

Human Age
Local Impact
Teachable Fit
Project Ability

Friday, November 18, 2011



Manpower®



ManpowerGroup



ManpowerGroup™

ManpowerGroup™ is the world leader in innovative workforce solutions. We leverage our global reach and local expertise of tens of thousands of people across more than 80 countries, making it possible for businesses to access the talent they need when they need it.



ManpowerGroup™
Solutions

ManpowerGroup™ Solutions provides clients with human resources outsourcing services primarily in the areas of large-scale recruiting and outcome-based workforce-intensive initiatives, thereby sharing in the risk and reward with our clients.



Experis™
ManpowerGroup

Experis™ is the global leader in professional resourcing and project-based workforce solutions. With operations in more than 50 countries, we deliver 53 million hours of professional talent specializing in IT, Finance and Engineering to accelerate clients' businesses each year.



Right
Management®
ManpowerGroup

Right Management® is the global leader in talent and career management workforce solutions. Through our innovative and proprietary process, we leverage our expertise to successfully increase productivity and optimize business performance..

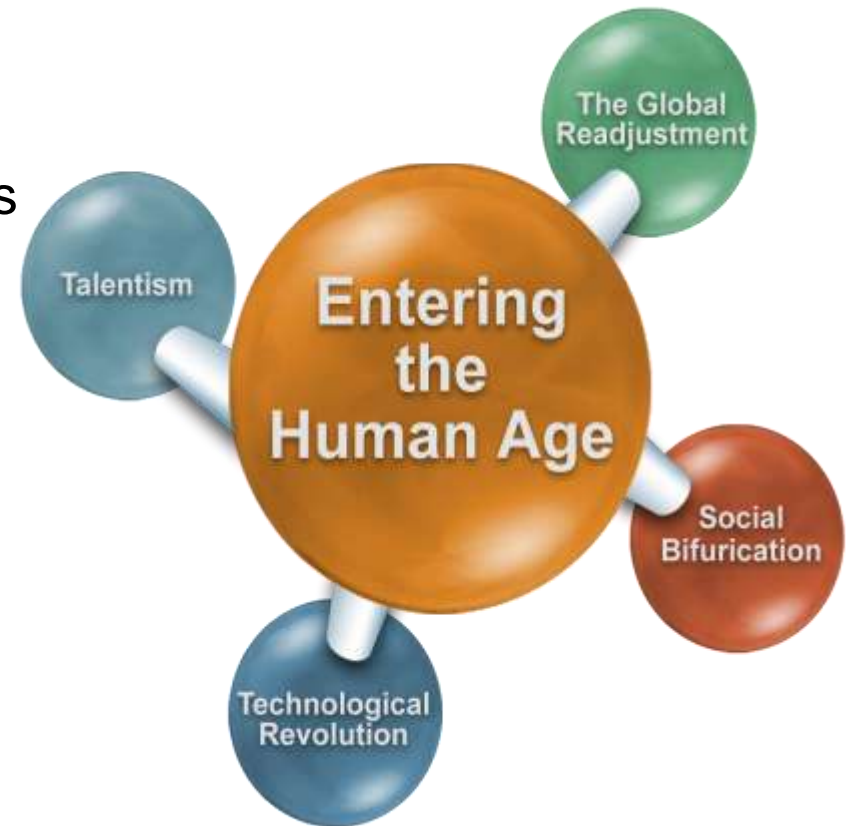


Manpower®

Manpower® is the global leader in contingent and permanent recruitment workforce solutions. We provide the personal flexibility and agility businesses need with a continuum of staffing solutions.

Forces of change in the world

- Emerging markets are reshaping the global economy...
- Widening the gap between the haves and the have not's.
- Rapid technological innovation is creating transparency and lowering transaction costs.
- Talent is the new 'it' – unleashing human potential becomes the major agent of economic growth.



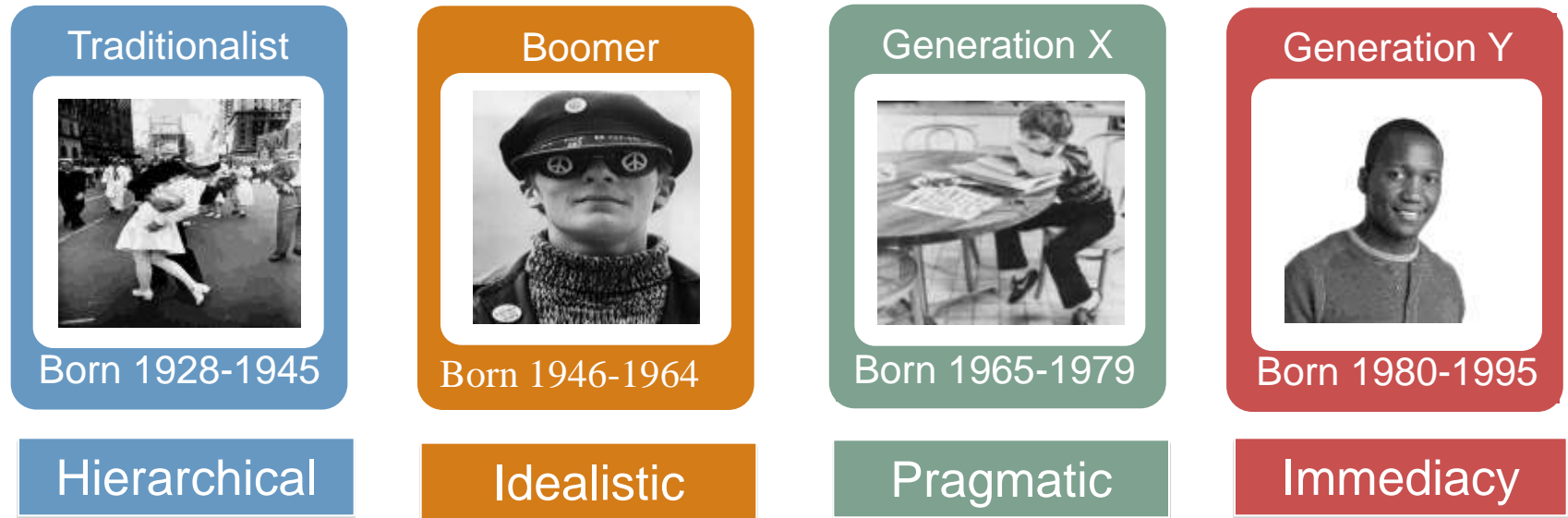
The Dawn of the Human Age

We are entering a new age, the HUMAN AGE, where the true power of human potential will be fully realized.

- Unleashing potential requires a one-size-fits-one approach and will require employers to engage with their people on a more human level.
- This is creating complexity and opportunity in the marketplace.

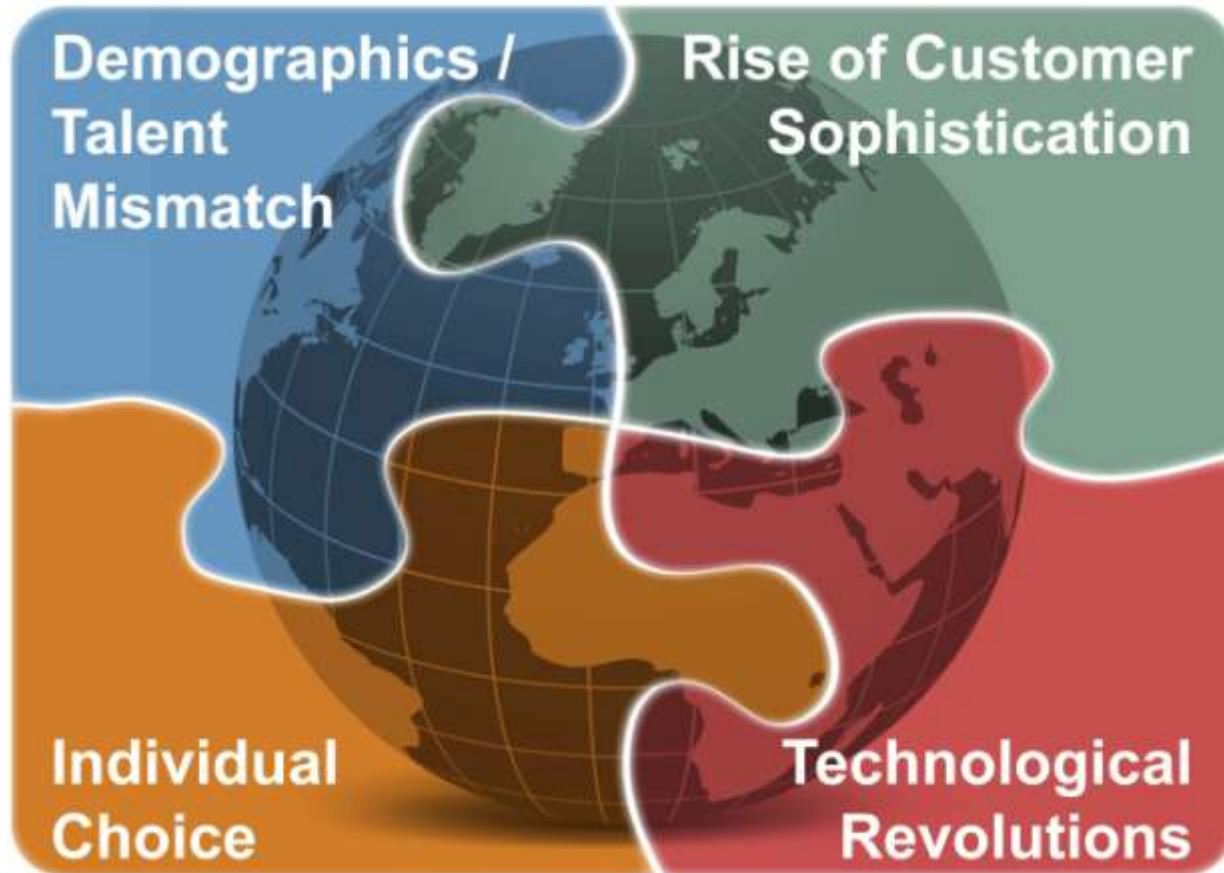


One Size Does Not Fit All



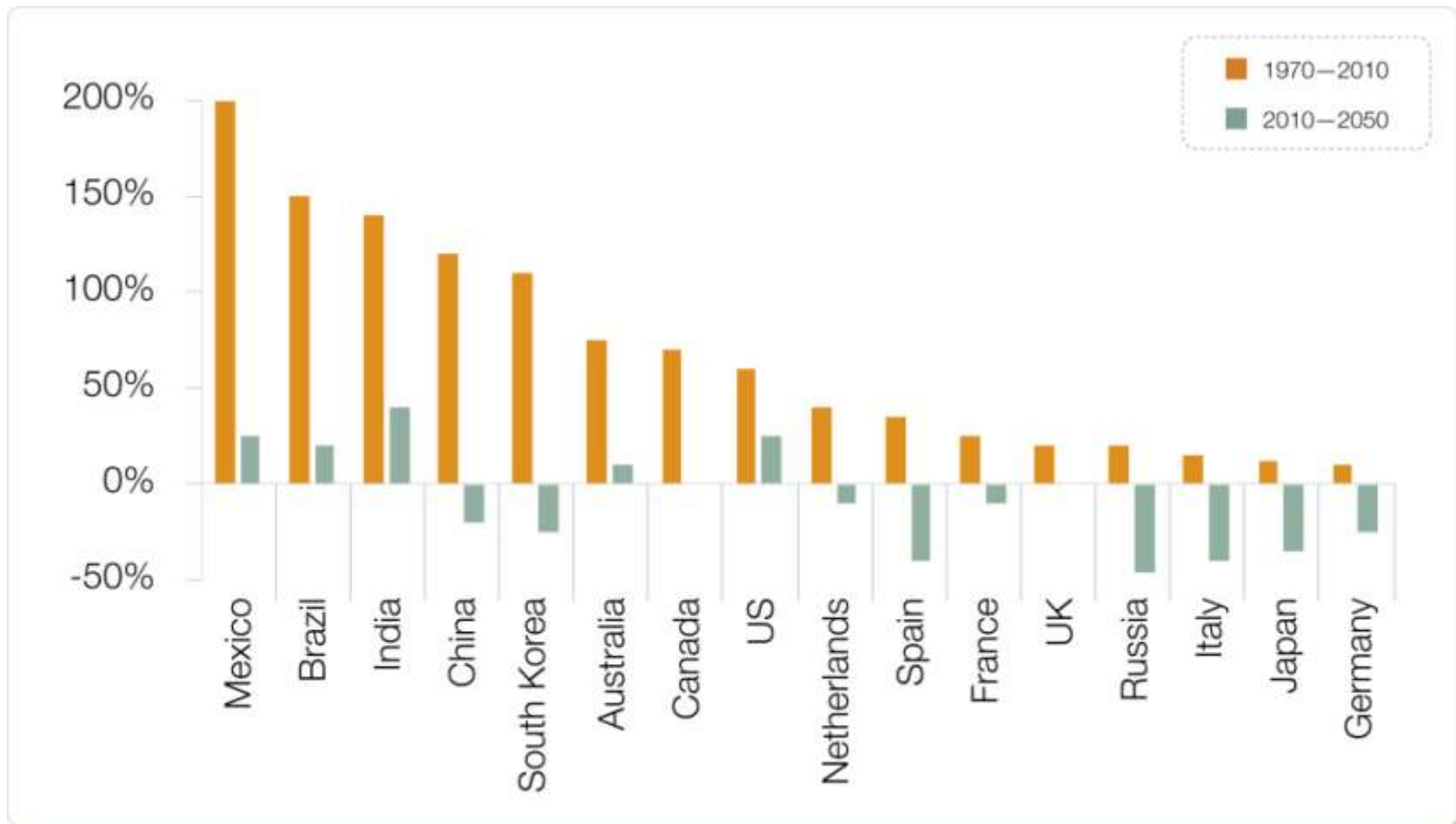
Each generation approaches work differently, shaped by the economic, social and political forces of their time.

ManpowerGroup World of Work Trends: Indicators of the Human Age



Source: ManpowerGroup

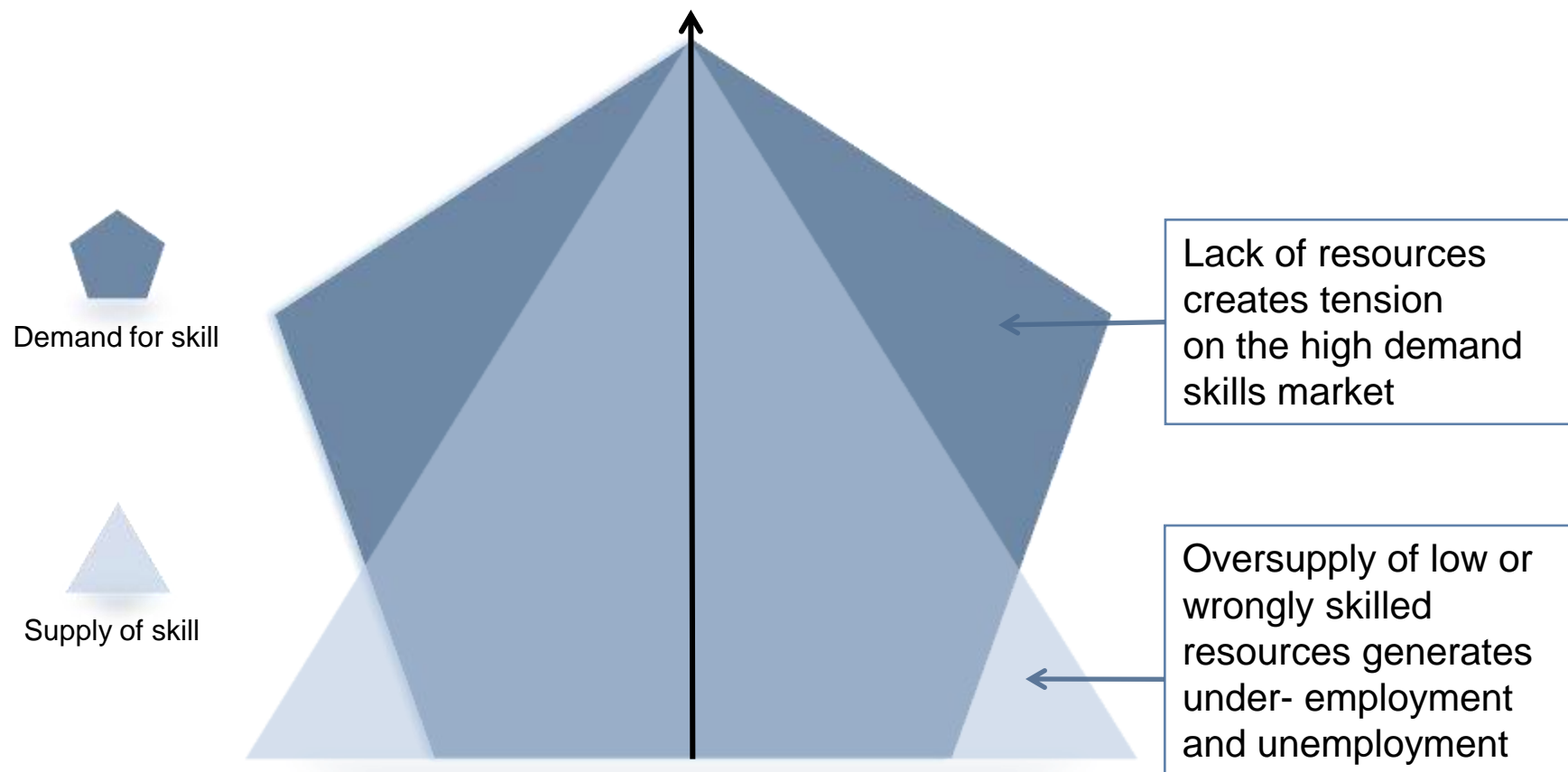
The Global Working Age Population



Source: Deloitte Research/UN Population Division (<http://esa.un.org/unpp/>) It's 2008: Do You Know Where Your Talent Is? Why Acquisition and Retention Strategies Don't Work, p.6

Demographics/Talent Mismatch

The Talent Mismatch Illustrated





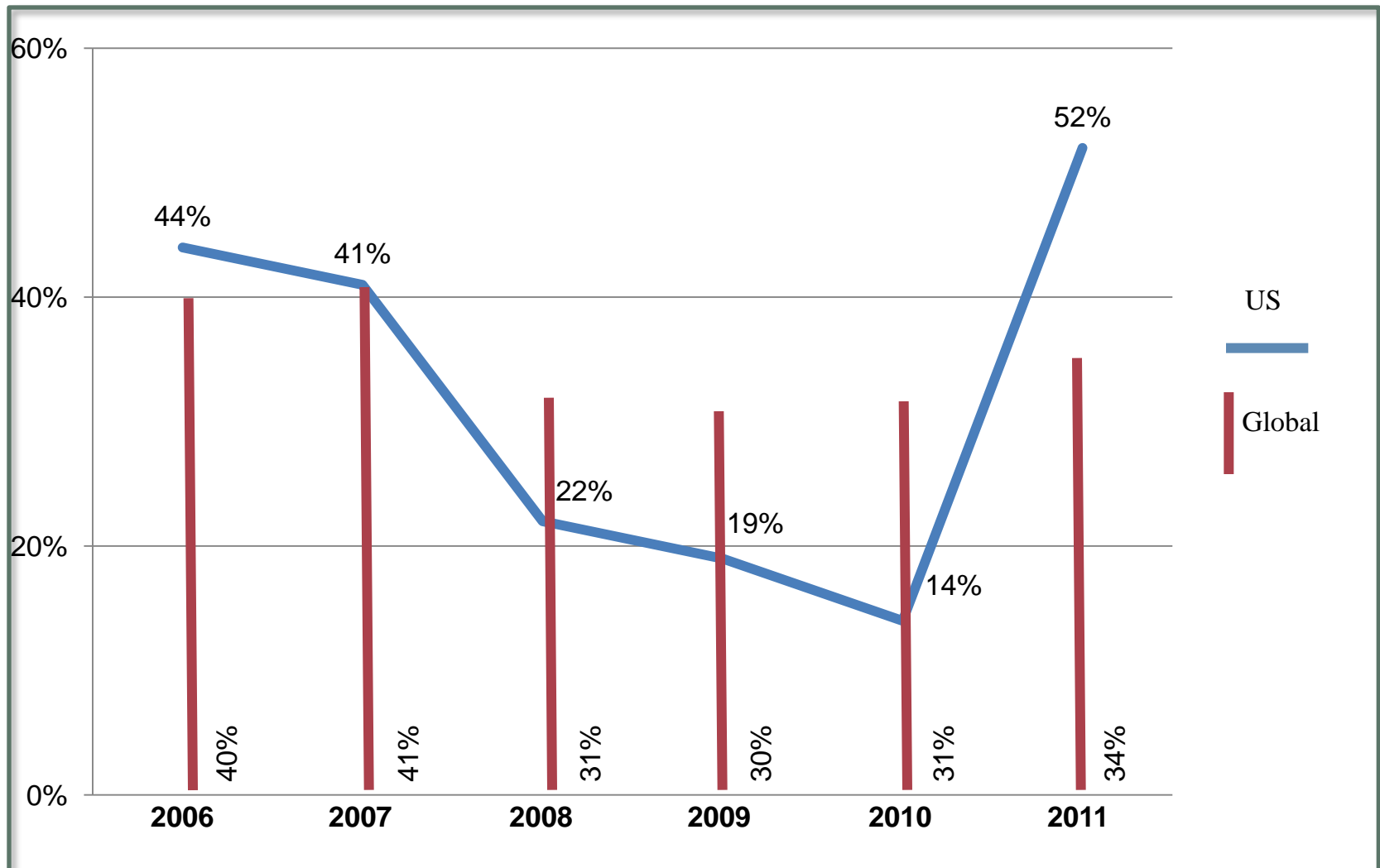
The U.S. is still
wrestling with high
unemployment, but...

52%

of employers report
difficulty filling open
positions.

ManpowerGroup 2011

Percentage of U.S. employers having difficulty



10 Hardest Jobs to Fill

Global

1. Technicians
2. Sales Representatives
3. Skilled Trades
4. Engineers
5. Laborers
6. Management / Executives
7. Accounting & Finance Staff
8. IT Staff
9. Production Operators
10. Administrative Support Staff

United States

1. Skilled Trades
2. Sales Representatives
3. Engineers
4. Drivers
5. Accounting & Finance Staff
6. IT Staff
7. Management / Executives
8. Teachers
9. Administrative Support Staff
10. Machinist

For complete 2011 *Talent Shortage Survey* results from each of the 39 countries and territories participating, visit: <http://us.manpower.com/us/en/research/hardest-jobs-to-fill/default.jsp>.

Total Number of Respondents: 40,000 | Employers indicating difficulty filling positions: 34%
Employers indicating no difficulty filling positions: 66% | Margin of error: +/-2.2%

Why are employers having difficulty?

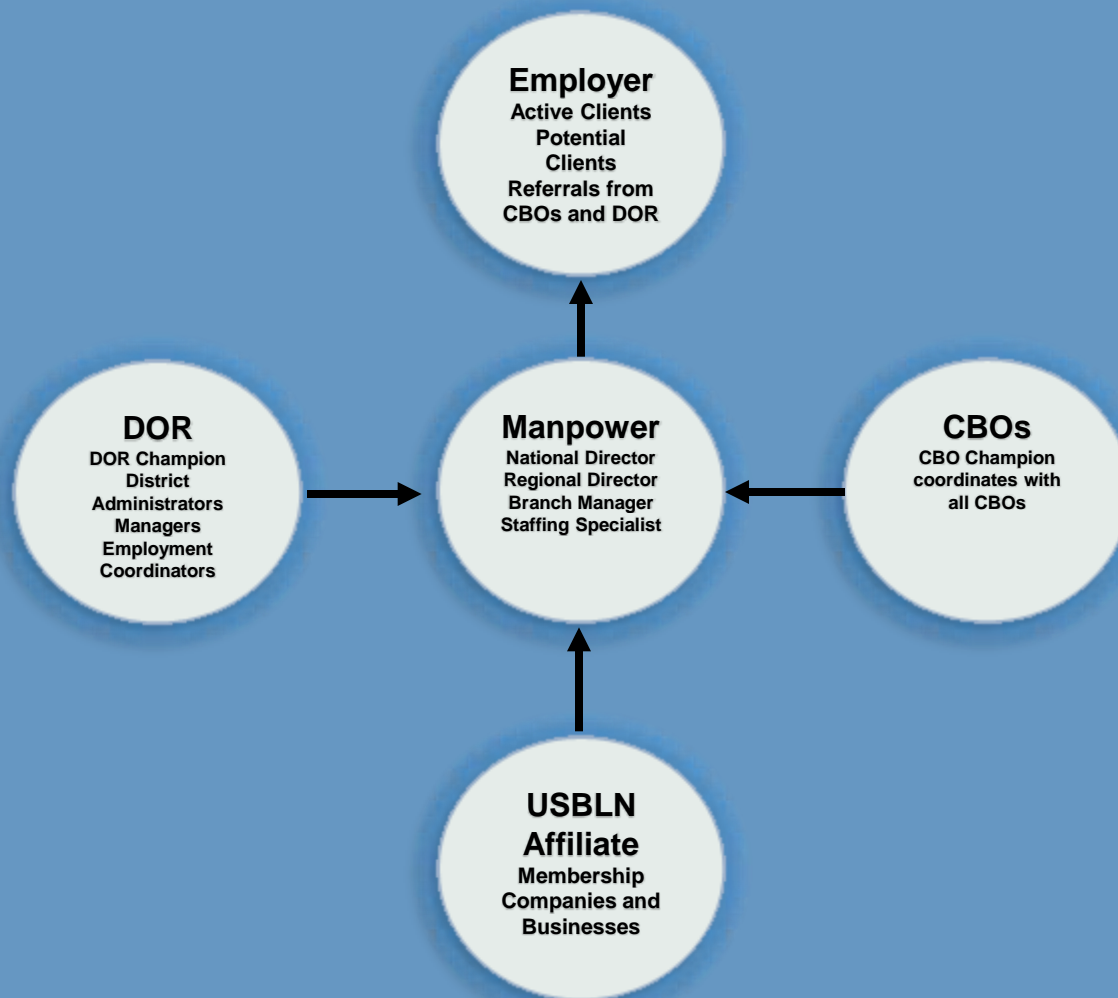
- Looking for more pay than is offered.
- Lack of "hard" job skills or technical skills.
- Lack of experience.
- Lack of available applicants/no applicants.
- Don't possess the right values and mindset.
- Lack of knowledge of business or academic disciplines.

Project Ability - Vision

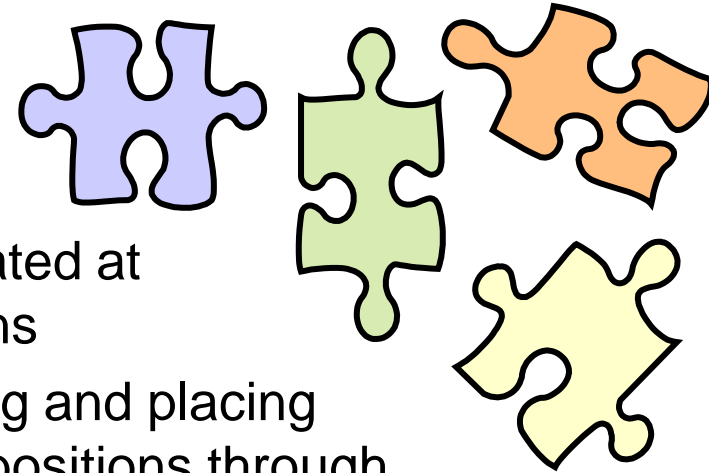


Project Ability is a partnership that relies on collaboration with Community Based Organizations and the State Department of Rehabilitation to provide a workforce solution and talent to our clients that happen to have a disability

Project Ability Partnerships



Value to Employers



- Access to untapped talent pool that is estimated at approximately 20% of most states populations
- Tapping into Manpower expertise in attracting and placing over 5 million people globally in a variety of positions through a proven intake process that identifies the best candidate match
- Proactively attract, hire and develop a population that the federal government is creating more programs and/or accountability for employment (especially through the OFCCP and EEOC)
- Be viewed in the community as a responsible employer that

Manpower client = Manpower customer = Employer

Value to Consumers

- Access to short/long term and full-time positions for their clients
- Exposure to assignments that could turn into a permanent hire
- Access to jobs that are most plentiful in the current economy
- Tapping into Manpower expertise in attracting and placing over 5 million people globally in a variety of positions through a proven intake process that identifies the best candidate match
- Ability to receive 24x7 online training through Manpower Training Development Center (TDC)
- Benefits available for long-term assignments – vacation, holiday, and health benefits



Consumer = Manpower Job Applicant = Manpower Candidate = Manpower Associate

Value to Vocational Rehabilitation and Community-Based Organizations

- Project Ability creates employment opportunities for people with disabilities
- Ability for all organizations to network and share best practices
- Contract hiring is a standard hiring practice
- All participating Manpower offices are trained in etiquette and are prepared to work with a diverse population with sensitivity and awareness
- Project Ability is designed to be responsive and efficient
- Program was created specifically with goal to employ people with disabilities and to get immediate results





Value to Manpower

- Leverage our existing People with Disabilities and focused relationships and projects to tap into this unique talent pool
- Strengthens our Brand and differentiates us by visibly aligning ourselves with a global population that is plentiful
- Provides opportunity for positive community visibility and Public Relations as a result of focused efforts at employing skilled individuals with barriers to employment



Success Stories

- Changing mindsets
- Opening doors
- Breaking barriers
- Building confidence

Manpower Employment Outlook Survey
Statistics from EDD





Local and California Outlook

Unemployment Rates in California

September 2011

www.labormarketinfo.edd.ca.gov/

Current Statistics

Three-Year Trend in California and U.S. Unemployment Rates
September 2011; Seasonally Adjusted Data



- **Santa Clara – 9.6%**
- **San Mateo – 8.0%**
- **Alameda – 10.2%**
- **San Francisco – 8.3%**
- **Santa Cruz – 10.1%**
- **Contra Costa – 10.1%**
- **San Benito – 11.6%**
- **Monterey – 10.1%**
- **Marin – 7.4%**

San Jose – Sunnyvale – Santa Clara Q4 Outlook

	Increase Staff Levels	Decrease Staff Levels	Maintain Staff Levels	Don't Know	Net Employment Outlook
Q4 2011 (current)	16%	11%	68%	5%	5%
Q3 2011 (previous quarter)	21%	14%	61%	4%	7%
Q4 2011 (one year ago)	11%	8%	78%	3%	3%

*The **Net Employment Outlook** is derived by taking the employers anticipating an increase in hiring activity and subtracting from the percentage of employers expecting a decrease in hiring activity.*

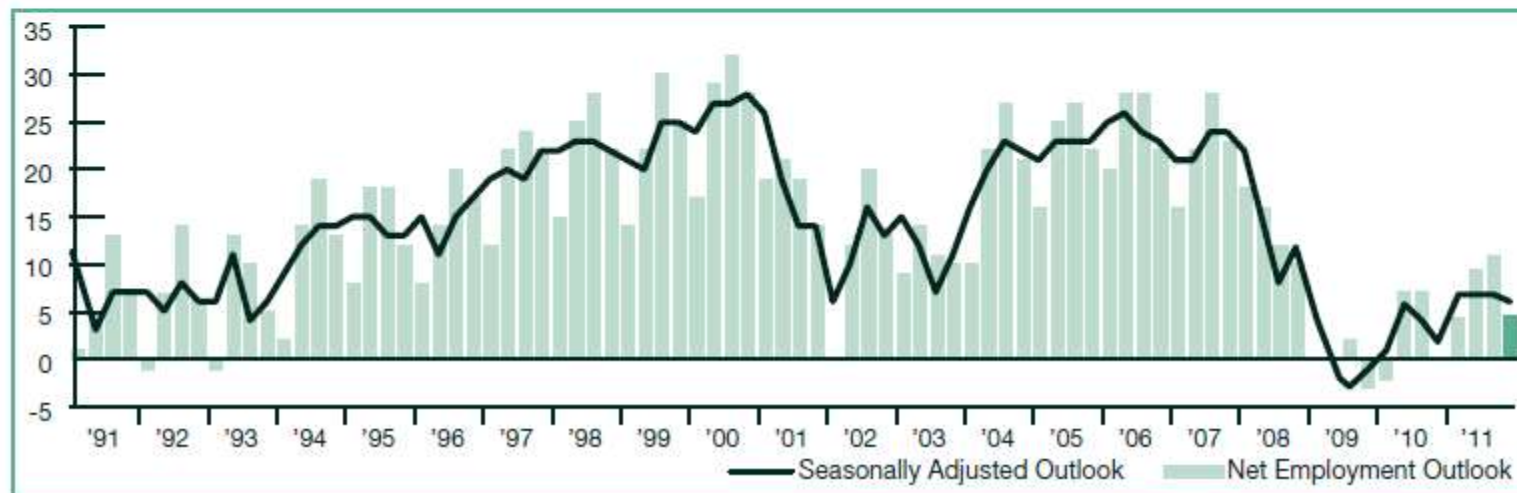
SF – Oakland - Fremont – Q4 Outlook

	Increase Staff Levels	Decrease Staff Levels	Maintain Staff Levels	Don't Know	Net Employment Outlook
Q4 2011 (current)	17%	9%	71%	3%	8%
Q3 2011 (previous quarter)	18%	13%	66%	3%	5%
Q4 2011 (one year ago)	20%	11%	66%	3%	9%

*The **Net Employment Outlook** is derived by taking the employers anticipating an increase in hiring activity and subtracting from the percentage of employers expecting a decrease in hiring activity.*

Industry Sectors/ Employment Outlook for the West Coast

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
All Industries – West	16	12	69	3	4	6
Construction	11	20	64	5	-9	-
Education & Health Services	15	8	71	6	7	-
Financial Activities	12	6	80	2	6	-
Government	13	16	67	4	-3	-
Information	17	8	73	2	9	-
Leisure & Hospitality	23	11	63	3	12	-
Manufacturing – Durable Goods	16	12	68	4	4	-
Manufacturing – Nondurable Goods	19	10	70	1	9	-
Other Services	11	7	80	2	4	-
Professional & Business Services	16	14	65	5	2	-
Transportation & Utilities	16	17	65	2	-1	-
Wholesale & Retail Trade	23	8	67	2	15	-



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

Top Occupations with Fastest Job Growth (% change) from 2008 – 2018 in local Bay Area counties

Occupations in Santa Clara County	Projected # Jobs	# New Jobs	% of change
Personal and Home Care Aides	17,990	5,850	48.2
Sec. Analysts, Web Dev, Net Archit.	8,320	2,740	49.1
Home Health Aides	4,550	1,380	43.5
Occupations in San Mateo County	Projected # Jobs	# New Jobs	% of change
Personal and Home Care Aides	34,730	10,460	43.1
Sec. Analysts, Web Dev, Net Archit.	6,400	1,980	44.8
Medical Scientists, Except Epidem.	5,570	1,770	46.6
Occupations in Alameda County	Projected # Jobs	# New Jobs	% of change
Personal and Home Care Aides	6,700	2,250	50.6
Fitness Trainers and Aerobics Inst.	3,850	1,100	40.0
Physician Assistants	1,050	310	41.9



National Outlook



Manpower Employment Outlook Survey (MEOS)

www.us.manpower.com

“How do you anticipate total employment at your location to change in the three months to the end of December 2011, as compared to third quarter, 2011?”

More than 18,000 interviews have been conducted with employers within the United States, including all 50 states, the top 100 Metropolitan Statistical Areas (MSAs), the District of Columbia and Puerto Rico, to measure hiring intentions between October and December 2011. The mix of industries within the survey follows the North American Industry Classification System (NAICS) Supersectors and is structured to be representative of the U.S. economy.

The National MEOS 4TH Quarter Results

- Encouraging signs in hiring activity in the U.S.
 - 16% intend to increase
 - 11% intend to decrease
 - 70% intend no change
 - 3% are undecided

- Seasonally adjusted Net Employment Outlook is +7%
 - Survey results suggest that employers expect a relatively stable hiring pace during Quarter 4 2011 compared to Quarter 3 2011 as well as compared to one year ago at this time.
 - U.S. employers have now conveyed a positive Outlook for eight straight quarters.

The National MEOS 4TH Quarter Results by Region

- **Midwest +8%**
 - *Slightly Up Year over Year*
 - *Similar Quarter over Quarter*
- **Northeast +6%**
 - *No Increase Year over Year*
 - *Weaker Quarter over Quarter*
- **South +8%**
 - *Unchanged Year over Year*
 - *Unchanged Quarter over Quarter*
- **West +6%**
 - *Slightly Improved Year over Year*
 - *Stable Quarter over Quarter*

In Sum ...

- There are encouraging signs in hiring activity, forecasted by MEOS and revealed in recent Job's Reports
- Almost every Industry sector has forecasted a gain – construction and government are cyclical
- Cautious optimism is becoming more widespread geographically and the overall 2011 employment trend has been up for 8 quarters



Projected industry growth in the U.S. 2008 and 2018



Table 1. Occupations with the fastest growth

Occupations	Percent change	Number of new jobs (in thousands)	Wages (May 2008 median)	Education/training category
Biomedical engineers	72	11.6	\$ 77,400	Bachelor's degree
Network systems and data communications analysts	53	155.8	71,100	Bachelor's degree
Home health aides	50	460.9	20,460	Short-term on-the-job training
Personal and home care aides	46	375.8	19,180	Short-term on-the-job training
Financial examiners	41	11.1	70,930	Bachelor's degree
Medical scientists, except epidemiologists	40	44.2	72,590	Doctoral degree
Physician assistants	39	29.2	81,230	Master's degree
Skin care specialists	38	14.7	28,730	Postsecondary vocational award
Biochemists and biophysicists	37	8.7	82,840	Doctoral degree
Athletic trainers	37	6.0	39,640	Bachelor's degree
Physical therapist aides	36	16.7	23,760	Short-term on-the-job training
Dental hygienists	36	62.9	66,570	Associate degree
Veterinary technologists and technicians	36	28.5	28,900	Associate degree
Dental assistants	36	105.6	32,380	Moderate-term on-the-job training
Computer software engineers, applications	34	175.1	85,430	Bachelor's degree
Medical assistants	34	163.9	28,300	Moderate-term on-the-job training
Physical therapist assistants	33	21.2	46,140	Associate degree
Veterinarians	33	19.7	79,050	First professional degree
Self-enrichment education teachers	32	81.3	35,720	Work experience in a related occupation
Compliance officers, except agriculture, construction, health and safety, and transportation	31	80.8	48,890	Long-term on-the-job training

SOURCE: BLS Occupational Employment Statistics and Division of Occupational Outlook



Fresh Perspectives

Teachable Fit:

A New Approach for
Easing the Talent Mismatch



Manpower®

The world of work is changing...

Technology

“Reinventing”
Work

Skills gaps

Large-scale workforce consolidations

Managing multi-generational workforces

Global talent scarcity

Increasing work migration

Need to adapt to diverse and flexible work arrangements

Drive for “green” job creation

Social networking

Aging workforces

We can help. {We’ve been experts for 6 decades}



By 2020 there will be
123 million
high-skill, high-pay jobs
available in the U.S., but only
50 million
Americans with the right
education to fill them.

Economist Intelligence Unit



3,100,000

job openings in the U.S.

BLS Job Openings and Labor Turnover Survey, April 2010

Demographics / Talent Mismatch



Trend #1: Demographics / Talent Mismatch

Changes in demographics and social shifts means there are not enough people to fill available jobs.

Implications:

- Older workforce will become more prevalent
- Migration for work will increase
- Multi-generations co-exist in work environments
- Unbalanced supply and demand

Why is it getting harder to find the right people?

Employers Want Soft and Hard Skills

- Employers are searching for ever more specific skill sets and combinations.
- They also want candidates with the soft skills, like critical thinking or public speaking, that will help the company excel.

But they can't always find the perfect candidate.

- The exit of the Baby Boom generation from the workforce and the limited number of workers to take their places means there will be fewer available workers.
- Even in low-growth industries there is a lack of qualified candidates to meet current needs.
- Where there are systemic shortages, employers can't fill the gaps one position at a time.

The talent mismatch can't be fixed one hire at a time. We need a change of mindset.

Employers must recalibrate their mindsets to consider candidates who may not meet all the job specifications, but whose capability gaps can be filled in a timely and cost-effective way.



Training is vital.

A commitment to training and development is central to building a sustainable talent strategy.



Manpower's "Teachable Fit" Framework



Manpower's "Teachable Fit" Framework

To close the gap between employer needs and the abilities of candidates and employees, employers need to ask four questions:

- What capabilities are essential to performing the job?
- Which of these are teachable in an efficient way?
- Is there adequate time and money to develop these capabilities in the candidate?
- Do candidates have the capacity (motivation and capability) to develop them?

The Four Capability Groups of the “Teachable Fit” Framework

- **Knowledge:** Understanding of business or academic disciplines or industries.
- **Skills:** Demonstrated aptitudes and practices.
- **Values and Mindset:** Attitudes and preferences sought in work and life.
- **Personality and Intelligence:** Basic characteristics and mental traits.

Weighing Job Capabilities

After examining the four areas of capability, the employer must weigh each on two scales:

- **Is it important?**
How essential is the capability for performing the work well?
- **Is it teachable?**
To what extent and with what degree can the capability be developed?

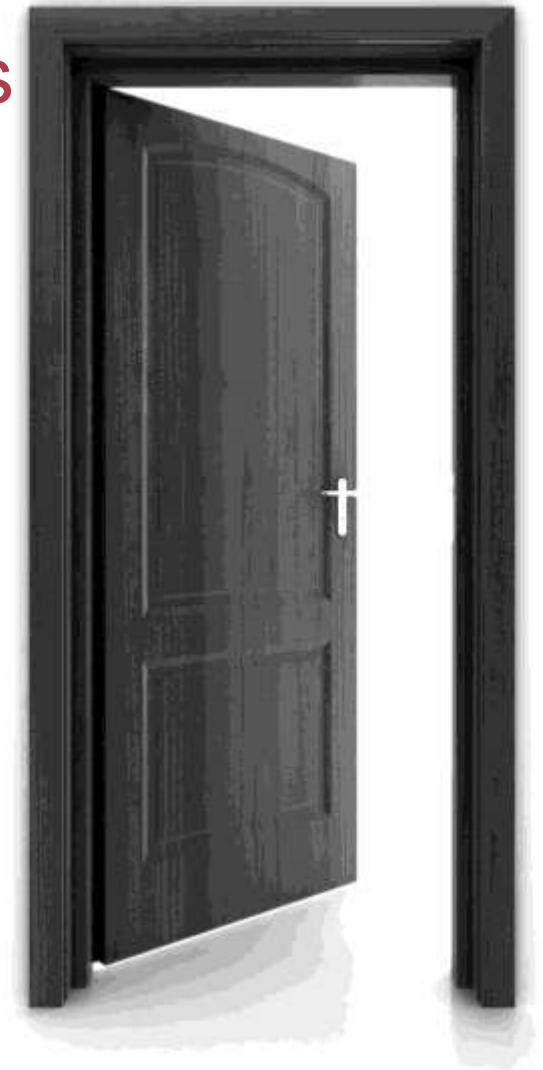


Strategies for Success

Surviving and succeeding
in today's job market.

Strategies for Success- Job Search Basics

- **Review your skills, strengths and experience**
- **Get organized**
- **Create a resume**
- **Network**
- **Use the Internet**
- **Go to job fairs**
- **Prepare for interviews**



Networking

- Create a contact list of 50+ people
- Prioritize each contact
- Make calls specific to what you are looking for
- Expand your network
 - Networking clubs
 - Chamber events
 - Professional associations
 - Tradeshow



Networking

- Unstructured events
 - Restaurants and clubs
 - Parties
 - Social occasions
- Online social networking
 - Facebook.com
 - LinkedIn.com
 - Myspace.com
 - Yahoo
 - Twitter
 - MyPath



The world of work experts

Manpower provides research and reports for economists, journalists, university researchers and think tanks to help them assess and forecast the health and direction of the world's labor markets.



Teachable Fit: A New Approach for Easing the Talent Mismatch

The talent mismatch will only intensify as the economy recovers. Learn how organizations can recalibrate their talent strategies and find candidates with a “teachable fit.”



Social Networks vs. Management? Harness the Power of Social Media

This Fresh Perspectives paper explores how organizations should leverage the connective power of social networking to enhance productivity, innovation, collaboration, reputation and employee engagement.



Manpower Employment Outlook Survey

The most extensive, forward-looking hiring forecast; 36 countries and territories.

Full articles can be found in Manpower's Research Center at
www.manpower.com/researchcenter

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Questions and Answers

Sources of Information

- Manpower U.S. Web site
www.us.manpower.com
- California EDD
www.edd.ca.gov
- U.S. Bureau of Labor Statistics
www.bls.gov
- THANK YOU!

