

2001

ELECTRONIC

RECRUITING

INDEX

The Human Capital Marketplace

Executive Summary

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John Sumser's Electronic Recruiting Index

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- 1: Industry Overview and Stats
- 2: Job Board In A Box Companies
- 3: Regional Job Boards
- 4: Trends and Forecasts
- 5: Public Company Performance
- 6: Market Opportunities and Acquisition Targets
- 7: Design Trends in Corporate and Vendor Job Boards / Employment Sections
- 8: Investors and Investments
- 9: Buyers' Survey
- 10: Summaries and Conclusions

Volume II

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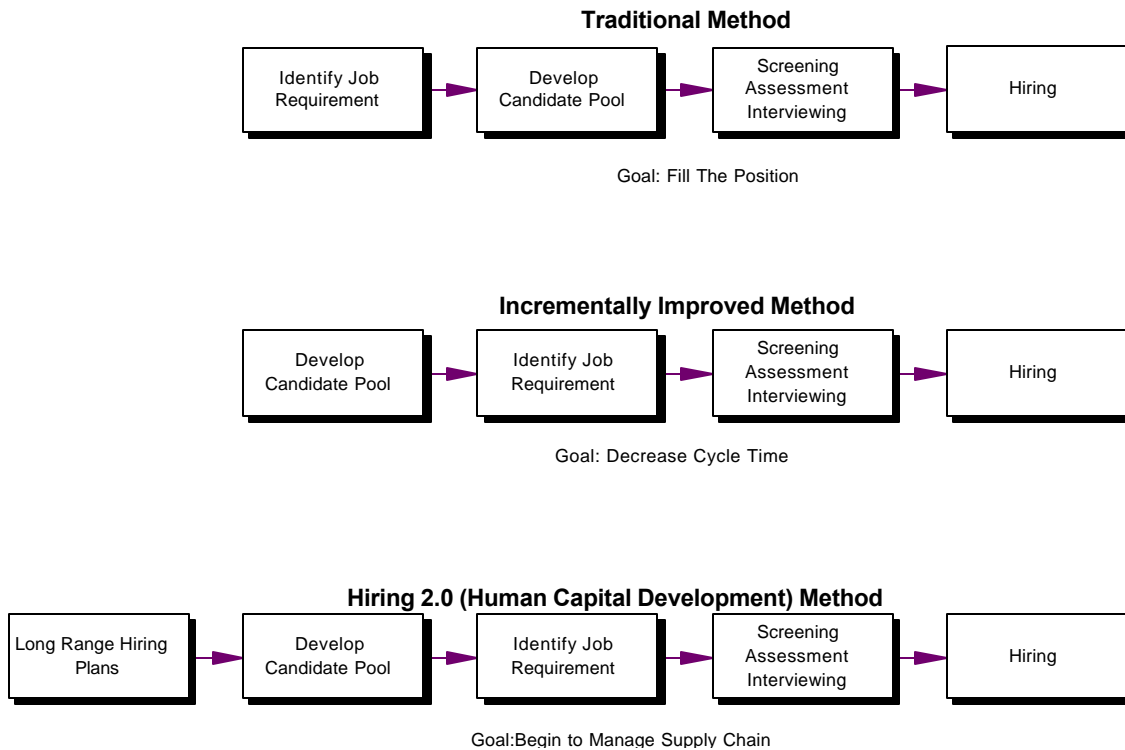
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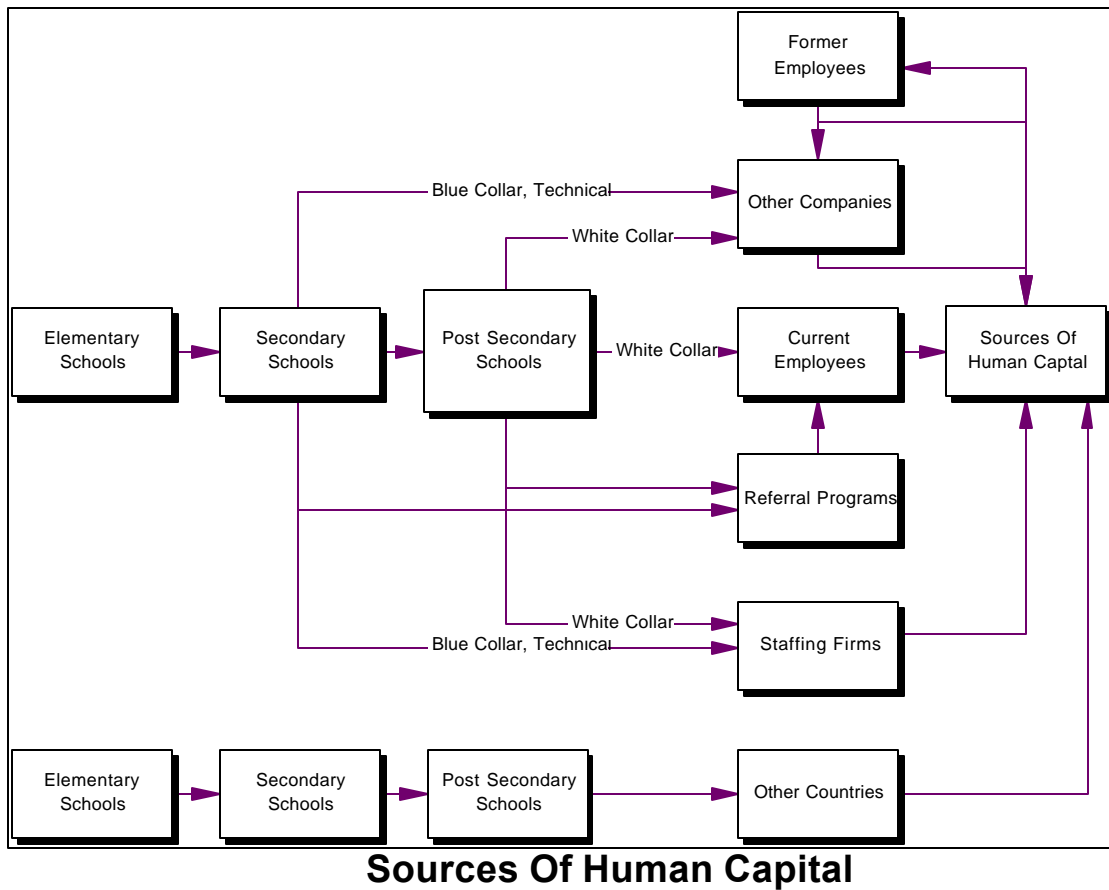
Phased Process Improvements Over Five Years Of Industry Development

The **2001 Electronic Recruiting Index** is simultaneously an extension of seven years of research and a standalone analysis of the emerging Human Capital Management Industry. Beginning with the pioneering work of the job board companies in the Electronic Recruiting Index, the Human Resources function is being radically reshaped by vendors and innovative internal practitioners. Each step forward brings a heightened emphasis on quality and planning at the expense of older, reactive methods.

The **2001 Electronic Recruiting Index features:**

- The first ever comprehensive description of Human Capital Management as an Organizational Function
- A detailed design for Recruitment Optimization Audits
- A clear picture of the services and functions provided by a 21st Century Recruitment Advertising Firm
- A detailed analysis of the top 225 companies in the Human Capital Industry (Volume 2)

- The only industry-wide survey of the top 100 Job Boards (by traffic),
- A comprehensive look at the financial performance of all 59 public companies in the arena;
- A complete rethink of the impact of labor shortages on conventional management practice,
- An analysis of trends and influences driving the industry, and,
- A range of other system wide diagrams, insights and material for retention management, Employee out reach and other evolving sourcing methods.



The **2001 Electronic Recruiting Index** documents the continuing evolution of an industry that grows too quickly to categorize. The introduction of Web technology into the Recruiting process makes an array of heretofore impossible measurements both practical and useful. As the labor shortage continues and expands, the Recruiting team

must increasingly use all of the assets available to build a long-term labor supply while increasing the organization's return on its Human Capital Investment.

Essential Functions In An SBB (21st Century Advertising Agency)

Account Management

- Requirements Analysis
- Branding and Strategy
- Message Design & Development
- Tactics Development

Message Delivery

- Media Research
- Media Planning
- Demographic Targeting
- Media Buyers

Creative

- Content Generation
- Audience Development
- Audience Relationship Management
- Response Management

Technical / IT

- Results Measurement / Monitoring
- Database Development
- Data Parsing/Integration (Wrapping)

Overhead

- Financial Management
- HR
- Treasury
- Subcontract Management

Recruitment Technology

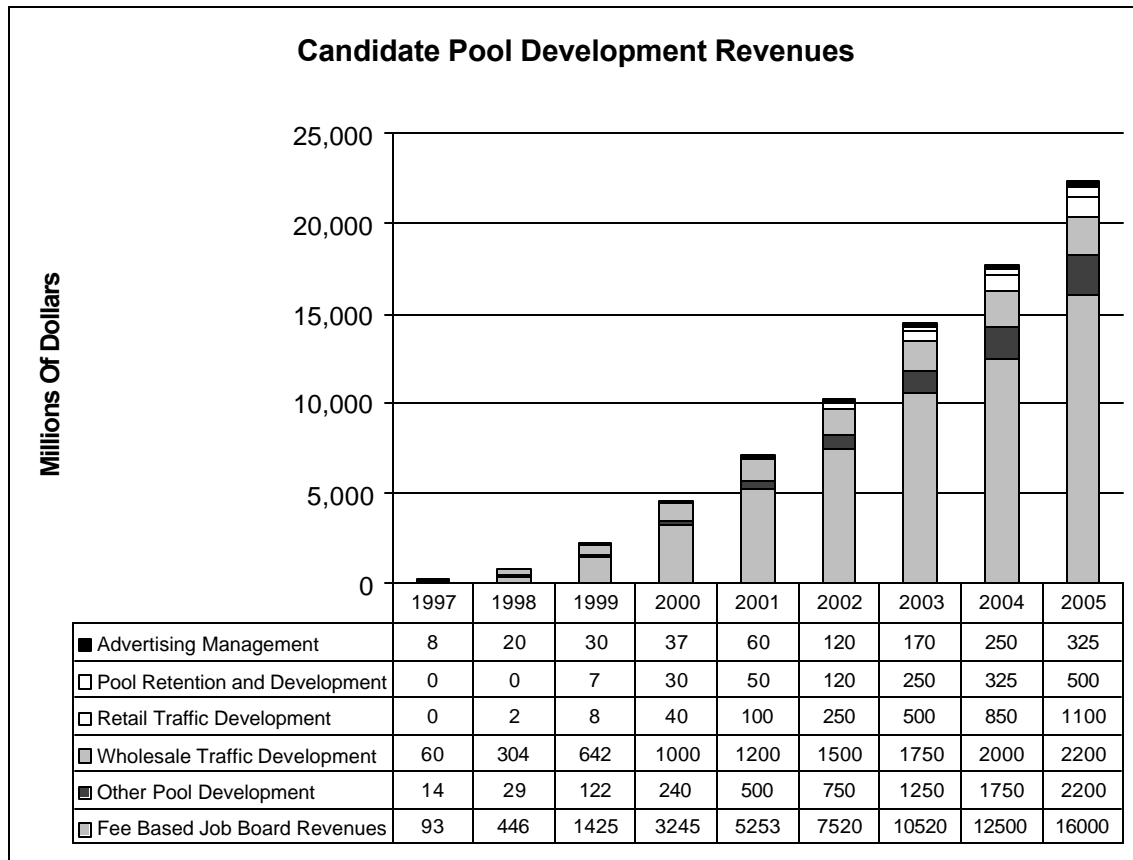
- Sourcing Section
- Recruitment Optimization
- Recruiting Training
- Technology Analysis
- Systems Data Interfaces

Sales and Marketing

- Alliance Development
- Regional Offices
- Sales
- Biz Dev

Managers charged with navigating the rapidly changing industry are stuck with extremely complex problems . The industry itself offers little in the way of help. Over 40,000 vendors offer services that overlap and conflict with each other. Little is done to resolve opposing claims or verify marketing assertions. The ERI offers a detailed plan for a company that would be positioned to solve all of the Human Capital Management needs,

from sourcing to seating, for its clients. Detailed plans for an audit process are also included in the section

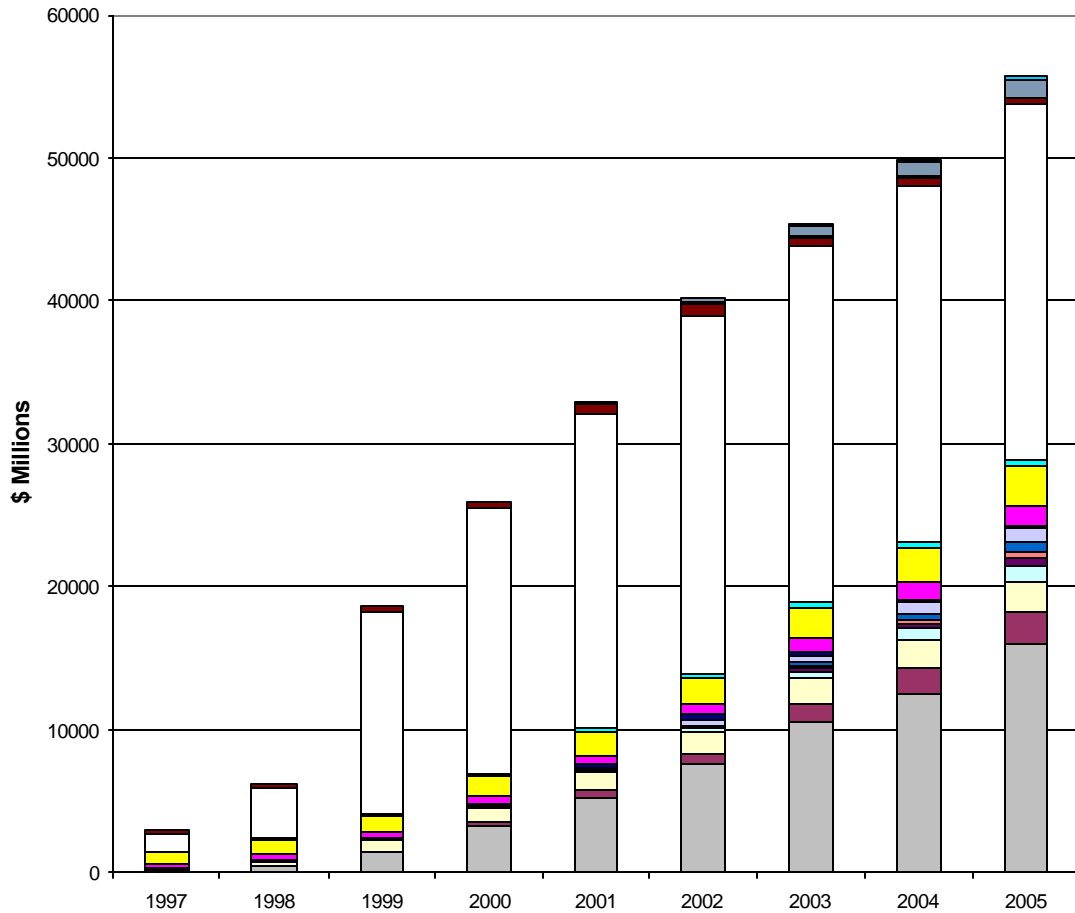


The core Electronic Recruiting Segment has surpassed even our optimistic earlier financial forecasts. Nearly \$7.5 Billion will change hands in this arena that did not even exist six years ago during 2001. Meanwhile, the overall HCM Industry is headed towards a \$60 Billion dollar year in 2005.

The ERI describes the various industry components in a patient, modular fashion so that business planners and Recruiters alike may begin to make sense of the rapidly morphing environment. It is clear, for instance, that Job Boards are an early, somewhat primitive manifestation of the tools available to the Chief Talent Officer of five years hence.

We see the Job Board segment as the logical precursor of a complex set of inter-related tools and companies that strive to make their customers the best possible talent pool managers.

HCM Industry Revenue



- Alumni Relationship Management Systems
- Employee Relationship Management Systems
- Hiring Workflow Tools
- Intake and Tracking
- Website Development
- Database Subscriptions
- Screening & Credentialling
- Assessment
- Sourcing
- Wholesale Pool Management Tools
- Retail Pool Management
- Advertising Management
- Pool Retention and Development
- Retail Traffic Development
- Wholesale Traffic Development
- Other Pool Development
- Fee Based Job Board Revenues

Elements Of An Employment Brand Checklist

Clear Staffing Requirements Definitions

- Immediate Requirements
- Medium Term (1 to 3 Years)
- Long Term (3 to 5 Years)
- Prioritization and Budgeting
- Department Level

Demographic Targets

- Age Groupings
- Regional Groupings
- Historical Groupings
- Key Intersections

Message Components

- Core Hook and Tailoring
- Graphic Images
- Level Of Playfulness
- Profession Specifics
- Positioning

Value: Propositions and Realities

- Hygiene: Comp and Benefits
- Challenge By Profession
- Benefits of Membership
- Specific Attractors

Audience Retention/ Relationship MGT

- Aggregation Of Positive Results
- Time Based Data Collection
- Pulsed Value Delivery
- Communications Systems
- Brand Reinforcement

Performance Feedback Mechanisms

- Response Rates
- Repeat Traffic
- Supply Effectiveness
- Hiring Quality
- Formal Assessment

Delivery Mechanisms

- Web
- Email
- Internal
- Broadcast
- Print

Each year, we conduct a detailed survey of over 2,000 professional recruiters. We detail their familiarity with and experience of a range of companies in the industry, These survey results are then converted into Customer Satisfaction, Market Penetration and Usability assessments of the covered firms.

This year, the ERI covers the following 100 Companies in its survey. They were chosen based on traffic rankings according to an independent traffic authority,

Companies Surveyed			Companies Surveyed		
Company Name	Traffic Rank	Category	Company Name	Traffic Rank	Category
ZDNet	1	niche site	Excite Careers	31	Job Board
recruitingshark	2	Research	ComputerJobs.com	32	niche site
The Washington Post	3	niche site	Career Web	33	Job Board
Headhunter.net	4	Job Board	The San Diego Union Tribune	34	niche site
Cnet	5	niche site	interbiznet	35	Resource
Bloomberg Financial	4	niche site	Brilliant People	36	Exec Srch
HotJobs	6	Job Board	SAP	37	Services
DICE	7	Job Board	Information Week	38	niche site
Guru.com	8	Free Agent	JobsAhead.com	39	Job Board
Standard Media International	9	niche site	Coolworks	40	niche site
Jobs.com	10	Job Board	Salary.com	41	Services
Monster.com	11	Job Board*	Student Advantage	42	niche site
Ad Age	12	niche site	VerticalNet	43	niche site
Vault.com	13	Job Board	AARP	44	niche site
Your Magazine (Fortune)	14	niche site	GlobalNet	45	niche site
Ad Week	15	niche site	Boston Globe	46	niche site
Washington State Labor Market	16	niche site	Cruel World	47	niche site
Business.com, Inc.	17	niche site	Recruiters OnLine Network	48	Services
JOBTRAK	18	niche site	Career Builder	49	Job Board
Wet Feet Press	19	Job Board	CareerBridge Corp.	50	niche site
Net-Temps	20	Job Board	FreeAgent.com	51	Free Age
FlipDog	21	Job Board	Career Cast	52	Services
BrassRing	22	Services	Ants.com	53	Free Agent
Jobsite UK	23	Job Board	Cytiva/CareerExchange	54	Job Board
1-jobs.com	24	Job Board	Electronic Recruiting Exchange	55	Resource
Job Options	25	Job Board	Campus Worklink	56	niche site
Fast Company	25	niche site	Kforce	57	Third Party
NationJob, Inc	26	Job Board	4 Work	58	Job Board
Computer World	27	niche site	CareerSite Corp	59	Job Board
CareerMagazine	28	Job Board	eQuest	60	Gateway
Brainbench	29	CredentiaIli	JobWarehouse	61	niche site
ExpertCentral	30	niche site	Workseek.com	62	niche site

Companies Surveyed

Company Name

Traffic Rank Category

Careers.wsj.com
 Kelly Services
 Job Bank USA
 techies.com
 Skill Bot
 Future Step
 Volt Information Sciences
 Experience.com
 Workforce Magazine
 IDG
 Career City
 Job Finder
 TMP
 Manpower
 Best Jobs In The USA
 Leaders OnLine
 Chicago Tribune
 LatPro
 Aquent Partners

63 niche site
 64 Third Party
 65 Job Board
 66 niche site
 67 Services
 68 niche site
 69 Third Party
 70 niche site
 71 Resource
 72 niche site
 73 Job Board
 74 niche site
 75 Agency
 76 Third Party
 77 job Board
 78 niche site
 79 niche site
 80 niche site
 81 Services

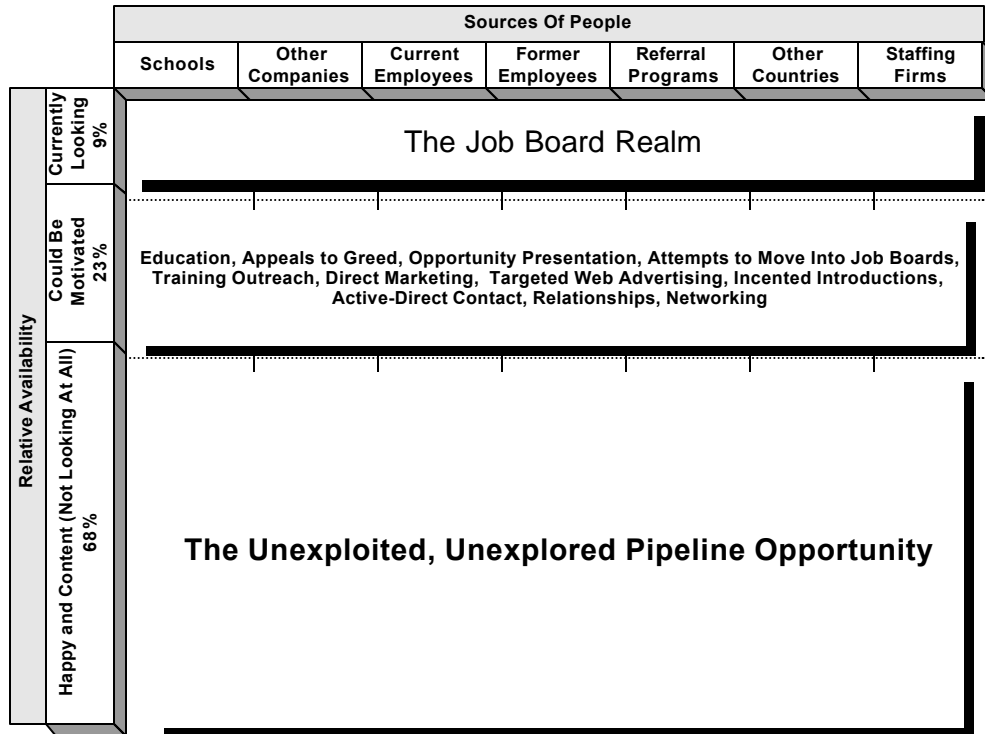
Companies Surveyed

Company Name

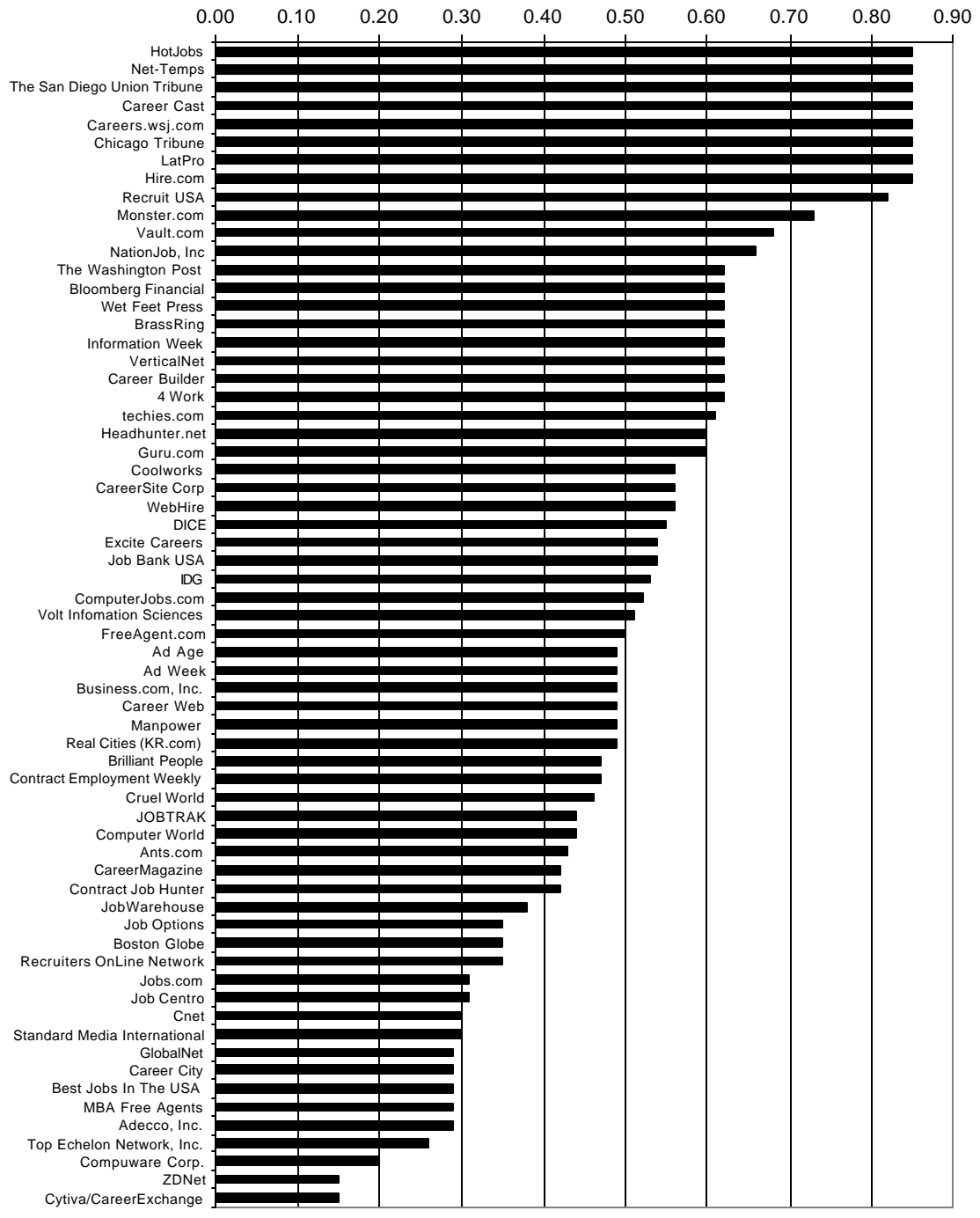
Traffic Rank Category

Benefits Link
 Employ China
 MBA Free Agents
 Destiny Group
 ProvenResumes.com
 Real Cities (KR.com)
 Referrals.com
 Top Echelon Network, Inc.
 Adecco, Inc.
 Recruit USA
 Compuware Corp.
 WebHire
 Crain's NY Business
 Penton
 Contract Job Hunter
 Contract Employment Weekly
 Hire.com
 jobpilot AG
 Job Centro

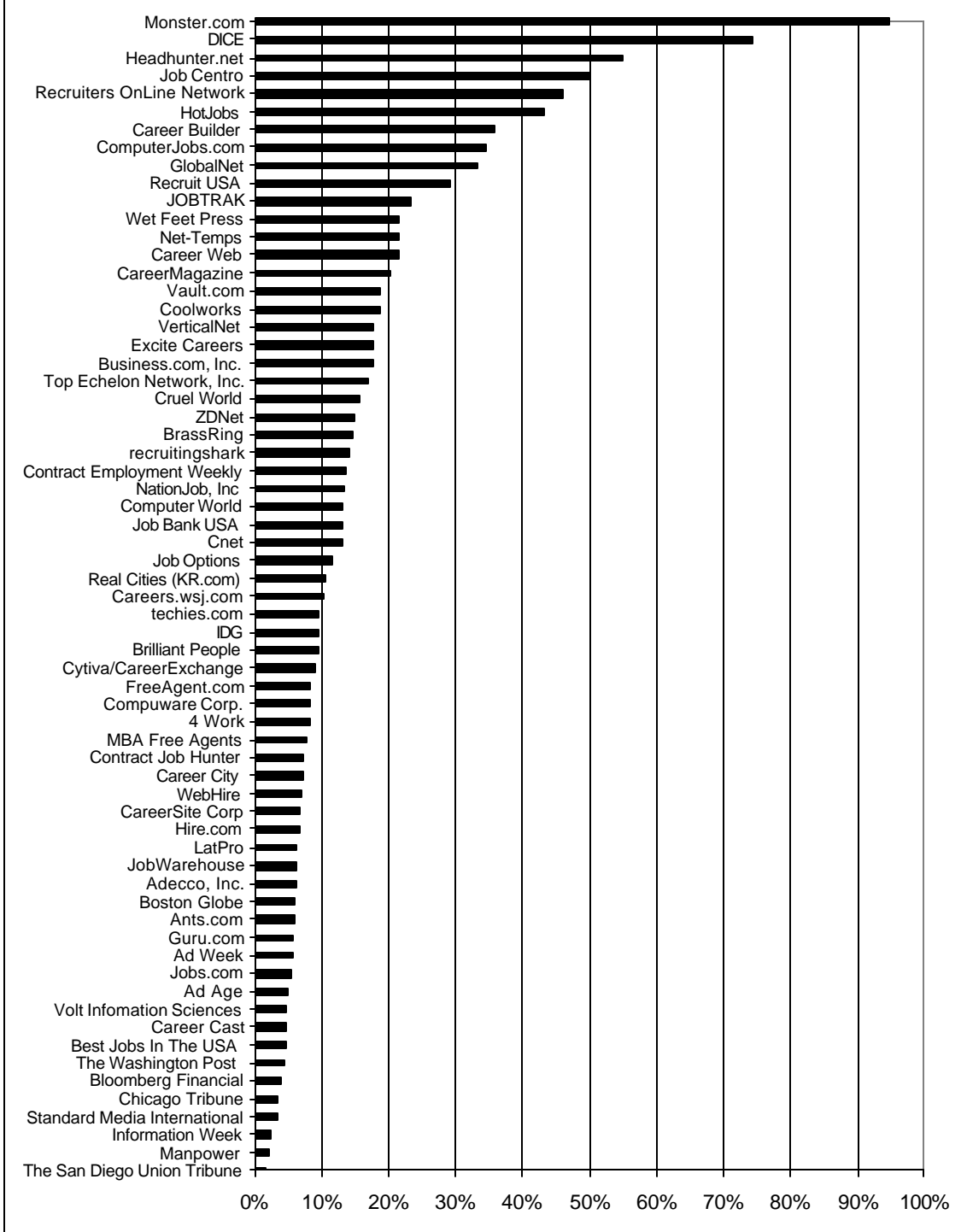
82 Services
 83 niche site
 84 niche site
 85 niche site
 86 niche site
 87 niche site
 88 Services
 89 Services
 90 Third Party
 91 Gateway
 92 niche site
 93 Services
 94 niche site
 95 niche site
 97 niche site
 96 niche site
 98 Services
 99 niche site
 100 niche site



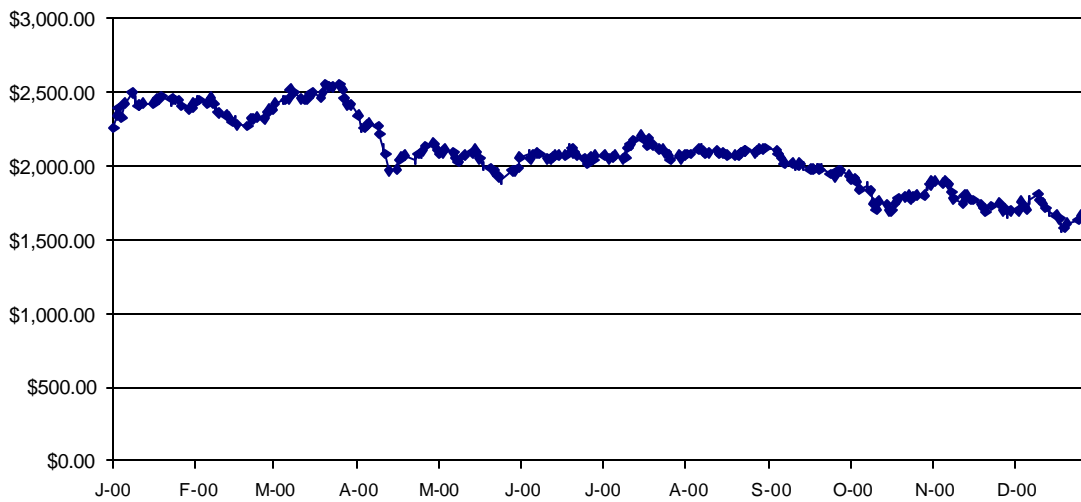
Top HCM Sites By Customer Satisfaction



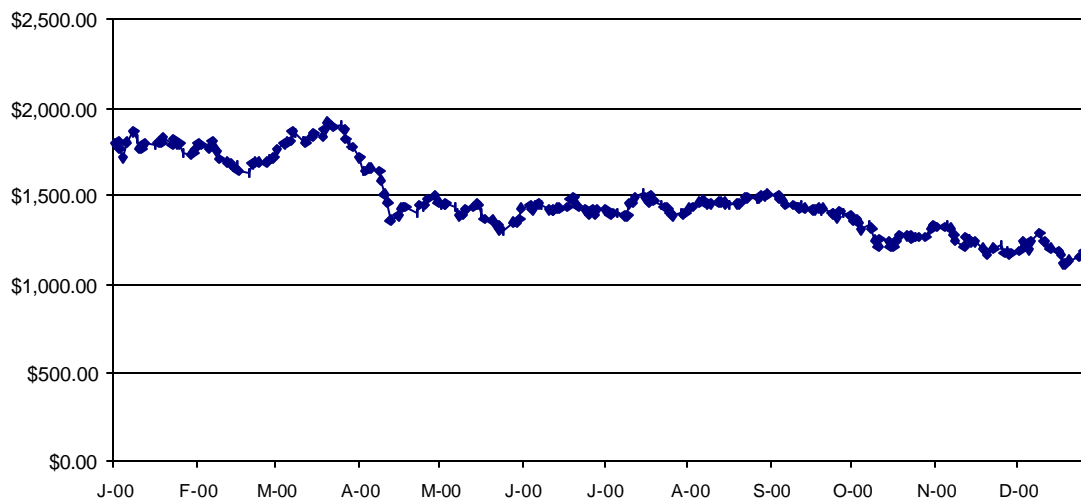
Sites By Relative Sales Force Effectiveness



Value Of Electronic Recruiting Stocks



Value Of New Economy Stock Basket



Contents Of The 2000 Electronic Recruiting Index

Section	Description	Contains
1. Executive Summary	A detailed introduction to the material featuring key charts and findings	
2. Introduction	A look at the global implications of the labor shortage on HR systems and their design. Defines functionality used to assess the companies in Volume 2.	<ul style="list-style-type: none"> • Global Growth Rates • End to End Functionality • Shortage Strategies • Outsourcing Guide
3. The HCM Industry	The Statistics and Industry Description. Five Top level industry segments are deconstructed to identify growth vectors and growth directions	<ul style="list-style-type: none"> • 5 Year Sales Forecasts • Market Opportunities • Industry Structure
4. Human Capital Changes	A description of the changes brought to the market by generational shifts in the labor supply. Defines the underlying premise for long term industry growth in sourcing, network development and communications systems.	<ul style="list-style-type: none"> • Mindset Changes • Management Changes • Investment Metrics • Rethinking Retention
5.21st Century Ad Agency	A defining view of all of the services required to be delivered by a "Single Belly Button" provider of web service and recruitment optimization.	
6. Employment Branding	A clear description of all of the elements of a comprehensive Employment Branding strategy.	
7. Role Of The CTO	Defines the organization that pulls together and delivers a high quality labor supply that meets the needs of the organization.	
8. Trends and Predictions	Key variables in the near and medium term future of the Industry	
9. Recruiters Survey	The top 100 HCM companies (including job boards) were ranked according to traffic volume and then assessed by over 2000 Active Recruiters. The survey is a standard measurement of brand penetration, growth potential and acquisition desirability.	<ul style="list-style-type: none"> • Customer Satisfaction • Sales Effectiveness • Acquisition Desirability • Market Penetration • Detailed Data
10. Stock Market Performance	59 Public Companies with initiatives in the Human Capital Market are covered in detail along with an aggregate performance analysis that compares old school to new school companies	<ul style="list-style-type: none"> • Business Description • Stock Chart • Contact Information • Comments
Volume 2	A CD based database of the Top 225 companies in the industry.	<ul style="list-style-type: none"> • Detailed Business Case • Contact Information • Functionality Maps • Site Reviews • Rankings • Data Output

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