

Contingent Workforce Management (CWM) – Service Provider Compendium 2020

September 2020: Complimentary Abstract / Table of Contents



Our research offerings for global services

<div>▶ Market Vista™ Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available</div>	
▶ Application Services	▶ Finance & Accounting
▶ BPS Banking & Financial Services	▶ Human Resources
▶ BPS Healthcare & Life Sciences	▶ ITS Banking & Financial Services
▶ BPS Insurance	▶ ITS Healthcare
▶ Catalyst™	▶ ITS Insurance
▶ Cloud & Infrastructure	▶ IT Services Executive Insights™
▶ Customer Experience Management Services	▶ ITS Life Sciences
▶ Contingent Workforce Management	▶ Locations Insider™
▶ Data & Analytics	▶ PricePoint™
▶ Digital Services	▶ Procurement
▶ Engineering Services	▶ Recruitment Process Outsourcing
▶ Enterprise Platform Services	▶ Service Optimization Technologies

Membership information

- This report is included in the following research program(s)
 - [Contingent Workforce Management](#)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Contents

Arkadev Basak, Vice President

Krishna Charan, Senior Analyst

Rhea Nijhawan, Analyst

1. Introduction and overview	5
• Research methodology	6
• Background of the research	8
2. CWM service provider landscape snapshot	9
• CWM services PEAK Matrix® 2020	10
• Service provider capability summary dashboard	11
3. Profiles of 23 CWM providers	16
• Leaders	16
– Allegis Global Solutions	17
– Guidant Global	21
– KellyOCG	25
– Pontoon Solutions	29
– Randstad Sourceright	33
– Talent Solutions TAPFIN (ManpowerGroup)	37
• Major Contenders	41
– AgileOne	42
– Alexander Mann Solutions	43
– AMN Healthcare	47
– Broadleaf Results	51
– Geometric Results, Inc.	52

Contents

– Hays Talent Solutions	56
– HCMWorks	60
– nextSource	61
– PRO Unlimited	65
– Resource Solutions	66
– Volt Consulting Group	67
– Workforce Logiq	68
– Yoh	69
• Aspirants	73
– Brainnet	74
– Capita Resourcing	75
– Cross Country Healthcare	76
– Fircoft	77
4. Appendix	78
• PEAK Matrix® methodology	79
• Glossary of key terms	82
• Research calendar	83

Everest Group’s Contingent Workforce Management (CWM) research is based on multiple key sources of proprietary information

- Everest Group’s proprietary database of over **1,400 CWM outsourcing & services procurement deals** (updated annually)
- The database tracks the following elements of each MSP deal:
- Buyer details including industry, size, location, and signing region
 - Deal details including ACV, term, start date, spend managed, primary pricing structure, process coverage, and geographic coverage (at country level)
 - Technology ownership and maintenance
 - Global sourcing

- Everest Group’s proprietary database of **operational capability of 23 CWM service providers** (updated annually)
- The database tracks the following capability elements for each service provider:
 - CWM deals, managed spend, revenue, service suite, and employees
 - Recent CWM-related developments (investments and partnerships)
 - CWM deals split by geography, industry, scope, funding model, and buyer size
 - Managed spend split by geography, industry, job family, and type of sourcing model
 - Delivery locations and level of offshoring
 - CWM supplier partners by geography

Ongoing buyer surveys and interactions

- Everest Group’s **executive interviews and data collected from CWM buyers**
- The data contains the following detailed buyer perspectives about services procurement deals:
 - Drivers for adopting CWM and buyer-provider relationships
 - The level of buyer satisfaction and the underlying reasons

The analysis in this report is presented at two levels:

- Overall market analysis that highlights the market composition/dynamics
- The current market trends based on deal activity in the last five years

The sample size varies for different analyses based on the availability of deal details

Service providers assessed



Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected, is only presented back to the industry in an aggregated fashion

Background of the research

The CWM outsourcing market is a growing outsourcing market in the world today, clocking, yet again, a steady growth rate in 2019. North America continues to hold the majority share of the market followed by EMEA, and Asia Pacific being the emerging market. The CWM outsourcing market has almost matured in certain regions, but overall growth has remained steady due to an increase in adoption from mid-market and small buyers, as well as from new geographies and industries. This report examines the dynamics of the global CWM outsourcing service provider landscape and its impact on the CWM outsourcing market. It positions 23 CWM service providers / Managed Service Providers (MSPs) and provides accurate, comprehensive, and fact-based snapshots of 12 CWM service providers / MSPs. It offers a detailed profile of CWM service providers, with a comprehensive picture of their service suite, scale of operations, recent developments and investments, technology solutions, and delivery locations. The report also provides insights on the global CWM service provider landscape. Each profile also specifies the service provider's position on the Everest Group PEAK Matrix®.

In this research, we focus on:

- Everest Group's Services PEAK Matrix® evaluation, a comprehensive assessment of 23 CWM service providers
 - 2020 CWM PEAK Matrix®
 - Service provider capability assessment
- Remarks on key strengths and areas of improvement for each CWM outsourcing service provider
- Service provider landscape

Scope of this report:



Geography
Global



Services
Contingent Workforce Management



Coverage¹
Across 23 CWM service providers with multi-process capability including AgileOne, Alexander Mann Solutions, Allegis Global Solutions, AMN Healthcare, Brainnet, Broadleaf Results, Capita Resourcing, Cross Country Healthcare, Fircroft, Geometric Results Inc., Guidant Global, Hays Talent Solutions, HCMWorks, KellyOCG, nextSource, Pontoon Solutions, PRO Unlimited, Randstad Sourceright, Resource Solutions, Talent Solutions TAPFIN (ManpowerGroup), Volt Consulting, Workforce Logiq, and Yoh

¹ While we considered a much bigger list of CWM providers, these 23 CWM providers are shortlisted based on their presence and meaningful play in the CWM outsourcing space

The study provides detailed view of service provider’s CWM offerings & capabilities as well as key strengths & areas of improvement | Snapshots to illustrate the depth of report

Contingent Workforce Management (CWM) – Service Provider Compendium 2020

Summary dashboard | market impact and vision & capability assessment of providers for CWM 2020¹

Leaders

Service provider	Market adoption	Portfolio
Service provider 1	<div></div>	<div></div>
Service provider 2	<div></div>	<div></div>
Service provider 3	<div></div>	<div></div>
Service provider 4	<div></div>	<div></div>
Service provider 5	<div></div>	<div></div>
Service provider 6	<div></div>	<div></div>

1 Service providers scored using Everest Group's proprietary scoring method

2 Value delivered score impacted for service providers that did not provide data

Everest Group[®] PROPRIETARY & CONFIDENTIAL. © 2020, Everest Global, Inc. | EGR-2020-25-CA-3962

Contingent Workforce Management (CWM) – Service Provider Compendium 2020

Service provider 1 | Contingent Workforce Management Profile (page 1 of 4)

Service capability and strategy

Company profile

Allegis Global Solutions is a leading talent solutions provider. It provides solutions to customers seeking to improve the efficiency and effectiveness of their talent management. Headquarters: XXXX Leadership: XXXX Website: www.abc.com Total managed spend: US\$ABC Total number of current CWM programs: ABC Total contingent workers managed: ABC

Recent Investments

- 2019: Invested in QuantumWork to aggregate all data from current Applicant Tracking System (ATS), and Vendor Management System (VMS) talent in one place
- 2019: Invested in Hiring Solved to automate candidate matching
- 2019: Invested in DocuSift to drive digital transformation within detailed spend insight for services spend categories

Tools and technology

Tools	Partnership/ partnership
Vendor Management System (VMS)	Partnership: Beeline/ION, Fieldglass
Services procurement / Statement Of Work (SOW)-related tools	Proprietary: DocuSIFT Partnerships: SAP Fieldglass, Ariba
Freelancer Management System (FMS)	Partnership: Fulcrum and BTG
Analytics	Proprietary: ACUMEN Workforce Partnerships: DocuSift in partnership with Azure and PowerBI
Others	Proprietary: QuantumWork, Allegis Partnerships: HICX

Everest Group[®] PROPRIETARY & CONFIDENTIAL. © 2020, Everest Global, Inc. | EGR-2020-25-CA-3962

Contingent Workforce Management (CWM) – Service Provider Compendium 2020

Service provider 1 | Contingent Workforce Management Profile (page 2 of 4)

Portfolio

Major CWM clients

Not Disclosed

Services procurement / SOW spend by geography

% split of services procurement / SOW spend managed 100% = US\$11.3 billion

LATAM 9%

EMEA 13%

APAC 33%

North America 44%

Everest Group[®] PROPRIETARY & CONFIDENTIAL. © 2020, Everest Global, Inc. | EGR-2020-25-CA-3962

Contingent Workforce Management (CWM) – Service Provider Compendium 2020

Service provider 1 | Contingent Workforce Management Profile (page 3 of 4)

Location landscape

CWM delivery locations

Seattle

Phoenix

Del

Everest Group[®] PROPRIETARY & CONFIDENTIAL. © 2020, Everest Global, Inc. | EGR-2020-25-CA-3962

Contingent Workforce Management (CWM) – Service Provider Compendium 2020

Service provider 1 | Contingent Workforce Management Profile (page 4 of 4)

Everest Group assessment – Leader

Market impact

Vision & capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Measure of capability: ● High ● Low

Strengths

Areas of improvement

- Service provider 1 is a subsidiary of ABC, one of the world's largest staffing and recruitment services companies. Its expertise spans permanent workforce, contingent workforce, integrated talent, and advisory solutions
- It has a diversified portfolio with significant delivery capability across geographies, categories, and job roles. Enterprises looking for a global service provider to execute complex multi-country-continent deals spanning industries and job roles will find service provider 1's offering compelling
- A major part of its strategy revolves around leverage of technology and automation to improve the quality of its CWM solution. Buyers also lauded its technology and analytics capability such as:
 - Investing significantly in its proprietary analytics tool "ACUMEN" to offer critical insights to its clients across multiple areas including rate card benchmarking, talent mapping, market analytics, and supplier performance
 - Developing solutions to automate various processes across the value chain to increase program efficiency, for example, time sheet automation, browser automation, and assignment management
- Service provider 1 has one of the best services procurement offering among all MSP providers globally. It is making dedicated investments by bringing in experienced procurement experts and dedicated sales personnel
 - It has developed a full technology stack solution for services procurement through both proprietary investments and partnerships including contract analytics tool leveraging AI and ML
- Its capability, experience, and focus around providing Total Talent Acquisition (TTA) is reflected in the launch of its proprietary technology "QuantumWork," which enables enterprises to manage and view various aspects of all types of talent being used by them
- Referenced clients cited its forward thinking, proactiveness in bringing innovative solutions, and relationship management as key strengths

- While it has experience serving clients in European and Latin American countries (primarily as part of multi-country deals), locally headquartered buyers looking for curated solutions in these countries should evaluate service provider 1's capabilities carefully, given the relative lack of such clientele in its portfolio
- While it is investing in and leveraging direct sourcing in its existing MSP deals, clients need to evaluate the depth and breadth of its direct sourcing capabilities and experiences before engaging
- Referenced buyers feel that service provider 1 offers consistent service levels across different countries but can be better equipped in bringing consistent quality of suppliers across geographies. Clients highlighted concerns related to the quality of suppliers outside North America
- Referenced clients also highlighted that service provider 1 can be more flexible and effective in terms of project management. They also expressed the need to focus on enhancing stakeholder experience management
- Referenced clients further felt that service provider 1 can improve its implementation and transition management. They felt that it tries to implement its standard one-size-fits-all model; they expect better understanding of individual client requirements

Everest Group[®] PROPRIETARY & CONFIDENTIAL. © 2020, Everest Global, Inc. | EGR-2020-25-CA-3962

Everest Group[®] PROPRIETARY & CONFIDENTIAL. © 2020, Everest Global, Inc. | EGR-2020-25-CA-3962

7

Research calendar

Contingent Workforce Management Services

Published Planned Current release

Flagship CWM reports

	Release date
Managed Service Provider (MSP) Service Provider Landscape with PEAK™ Matrix Assessment 2019	June 2019
Managed Service Provider (MSP) Annual Report 2020: Leading Through Disruption	October 2019
Services Procurement – Service Provider Landscape with PEAK Matrix® Assessment 2020: Unlocking the True Potential of Services Procurement	April 2019
Contingent Workforce Management (CWM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	August 2020
Contingent Workforce Management (CWM) – Service Provider Compendium 2020	September 2020
CWM State of the Market Report 2020	Q4 2020

Thematic CWM reports

	Release date
In pursuit of best in class MSP program	January 2020
Reshape Services Procurement with analytics – An enterprise guide to unleashing power of data in Services Procurement	March 2020
Collaboration to beat disruption – Future of CWM	July 2020
Total Talent Acquisition (TTA) report	Q4 2020

Note: For a list of all of our published Contingent Workforce Management Services reports, please refer to our [website page](#)



Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at [everestgrp.com](https://www.everestgrp.com).

Stay connected

Website

[everestgrp.com](https://www.everestgrp.com)

Social Media

 @EverestGroup
 @Everest Group
 @Everest Group
 @Everest Group

Blog

[everestgrp.com/blog](https://www.everestgrp.com/blog)

Podcast

DigitalRealITy



Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.