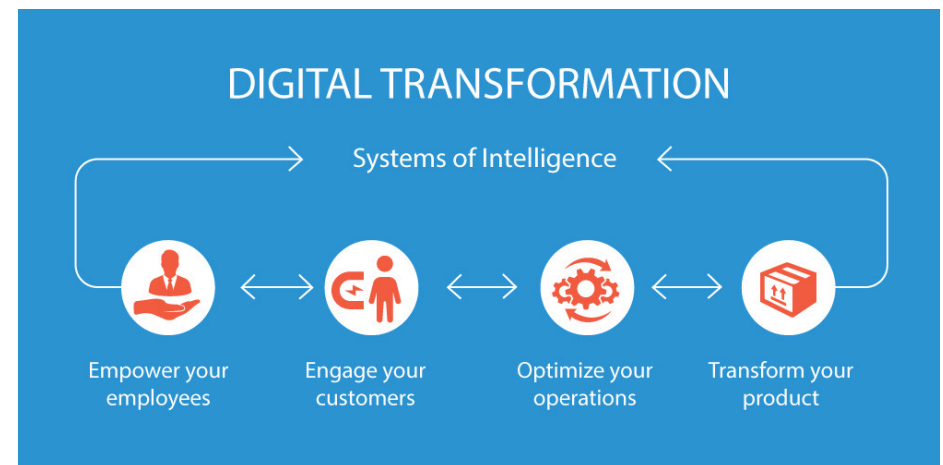
SHARE OF AMERICANS WORKING REMOTELY



THE NEXT GENERATION OF STAFFING

Digital Transformation Continues

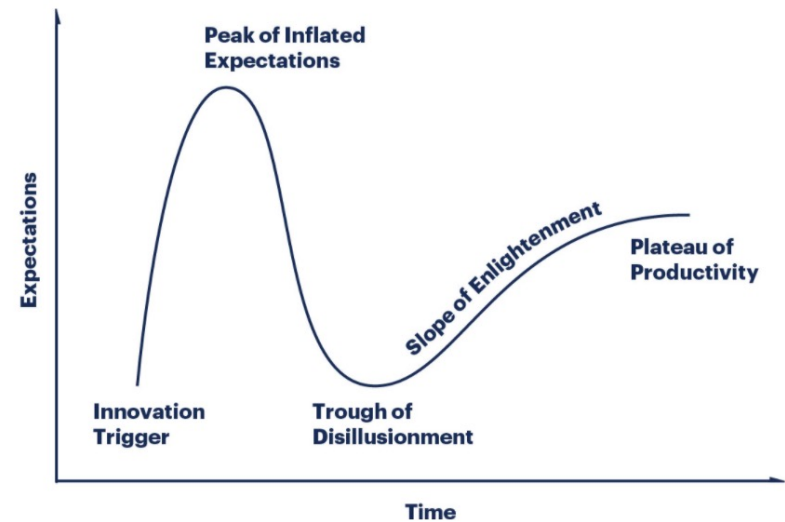
- Booming areas
 - Chatbots
 - Texting
 - Sourcing automation
 - Workforce analytics
 - Software integration



THE NEXT GENERATION OF STAFFING

Digital Transformation Continues

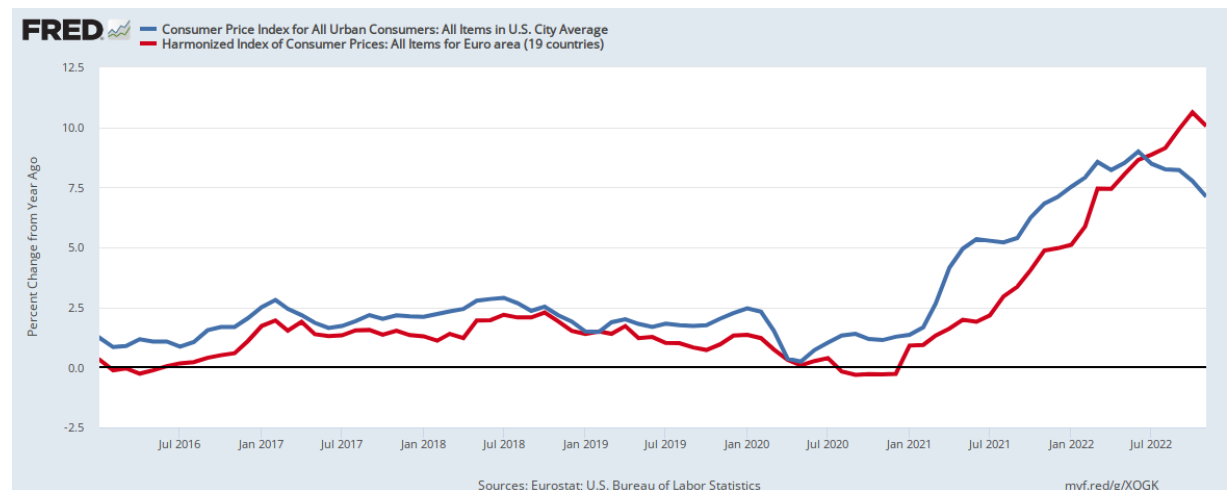
- Booming areas
 - Chatbots
 - Texting
 - Sourcing automation
 - Workforce analytics
 - Software Integration
 - Candidate automation
- Staffing platforms growing 5x faster than traditional staffing (59% versus 11%)
- AI at maximum hype (inflated expectations)



THE NEXT GENERATION OF STAFFING

Inflation

- Appears to be moderating (4.7% in Jan 2023)
- Has a positive impact on staffing revenue



THE NEXT GENERATION OF STAFFING

New Models

- Direct sourcing is expected to become 20% of staffing spend (large staffing buyers)
- Staffing firms getting more into a full range of talent solutions
 - Traditional staffing
 - Independent contractor management
 - SOW consultants / Project solutions
 - Freelancers Online workers (staffing platforms)
 - Crowdsourcing
- Staffing companies doing more beyond staffing
 - HR consulting
 - Payroll / EOR
 - Upskilling / Reskilling
 - Employee engagement and retention
 - Outsourcing
 - Online job advertising



THE NEXT GENERATION OF STAFFING

Where Are We Going?

- A recession is highly anticipated (highest probability since 1968)...
But also the lowest unemployment
- SIA / Bullhorn Staffing Indicator has done negative (Sept 22)
- SIA forecasting staffing up 2% in 2023
 - Clerical – 3%
 - LI – 5%
 - IT – 8%
 - Health Care – down 9% (now the largest segment in staffing!)
 - Accounting / Finance – 7%
 - Engineering – 5%
 - Place and Search – 5%
- Strong long-term drivers

SIA Bullhorn Staffing Indicator			
Week ending Feb. 11, 2023	Indexed value	Year over year	Week over week
US staffing	100	-11.0%	+0.3%
Commercial staffing	84	-13.0%	-0.1%
Professional staffing	140	-4.0%	+1.2%

NAVIGATING WHAT'S NEXT: INSIGHTS FOR THE FUTURE OF WORK

3 Big Questions

1. Are there any changes in our business reality that we are aware of but haven't taken ownership of?
2. What matters now?
3. What values drive engagement?

NAVIGATING WHAT'S NEXT: INSIGHTS FOR THE FUTURE OF WORK

1. Are there any changes in our business reality that we are aware of but haven't taken ownership of?

- Change starts internally
 - Emotional
 - Psychological
 - Truth
- Identity (beliefs about self and the world)
 - Power of "I Am" statements
 - Who must you be

NAVIGATING WHAT'S NEXT: INSIGHTS FOR THE FUTURE OF WORK

2. What Matters Now?

- Your values determine what you do. Covid impacted our values
- From a 30K person survey by Oracle:
 - 92% reflected on their values in the last 3 years
 - 88% had a new evaluation of what success looks like
- There are 56 core values that motivate and influence what we do
 - A nurse's top values: Community, Compassion, and Service to Others. You must communicate the WHY and the WHO to these nurses—celebrate who benefits from their service, and how! Often!

NAVIGATING WHAT'S NEXT: INSIGHTS FOR THE FUTURE OF WORK

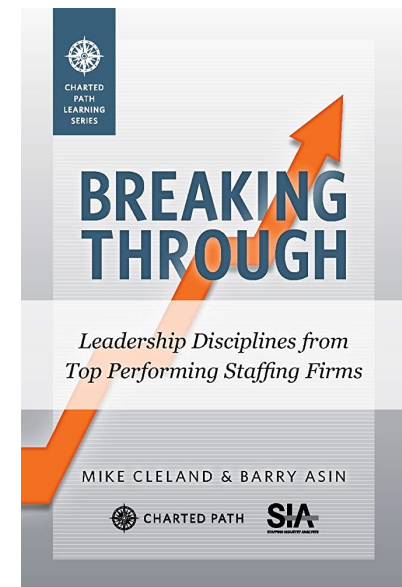
3. What Values Drive Engagement?

- 70% of people are under-engaged (down another 2% in 2022)
- 50K surveyed, ONE WORD was consistently tied to engagement & performance: LOVE
- Doing work you are good at and that you LOVE is the key
 - Look to your values
- Help your people find their love (you must help yourself first!)
 - Help them to identify the parts of their job they love.
- Love your people

BEYOND BREAKING THROUGH: BUILDING AND SUSTAINING A TOP PERFORMING STAFFING FIRM

5 Disciplines of a Top-Performing Staffing Firm

- Commitment
- Direction
- Culture
- Talent Development
- Execution



BEYOND BREAKING THROUGH: BUILDING AND SUSTAINING A TOP PERFORMING STAFFING FIRM

Keys to Growth

- Surrounding myself with successful people
- Board of advisors that pushed to get to the next level
- Hiring top people for key roles
- Accountability and having a business coach
- Scaling up methodology - get better every 90 days

BEYOND BREAKING THROUGH: BUILDING AND SUSTAINING A TOP PERFORMING STAFFING FIRM

Keys to Strategy

- Saying “no” - to things that are a distraction from the core focus
- A clear focus on what the company wants to become
 - Even to the point of closing things down to get more focused
- Don't try to serve the world - be a purpose-driven company
- Know your customer and build your business to serve your ideal customer
- Execution drives growth
- You need to be constantly out of your comfort zone

BEYOND BREAKING THROUGH: BUILDING AND SUSTAINING A TOP PERFORMING STAFFING FIRM

Creating a Winning Culture

- Hire to match the values of the owner
- Have fun
- Ensure your people know you're working side by side with them
- It's your history, your values, your stories
- Culture comes from who you hire, promote, and fire
- No service company can maintain customer loyalty without employee loyalty

BEYOND BREAKING THROUGH: BUILDING AND SUSTAINING A TOP PERFORMING STAFFING FIRM

Successful Execution

- The difference between a dream that comes true...and a hallucination is execution
- Integrate strategic management into operations using technology
 - Ensure people are accountable to the data
- Make all priorities and accountability highly visible
- Ensure everyone clearly knows their part in the big picture
- Execution gets more complicated as you add people
 - Without alignment on goals, people will not succeed
- Building line-leaders is the biggest bottleneck to growth
 - People who can grow revenue
 - People who can get new hires up to speed faster
- When you hire leaders, you need to work through them and not go around them

BEYOND BREAKING THROUGH: BUILDING AND SUSTAINING A TOP PERFORMING STAFFING FIRM

Biggest Mistakes and Lessons Learned

- Not investing in training managers soon enough
- Scaling a sales force faster than feels comfortable
- Realizing that it's not who you hire, it's who you fire
- Should have brought in an outside board / coach much earlier
- Should have enjoyed the ride earlier - I was too afraid
- More of an outward focus on client experience
- More discipline around hiring
- For key hires, get an outside group to bring in new perspectives
- Pivot from being opportunistic to being intentional

RECRUITING AND RETAINING THE NEXT GENERATION OF STAFFING TALENT

Our Relation to Work is Changing

- Baby Boomers
 - Need "off-ramping" programs that engage in the transfer of knowledge.
- Gen X
 - Fiercely independent, skeptical, appreciate honest, direct, unfiltered communication. You need to think about the questions they are going to ask!
- Millennials
 - Collaborative, risk-averse, in search of meaning. Need collaboration, assurance, yearning for more empowerment.
- Gen Z
 - ½ of this group say parents are their best friends. Need to anticipate parent input. 50% of Gen Z is white, and they want inclusion. Organizations that aren't inclusive can't compete.

RECRUITING AND RETAINING THE NEXT GENERATION OF STAFFING TALENT

Our Relation to Work is Changing

- Farm > Factory > Office > Home > ?
- Employers need to understand talent is asking:
 - "What am I willing to sacrifice for my job?"
 - "What role will I allow work to play in my life?"
- Well-being revolution
 - If you don't make time for wellness, you'll be forced to make time for illness

SESSIONS

RIDING THE ECONOMIC WAVES: WHAT I WISHED I KNEW BEFORE THE LAST RECESSION

The Unanimous Advice From The Panelists

- Internal Communication is Critical
- Invest in Technology
- Be Careful Where You Are Cutting Costs



Mahfuz Ahmed

Chief Executive Officer
DISYS



Kevin Chen

Research Analyst
Staffing Industry Analysts



Tammi Heaton

Co-CEO
PrideStaff, Inc.



Mike Kohlsdorf

President
Franciso Partners
Consulting, Board Member
Senegal Software



Kara Rogan

Chief Executive Officer
Cowork Staffing Services
LLC

THE OUTLOOK FOR THE NEXT GENERATION OF STAFFING

- No longer in a talent shortage, we are in a crisis
 - WHO reports only 13mm nurses, need 27mm
- Need to incorporate high-tech but also be high-touch
- The shift from staffing company to "talent" company
 - Workers/talent will define their own arrangement
- A shift to more consulting-based work
 - No longer just role-based
 - Looking at the entire cycle of recruitment, engagement, retention
 - Looking across the entire organization
- Need a strong understanding of core purpose, then a relentless focus on how to get internal operations to deliver
- Look for any ways to automate
 - Define your processes
 - Know your desired outcomes
 - Automate everything you can

DOUBLE JEOPARDY! THE BIG LEGAL CHALLENGE

- Long-term effects of COVID are considered a disability
- It is unlawful to state in job postings that residents in a state with pay transparency laws are not eligible for remote roles.
- AI is the next landscape for litigation



Fiona Coombe
Director, Legal & Regulatory
Research, CCWP,
Staffing Industry Analysts
(Moderator)



Lisa Ann Cooney
Chief Legal Officer,
Day & Zimmermann



Jason B. Klimpl, Esq.
Partner,
Tannenbaum Helpert



Joanna Monroe
Co-Managing Partner,
Staffing GC

KEY TRENDS AND OUTLOOK FOR PROFESSIONAL STAFFING

“What Was David Doing on This Panel?”

- Remote work trends and challenges
 - Candidates overwhelmingly want it
 - Clients are decreasingly accepting
 - Creating a mismatch in the market – need to work with both sides
- DEI programs
- The big companies are very intentional
 - As a marketer, the key is to enable people to see themselves in the roles you fill
- Market trends
 - Still a candidate’s market
 - Selling is harder (buyers harder to reach, buying process more complex)
 - More need to prove ROI
- Advice to professional staffing firms
 - Get closer to clients (understand your value, address recruiting challenges)
 - Look for ways to move up the value chain (SOW, upskilling)
 - Help clients play a global game – right talent, right skills, right place, right cost

WHAT TO AUTOMATE AND WHEN

Determine Your Digitization Options for Your Business

- Transform your business to a completely new business model.
 - VMS
 - Platform-based
- Digitize/automate core business processes to support the current model.
- Do nothing (hint, not the best option).

Determine Your Digitization Options for Key Areas

- Marketing Tech
- Recruiting Tech
- Training and Rollout
 - Shift and upskill current staff
 - Technology doesn't usually fail; rollout does

WHAT TO AUTOMATE AND WHEN

How to Select the Right Automation Vendors/Tech

- Understand who you are and where you're going.
- Look closely at the vendors themselves and their support structure.
- Can you influence the roadmap?
- Does the roadmap align with your roadmap?
- Evaluate the systems that integrate with your ATS already.

Companies that invest more in technology and training and less in headcount will come out on top!

LESSONS LEARNED

DAVID

AI Everywhere

- AI is rapidly being integrated into staffing technology, but it can and should also be integrated into sales and recruiting.
- Big staffing companies think differently.
You can't outspend them on technology or training.
You can win the local battles and play where they can't or don't want to play.
- Technology, platforms, and a changing economy mean that staffing companies need to rethink their value proposition. For 10+ years, it's been about finding people. Now it's about new ways to deliver the outcomes your clients want.

BRAD

High-Tech Meets High-Touch

- AI and Tech SUPPORTS Personal Relationships
 - They aren't competing! We need to embrace the fact that we are a people business, and automation and tech give us MORE time to strengthen relationships.
- Talent Shortage is Now a Talent Crisis
 - Companies may need to hoard talent.
 - You will need to leverage AI/Automation to get more done in the absence of available talent.
- Adapt to Generational Work Style Differences: Understand the Unique Needs of Each Generation.
 - Facilitate knowledge transfer
 - Foster collaboration and empowerment
 - Prioritize inclusion, anticipate parental input
 - Embrace the well-being revolution

SUSAN

The Industry is on the Cusp of Major Change

- AI is the next industry disrupter, and staffing companies that don't embrace it won't be able to compete.
- There is a large opportunity for staffing companies to increase the services they can provide their clients.
- Gen Z relates well to their Gen X parents. This is a leadership opportunity that can be taken advantage of.

RYAN

Embrace Change!

- Take ownership of changes in technology, management, and staffing:
Start with the personal (emotional) before strategic shifts.
- Reevaluate priorities and values:
To keep your teams motivated and engaged in an evolving work environment, make sure individual core values align with the work done.
- For AI, it may be more helpful to think “Automated Information” as opposed to “Artificial Intelligence” when considering how this revolutionary technology can impact your business.



Questions?

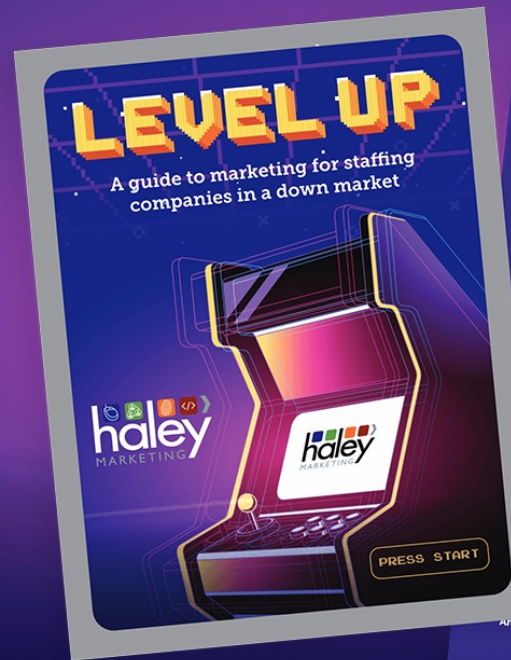
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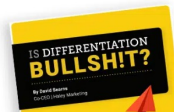
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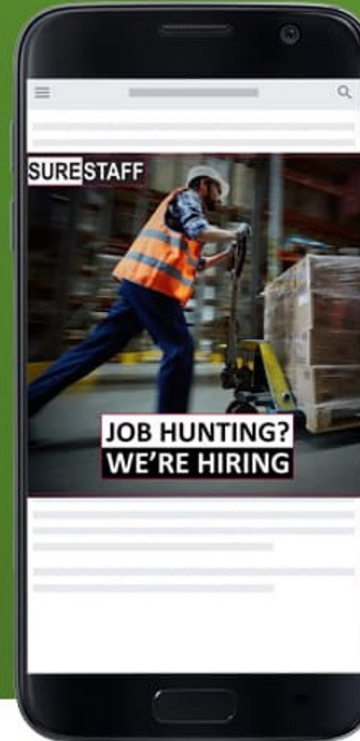
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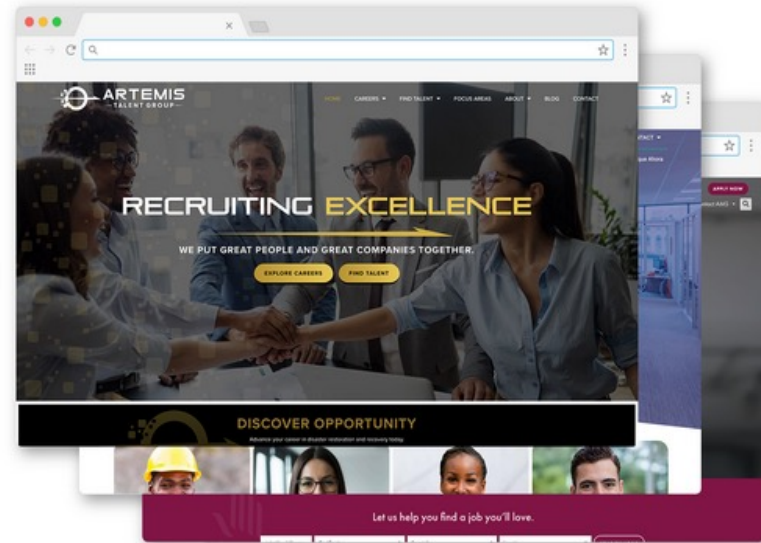
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3 Ways to Make Your Sales Prospecting Efforts Easier and More Effective

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Thursday, April 13 at 2:00 PM ET

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