

THE EMERGENCE OF ONLINE MARKETPLACES

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AGENDA OVERVIEW

- » **Online Marketplace Definition**
- » **Online Marketplace Fast Facts**
- » **Marketplace Sizing**
- » **Vendor Landscape**
- » **Enterprise Readiness & Benefits**
- » **Maturity Model**
- » **Talent Pool Creation**
- » **Supply Chain Models**

ONLINE MARKETPLACE TERMINOLOGY

» Online Marketplace

- *Online platform that enables specific hires and specific workers (freelancers) to enter into, complete, and transact work arrangements. The platform enables a direct working relationship between the hirer and the worker.*

» Freelancer

- *Independent worker assigned to complete a certain task or project (work arrangement) without a staffing supplier intermediary.*
 - › Remote / Virtual Work
 - › Onsite / Local Work

ONLINE MARKETPLACE FAST FACTS

» At a Glance:

\$2B

OLM Billings in
2013

70+

Number of OLM
Providers

60%

Forecasted YOY
Growth

\$40B+

OLM Billings
in 2020
(est. potential)

500

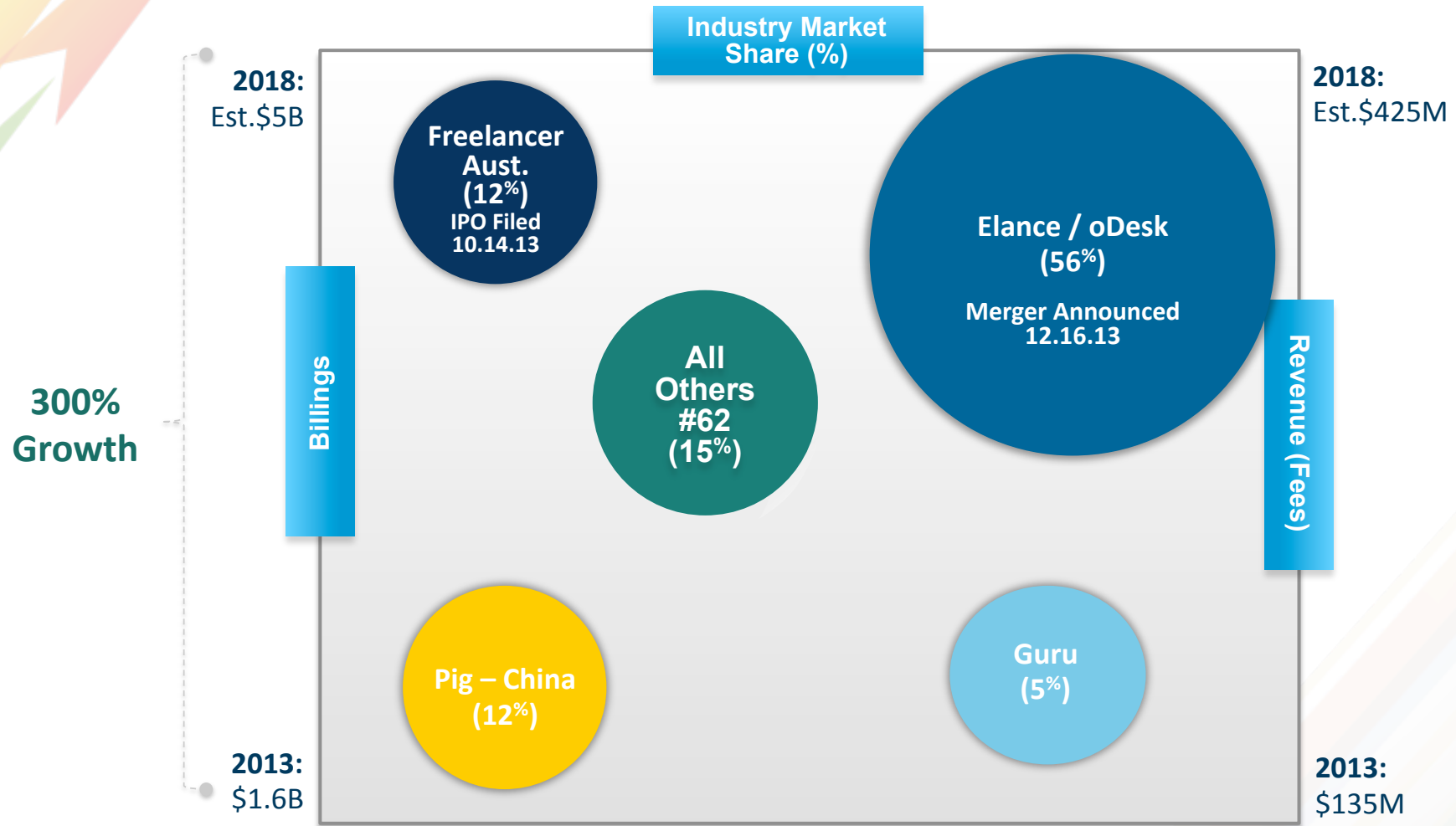
Fortune 500
Industry Vertical
Leaders Adopting

» Directional Guidance:

- Staffing companies addressing online marketplace aggressive growth
 - › Evidence of staffing company investments (e.g. Randstad investment in Gigwalk)
 - › Evidence of staffing company partnerships (e.g. Kelly – oDesk)
- OLM Marketplace consolidation on-going
 - › Elance – oDesk merger
 - › Freelancer.com continued acquisitions
- VMS functionality entering talent pool realm
 - › Migration from “public” marketplaces to “private” talent pools

MARKETPLACE SIZING

Industry Representation



VENDOR LANDSCAPE

50, 55, 60.....67+ OLM Providers and counting!

Prototypical Freelance North America

Prototypical Freelance EMEA

Prototypical Freelance APAC

Prototypical Freelance LATAM

Micro-Task

Offshore / Virtual Assistance

Source: OLM Provider Web Sites

Enterprise OLS Customers

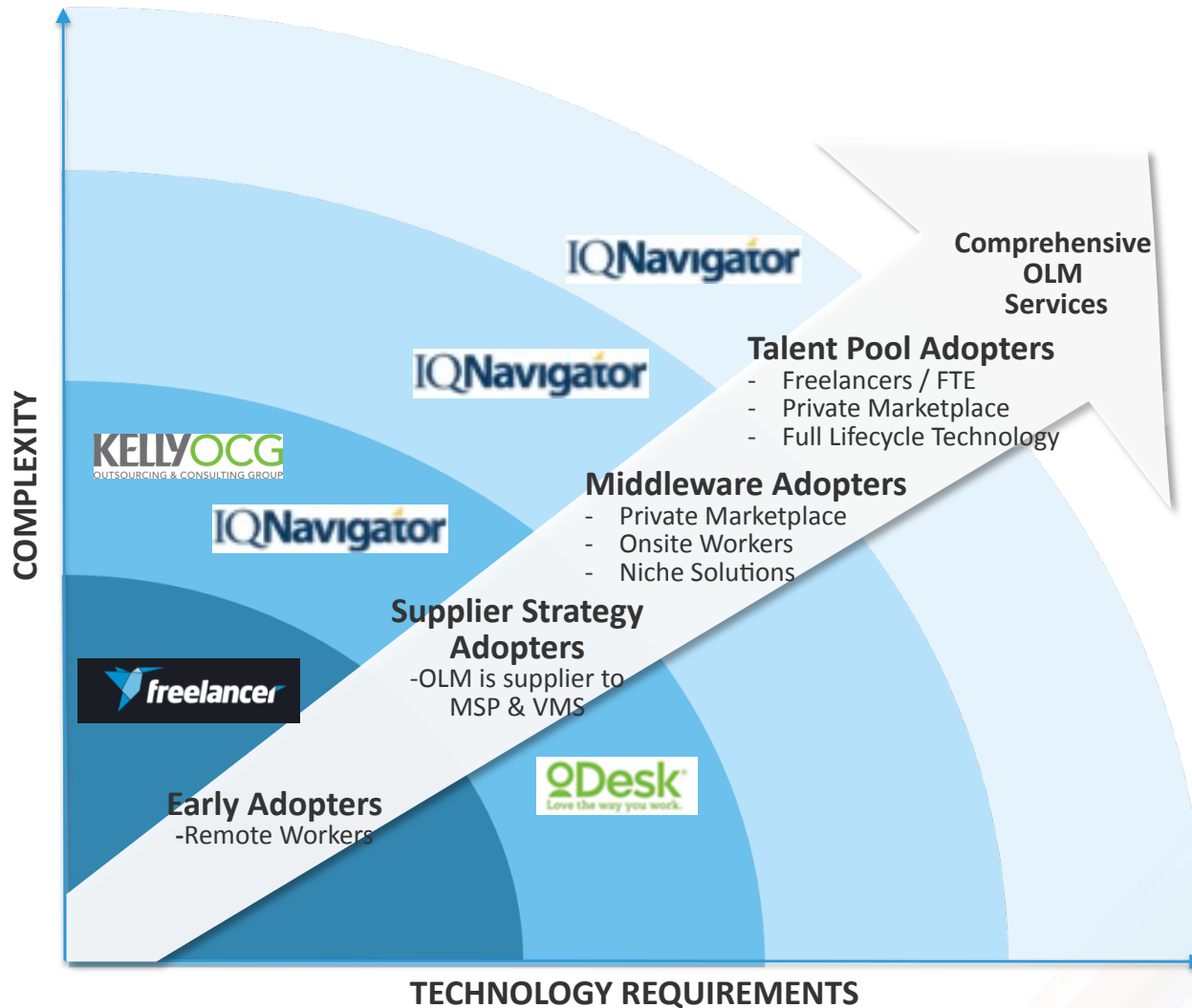


Drivers for Engaging Online Marketplace

- » Access to broader, quality talent
- » Generational workers seeking OLM model
- » Cost effective labor solutions
- » Client niche / remote needs not provided by staffing companies

OLM SERVICES MODELS MATURING

Transition from Remote Workers to Onsite Workers



ON-DEMAND TALENT POOLS

Private talent pools are proactively filled for a specific client's recruitment needs.

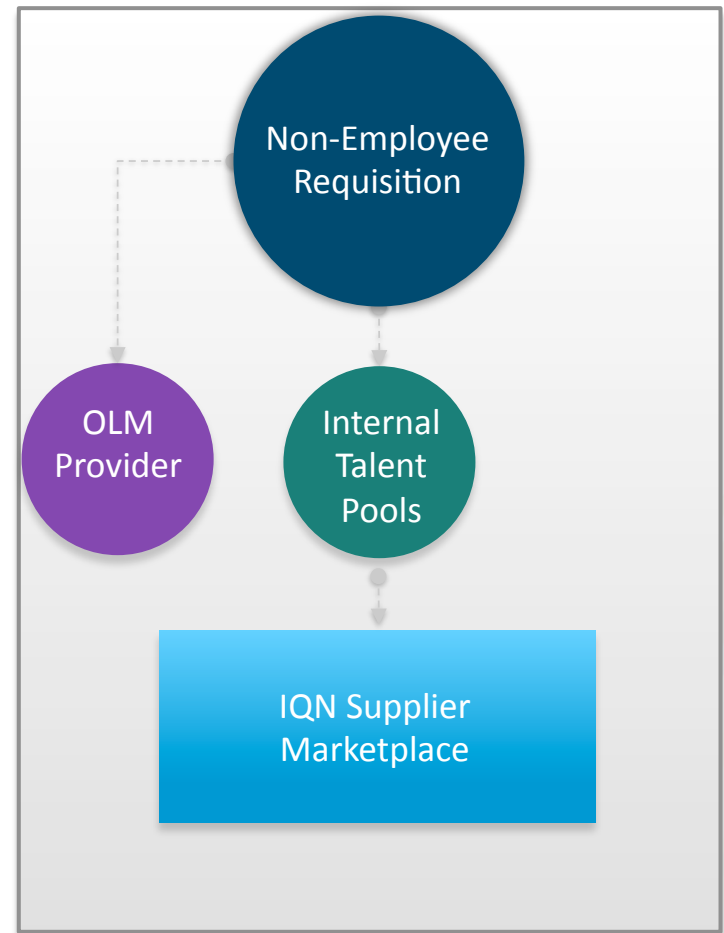


Quicker Access to Talent
On-Demand Talent Inventory
Talent Cost Savings

Today's Supply Chain



Tomorrow's Supply Chain



Directional Value

» Innovate

- Enable talent pool creation
- Public & private talent pool services
- Empower faster, “just-in-time” hiring capabilities
- Align with worker generation preferences

» Elevate

- Create new sourcing workflow strategies
- Broaden candidate pools beyond network of suppliers
- Integration with social media
- Ensure “right-resource, right job”

» Transform

- Shift from reactive recruitment to proactive candidate inventory
- Big data aggregation of worker information
 - › Algorithm scoring beyond skills measurement
- RateIQ for Talent Pools
 - › Rate, skills, experience aggregation across talent pools

WRAP UP

What should you be thinking about???

- » **Does your company have unmanaged talent pool workers today?**
 - Pre-identified workers
 - Returning workers
 - Referrals / Brand loyalty etc.

- » **Would aggregating these talent pools drive value to your company?**
 - Quicker hires
 - Better quality candidates
 - Cost savings
 - Business Intelligence

- » **Can some of your work arrangements be outsourced to a remote workforce?**
 - Remote / Virtual Work

The logo for IQNsiders 2014, featuring the word "IQNsiders" in a bold, sans-serif font with "2014" in a smaller font above the "siders" part. The background of the slide is a blue diagonal band on the left and a multi-colored striped pattern on the right, with colorful arrow graphics in the corners.

IQNsiders²⁰¹⁴

Innovate

Q&A