



ExecuVision[®]

INNOVATION

STRATEGY

GROWTH

CONNECTIONS





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ExecuVision Agenda: Tuesday, Feb. 11

7:30–8:45 a.m.	Networking Breakfast
8:45 a.m.	Welcome
9 a.m.–12 noon	ExecuVision Masterclass With Jim Collins
12 noon–1 p.m.	Networking Lunch and Q&A With Jim Collins
1–2:30 p.m.	Industry Speed Talks & Networking Session
2:30–2:45 p.m.	Break
2:45–4:45 p.m.	Industry Speed Talks & Networking Session
4:45–5:25 p.m.	Panel Discussion on Growth
5:30–8 p.m.	Networking Reception and Evening Opportunity

ExecuVision Resources

SCAN ME



Download session resources
View presenter bios



Ask Me About StaffingPAC

Toby Malara, Esq.

Vice President, Government Affairs

tmalara@americanstaffing.net



American Staffing Association

FOUNDATION

DONATE TODAY



Diana will update this slide

Support Women in Staffing
SCAN ME

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2025 
STAFFING
LAW & COMPLIANCE
CONFERENCE

★ **MAY 8-9**
WASHINGTON, DC



SW 2025
STAFFING WORLD®
OCT. 6-8 | ORLANDO, FL



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INNOVATION
STRATEGY
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EV25 Video
~30 seconds

Joanie Bily
Division President
Employbridge



Past Chair, ASA

Janette Marx
CEO
Airswift



Chair, ASA



Richard Wahlquist
CEO
American Staffing Association

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Bob Thompson
CEO
T2 Insurance Solutions



INSURANCE
— SOLUTIONS LLC —

ExecuVision Masterclass With Jim Collins

Getting From Good to Great to Growth





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Networking Lunch and Q&A With Jim Collins

12–1 p.m.



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PJ Rescigno

Assistant Vice President, Specialty Products

Planned Administrators Inc.



Wisdom of the Crow: How Top Staffing Firms Can Double Industry Growth



Eric Gregg
Founder and CXS
ClearlyRated

Eric Gregg SLIDES!!

Riches in the Niches: Unlocking Growth Through Targeted Business Development



Dougie Loan
Chief Revenue Officer
SourceWhale

A world map in a dark blue color, overlaid with a grid of small red dots representing data points. The dots are distributed across the continents, with a higher density in North America and Europe. The map is centered on the Atlantic Ocean.

100+ Million Data Points

collected from the SourceWhale platform, utilized by
1000's of staffing firms across **100's** of regions

STATE OF THE MARKET

Research Insights



BD is the majority focus

9 in 10 want to increase client wins in 2025



61% Client Retention

—Bullhorn



18% have a BD Process

& less than half can define their ICP beyond their market.



ICP is Key

“Knowing that our partners will consistently deliver high quality candidates for us within our time frame is one of the most important parts of our relationship”

— Hiring Managers





TIER 1

**High Fill /
Low Time to Fill**

1



TIER 3

**Low Fill /
Long Time to Fill**

3

TIER 2

**Average Fill /
Average to Long
Time to Fill**

2



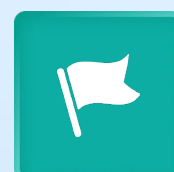
Profile based on characteristics



Geolocation



Specialization



Role



Company stage

“I specialize in partnering with Series A B2B SaaS companies in Boston to build their foundational GTM teams.”

“I focus on 3 key roles: SDRs, AEs, and Customer Success.”



Executive Communication: Cat on a Mat

SourceWhale

**Business Development Tactics From
Over 100 Million
Data Points in 2024**



Multi-Touch Success:

Campaigns with 3 steps achieve 50% more meetings than 1-step campaigns, with follow-ups driving sustained results.

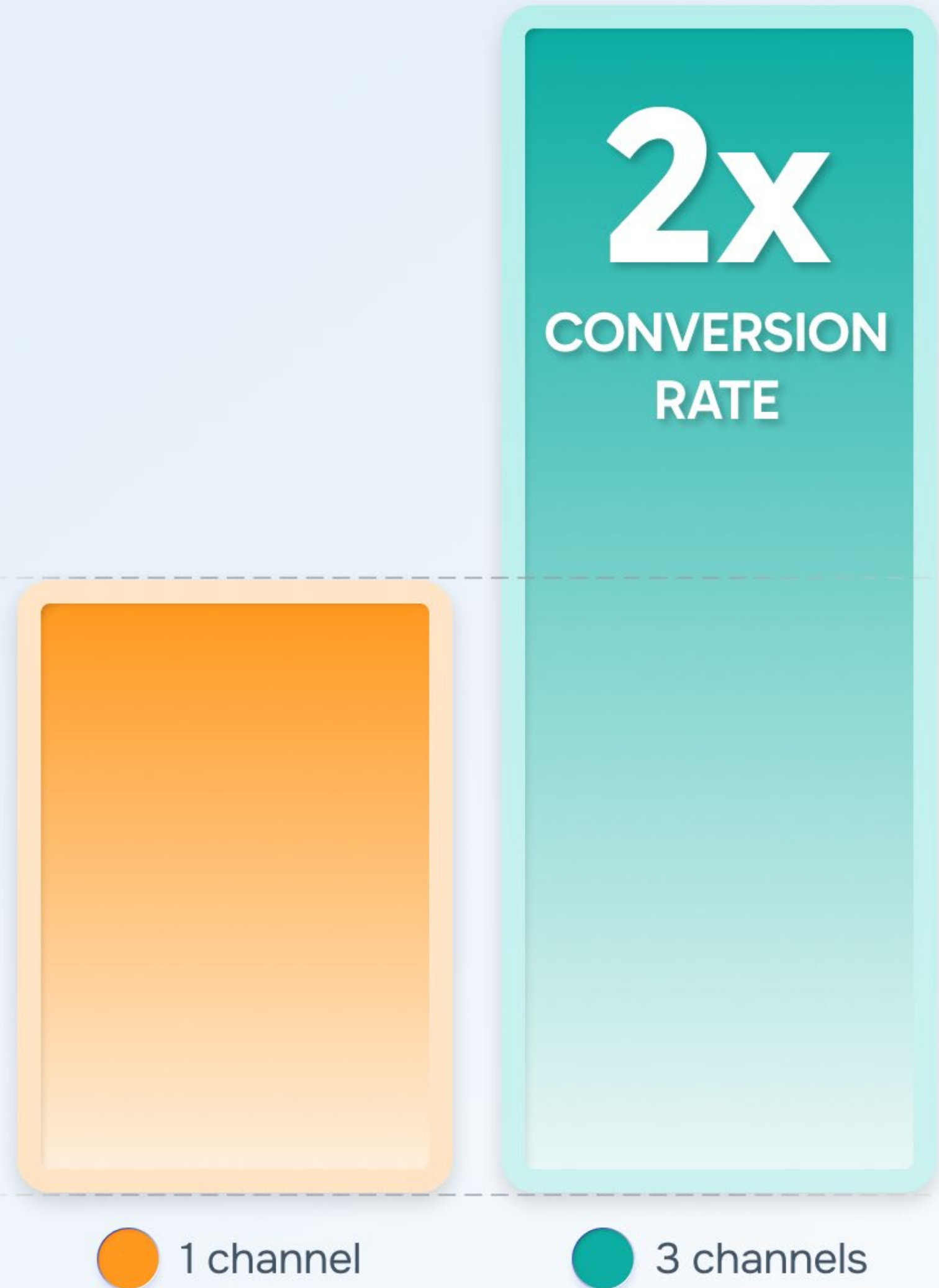


- 3 step
- 1 step



Multi-Channel Advantage:

Leveraging 3 channels doubles the conversion rate compared to single-channel campaigns.



Quality Drives Conversions:

Leveraging frameworks drives consistent quality and the highest conversion rates.

Consider: OPPS / Teacher / PSA





Quantity Matters:

Targeting fewer than 100 people triples conversion rates compared to campaigns over 500.



MMQQ



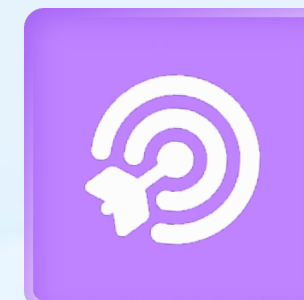
Multi-Touch



Multi-Channel



Quality



Quantity

Multi-Thread Impact

Executive Alignment Drives Results:

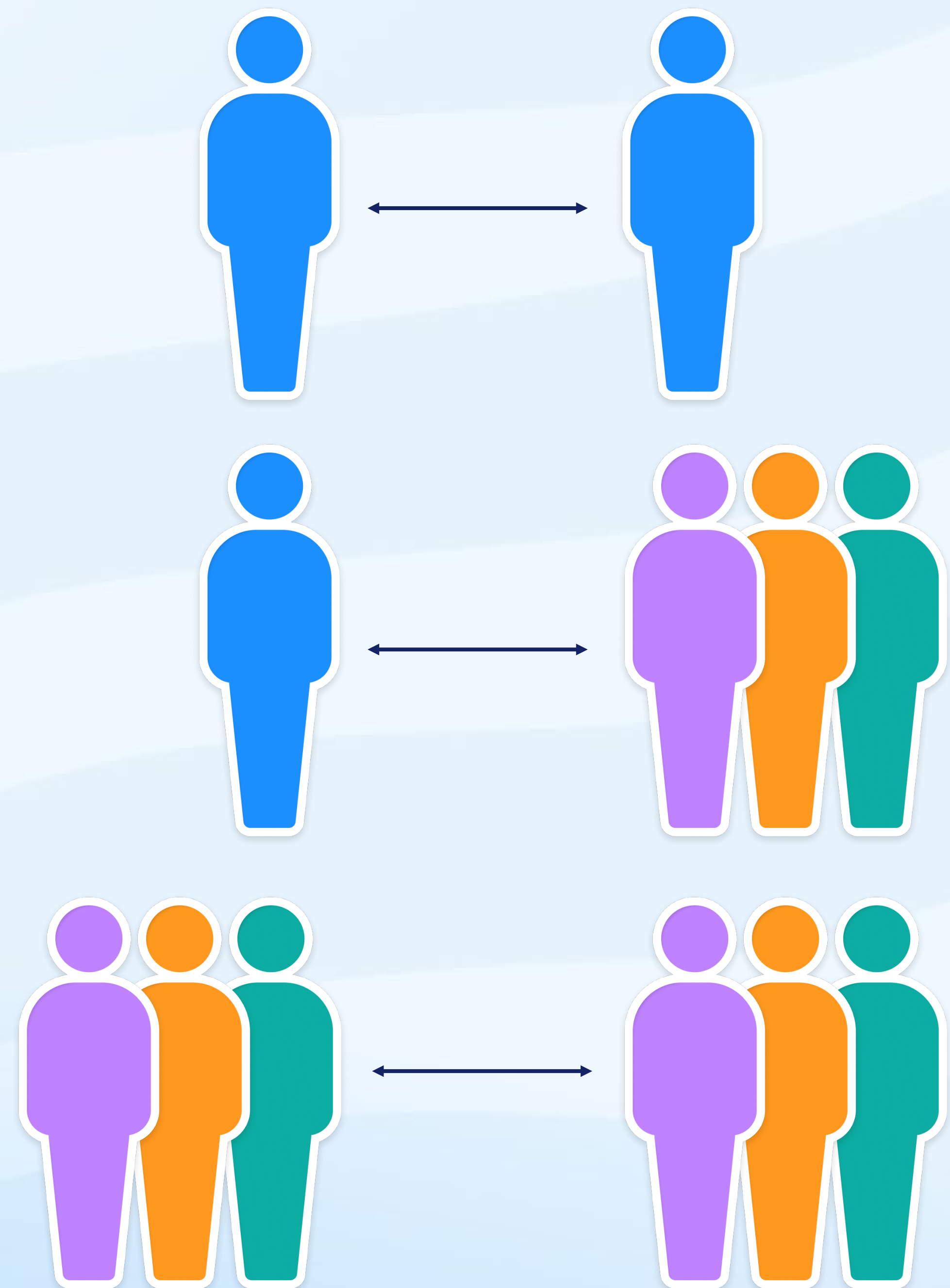
Executive support increases meeting conversions by 33%.

Broader Stakeholder Engagement:

Multi-threaded outreach builds stronger relationships across decision-makers.

Higher Conversion Potential:

Connecting with multiple contacts ensures consistent progress and reduces single-threaded risk.



SourceWhale

GET CONNECTED

Connect
with me
on LinkedIn



Dogie Loan

dogie.loan@sourcewhale.com

Practical Advice for Streamlining Your Operations With AI and Automation



Kelli Ryan
Chief Customer Officer
Cartwheel

AI and Automation are top of mind for everyone

The New York Times

How A.I. Could Reshape the Economic Geography of America

TBI The Business Journals

The Playbook: AI is shaping hiring decisions as more workers start looking for jobs

 Josh Bersin

The Rise of the Superworker: Delivering On The Promise Of AI

Forbes

Want To Keep Your Small Business Relevant As AI Changes The Workplace? An Early Adopter Of AI Marketing Offers Advice From The Front Lines



Staffing is on the hunt for growth



Source: U.S. Bureau of Labor Statistics and ASA Research Department



**Staffing is on the
hunt for growth**



**Think beyond your
traditional growth lever
toolbox**



Is AI the silver bullet
everyone chalks it up
to be?

(Not yet)



48%

Roughly half (48%) of staffing respondents currently use AI for business applications, and 48% of those who don't use AI yet plan to adopt it this year. - Staffing Hub

Automation



The use of technology to perform tasks with minimal human intervention.

- Scheduling
- Workflow management
- Data processing
- Financial transactions and accounting

Artificial Intelligence



Intelligent machines that can learn, reason, and self-correct.

- Virtual Agents
- Personalized recommendations
- Chatbots
- Predictive analytics



Example: Automation and AI work together

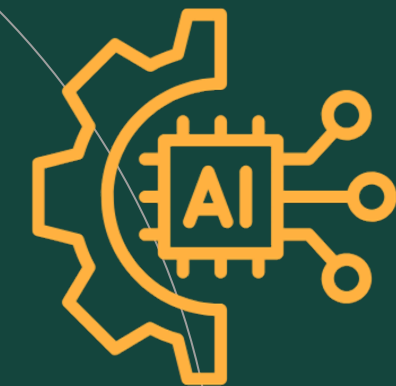
Payroll Processing and Compliance

Automation

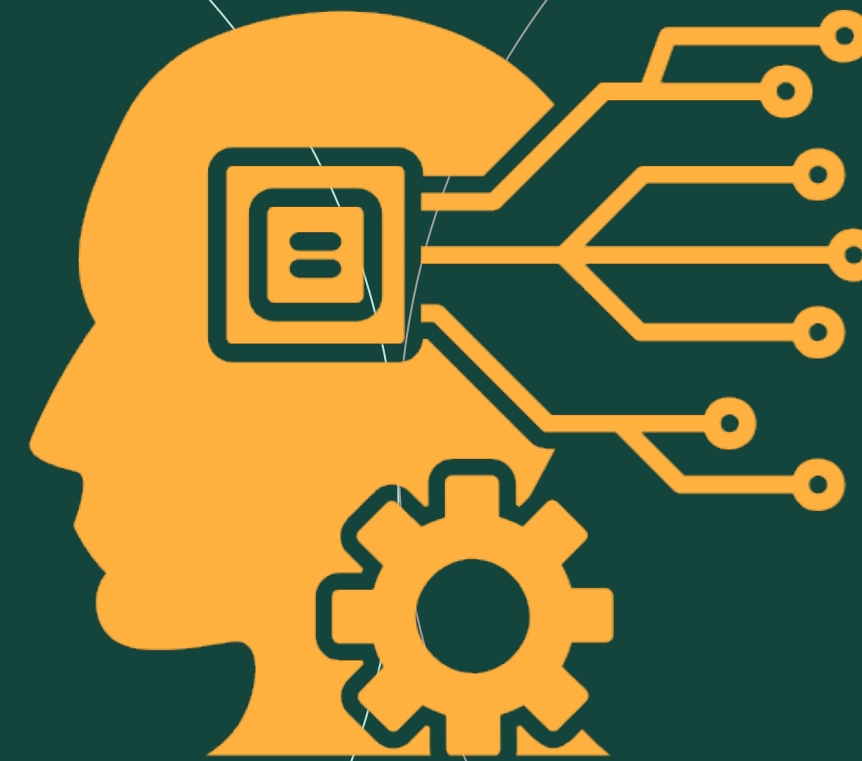


Calculation of wages, deductions, and tax filings based on hours worked and local laws.

Artificial Intelligence



Ensures compliance and clean data input for AI systems that predict payroll expenses or evaluate process efficiencies.



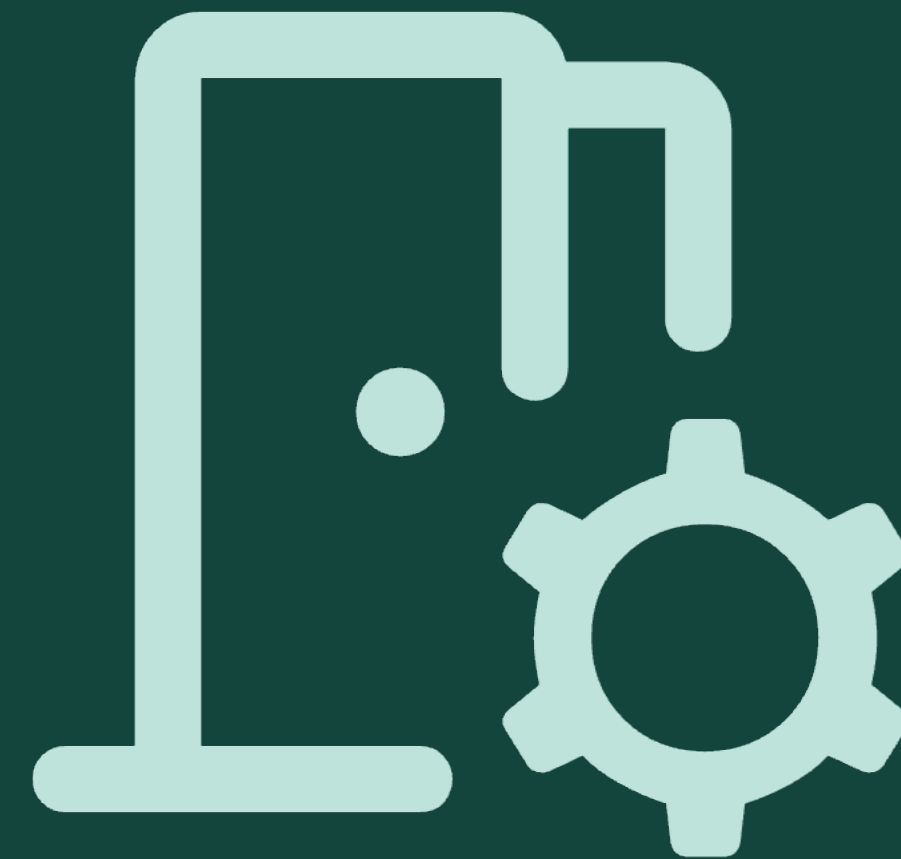
**Staffing has
invested in AI and
Automation for the
front office**

40%

**of companies use AI to source
and engage talent for their
hiring pipelines.**



What's hiding in your back office?



Your back office is directly tied to your cashflow. It deserves equal investment in optimization.



**AI and automation
are high-impact on
the middle and
back office**

80%

**of the finance department's
transactional work could be
automated.**



Leveraging technology effectively gives us space, time, and resources to do things that help us grow.



64%

of staffing technology suppliers believe AI will have the most significant impact on their business in the next 5 years. They anticipate AI will automate repetitive tasks, enhance efficiency, and improve operational workflows.

Staffing Industry Analysts



Get started

1. Evaluate your current state

Understand business functions, employee roles, and existing technologies.

- ID which tasks are being handled manually
- Understand where automation and AI can alleviate teams, amplify impact, or accelerate a process
- Confirm or refute your assumptions with qualitative and quantitative data

2. Get ahead of the challenges

New things face challenges, get ahead of implementation costs, resistance to change/adoption, and employee anxieties.

- Provide training
- Understand resource goals
- Showcase the expected impact



Areas to Consider for Automation and AI



Payroll Processing & Management

Automate data entry, calculations, and compliance checks. Reduce errors and ensuring timely payments.

Deel, Employdrive, Rippling, ADP Workforce Now



Compliance & Credentialing

Manage compliance by tracking employee certifications, licenses, and training requirements. Monitor expiration dates and send alerts to meet regulatory standards.

Symplr, Medallion, Credentiaally



Data Management & Reporting

Enhance data accuracy by automating the collection, analysis, and reporting of key metrics. Capture actionable insights into performance trends, financial health, and operational bottlenecks.

Bullhorn, JobAdder, Avionte, JobDiva



Financial Transactions & Accounting

Automate repetitive financial tasks like invoicing, accounts payable/ receivable, and expense management. Reduce the manual effort and minimizes the risk of errors.

Cartwheel, Sage Intacct



Document Management

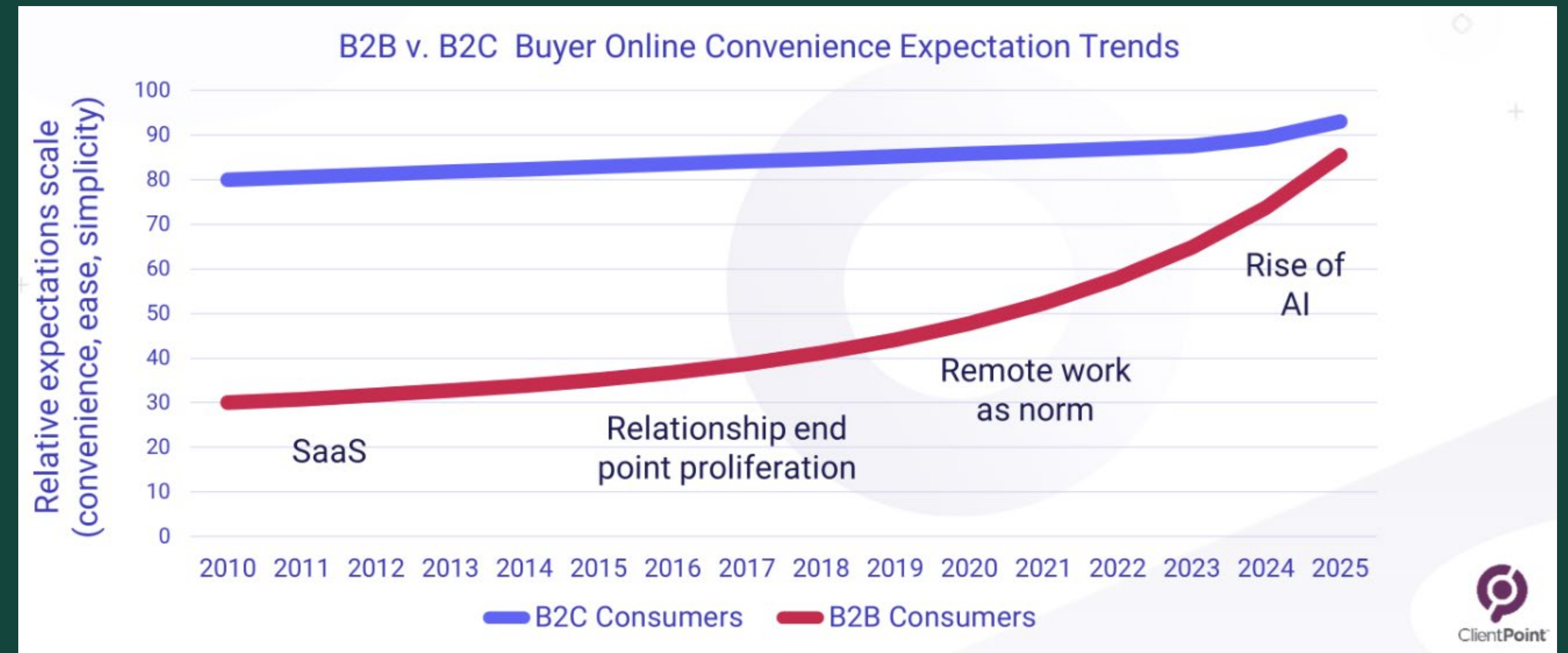
Facilitate the organization, storage, and retrieval of documents, enabling quick access to necessary information and reducing the reliance on paper-based processes.

M-Files, Fluix, ABBYY, Simplifai



A more streamlined organization means more time to meet your customer expectations & grow

- Automated processes
- Automated insights
- Digital payments



Top Takeaways

- **AI is a major trend** across all industries. Staffing has started to adopt, but there is still room to grow.
- **Look into your back office** for areas of hidden growth and optimization
- **Go on a learning tour.** Understand and evaluate where you are, and then choose a spot to start.



Let's connect!



Building Level-Five Leaders



Jason Leverant, CSP
President and Chief Operating Officer
AtWork Group

Jason's *SLIDES!!* – Dustin will
create

Break

2:30–2:45 p.m.



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Building a High-Performing Sales Organization: Driving Organic Growth Through Innovative Leadership and Customer-Centric Practices



Kelly Boykin
Founder
Growth Curve

Kelly SLIDES!!

The Human Factor in Mergers and Acquisitions: Keys to Sustainable Success



Suky Sodhi
President
Elite Global Recruiters

THE COST OF OVERLOOKING HUMAN CAPITAL

- A merger isn't just a financial transaction; it's a people transaction. When human capital is overlooked, the real cost is the loss of trust, talent, and long-term value.
- If people are the ones driving the merger forward, why are they the last to be considered?
- What would happen if human capital was treated as the priority, not an afterthought?



STRATEGIES FOR CULTURAL ALIGNMENT

- Cultural alignment isn't about forcing uniformity; it's about finding common ground to build a shared vision that fuels collaboration and growth.
- Think of cultural alignment as blending two colors into a vibrant new shade—not erasing one for the other.
- When employees see their culture respected, they see the merger as an opportunity, not a threat.

RETAINING TALENT AS A GROWTH STRATEGY

- *In every merger, people don't just want a paycheck—they want a purpose. Retain their purpose, and you'll retain their loyalty and innovation.*
- When leaders communicate clearly and frequently, they turn anxiety into engagement.
- Retention isn't just about holding on to people; it's about empowering them to help build the future of the new organization.
- If you want your next acquisition to be among the 30% that succeed, let's start by putting people at the center of the plan.

THANK YOU

Get in touch!

 suky@professionalselection.com

 +1 9053927313

 <https://professionalselection.com/>

EGR

The Hidden Catalyst for Accelerating Staffing Firm Growth



Jay Mattern
Chief Executive Officer
TerraFirma Marketing



ABOUT US

HI, I'M JAY MATTERN



A 32-year veteran of the staffing industry in all primary verticals



Co-founded a staffing firm that grew to nearly \$400M and recognized by SIA as the 35th largest US staffing firm



Named to SIA's Top 100 Most Influential Staffing professionals three times



Company was recognized four times on the INC 500/5000 list of fastest-growing private companies



Experience in both organic and acquisition growth

TERRAFIRMA MARKETING



At TerraFirma we provide simple, effective and manageable marketing solutions solely for the staffing industry, including:



Website development, design and support



Both company and employment brand consulting



Social media and content marketing



Lead generation

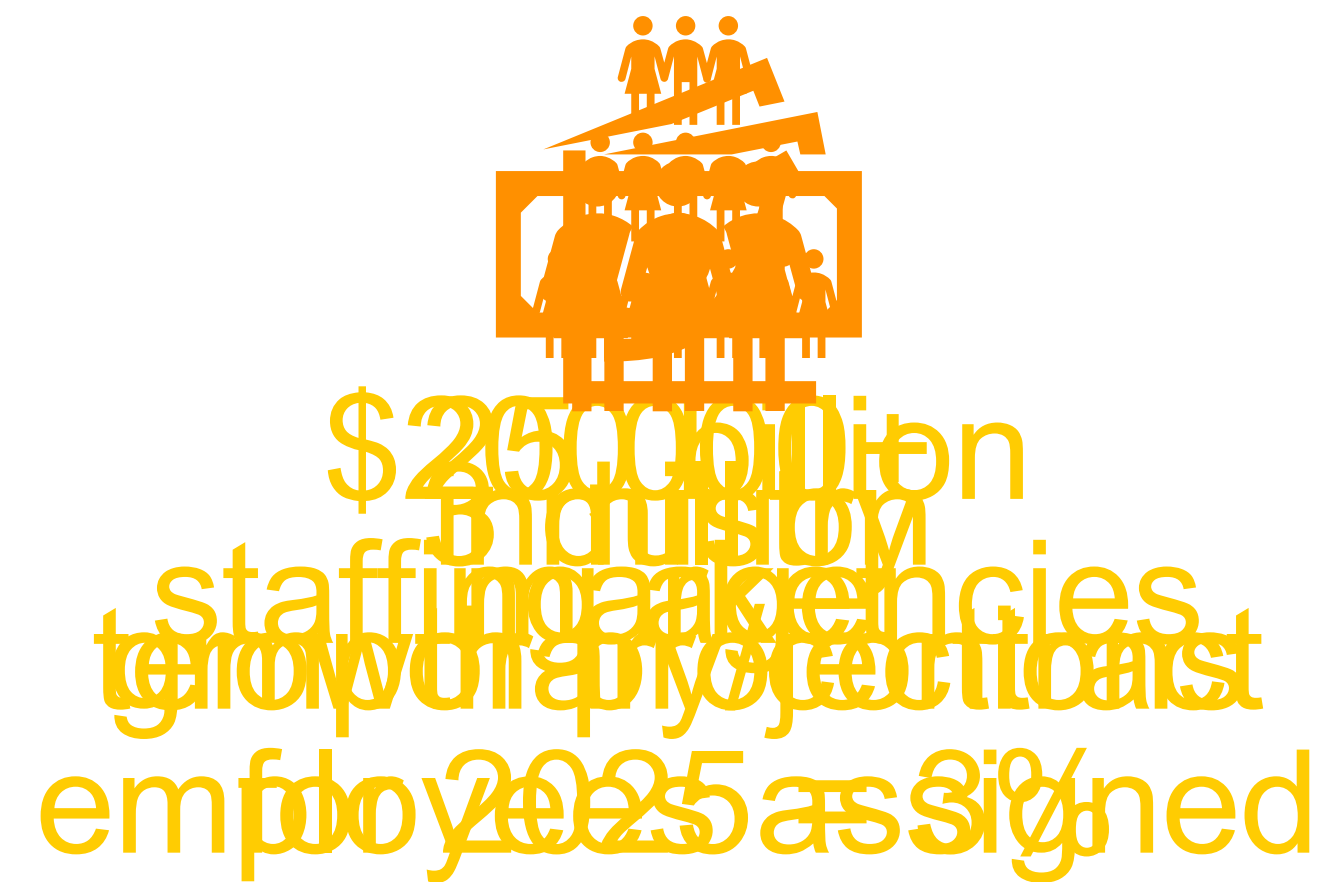


Marketing collateral

THE HIDDEN CATALYST

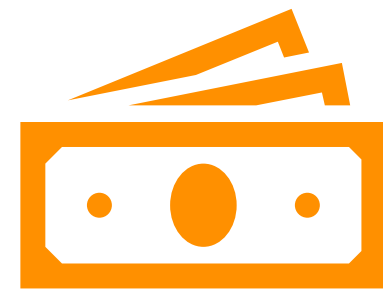
Introduction: The Staffing Industry Landscape

US Market Snapshot

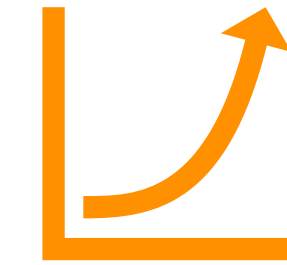


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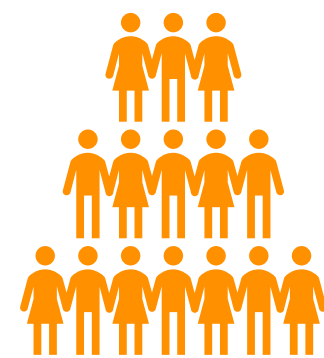
US Market Snapshot



\$200 billion
market



3 million
temporary/contract
employees assigned



25,000+
staffing agencies



industry
growth projections
for 2025 = 3%



THE HIDDEN CATALYST

The Growth Puzzle

Common Strategies Used by Staffing Firms

Technology adoption (artificial intelligence, automation)

Expanding service offerings

Geographic expansion

M&A activities





THE HIDDEN CATALYST

The Growth Puzzle

Why Some Firms Struggle

Commoditization of services

Difficulty in differentiation

High turnover rates (internal staff and placed talent)

Identifying growth vs scale challenges

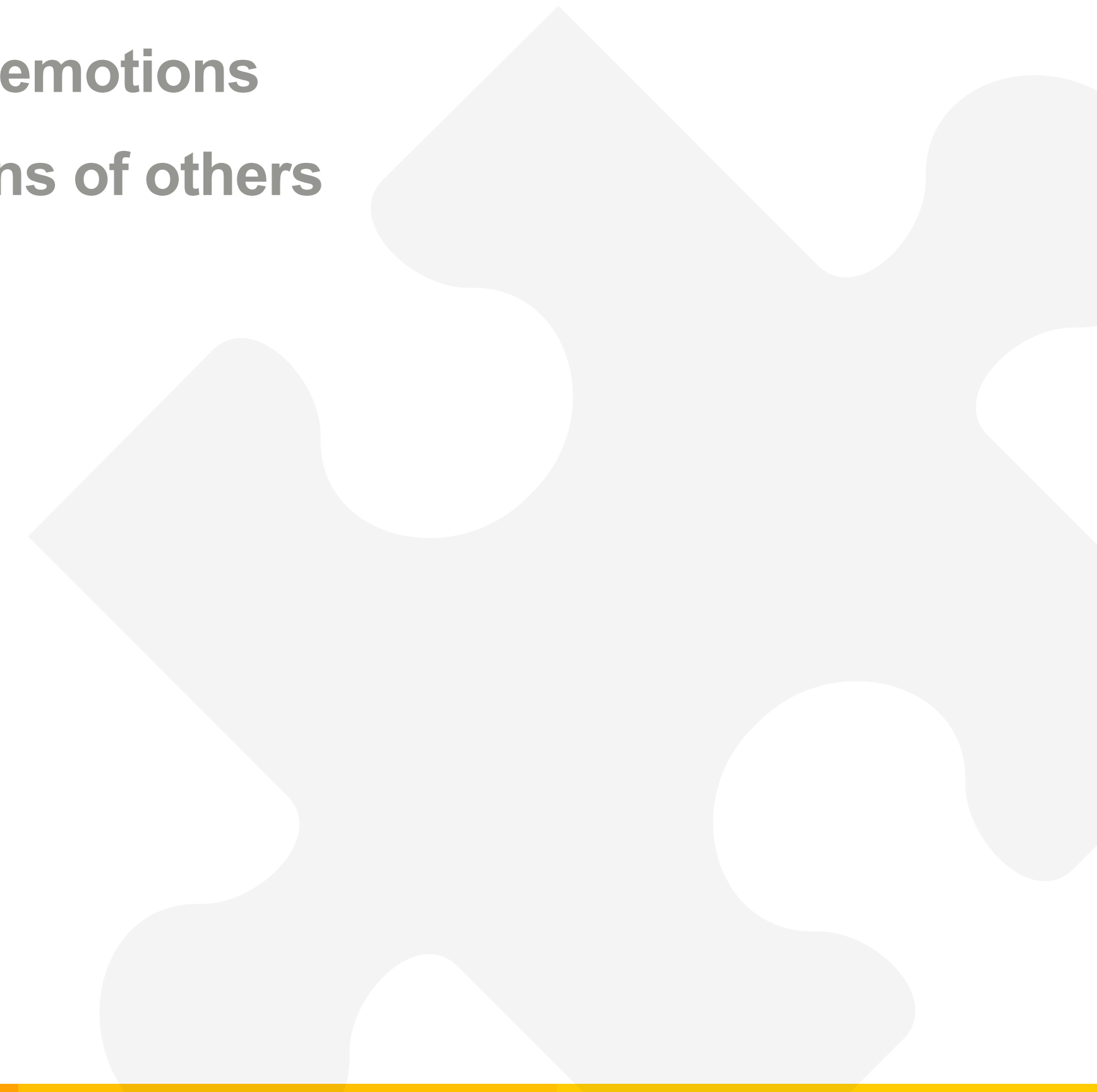
THE HIDDEN CATALYST

The Missing Piece: Emotional Intelligence (EI)

Definition of EI

Recognize, understand, and manage your own emotions

Recognize, understand, and influence the emotions of others



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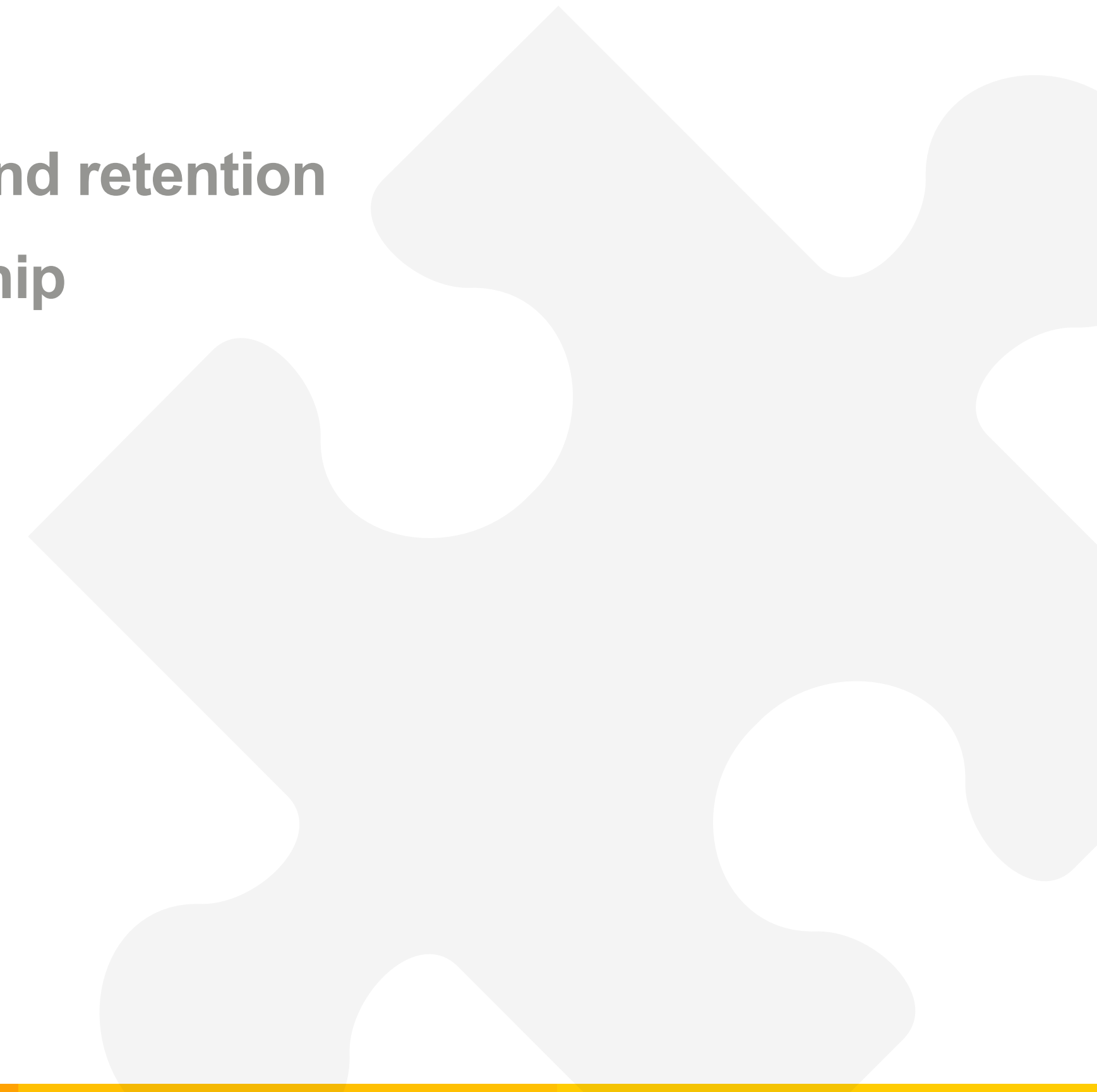
The Missing Piece: Emotional Intelligence (EI)

Why EI Matters in Staffing

People-centric nature of the business

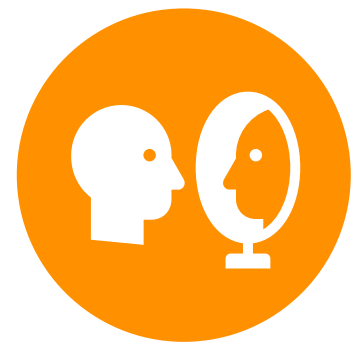
Strengthens relationships in sales, recruitment, and retention

Enhances decision-making and leadership



THE HIDDEN CATALYST

The Four Pillars of EI



Self-Awareness

Recognize your emotions,
strengths,
and weaknesses

Understand how they
impact interactions



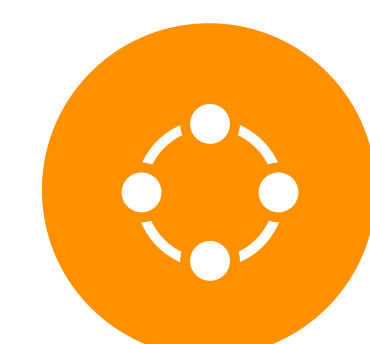
Self-Management

Control impulsive feelings
and adapt to changing
circumstances



Social Awareness

Understand others'
emotions and concerns
Pick up on emotional cues



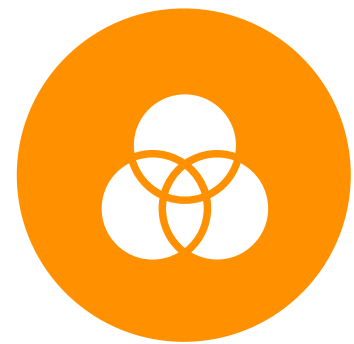
Relationship Management

Build trust and manage
conflict effectively

Inspire and influence
others

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EI's Impact on Key Business Areas



Client Relationships

Build trust and long-term partnerships

Navigate difficult conversations



Candidate Experience

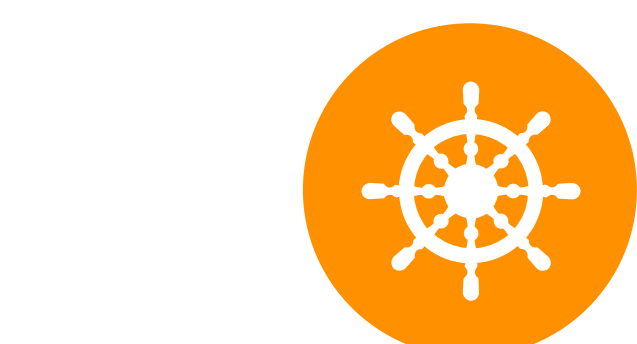
Enhance quality of interactions

Improve placement success and longevity



Team Performance

Foster collaboration and reduce turnover



Leadership Effectiveness

Make better decisions under pressure

Inspire and motivate teams

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Implementing EI in Your Firm



Assessment

- ✓ Measure EI levels in leadership and teams
- ✓ Identify strengths and areas for growth

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Implementing EI in Your Firm



Training Programs

- ✓ Workshops and coaching to develop EI skills
- ✓ Reinforce through practice opportunities

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Implementing EI in Your Firm



Hiring & Promotion

- ✓ Prioritize EI in recruitment and career advancement

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Call to Action: Take the Lead in EI

Next Steps

Conduct an EI assessment

Develop an EI training program

Integrate EI into hiring and promotion processes



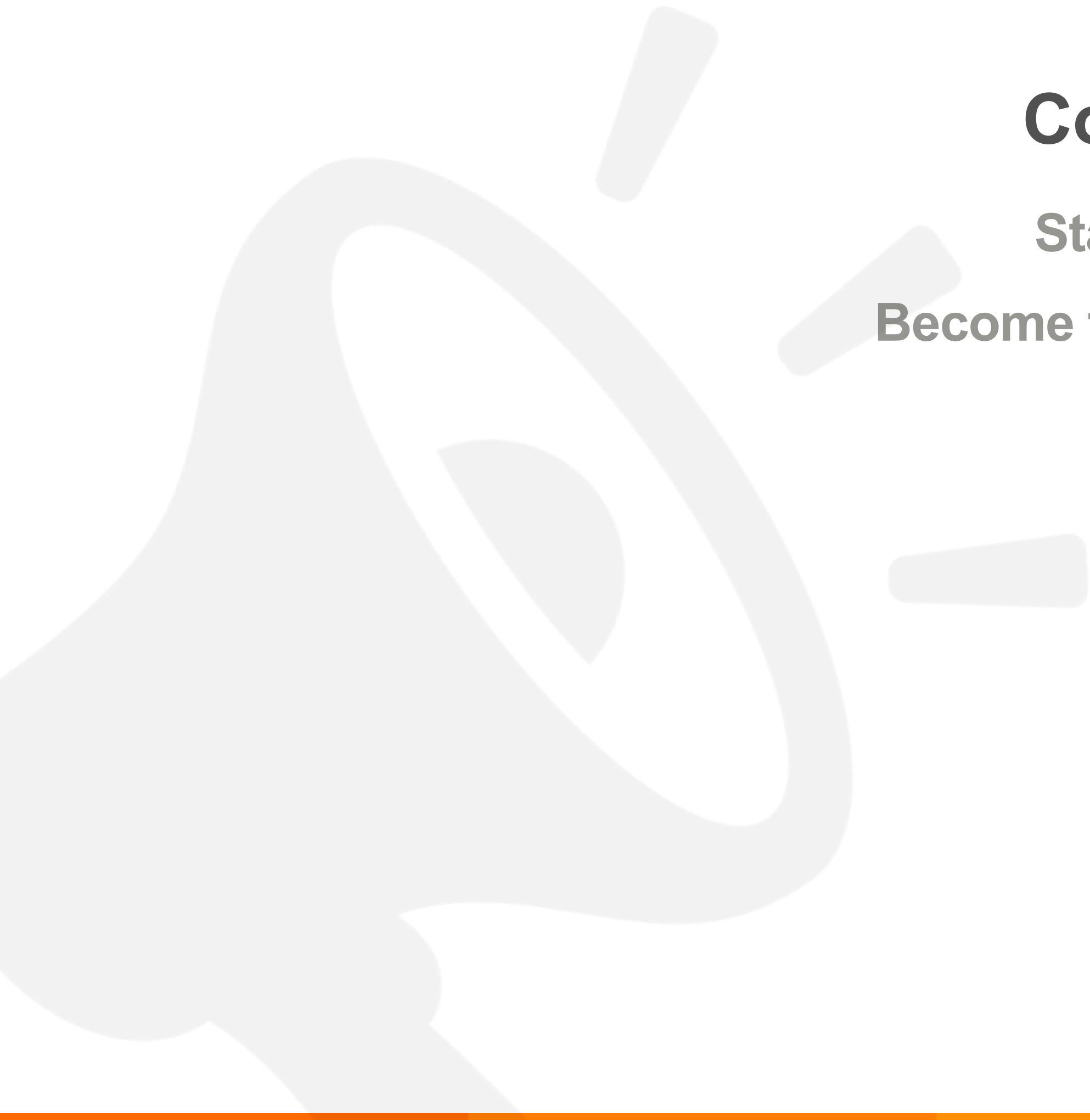
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Call to Action: Take the Lead in EI

Competitive Advantage

Stand out in a crowded market

Become the employer and partner of choice



THE HIDDEN CATALYST

Conclusion

Recap



El is the hidden growth driver

Transform staffing with EI-focused leadership

THE HIDDEN CATALYST

Conclusion

Vision



Imagine a future led by emotionally intelligent firms

"Lead the charge. Redefine the industry."



Q & A



TERRAFIRMA

MARKETING SOLUTIONS
FOR THE STAFFING INDUSTRY



LEARN MORE
ABOUT TERRAFIRMA

Confronting the Brutal Facts



Dana Baughns
Chief Legal Officer
Allegis Group

Ken Taunton's SLIDES!!

Staffing M&A: Top 10 KPIs to Maximize Marketability and Valuation



Matt Rupprecht
Director
PMCF Investment Banking

Matt's SLIDES!!

Panel Discussion on Growth



Facilitated by
Jason Leverant, CSP
President and Chief Operating Officer
AtWork Group



Kelly Boykin
Founder
Growth Curve



Eric Gregg
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ClearlyRated



Dougie Loan
Chief Revenue Officer
SourceWhale



Jay Mattern
Chief Executive Officer
TerraFirma Marketing



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PMCF Investment
Banking



Kelli Ryan
Chief Customer Officer
Cartwheel



Suky Sodhi
President
Elite Global Recruiters

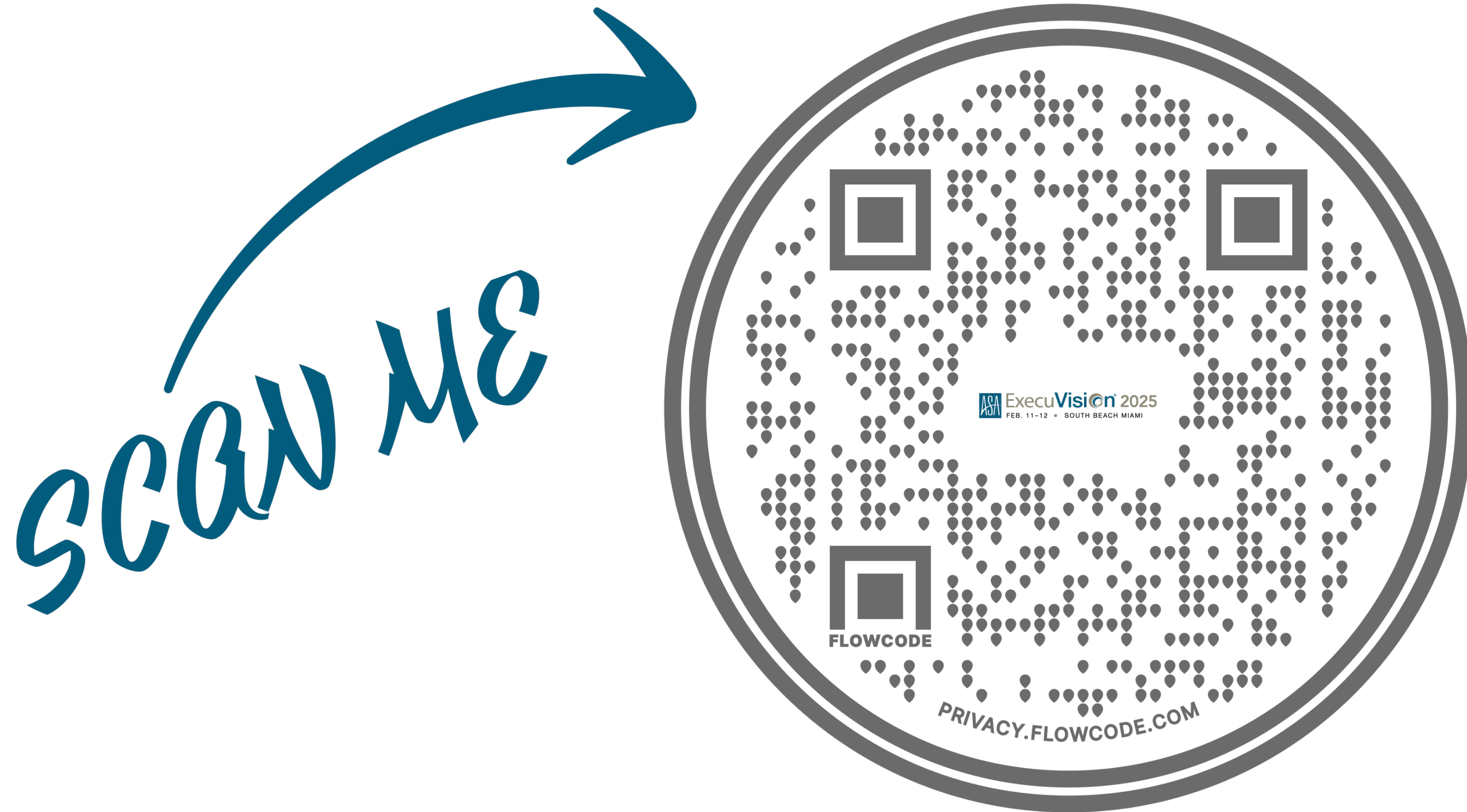
Joanie Bily
Division President
Employbridge



ExecuVision Name Badges



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Networking Reception and Dinner

5:30–8 p.m.



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