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# Becoming a Talent Solutions Provider: From Staffing to Consulting Solutions

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**Mike Small**

President Akkodis North America, and  
US Country President, The Adecco Group

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THE ADECCO GROUP

Adecco AKKODIS LHH

**AKKODIS**

## The Adecco Group



**100,000+**  
Clients Globally

**>60**

Countries and Territories



**2 million+**  
Associates on assignment every day



**5,000 +**  
offices



**180,000+**  
Permanent placements



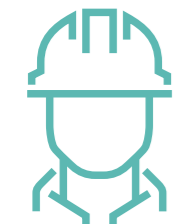
**39,000+**  
Employees Globally



**850,000+**  
Trained and coached



**30,000+**  
Tech Experts



**500,000+**  
People successfully transitioned every year



**Revenues 2022**  
\$24.8 billion

## Talent & Tech Solutions Delivery by our marker-leading businesses

**Adecco**

Adecco is a global leader in workforce solutions, offering flexible placement, permanent placement, outsourcing and managed services across all sectors.

**AKKODIS**

Akkodis powers the Smart Industry transformation globally with digital and engineering services across Consulting, Solutions, Talent and Academy.

**LHH**

LHH unlocks the full potential of professional talent via a comprehensive portfolio of services across talent identification and sourcing, talent development and retention, talent mobility, and talent outplacement.

# Comprehensive Portfolio of Solutions in Talent & Technology

1

## Define Workforce Strategy

Workforce Planning	Workforce Analytics
Regulatory Expertise	Process Optimization
MSP	Supplier Optimization
Talent Market Watch	Salary Benchmark
Future of Work Trends	Advisory

2

## Attract, Hire, Deploy

Executive Search	Employer Branding
RPO / RXO	Hire, Train, deploy
Flexible Jobs	Permanent Hire
Outsourcing	Apprenticeship
Diversity, Inclusion & Social Impact (DEI)	

3

## Skill, develop, transition

Workforce Transformation	Assessments
Re/Upskilling	Academies
Leadership development	Soft Skills
Coaching	Career Transition
Career Mobility	Inclusion Path (DEI)

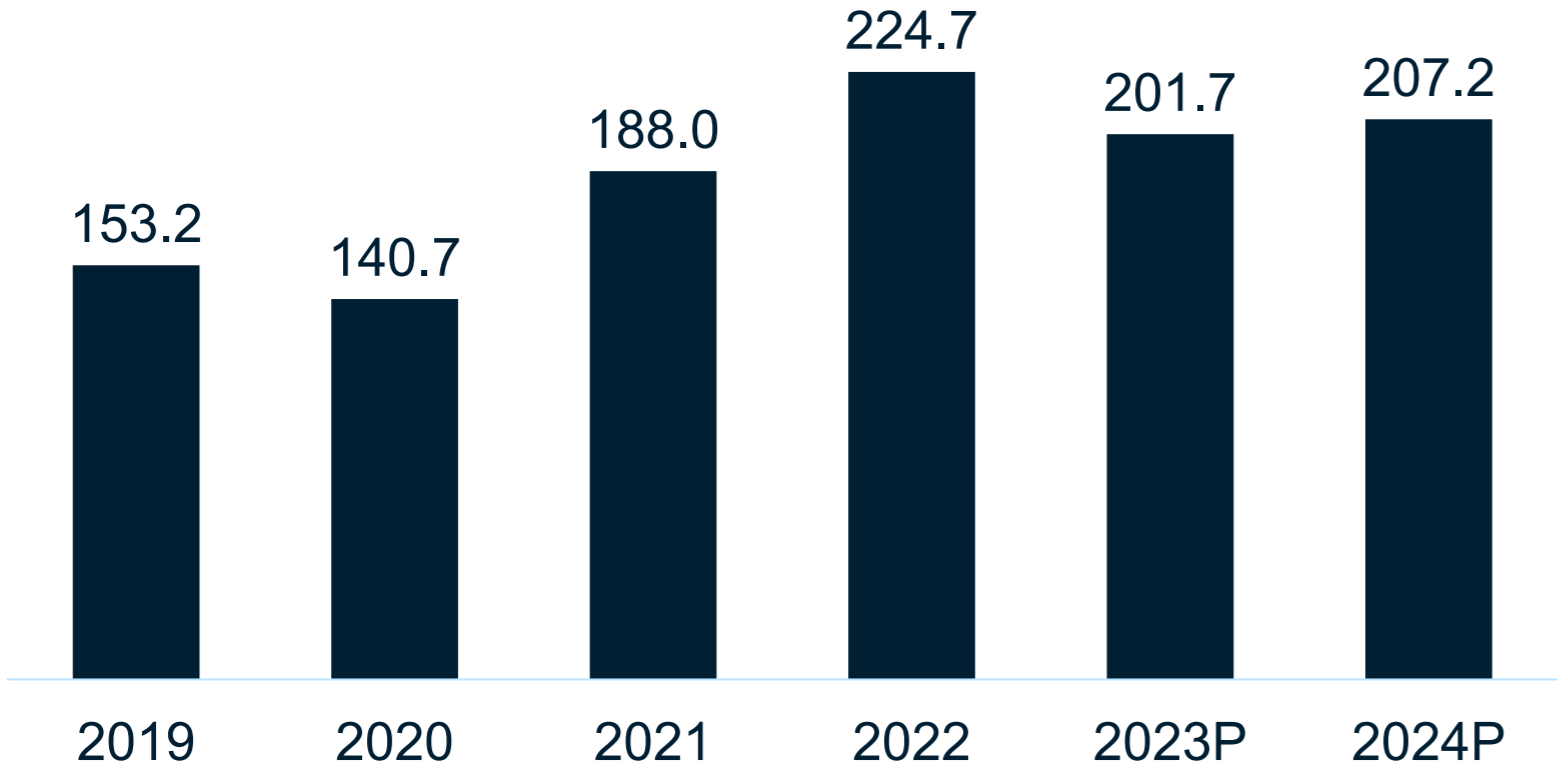
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## Transform and evolve

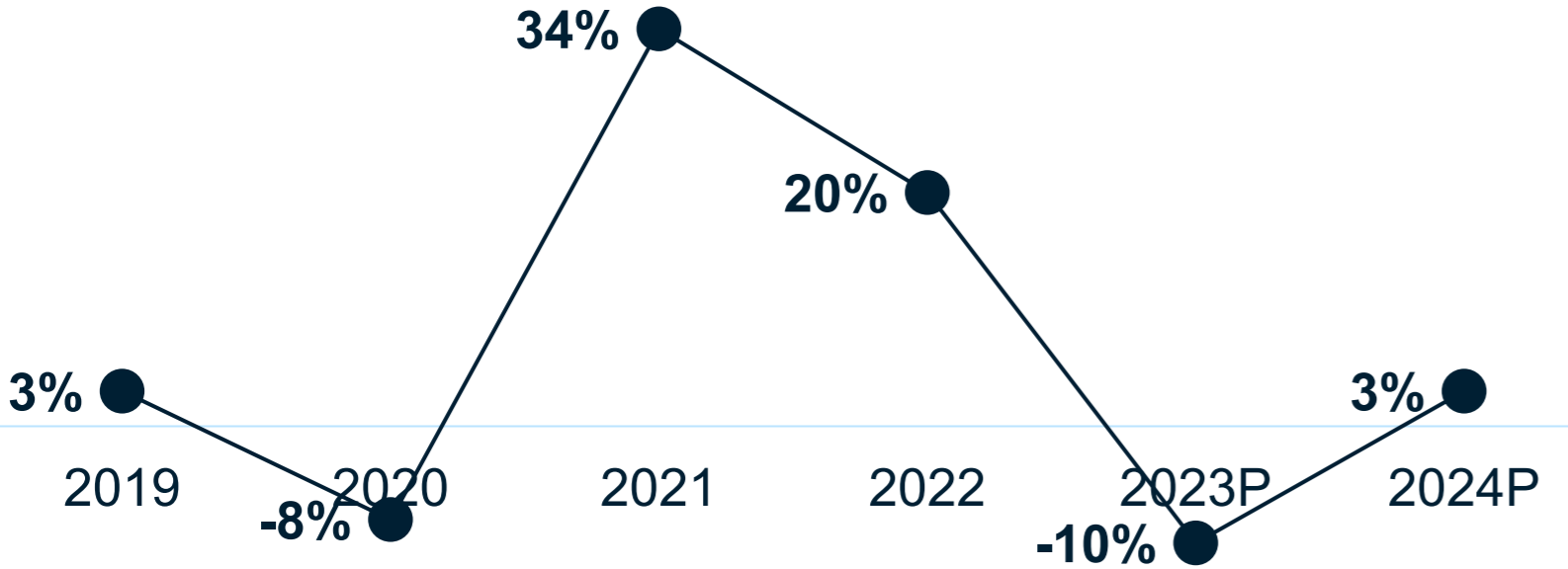
Product & System Development	Technical Consulting
Cybersecurity	Robotics
R&D Outsourcing	Virtual Reality Solutions
IT Digital Backbone	Operations Management
Data Analytics & AI	IOT(Device & Testing)

# Why We Are Here

### US Staffing Industry Size and Outlook (\$ Billions)



### YoY Growth %



- **Staffing is Cyclical**
- **We are in a Down Market**
- **Huge Opportunity in Adjacent Markets**

Source: US Staffing Industry Forecast: September 2023 Update

# Examples of Adjacent Markets in Business Process Services



Horizontal service areas	Customer Experience Management (CXM) services	Finance and Accounting Outsourcing (FAO) services	Human Resource Outsourcing (HRO) services	Marketing services	Trust and safety services
Global market size in 2021 (in US\$ billion)	101.0-103.0	10.8-11.0	5.3-5.4	8.2-8.7	7.0-7.5
Growth % (2017-19)	2-4%	9-11%	6-8%	13-15%	45-47%
Growth % (2020-22E)	10-12%	9-11%	8-10%	13-15%	33-35%
Growth % (2022E-23F)	5-7%	12-14%	6-8%	21-23%	26-28%



**BPS is positioned to remain comparatively resilient**

The BPS industry is expected to not be impacted heavily in recessionary times; when cost reduction seems to be the obvious move, and digital-infused BPS offers additional value with lower investments.



**The ongoing talent shortage will provide BPS with greater access to global talent**

Due to the talent shortage the industry is experiencing right now, BPS provides an opportunity to access global talent and improve efficiency.



**BPS growth would be sustainable coming out of a downturn**

For the BPS market, while the near-term growth rate is expected to be in the range of 9-9.5%, even the medium- to long-term forecast is expected to be in a healthy range of around 8-8.5%.

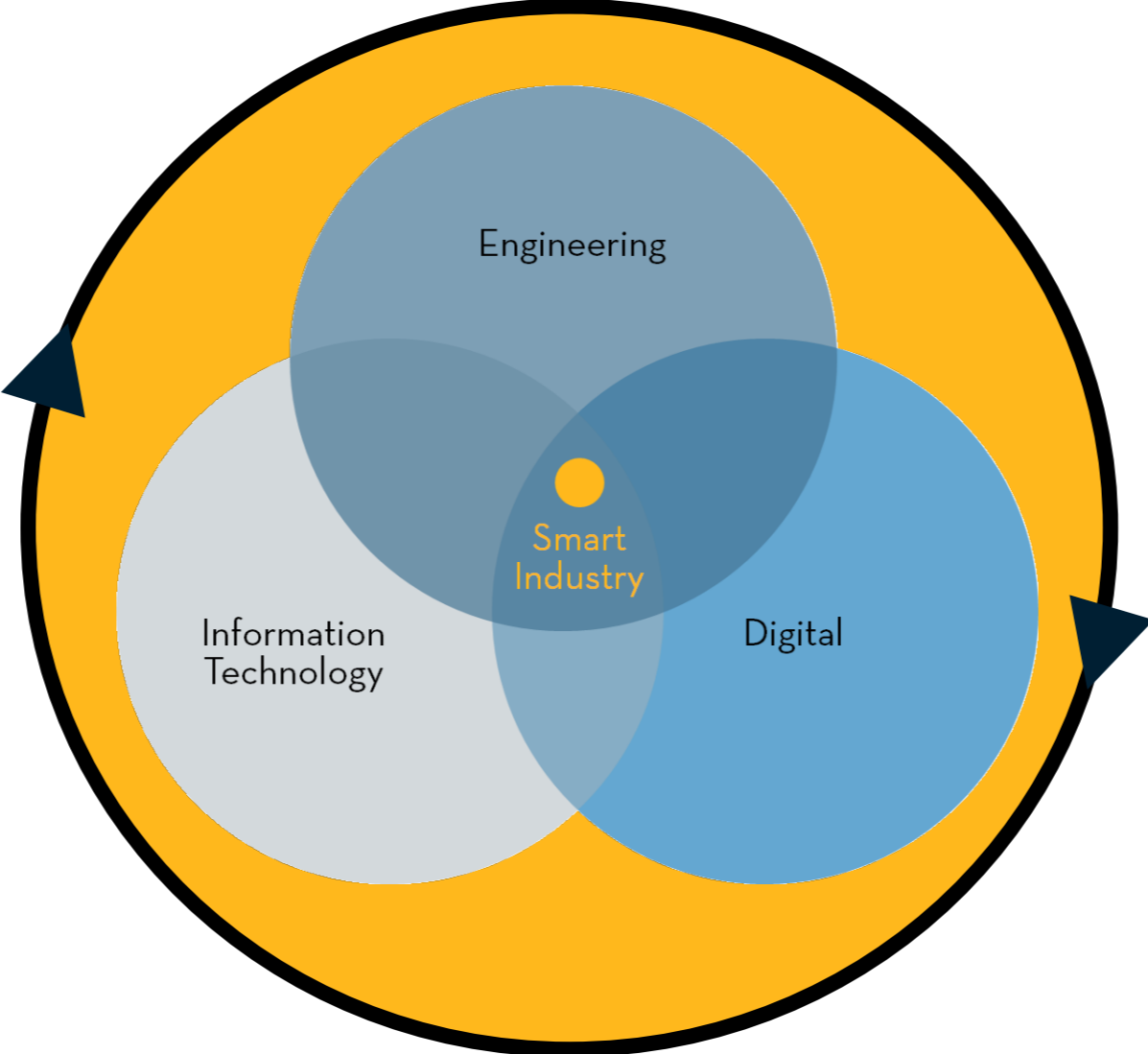
Source: Everest, 2023, [Decoding Managed Services for Staffing Providers: Navigating the Business Process Services \(BPS\) Landscape](#)

# Our Evolution in Establishing a Consulting Solutions Brand

**AKKODIS**

\$2.4B Acquisition  
\$4.1B Company

**AKKA**  
A leading engineering  
and technology consulting player



**modis**  
A technology IT consulting  
and talent services player

A Global Leader in Smart Industry

Differentiated Offering

Rich in Talent

Well Diversified

Clear Ambition

# Our Portfolio of Services



X



X



## Industries

## Tech Practices

## Service Lines

- Automotive & Transportation
- Aerospace & Defense
- Energy & Clean Technology
- Banking & Financial Services Information &
- Communication Technology Manufacturing & Logistics
- Life Sciences & Healthcare

- Digital & Software
- Data Analytics & Artificial Intelligence
- Cloud, Infrastructure & Security
- Product & System Development
- Wireless & Connectivity
- Validation & Verification
- Manufacturing & operations



# Market Opportunity: Expanding our Talent Solutions to Consulting Solutions



## Customer Requirements

### Key growth drivers

**Large Market for North America IT Services (Estimated Size)\***

**\$312B - \$324B**

**2021 – 2026 Projected IT Services CAGR  
8% - 10%**



#### **Need for sustainability**

Increased cyber threats, hybrid working model, talent crunch, and business continuity requirements.



#### **Need for efficiency**

Increased focus on cost optimization, automation, agility, and better employee utilization and productivity.



#### **Need for differentiation**

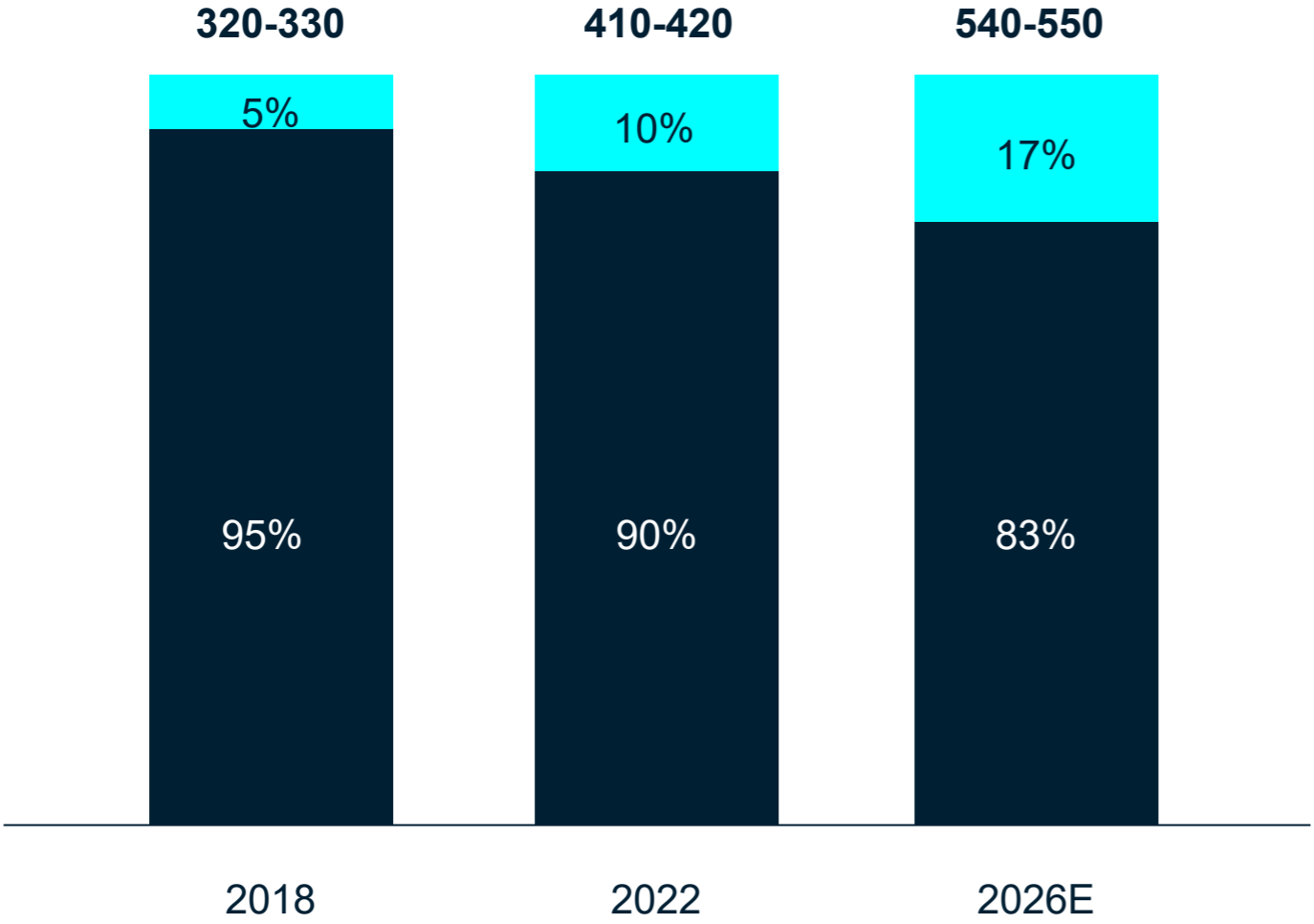
Digital delivery of products and services, better customer experience, changing customers' preferences, innovation, and value addition.



# Consulting Solutions and a Managed Services Model: Why Pivot?



**Staffing firm revenues (share of staff augmentation and SoW models)**  
 Percentage in terms of spend (US\$ billions)



● Traditional staff augmentation    ● SOW- retained by staffing providers E: Estimated

## Benefits of managed services engagements for staffing firms

Better margins in the long term	Long-term client relationship	More predictable, less cyclical business	Enhanced employer brand and access to associates	Access to a larger market

Source: Everest, 2023, [Contingent Talent and Strategic Solutions State of the Market 2023 - Elevating Efficiency and Experience to Navigate Uncertain Times](#)

# Seeds of Success: Evolving from Staffing to Consulting Solutions



**Built Leadership Team**



**Established Shadow P&L and Aligned to Go-to-Market Structure**



**Subject Matter Experts: Sales, Solutions, Delivery**



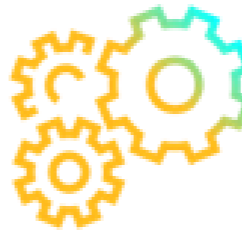
**Partnered Cross-country, Cross-GBU**



**Strong Technical Delivery Management and Client Success Management Structure**



**Betting on Global Delivery Centers: Mexico, India, Bulgaria**

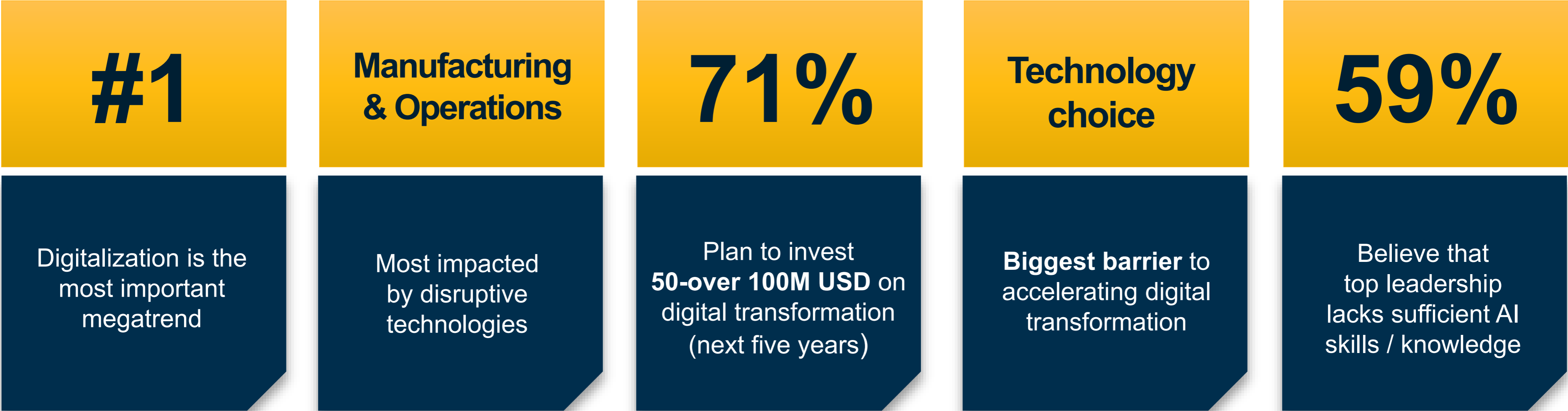


**Focus on Analysts and Advisors**



**Thought Leadership**

# Seeds of Success: Educated Our Sellers on “What CTO’s Think”

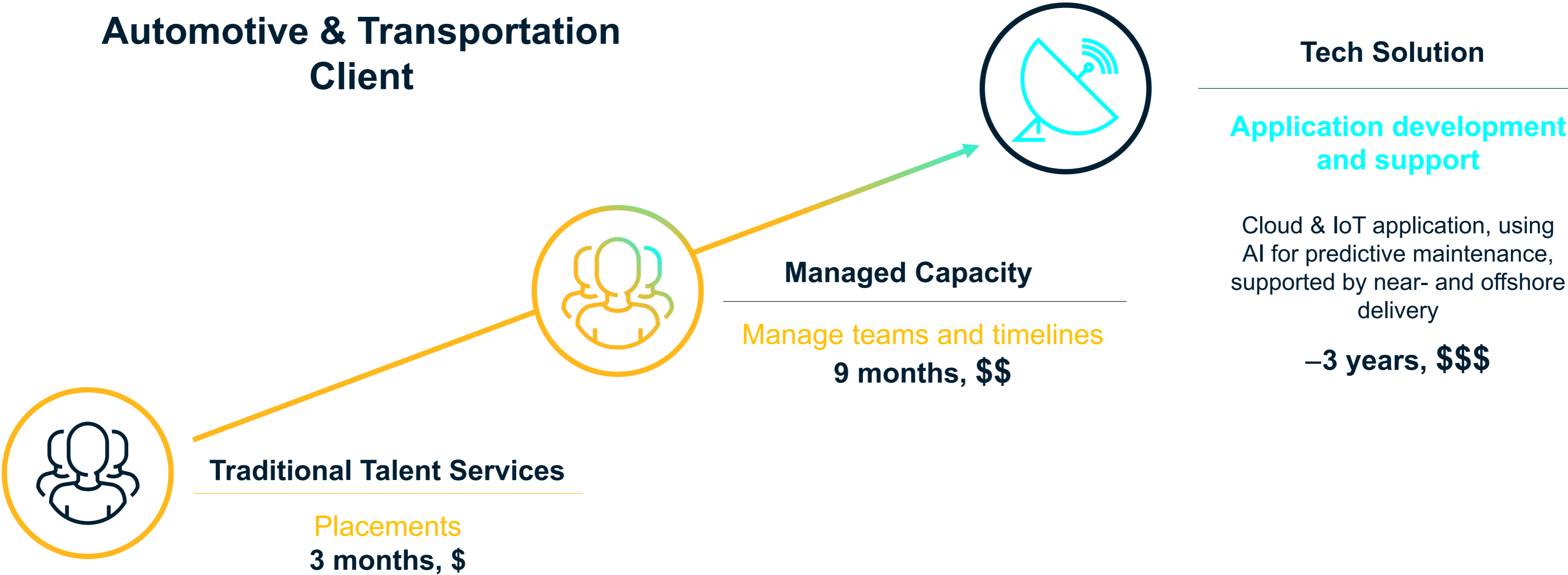


Source: During 2023\*\*, Akkodis conducted thought leadership research with C-Suite global business leaders from the world’s major industries. 150+ CTOs in the US and Canada

# Case study: Upselling Talent to Consulting & Solutions



## Automotive & Transportation Client



- Think about this from the perspective of the Recruiter's and BDM's Desk
- How will you manage the change and get them bought into the new model?
- How do you manage the communication and transformation?
- Some will come along on the journey and some will resist the change
- Build a team to pivot to new segments of solutions and consulting

***Do Not Overlook the Power of Staffing!***

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Thank  
you

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