

GLOBAL STAFFING INDUSTRY OUTLOOK [2019-2023]

Views and insights from the industry
thought leaders



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PREFACE



AMIT SOMAIYA
CEO | IMS People

To all the colleagues in the staffing sector,

Times are changing, business models within our sector are fast transforming. At times, we are left thinking about our future and what lies in store for our businesses.

Much is being said and written about this across various publications and social media. Here is an attempt, to bring to you a cross section view from some experts within our industry and what they believe are crucial elements to make staffing business successful in the new age. We have brought together their views through this Ebook and invite you to **contribute** your thoughts on this.

Happy Reading, Happy Sharing, Happy Transformation!

**EXPERTS
SPEAK**



YOUR VIEW OF THE GLOBAL RECRUITMENT INDUSTRY

10 years ago at a big recruiting conference I contended that nothing would be different despite all of the new technologies becoming available. Everybody would still be chasing the silver bullet, looking for great candidates in unknown places. LinkedIn was a game-changer until everyone had it. The same will be true for AI. The problem, you can't use a surplus of talent model weeding out the weak, when there isn't a surplus of talent.

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

Nothing will change in the next 10 years, either, without a change in strategy. In a talent scarcity situation, you need to attract people in with better career opportunities, not weed them out using a laundry list of skills and experiences that are nothing more than ill-defined lateral transfers. A "high tech, high touch" approach could represent the future, but this requires fully-engaged hiring managers working in partnership with skilled recruiters who can find and compete for the best talent.

LOU ADLER

CEO | Performance-Based Hiring Learning Systems

Lou Adler is the CEO and founder of **Performance-based Hiring Learning Systems**-a consulting and training firm helping recruiters and hiring managers around the world source, interview and hire the strongest and most diverse talent. Lou is the author of the Amazon top-10 best-seller, *Hire With Your Head* (John Wiley & Sons, 3rd Edition, 2007), *The Essential Guide for Hiring & Getting Hired* (Workbench Media, 2013) and the Lynda.com Performance-based Hiring video training program (2016).

ADVICE FOR RECRUITMENT AGENCY OWNERS

To stay relevant, recruiting agencies need to differentiate themselves by leading type of disruptive change. This needs to start with a thorough knowledge of the job, the hiring manager, the company and the industry. That is what's missing today and how recruiters can provide an indispensable value-added service to their clients and candidates alike.



JACK UNROE

Board of Directors | Nelson Family of Companies
Business Advisor | Empresaria Group, PLC
Onshore Advisor | IMS People

YOUR VIEW OF THE USA RECRUITMENT INDUSTRY

Our industry is exciting, fast paced, extremely competitive, and technology-driven. The vibrant economy and accompanying pressure to find workers produces a need for a comprehensive plan for talent management. Worker demand exceeds supply, creating a favorable environment for workers: where and how much they work, their compensation and employment status. This high level of demand is a double-edged sword. Staffing companies can excel by finding qualified, interested and available candidates quickly. However, there can be a false sense of achievement, masking inadequate or ineffective processes, which will surface with an economic slowdown. Developing and implementing processes establishing solid candidate / client relationships is more important than ever.

Jack Unroe oversees IMS People client relationships in the United States. Located in Northern California, Jack utilizes over 20 years of staffing and recruitment expertise to help USA-based companies define and implement a successful offshore recruitment strategy. Jack has served as CEO for four different recruitment firms-JAMS, Accountants International, Human Resources International and Nelson Staffing. Jack's substantial credentials include managing operations generating nearly \$260 million in revenue. He has also held multiple board memberships, including a public company and has successfully completed numerous mergers and acquisitions in Latin America and the USA. His deep knowledge of the competitive USA staffing market is enhanced by his hands-on experience developing and benefiting from offshore recruitment partnerships, a strategy he maximized as CEO of Randstad Finance and Accounting (formerly Accountants International).

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

The big question is "How will the industry react to an economic slowdown / recession"? Many current leaders have never experienced the significant drop in demand and its impact. With a slowdown, the current lack of qualified candidates will become an insufficient number of orders. Successful companies will have invested in people, processes and client relationships during the "good times." Likely, a slowdown won't last five years, but it will last long enough to put pressure on organizations that have failed to establish a strong foundation. While innovation continues to create new ways to identify and service clients, staffing companies cannot lose sight of the fundamental service: Labor on Demand.

ADVICE FOR RECRUITMENT AGENCY OWNERS

Evaluate your talent management plan now, when times are good, by identifying what you currently provide: tools, processes, strategies, technology, training, marketing, and social networking. Categorize each into one of the three "buckets":

1. Need To Participate-Do we have all of the absolute requirements in place to participate in the market?
2. Need To Compete-Are all of our investments, at a level that we are a formidable competitor in the sectors, in which we participate?
3. Need To Win-What investments would give us an opportunity to excel, win, and set us apart? Invest in NTP and NTC before you take on NTW.



CHARLES CAMERON

Chief Executive | RCSA Australia and New Zealand

Charles Cameron is the Chief Executive of RCSA Australia and New Zealand. Charles is a Board Member of the World Employment Confederation and, prior to his appointment as CEO for RCSA, Charles was a workforce management consultant with expertise in non-traditional working arrangements. Charles lives in Melbourne, Australia.

YOUR VIEW OF THE AUSTRALIA AND NEW ZEALAND RECRUITMENT INDUSTRY

When you're riding the perfect wave, do you really care about the next ride? Whilst I'm always delighted to see our recruitment industry thrive in a buoyant market, I am concerned that firms may be distracted from investing more in business transition. Business is changing at pace and we must invest in future fit recruitment solutions whilst we have the capital to do so, even if it is at the expense of short-term profit.

ADVICE FOR RECRUITMENT AGENCY OWNERS

Invest in transition. Don't wait until a dip in the market. Push your firm to become a truly multi-disciplinary workforce management consultancy. Embed a different style of consultant amongst your traditional consultants. Workforce planners, business analysts and change management professionals. Push now to lead later.

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

Progressive Australian and NZ recruitment and staffing firms will further appreciate the need to blend talent acquisition with workforce management to ensure a more holistic service offering. Clients will need more convincing around their recruitment expenditure as we see markets soften and recruitment firms will understand that they must embed their traditional solutions within management consulting. Workforce planning and consulting will see a different type of consultant hired.



JULIEANN FOUAD

Onshore advisor | IMS people

Julie has worked within the recruitment industry for over 30 years. Starting out as a recruitment consultant and working her way up to the boardroom, Julie's in depth understanding of the recruitment role and collaborative and progressive approach to business and team development has resulted in a track record of consistent achievement throughout her career to date.

Julie has worked with and within Top 5 Blue Chip multi-site Global/Nationals, Government, and single site SME, delivering outcomes at the front line of an organization, producing and driving strategic business plans and change programs across multiple sites, teams, and operations.

ADVICE FOR RECRUITMENT AGENCY OWNERS

It is vital to act as soon as possible to changes in the recruitment arena, waiting for total clarity when changes happen can often lead to you losing the advantage. Constantly review your business model to ensure it remains fit for purpose.

YOUR VIEW OF THE UK RECRUITMENT INDUSTRY

Presently, there are over 40,000 recruitment businesses in the UK. It is an unquestionably dynamic growing industry with the low barrier to entry enabling over 8500 new recruitment businesses to start up over the last year. So, it's fair to say the recruitment industry continues to thrive despite the challenges it has faced, is facing, and undoubtedly, will continue to face in the coming years, many of which have been predicted to seal its fate!

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

There are clearly sectors and roles that are predicted to be heavily impacted by tech advances. However, alongside this skills, labour and talent shortages together with the need to fill newly created roles as a result of the change in the workforce dynamic will provide significant opportunities for recruitment businesses.

DAVID HEAD

CEO | Recruitment International

David Head has been associated with the recruitment industry for more than 31 years. In his role, David has built up a unique insight and network into the world of recruitment, especially the companies and individuals who operate in it. Through his involvement with RI, David is recognised throughout the world of recruitment and is the proud recipient of the REC's Lifetime Achievement Award, he remains passionate about the recruitment industry.



YOUR VIEW OF THE UK RECRUITMENT INDUSTRY

The UK recruitment industry is both extremely entrepreneurial and very versatile, which has enabled it to stay ahead of other sectors despite disruptions such as BREXIT and uncertain business confidence. This flexibility and attitude has seen the sector continue to flourish and growth is very much in the majority. Skills and talent shortages have also been an issue, however, with over 8500 new recruitment companies having set up in the year this has not dampened the sector.

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

The industry faces a number of challenges not least in terms of technology and disruption, as everyday there appears to be a new entrant created to erode traditional market share. Once again, a number of these initiatives have been created by the traditional recruitment companies themselves and it will be the harnessing of the new technology which will help to drive the winners. Recruitment is evolving into the much wider delivery of talent and this means more opportunities for all those who are willing to adapt.

ADVICE FOR RECRUITMENT AGENCY OWNERS

Embrace the new technology, however, do not lose sight of the human part of the recruitment equation. Keep away from easy to replace transactional activities and move more into the consultancy areas where human intervention is key. Don't allow your business to become commoditised or simply a 'me too' company.



YOUR VIEW OF THE AUSTRALIA AND NEW ZEALAND RECRUITMENT INDUSTRY

The industry in Australia and NZ is as strong now as it has been for ten years. Despite shambolic government in Australia and a change of government in NZ, hiring is strong, and many recruitment companies are reporting record profits. Candidate shortages and lack of skilled recruiters are the two things holding recruitment back, both agency and in-house. Smart operators are devising ways to meet these challenges and those doing it best are coming out on top.

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

Technology will automate the transactional side of recruitment, including digital sourcing, screening, matching, and logistics. The recruiter will increase in importance as clients will need informed advice, and the best candidates will want an agent to represent them. Assuming no recession, I predict the staffing market in ANZ to grow significantly, particularly temp/contract. However, not everyone will rise on the tide. The innovative and adaptive will thrive while many others will suffer and even exit.

GREG SAVAGE

Principal | Greg Savage-The Savage Truth
Founder | Firebrand Talent Search
International CEO | Aquent

Greg is an expert in the international recruitment and consulting sector and has nearly 40 years of executive global experience of the highest level. He started his career in Australia and New Zealand before taking up a wider multi-regional role which saw him become International CEO of Aquent, a position that saw him overseeing over 25 offices in 17 countries across Europe, Asia and ANZ.

Greg has been a recruitment industry pioneer and in recognition of such he has received many accolades over the years including the most influential Australian business person on Twitter in 2016, the most influential recruiter in Australia in the past 60 years in 2015 and in November 2018 he was named one of LinkedIn's 'Top Voices'. An early adopter of social media for recruiting, Greg's industry blog - **The Savage Truth**-is a must-read for the recruitment industry.

ADVICE FOR RECRUITMENT AGENCY OWNERS

You need to think strategically. Don't be lulled into a sense of false security because of recent success. Do not be seduced by short-term profits. Build a business that is going to thrive in the environment to come. Disrupt your business now, before someone else does it for you! Engineer micro internal change based on a plan for the future. Innovation can be incremental.

ROD HORE

Director | HHMC Global
Onshore Advisor | IMS People

Rod Hore is a 30-year veteran of Australian and international IT and corporate advisory organizations. His executive-level credentials traverse many segments of the staffing and recruitment industry and include corporate advisory assignments, mergers and acquisitions mandates, and C-level advisement to multinational and other public and private organizations. Located in Perth, Rod provides local industry acumen and offshore expertise to Australian and New Zealand-based companies.



YOUR VIEW OF THE AUSTRALIA AND NEW ZEALAND RECRUITMENT INDUSTRY

The ANZ recruitment industry is strong with most companies enjoying growth and profitability on the back of continued local and global positive economic conditions. Agencies are resilient and adjusting to changes in business requirements and regulation, but many business owners have struggled to manage and implement the growth opportunities that have been presented. Leadership, staff attraction and retention, staff costs and productivity, and technology choice and implementation are all issues we see regularly.

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

The ANZ market is fortunate to be able to see most global trends before they have a major impact locally, so the continued growth of client-led models such as RPO, MSP and SOW should be no surprise. We see the opportunity for single-job-order business reducing as managed services, technology innovations and a focus on talent management grow in importance. The successful business model used previously will not be appropriate in the future.

ADVICE FOR RECRUITMENT AGENCY OWNERS

Recruitment agency owners that grow beyond 20 staff need to put as much focus on running a business in the future as they have becoming recruitment professionals in the past. Most business owners are novices at running a business and wealth creation will be for those that transform.



SUHAIL MIRZA

Chairman | H1 Healthcare

Non-Executive Director | Camino Partners Ltd.

Author | Meet the CEO

Onshore Advisor | IMS People

With over 2 decades of experience, Suhail is a well-known figure in the UK recruitment and support services sector within which he is the Chairman of three companies. Through his significant business skills, he formerly co-owned a family healthcare business employing 250 people. He is also the author of the widely acclaimed book "Meet the CEO" which charts the meritocracy within the staffing sector. Being a staffing expert who always seeks opportunities to share his knowledge, Suhail remains a regular contributor at Recruitment International.

ADVICE FOR RECRUITMENT AGENCY OWNERS

Be proud of the sector. Be uncompromising in your adherence to your vision and mission and equally importantly to your values. Ensure the candidate, client and consultant journey with your business remains a mutually enriching and empowering one. Be bold and think long term in your investment in people and processes. Never has authenticity been more of a differentiator in business and within the sector.

YOUR VIEW OF THE UK RECRUITMENT INDUSTRY

The UK recruitment industry continues its expansion and growth. It also continues to professionalize internally in terms of business models and infrastructure and also externally in the creativity of offerings to its clients across both the private and public sectors. It does retain its essential entrepreneurialism, and this is to be celebrated. Notwithstanding the profound challenges that Brexit is bringing, the industry continues to innovate and its misunderstanding and under appreciation amongst policymakers and purchasers of its services will not prevent its continued pivotal role in the provision of talent in a highly competitive landscape.

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

The industry may be in the midst of a true "inflection point" with the forces of ever more demanding clients, the intensification of the battle for scarce global talent and the ubiquitous nature of disruptive technology impacting the industry ever more deeply. Such change necessitates new models of service delivery. This will range from broader adoption of technology platforms that perform the logarithmic tasks of the recruitment professional across many verticals; far from being a threat this can be the harbinger of staffing businesses being able to focus resources on the true value add they bring to the labour markets; deep knowledge of and relationships with crucial stakeholders in any business supply chain. Technological innovation will bring new roles to be filled and creative staffing businesses will expand their models to offer efficiency and effectiveness in the management of workforce talent to their commercial and governmental partners across the globe.



MARY KRISTYNIK 
Onshore Advisor | IMS People

Mary Kristynik is an accomplished leader with nearly 20 years' experience of contingent workforce experience. Mary possesses extensive history of innovation and enhancement that elevates operational effectiveness, supplier engagement and client satisfaction. An enthusiastic mentor and motivator who inspires peak performance and accountability. Expert in building collaborative relationships gaining buy-in and driving strategic initiatives forward through complex and multi-tiered organizations. Known for tenacity and focus on results; applies robust analytical and problem-solving acumen based on intense motivation to succeed.

ADVICE FOR RECRUITMENT AGENCY OWNERS

Stay focused on your niche and be creative with how you attract talent. While important to attract candidates, the marker of a great recruitment agency is how to keep them engaged for the long-term. Having a strong redeployment strategy is critical to ensuring top talent sticks within your client base.

YOUR VIEW OF THE USA RECRUITMENT INDUSTRY

Today's USA workforce is driven by candidates. Talented employees expect more from their employers, requiring organizations to keep up with the latest trends and technology. Crowd sourcing models are on the rise, giving candidates ability to work on their own terms. AI is enhancing the way companies make meaningful and engaging connections, in a quick and efficient manner. Technology is the driving force of the industry and will continue to make a big impact.

FORECAST ON HOW THE INDUSTRY WILL CHANGE/GROW IN THE NEXT FIVE YEARS

Digital platforms and AI will continue to lead the way in industry innovation. In addition, the dynamics and wants of our candidate pool have changed, as millennials already make up majority of the USA workforce. Companies will invest in mobile communication methods to reach their audience with their preferred method of texting. To reach the widest net of candidates, any company will need to invest in an automated, recurring communication tool.

TAKEAWAYS

Don't wait for the future to act. Take a disruptive review of your business model and ensure that it is fit for the purpose and changes in the years to come.

Technology will automate the transactional side of recruitment, making the role of the recruiter shift from being process oriented to consultative.

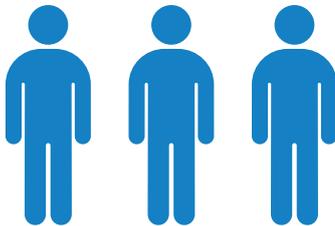
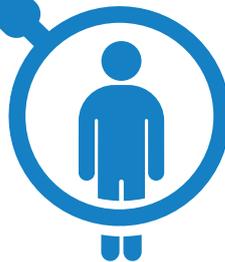
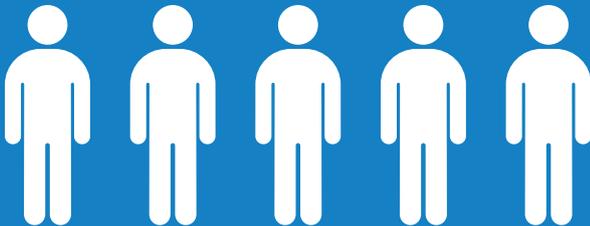
Developing and implementing processes establishing solid candidate / client relationships is more important than ever.

Recruiting agencies will need to stay relevant by leading disruptive change right from having a thorough knowledge of the job, the hiring manager, company, and industry.

ABOUT IMS PEOPLE

IMS People is an Offshore Recruitment Services company. We help staffing firms across USA, UK, ANZ, MEA and SEA with our extensive range of tailored services. From recruitment & administrative services to accounting support and bespoke one-off creative solutions we empower our clients to lower their cost of recruitment, increase margins and enhance profitability through innovative cost-effective expertise.

Our dedication to excellence is shared by our team of over 950 employees who operate 24/7 to deliver an exceptional service for your business. We are committed to exploring new ideas and generating long-term solutions of the highest quality. IMS People is fully **GDPR compliant** and Cyber Essentials certified. Our international experience and staffing industry expertise are backed by our **ISO 9001:2015** and **ISMS ISO/IEC 27001:2013** certifications and affiliation with the global staffing leader **Empresaria Group plc**.



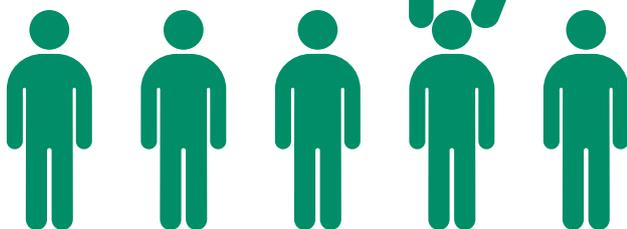
OUR SERVICES

OFFSHORE RECRUITMENT SUPPORT

We offer a comprehensive range of services including full cycle recruitment, head hunting, passive search, CV sourcing and vendor management services (VMS).

OFFSHORE ACCOUNTING SUPPORT

Our offshore accounting services like Management Reporting, Payroll Processing, Bookkeeping, Taxation, Credit Control and Accounting Administrative Services help accountants in providing a competitive advantage.





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