

THE EVER-CHANGING PORTRAIT
of
the American Workforce

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Spherion Corporation (NYSE: SFN) is a leading recruiting and staffing company that provides integrated solutions to meet the evolving needs of companies and job candidates. As an industry pioneer for more than 60 years, Spherion has screened and placed millions of individuals in temporary, temp-to-hire and full-time jobs. Positions range from administrative and light industrial to a host of professions that include accounting/finance, information technology, engineering, manufacturing, legal, human resources and sales/marketing.

With approximately 650 locations in the United States and Canada, Spherion delivers innovative workforce solutions that improve business performance. Spherion provides its services to more than 8,000 customers, from Fortune 500 companies to a wide range of small and mid-size organizations. Employing nearly 300,000 people annually through its network, Spherion is one of North America's largest employers. To learn more, visit <http://www.spherion.com>.



The Methodology

The Spherion Emerging Workforce® Study was conducted by Harris Interactive® on behalf of Spherion Corporation. A U.S. sample of 3,152 employed adults, aged 18 years and older, was interviewed between March 5-16, 2007. Employed adults were defined as those working 30 or more hours per week. Figures for age, sex, race/ethnicity, income, education and region were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting adjusted for respondents' propensity to be online.

With pure probability samples, with 100 percent response rates, it is possible to calculate the probability that the sampling error (but not other sources of error) is not greater than some number. With a pure probability sample of 3,152 U.S. employed adults, one could say with a 95 percent probability that the overall results would have a sampling error of +/- 1.8 percentage points. However, that does not take other sources of error into account. This online survey is not based on a probability sample and therefore no theoretical sampling error can be calculated.

About the 2007 Spherion® Emerging Workforce® Study

More than 10 years ago, Spherion Corporation consulted with international polling firm Harris Interactive to launch the Emerging Workforce® Study, a research initiative designed to provide a comprehensive portrait of changes in the American workforce in the context of on-going social and economic events. Since that time, Spherion has continued to track the growth of an *emergent* workforce and the resulting implications for U.S. employers.

In subsequent studies, Spherion experts have discovered that while attitudes and opinions of the workforce were changing, the majority of employers were reluctant to adopt a style of management which would allow them to attract and retain top talent. The most recent Study updates and expands on previous workforce research published by Spherion in 1997, 1999, 2003 and 2005.

Chapter 1

Introduction

Unquestionably, labor market dynamics are changing. Soon, what has largely been theoretical chatter will materialize into a stark reality. To what degree demographics will influence the supply and demand of talent as a whole is yet to be seen, and will no doubt vary by industry and employer. Still, the one projection void of debate, which stands to greatly impact any company, is that competition for skilled talent is about to become ruthless.

More than 10 years ago, Spherion Corporation consulted with international polling firm Harris Interactive to develop and launch the Emerging Workforce® Study, a research initiative designed to provide a comprehensive portrait of changes in the American workforce in the context of on-going social and economic events. Since that time, Spherion has continued to track the growth of an *emergent* workforce and the resulting implications for U.S. employers in 1997, 1999, 2003 and 2005. This 2007 installment is of great magnitude given its framework—ever-changing worker attitudes and demands amidst a much-touted and feared labor shortage.

In anticipation of a labor market characterized by a smaller supply of educated and/or skilled workers relative to demand, this latest Emerging Workforce® Study provides unprecedented insight into the minds of all workers, and most importantly, the *emergent* workers who are the most confident, change ready and are often your highest performers. We peer closely into their career motivations and employer expectations. The Study also provides further analysis of other key segments of the labor pool—*migrating* and *traditional* workers who have their own set of career motivations and attitudes and who will also play a key role in filling workplace vacancies. Learn what strengths and value each type of worker can bring to an organization, as well as how to create an *emergent* organization that appeals to all workers in chapter two of this report.



Global market dynamics, such as the aging population, immigration and employers' more technical job requirements will impact organizations differently based on their products or services, location and specific talent needs. To what extent will a skilled talent shortage impact your company? Do you operate in an industry sector projected to have growth or decline? Studying and understanding the global landscape and what impact, if any, it may have locally is central to designing your company's human resource strategies.

To assist organizations in developing world-class recruitment and retention programs, Spherion's Emerging Workforce data has been analyzed and published in this report based on a number of factors, including age, education, profession, workplace values and more. This report not only provides powerful information and data about today's workforce, but it also provides the foundation to begin building a better strategy to attract and retain workers of all types. Within this report, you'll find valuable insights such as, what drives retention for workers today, how work/life balance programs impact workers' job satisfaction, and how many employees plan on leaving their job at their own initiative.

With an ever-shrinking labor pool and a tight job market, the need for such information cannot be underestimated. Recruitment, today more than ever, is about finding the right fit between what a candidate is looking for and what an employer and the job has to offer. Anything less will result in costly turnover and a place on the losing end of the war for talent. With this Study, Spherion has delivered a research-based blueprint to take the guesswork out of recruitment and retention.

Chapter 2

THE EVER-CHANGING PORTRAIT *of the* *American Workforce: Emergent Trend 1997-2007*

Many experts believe that this is the year American employers will begin to feel the effects of a demographically different and supply-short labor force. Employers find themselves at a starting line, poised to begin what is predicted to be a marathon race in the quest for skilled talent. Along the way, competition will be fierce, and only those companies that can effectively identify and adapt to frequent changes in the landscape of the U.S. workforce will make it to the finish line and claim a big payoff.

After more than a decade of tracking and studying America's labor market, we've identified only one consistent and unfailing characteristic of the U.S. workforce that rings true year after year. Their attitudes and values are constantly changing.

This year is no exception. The unrelenting variations in workers' attitudes and preferences towards their employer and career are without question the motivation behind the Emerging Workforce® Study, commissioned by Spherion and conducted by Harris Interactive. We've identified the latest adjustments in workers' mindsets so that companies may have a clear and detailed map of the road that lies ahead, and the necessary adjustments they will need to make in their recruitment and retention of talent.

An Emergent Workforce

An increasingly abundant segment of workers, first identified by Spherion in 1997, have slowly embraced a new attitude and mindset towards career and the employment contract. Dubbed *emergent* workers by Spherion, these employees have provided a clear and consistent portrait of their workplace expectations based on their answers in Spherion studies published in 1997, 1999, 2003, 2005 and 2007. Beliefs about work/life balance, career growth and one's control over their career sets *emergent* workers worlds apart from their more *traditional* peers.



In previous studies, we've seen substantial growth within the emerging segment of the workforce, those employees whose attitudes fall firmly in the *emergent* camp. As a result, we have projected these increases would remain at a quick pace. However, this year's findings revealed a slight, but unexpected drop in the number of workers who fall decisively on the *emergent* side of the spectrum.

Yet, even despite the small decline in the number of pure *emergent* workers down to 27% from 31% in 2003, the Study findings indicate that the lion's share of traits and beliefs consistent with an *emergent* attitude appear to be taking hold among the workforce overall, with another 48% of the workforce on the threshold. Only their stance on a few factors, namely the concept of loyalty and a renewed desire for stability, has prohibited a greater number of these *migrating* workers from being identified as truly *emergent*.

Emerging Values

Emergent workers can be found in any organization, at any level and in any part of the country. They are not set apart by race, gender, geography or any demographic for that matter. Instead, *emergent* workers differ solely in their attitudes, values and expectations of the workplace.

Distinct *emergent* viewpoints on career management and a variety of workplace values characterize this new breed of worker. They generally believe they should be more in charge of their career, and in fact, are. They are more likely to feel that they should help their organization succeed by continuing to improve their skills, and are therefore intent on working for a company that rewards employees based on performance rather than tenure.

Emergent workers are drawn to an environment with frequent change and excitement. They seek out employers who provide opportunities to be creative and challenge traditional ways and means of accomplishing tasks. In line with these biases, *emergent* workers are most satisfied in an environment that offers mentoring and growth opportunities so that they may contribute to their organization. In fact, contributing at high levels is how *emergent* employees define their loyalty to their employer, not by how long they've been on the payroll.

Emergent workers won't fret if their employer doesn't embrace these values or offer such an environment, they will simply leave. Not only have these workers taken the reigns when it comes to their career, they are more likely to have a career plan they are working towards, and are highly confident even if their path requires them to maintain a stable income outside of the traditional corporate structure.

	Traditional	Migrating	Emergent
An employer has a moral obligation to keep long-term employees as long as they meet the requirements in the job description	93%	86%	50%
Loyalty is being willing to stay with an employer for the long haul	94%	83%	46%
I prefer work that provides an opportunity for growth, even if it is stressful	53%	81%	86%
My job means more to me than just a way to earn a living	58%	78%	83%
An employer is responsible for providing a clear career development path for its employees	86%	75%	53%
My level of commitment to my employer depends on the likelihood of long-term job security	83%	68%	40%
Loyalty is not related to how long you stay with employer, but to how big a contribution you are currently making	40%	68%	78%
Changing jobs every few years is usually damaging to a person's long-term career advancement	72%	61%	18%
Long-term career advancement depends on staying with an employer for a long time	77%	56%	13%

TYPICAL EMERGENT WORKERS ARE...

‣• **Highly Educated** •◀

17% received post graduate degree; 31% are college graduates

‣• **Of Moderate Age** •◀

Mean age of emergent workers is 44

‣• **Spread Evenly Across the Country** •◀

‣• **Hard Workers** •◀

Average hours worked per week is 45.1

‣• **Equally Likely To Be Male or Female** •◀

Male to Female ratio: 54% : 46%

‣• **Income** •◀

*9% make less than \$34.9K annually; 45% make between \$35K and \$99.9K annually;
35% make above \$100K annually*

Traditional Values

On the other hand, *traditional* workers are characterized primarily by their need and desire for safety and security. Comprising 25% of the workforce, these employees look to their employers to lead the way when it comes to providing a clear career path, and in return, will offer a long-term commitment to the company. Compared with *emergent* workers, they are more concerned with stability and clear direction, and define loyalty as someone who is “in it for the long haul.”

While both *emergent* and *traditional* workers gravitate towards an environment that encourages creative thinking and finding new and better ways of doing their jobs, *traditional* employees are much more likely to be attracted to an environment with “clear directions on what I need to do from day to day.”

Still holding on to days past, *traditional* workers like to do things the “company way.” They believe workers who put in their time deserve to remain at the organization, regardless of how well they perform or how productive they may be. Companies may feel these workers are an asset given their traditional mentality towards loyalty and workplace values, however, in a global marketplace that places a high price on speed and productivity, workers who are primarily slow and steady may not yield the best results.

Characteristics of an Attractive Work Environment	Traditional	Migrating	Emergent
Clear directions on what I need to do from day to day	93%	81%	53%
An employer who quickly weeds out employees who are not contributing at high levels	57%	79%	80%
An employer who spends a lot of time working with lower performing employees to help them improve their performance	86%	74%	53%
An employer who expects employees to pursue on-going training or educational experiences on their own	36%	61%	70%
An employer who expects all employees to follow the rules and regulations, regardless of the circumstances	71%	62%	32%

The Migrating Spectrum

Nearly half (48%) of all U.S. workers are currently on the path from *traditional* to *emergent*, according to this year's Study. Given the substantial number of employees sitting somewhere in between an *emergent* and *traditional* mindset, additional analysis was completed to better define these workers. Unlike previous studies, we've taken a deeper look at the largest segment of workers and are now able to provide a better analysis of those employees on the road from *traditional* to *emergent*. Now, *migrating* workers themselves have been further refined and broken down into three distinct segments based on their responses to the Study questions.

Migrating/Emergent (13%)

Sitting delicately on the cusp of becoming truly *emergent* are approximately 13% of workers. These *migrating/emergent* workers hold extremely similar views of the workplace and their career as those of *emergent* employees. Holding them back are slightly more *traditional* leanings when it comes to loyalty and commitment to employers.

Their more *traditional* outlook on commitment is most evident in that more than half (56%) agree that their level of commitment to their employer depends on the likelihood of long-term job security, and that loyalty is being willing to stay with an employer for the long haul. In addition, the entrepreneurial spirit doesn't run quite as deep among this group of workers either. *Migrating/emergent* workers are least likely to have confidence in their ability to earn a living outside a *traditional* work structure, with only 46% agreeing so.

The feelings of *migrating/emergent* workers towards tenure and fidelity to their company could be due to the relative older age of this group of workers, with the average worker being 43 years old. Another interesting differentiation is in the level of education of this group, as compared to their pure *emergent* counterparts. The Study findings suggest that a greater need for job security and lower confidence in their abilities may be linked to their lower levels of education, with only 24% receiving a college degree and 12% earning a post-graduate degree.

Migrating (14%)

This group of workers is truly *migrating*, with a blending of all four shades of *emergent* and *traditional* attitudes. No clear picture has materialized as to distinct opinions on workplace characteristics or values. This “melting pot” of attitudes means these workers are likely to find some things attractive about their employer—regardless of the organization’s management style or environment.

As employers begin to adopt more *emergent* practices, the challenge will be to ensure these workers migrate with them; and don’t become a casualty of this change. Maintaining frequent communication with these workers will go a long way towards their retention and satisfaction.

Traditional/Migrating (21%)

One might expect the *traditional/migrating* workers to share views and behavior with *traditional* workers, and they do to a degree. But surprisingly, *traditional/migrating* workers also express attitudes very similar to *emergent* workers. They share a certain level of confidence and job satisfaction with *emergent* workers, particularly when it comes to compensation and growth potential. They also believe strongly in the notion that periodically changing jobs can advance one’s career, not damage it.

Unlike their *emergent/migrating* counterparts, this group of workers is highly entrepreneurial, confident in their ability to step outside the protective walls of the corporate structure and earn a living.

This group of workers is unique in that they are younger than other segments of the workforce. They have the least amount of years in the workforce compared to all other segments. This relative inexperience may account for an apparent confusion among these workers in terms of workplace values and attitudes. *Traditional/migrating* workers have opinions about career and work environment that often conflict. For example, they are much more likely to agree strongly that they prefer an environment where their supervisor sets their goals and gives them their assignments—a clearly traditional value. On the other hand, the majority (69%) agreed they have growing confidence in their ability to make a stable income by means other than a *traditional* work structure within a company—a more *emergent* mindset.

According to the Study, *traditional/migrating* workers appear to be a younger, moldable group of employees given often contradictory and puzzling feelings about their career and workplace characteristics. Navigating their way through the world of work, these employees could benefit from added guidance, communication, mentorship and stretch assignments from employers. In turn, companies seeking to train and develop talent internally would be remiss by not putting these moldable workers at the top of the list.

THE MIGRATING CONTINUUM	
On the path from <i>traditional</i> to <i>emergent</i> , there are stops along the way. Migrating workers, in the 2007 study, can be further defined by:	
TYPE OF EMPLOYER	2007
Traditional/Migrating	21%
Migrating/Emergent	14%
Migrating	13%
Source: Spherion Emerging Workforce® Study, 2007	

LESS THAN TRADITIONAL

The revelation that even the most *traditional* workers are starting to have some doubts about the principles on which they've built their approach to work should be a red flag for U.S. companies. Employers should be quick to begin shaping recruitment and retention programs based on what has become a mainstream *emergent* mindset.

EMERGENT VIEWS TAKING HOLD			
Between 1999 and 2007, even <i>traditional</i> workers have begun to espouse <i>emergent</i> views.			
TYPE OF EMPLOYER	'99	'03	'07
A job change every few years can damage long-term career advancement	86%	72%	72%
I'd like to change jobs every 3-5 years - but within the same company	12%	27%	34%
Career advancement is the responsibility of the employer	93%	86%	86%
Source: Spherion Emerging Workforce® Study, 1999, 2003, 2007			

A Mainstream Mindset

While 27% of the U.S. workforce is *emergent*, there are a several key *emergent* traits that have taken root among the majority of today's employees. Strong opinions about work/life balance, career growth and career control have gone mainstream.

Furthermore, this year's survey tracks an apparent change of heart among most workers when it comes to beliefs about loyalty and desire for job security.

Mainstream Attitudes	Traditional	Migrating	Emergent
Employees should seek their own career development opportunities wherever they might be	88%	95%	96%
In order to keep their jobs, employees should be required to grow and improve their abilities to help the organization succeed	75%	85%	86%
An employer who promises long-term job security	99%	98%	89%
An employer who helps employees meet their family obligations through the use of flex-time, job sharing, telecommuting, etc.	95%	94%	94%
Source: Spherion Emerging Workforce Study, 1999, 2003, 2007			

While respondents were widely split on their attitudes towards a host of workplace characteristics and values, thus designating themselves as *emergent*, *migrating*, or *traditional*, there were several emerging viewpoints that firmly unite the three groups of workers. According to the Study, these key workplace traits are highly desirable to the majority of employees today, and can translate into higher retention levels and a more satisfied, happy workforce for those employers willing to provide them.

Career Development

Traditional and *emergent* workers alike feel employees should seek their own career development opportunities wherever they might be, and that in order to keep their jobs, employees should be required to grow and improve their abilities to help the organization succeed. The notion that changing jobs is detrimental to one's career is slowly vanishing, with only 52% of the workforce believing so. In fact, the same number of workers now believe frequent job change has increased their career potential.

Workers today have a newfound confidence in leaving the traditional and safe structure of their employer in order to satisfy their thirst for career development opportunities. As employers yearn to keep top talent in place, added efforts must be dedicated towards career management top resources and opportunities for growth within the company—not outside of it.

The Study reveals that employees prefer a job that allows them to think creatively (96%) and to think of new and better ways to do things (91%). This means taking on assignments that challenge their skills and apply what they've learned. Respondents find employers that offer them flexibility to participate in development programs on company time much more attractive than those who don't.

A Renewed Desire for Job Stability and Security

Time heals all wounds as they say. For many workers today, the volatile upheaval of corporate downsizings and layoffs of a decade ago seems a distant memory or not a memory at all. A decreasing number of workers have actually experienced the corporate downsizings that affected many of their older counterparts. According to the Study, 59% of workers have never experienced a restructuring or reorganization, a third have been through one such event, and a mere 8% have endured more than one.

The once raw feelings of vulnerability and mistrust of employers fueled by corporate restructuring, appears to have given way to a renewed desire for job security, with a twist. Although workers' longing for stability has risen again, it is based on an unwavering confidence in taking control over their own careers if and when needed. The once-prevailing fear of change has begun to evaporate as employees realize that they can successfully manage their own careers, with or without an ongoing organizational connection. Unlike the past, workers today take no assurances in the notion of lifetime employment. For these employees, job security and stability is simply a highly desirable benefit.

This trend may also stem from long-term economic uncertainties, lingering effects of terrorism and the war in Iraq, and geopolitical instability among other factors. These events have profoundly impacted workers' priorities both at home and at the office. As a result, how employees spend their time, and with whom, has taken on a greater importance.

A Plea for Work/Life Balance Programs

This juggling of priorities is no more evident than in workers' increasing desire for work/life balance. Over the past few years, the availability of programs such as flex-time, telecommuting and job sharing has unquestionably moved from being a "nice to have" to an absolute "must have" for most employees. This alteration of the conventional nine to five workday has yet to influence productivity levels of the U.S. workforce, which remain at an all-time high.

Why then, are so many employers sluggish to help employees create better work/life balance? With talent shortages looming in the not too distant future, companies seeking to compete for workers will find that offering work/life balance options is a basic requirement in the recruitment and retention of America's talent resources.

In fact, nearly all workers (95%), regardless of where they fall on the spectrum, agree that an employer who helps employees meet their family obligations through the use of flex-time, job sharing, telecommuting, etc. is highly attractive. This sentiment is likely driven by a strong desire to achieve a nirvana-like balance between home and work.

A full 88% of workers agree with the statement “my most important priority when thinking about the next step in my career is to ensure work fulfillment and balance.”

The demand for work/life balance has caused key segments of the workforce to choose to work for an employer who offers such programs, either formally or informally. The Study found that *emergent* and *migrating* workers appear to be gravitating towards employers who offer such programs, more so than *traditional* workers. Nearly two-thirds (65%) of *emergent* workers report their employer has a formal or informal program for flex-time and 45% for telecommuting. *Migrating* workers are close behind with 56% stating their employer offers flex-time programs and another 32% offers telecommuting. This compares to *traditional* workers, who report only 46% and 23% respectively.

Needless to say, *emergent* and *migrating* workers are also more likely to be currently taking advantage of both flex-time and telecommuting as compared to *traditional* workers.

Work/Life Balance Program - % Taking Advantage Of	Traditional	Migrating	Emergent
Flex-Time	24%	31%	42%
Telecommuting	10%	15%	23%

For those organizations that remain unconvinced, consider the influence work/life balance programs have in driving loyalty and greater satisfaction on a number of fronts. Employees who are more satisfied with their ability to maintain work/life balance; are generally more likely to stay on the job longer, and are more satisfied with salary, training, culture and work environment, and overall job satisfaction.

Employees that are extremely or very satisfied with their work/life balance, also rate their satisfaction with key retention and workplace characteristics higher.

*RETENTION SATISFACTION RATING	*EMPLOYEE
Likelihood of staying with employer for next 5 years	35% higher
*WORKPLACE CHARACTERISTIC SATISFACTION RATING	
Overall job satisfaction	48% higher
Satisfaction with current compensation level	35% higher
Satisfaction with training & career development	30% higher
Satisfaction with culture & work environment	42% higher

What Does It All Mean?

To effectively compete in the battle for talent, employers must embrace and implement a management style and recruitment and retention plans reflective of *emergent* attitudes. Failing to do so would be equivalent to dismissing a large portion of potential workers from an already depleted resource pool.

A small group of employers have embraced this reality and adapted their workplaces to accommodate a new style of worker by addressing work/life balance in meaningful ways, creating opportunities for creativity, innovation and learning on the job and are beginning to give their workforce a sense of stability, albeit perceived. Unfortunately, for many employers, a continued reluctance to adopt such *emergent* practices has resulted in a dangerous disconnect between themselves and their worker-bees as evidenced in Spherion's Studies.

DISCONNECTING DRIVERS OF RETENTION	
EMPLOYERS' VIEW	EMPLOYEES' VIEW
1. Management Climate	1. Benefits
2. Supervisor Relationship Compensation	2. Financial
3. Culture & Work Environment Potential	3. Growth & Earnings
4. Benefits	4. Management Climate
5. Growth & Earnings Potential Flexibility	5. Time & Flexibility
6. Training & Development Environment	6. Culture & Work
7. Financial Compensation Relationship	7. Supervisor
8. Time & Flexibility	8. Training & Development
Employers and employees wholeheartedly disagree on what drives retention. According to the Study, employers and employees ranked every factor of retention differently in terms of priority.	

Significant repercussions and implications will occur if the workforce continues to change, while employers do not. An already vast disconnect between worker and employer will continue to widen, and companies will struggle to be competitive in the marketplace for talent. Frustration and lost control over its workforce will characterize those companies reluctant to understand and adapt to a changing employee mindset.

As we mentioned in the opening of this report, employers are at the starting line of a long, competitive race in the quest for skilled talent. Through this Emerging Workforce® Study, employees are helping companies to navigate the race course and avoid stumbling blocks and potholes along the way. Like mile-markers, these signs provided by workers themselves, include:

- ▶• *Building career development and growth from the inside out:* As the Spherion Study indicates, today’s employees are taking control of their career and seeking development opportunities wherever they may be. If learning and job opportunities can be met within the organization—rather than outside its walls—workers will have few reasons to take their talents elsewhere, and employers will enjoy the financial benefits of having committed workers who take the lead in their own career growth.
- ▶• *Being an “employer of choice” and embracing a mainstream mindset:* Businesses that work to align benefits and workplace attributes with the needs of their employees create dynamic working environments that retain talent and attract exceptional workers. This translates into a strong, positive market profile and makes the company a place people want to work.
- ▶• *Making it a relay race vs. a solo race:* Newly self-reliant and confident employees can help drive organizational flexibility, putting their ability to adapt to marketplace change to work for their employers—if they’re given the chance, and if they’re rewarded with opportunities for career growth and development.

These are just a few of the ways organizations can get started towards becoming an *emergent* employer and one of the country's best places to work. For decades, Spherion® has been providing valuable insight into workforce motivations and attitudes to help clients and organizations attract and retain world-class talent. We believe it is our responsibility to keep companies abreast of workforce changes so that you can design or redesign human capital management strategies that will achieve your business goals. For a step-by-step guide to help you develop an *emergent* company, please ask your Spherion representative about receiving a copy of the Spherion article: *Building an Emergent Company from the Ground Up*.