Tomorrow’s Talent is Here
Today:
Seizing Opportunity in the Digital Age

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Vice President
Manpower Manufacturing
ManpowerGroup Overview

70 Years of Global Workforce Solutions Expertise

- Revenues of $21 billion
- 87% of revenues generated outside of U.S.
- 80 Countries & Territories
- 29,000 Employees
- 2,700 Offices

ManpowerGroup

Most Trusted Brand in the Industry

Strong and Connected Brands

• Providing meaningful work for 600,000+ people every day
• Connecting millions of job seekers with work every year, globally
• Finding talent for clients from small/medium to Fortune 100 companies

World-Leading IT Professional resourcing firm
A World-Leading Outplacement Firm
LARGEST GLOBAL VENDOR-NEUTRAL MSP PROVIDER
World of Work Trends – Human Age 2.0
The Skills Revolution
The State of the U.S. Labor Market

Talent Shortages Are Growing Nationally

14% Great Recession (2010)

46% Today (2018)

Participation rates are stagnant

<table>
<thead>
<tr>
<th>Year</th>
<th>Participation Rate</th>
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<tbody>
<tr>
<td>1948-1963</td>
<td>Below 60%</td>
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<tr>
<td>1970</td>
<td>61%</td>
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<tr>
<td>1980</td>
<td>63%</td>
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<tr>
<td>2000</td>
<td>67.3%</td>
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<tr>
<td>2013</td>
<td>63%</td>
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<tr>
<td>Today</td>
<td>63.1%</td>
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Record High

Great Recession (2010)
Tomorrow’s Talent is Here Today

Population Growth Hits 80-year Low

Low Unemployment

6.9%
2013

3.9%
Today

<1 Ratio of Unemployed Jobs

U.S. Census Bureau

ManpowerGroup
Job Growth Shows No Signs of Slowing Down

Recruitment Difficulty Index Values
What’s Coming
Next…
90%+ of employers expect to be impacted by digitization in the next two years.

75% of business leaders believe that, in that same timeframe, automation and “digital” will require brand new skills.

46% of employers already report that they are having difficulty in filling jobs.

87% of companies are planning to increase or maintain headcount as a result of automation.

As reported in ManpowerGroup’s Skills Revolution 4.0 Report: Humans Wanted: Robots Need You, 2019.
Mapping the Future of Digital Manufacturing

**THE 7 DOMAINS**

Our research identified 165 roles within manufacturing, distributed across the seven domains.

- **Digital Manufacturing** | 28%
  Traditionally known as the “shop floor”

- **Digital Thread** | 21%
  Management of an asset’s data across its product lifecycle

- **Digital Enterprise** | 16%
  Organizational-level leadership, strategy and governance

- **Digital Product** | 8%
  Aftermarket support services and feedback

- **Digital Design** | 10%
  Tools, techniques and innovative mindset to design, simulate and plan products

- **Supply Network** | 11%
  Technologies and capabilities that support the supply and delivery of resources and products

- **Omni** | 6%
  Wider, external cross-domain areas of work
### FINANCIAL TECHNOLOGY
- Digital Era Enterprise Ethicist
- AI Trainer
- Test Engineer
- Future Ventures Director
- Data Management Architect/Data Scientist
- Organizational Change Strategist

### HEALTH CARE
- 3D Printing Technician
- AI and Machine Learning Engineer
- Augmented Reality Journey Specialist
- IT/OT Systems Integration Specialist
- Clinical Delivery Change Coach
- Omni Care Practitioner
- Regulatory, Compliance and Legal Integrator

### MANUFACTURING
- Instrumentation, Automation and Controls Technician
- Factory Automation Engineering Manager
- Predictive Maintenance Systems Specialist
- Mega Systems Engineer
- Autonomous Mobility Engineer
- Data Science Researcher
- Material Science Bioengineer

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What’s Important?
The Importance of Learnability

- Human strengths in the skills revolution
  - soft skills + technical + digital skills = best blend

- Automation is good news for job seekers:
  - 10% of employers expect to reduce their workforce as a result of automation.
  - 65% of companies planning to increase headcount in IT roles say communication is the most valued soft skill.
  - 73% of companies shrinking their HR teams.

- 86% of employers plan to maintain or increase headcount due to automation.

Automation is good news for job seekers: if they have the skills.
Becoming Builders of Talent Cycles

A high-growth, highly stable environment, where companies had time and resources to be builders of talent.

Globalization brought shrinking margins and cost-cutting. Companies responded by labor cost reduction and just-in-time recruitment.

Now, companies need to quickly adjust to the market place to get a quicker return on investment and grow. Talent cycles are shorter so people need to upskill in short bursts.
Understanding Generational Motivations – Attract & Retain

- Getting paid well
- Learning new skills
- Work/life balance
- Work that’s meaningful to me
- Career advancement
- Providing a better future for my family/children
- Feeling appreciated by my employer
What Can We Do Together?
Building a Workforce Strategy that Enables Economic Development

BUILD
Invest in learning and development

BUY
Go to market to attract the talent that cannot be build-in-house

BORROW
Cultivate communities of talent beyond the organization

BRIDGE
Help people move on or move up to new roles inside or outside the organization
Buy: Creating Talent Communities Around Shared Needs

Delivering Innovative Human-Technical-Virtual Experiences & Care

Commercializing Innovation

Optimizing Bio-Science into Bio-Business, Cities and Services

Integrating Risk Mitigation: Security Compliance, Fiduciary and Legal Dependencies

Innovating Design and Development

Accelerating Modern/Next Core IT

Technician, Analyst, Analystsians

Designers, Producers, Developers

Engineers, Strategists, Architects

Integration Specialists

Organizational Change Strategist

Clinical Delivery Change Coach

Product Strategist

Data Science Researcher

Material Science Bioengineer

IT/OT Systems Integration Specialist

Test Engineer

Data Management Architect/Data AI & Machine Learning Engineer

Predictive Maintenance Systems Specialist

AI Trainer

Autonomous Mobility & Safety Engineer

3D Printing Technician

Instrumentation, Automation and Controls Technician

Mega Systems Engineer

Regulatory, Compliance and Legal Integrator

Factory Automation Engineer Manager

Modern Leaders

Customer/ Patient/ User Delivery Specialists

Augmented Reality Journey Specialist

Mega Systems Engineer

Future Ventures Director

Omni Care Practitioner

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Borrow: Creating Conditions for Flexibility & Balance

**NEXTGEN WORK:**

Part-time, contingent, contract, temporary, freelance, permalance, independent contractor, on-demand online and platform working.
Build: Developing Employability Today and Tomorrow

**CURRENT ROLE**

Payroll Specialist
- Open jobs in U.S.: 33,899
- Declining Outlook: \(-8.4\%\)
- Salary: $19/hour

**NEXT ROLE**

Accounting Clerk
- Open jobs in U.S.: 209,000
- Long-term demand: \(-1\%\)
- Salary: $21/hour

**GOAL ROLE**

Financial Analyst
- Open jobs in U.S.: 104,064
- Long-term demand: \(+11\%\)
- Salary: $41/hour

Acquired skills: On-the-job and additional training & certification

Next Job Access  Training and Development  Assessments and Feedback  Support and Advice

MyPath™
Bridging: Proactively Pipelining Talent

Functions Likely to See the Largest Increase and Decrease in Headcount in the Next 2 Years

- **Administrative & Office**: Increase by 10%, decrease by 6%
- **Human Resources**: Increase by 5%, decrease by 2%
- **Finance & Accounting**: Increase by 4%, decrease by 0%
- **IT**: Increase by 9%, decrease by 6%
- **Manufacturing & Production**: Increase by 18%, decrease by 12%
- **Frontline & Customer-Facing**: Increase by 25%, decrease by 15%
Success in the Digital Age Takes Us All

BUILD
Invest in learning and development

BUY
Go to market to attract the talent that cannot be build-in-house

BORROW
Cultivate communities of talent beyond the organization

BRIDGE
Help people move on or move up to new roles inside or outside the organization