

IQNsiders ²⁰¹⁴
Innovate. Elevate. Transform.

JOE JULIANO
PRESIDENT AND CEO

IQNavigator

Innovate.

Elevate.

Transform.



Advanced economies are challenged

16 -18 million college-educated worker shortage by 2020

13% increase in college-educated worker demand

Add in Developing economies like China & India

College educated shortage increase to 38-40 million by 2020

Potential global shortage of 45 million medium-skilled workers

Surplus of almost 95 million low-skill workers in 2020





AGING WORKFORCE



67% OF COMPANIES USE A MIX OF FULL-TIME AND NON-EMPLOYEES



NON-EMPLOYEE WORKFORCE

MORE THAN \$2 TRILLION IN SPEND AND GROWING AT A RATE OF 11%

“Simply put, organizations lack the tools with which to surgically manage, tune, or optimize their workforce.”



The logo for IQNsiders 2014. The word "IQNsiders" is in a bold, sans-serif font, with "IQ" in orange and "Nsiders" in dark grey. The year "2014" is in a smaller orange font above the "siders".

IQNsiders²⁰¹⁴

The word "Innovate" is written in a white, sans-serif font on a blue background. The blue background is a diagonal band that runs from the top-left towards the bottom-right.

Innovate

- » **Financial customer using 4 different MSP's**
- » **Energy customer using an MSP for some spend and wants to expand**
- » **Petrochemical customer managing all non-employee labor and SOW spend in 30 countries**

VMS is now the only constant

A solution to connect the global workforce of full-time and non-employee labor

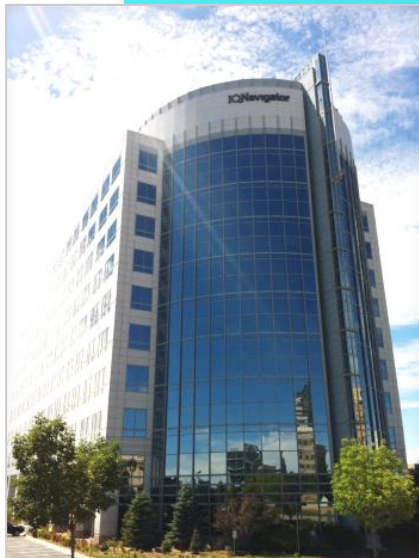
IQNavigator

The only independent VMS technology provider

Based in Denver with 450 colleagues

A trusted partner with MSP's and technology firms

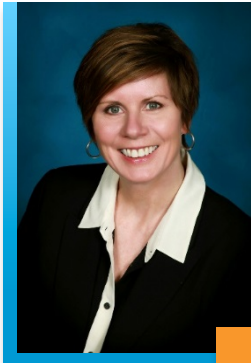
Owned by GTCR



- » **We have a great investor and a great board**
- » **We have amazing customers**
- » **We partner with the top staffing and MSP companies in the world**
- » **Our market dynamics have just improved**
- » **We have a solution that delivers real value**
- » **We are winning and growing**

LEADERSHIP CHANGES





Sherri Hammons
Chief Technology Officer



Jagan Reddy
EVP, Customer Success



Simon Fahie
Managing Director, EMEA



Eric Riddle
EVP, Sales & Marketing



Jeffrey Varon
EVP, Corporate Development

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IQNsiders²⁰¹⁴

The word "Transform" is written in a white, rounded, sans-serif font on a green background. The background is a solid green rectangle that is part of a larger green area in the top-left corner of the slide.

Transform



COMPETITORS

- » **Industrial Labor**
- » **Total Workforce Management**
- » **On Line Staffing**
- » **MSP And IQNavigator's MSP**