

Key insights into the global workforce from Kelly®

THE COLLABORATIVE WORK ENVIRONMENT



KELLY

Introduction

Is there a key workplace factor that would improve both a company's profitability and their ability to attract and retain top talent?

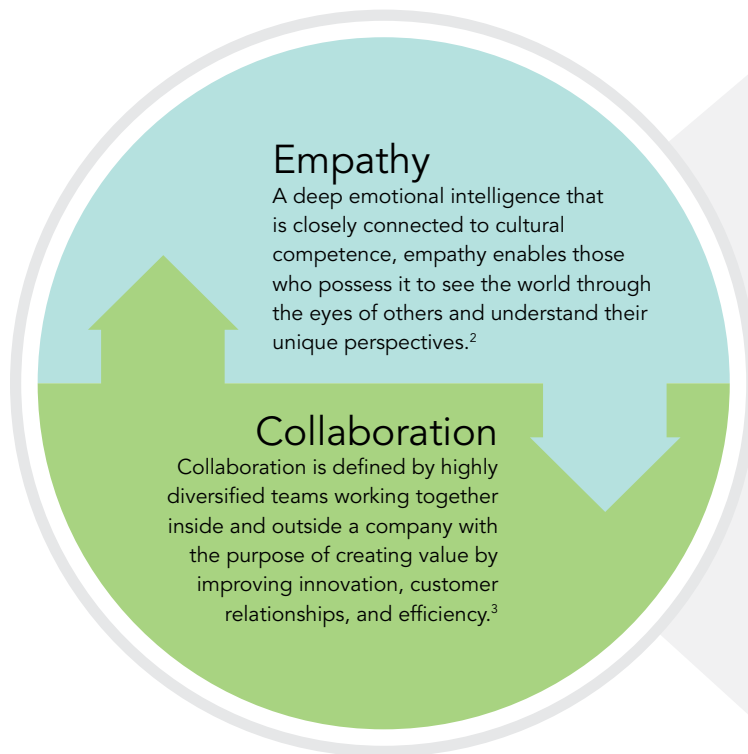
Collaboration is becoming just that factor for today's companies. Recently, nearly three out of four North American C-suite executives agreed that their organization would be more successful if employees were able to work in flexible and collaborative ways. And more than half ranked a collaboration-related measure as the number one factor for their organization's overall profitability.¹

Meanwhile, critical millennial talent—the largest generation in the labor force—stands out with an above average desire to work in a collaborative environment. With skilled candidates in short supply for many industries, it's important for employers to understand that the **collaborative work environment** is attainable, and can become a strategic opportunity to foster worker engagement, and capture a competitive advantage.

As a pioneer in the staffing industry, and in the study of workforce preferences, Kelly takes a high-level look at collaboration as it pertains to the global worker today. In addition to analyzing worker preferences and psychographic insights based on survey data from the 2015 and 2014 Kelly Global Workforce Index™ (KGWI), this report pulls insights from Kelly Free Agent research (2015) survey data and other research sources. Unless otherwise noted, all statistics come from recent Kelly workforce research data.

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Collaboration and empathy as drivers of business success



Hiring talent with the closely related skills of collaboration and empathy, and creating an environment that nurtures and encourages these skills, is critical to business success.

Enhanced recruiting and retention:

- Strengthens employer brand
- Has greater appeal to millennials, improving both recruitment and retention
- Encourages a more diverse talent pool by promoting inclusive decision-making
- Results in higher engagement of talent from a greater sense of satisfaction, belonging, and trust in co-workers and managers when given opportunities to contribute/participate in collaborative activities
- Improves employee health and wellness

Top and bottom line returns

- Higher knowledge worker productivity
- Increases top line revenues
- Improves profitability

Improved new product development

- Consumer-centric design
- Faster time-to-market
- Improves innovation

All 100 companies on the “Best Company to Work For” list have one thing in common: a collaborative work environment. Key examples include: Google®, Microsoft®, Accenture, Edward Jones®, and CHG Healthcare Services.⁴



“Change is constant. Problems are global. Information is at our fingertips. In the era of Wikipedia®, does it really matter how much you can memorize? What’s more important is that you can take the perspective of others—whether you’re designing a new technology, or negotiating, or anticipating the uncertain. Indeed, how well we do—whether in the classroom or the boardroom—depends more than ever on how well we forge and navigate relationships. In this way, empathy is the new literacy: essential for us to communicate, collaborate, and lead.”

—Stuart Foundation⁵

Building a collaborative culture

CORE BUILDING BLOCKS

LEAD FROM THE TOP

McKinsey found 89 percent of variance between strong and weak organizations, in terms of leadership effectiveness, driven by four traits:⁶

1. Being supportive
2. Seeking different perspectives
3. Solving problems effectively
4. Operating with strong results orientation

Having an open door policy helps, as does transparency into corporate strategies and goals.

TRAIN ALL TALENT

Don't just train full-time employees

- Critical soft skills include listening, empathy, and communications skills
- Help smooth out generational work style differences and bust generational myths

Training/development programs are important to attracting 66 percent of global talent.

BUILD/UTILIZE DIVERSE TEAMS

For all mission-critical decisions and projects, engage teams that cross:

- Talent categories (employees, independent contractors, partners)
- Functional areas
- Demographic factors (age, ethnicity)

Keep teams to a manageable size, and use intelligent workforce design to support formal and informal collaboration.

COLLABORATIVE TECHNOLOGIES

Play a supportive role to cultural building blocks that can help drive better outcomes

- The McKinsey Institute projects 20% – 25% improvement in knowledge worker productivity through fully connecting talent via social networking technologies⁷
- Leverage video conferencing (still underutilized) for face-to-face contact to support "presence" when absent

Innovative enterprises make creating a collaborative work culture a top priority to compete effectively in rapidly changing and volatile market conditions, updating older ways of thinking about collaboration as activity-based or "extra" work.

CULTURE SHIFT

Collaboration skills are a new currency in the age of career resilience and employability: skill building and training development become part of a compensation package

Fresh ideas cross-pollinate across silos and boundaries of an organization (via partners and vendors) along with stimulating debate through greater trust and communication

Recognition and reward for collaborative (versus competitive) behaviors

A culture that is truly supportive of empathy and collaboration requires constant nurturing, and leadership from the top.

IMPROVED OUTCOMES

Stronger employer brand to attract and retain highly skilled, diverse talent—especially millennials and those with professional/technical (PT) skill sets

More engaged talent, offering discretionary work effort and increased productivity

Faster time-to-market for improved market position

Fortified organizational and talent resilience to market fluctuations and changes

Top and bottom line returns in revenue and profitability

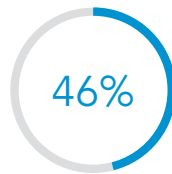
"Efficient ongoing collaboration has a fundamental impact on business innovation, performance, culture, and the bottom line."¹
The key is efficient collaboration—make sure your collaborative culture is a smart one that doesn't overload top collaborators!

Talent perspective on employers' collaborative culture

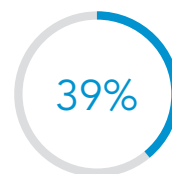
Companies can do better. Just over half (52 percent) of global workers feel that their current or most recent employer's (physical and virtual) workplace promotes collaboration and inclusion; 47 percent believes their organizational structure promotes collaboration and inclusion. Given the strong business case for a collaborative work environment, there is room for improvement.

According to the 2015 and 2014 Kelly Global Workforce Index, global talent cites collaborative measures, as well as some of the possible outcomes from collaboration, such as improved engagement.

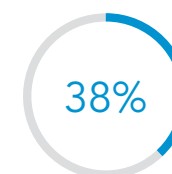
As companies adopt more collaborative structures, processes, and supporting technology over time, engagement may increase.



46% say their current/most recent manager continually fosters and encourages a culture of engagement



39% of global workers feel totally engaged, up from 31% in 2014

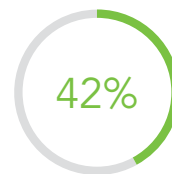


38% of global workers say diversity is an attraction factor, up from 28% in 2014

Collaboration promotes higher knowledge worker productivity, the exchange of ideas, and alignment of action.



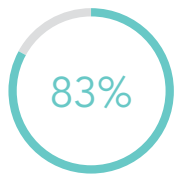
57% of workers want the opportunity to work with colleagues who are recognized as knowledgeable and from whom they can learn, up from 46% in 2014



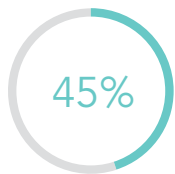
42% say their current/most recent company makes special efforts to retain innovators and key knowledge workers

Talent perspective on employers' collaborative culture (continued)

Innovative processes and opportunities may improve the speed and outcomes of product and service development.



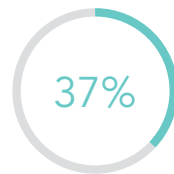
83% feel it's important to work for an innovative/progressive company



45% want the opportunity to innovate/work on innovative projects and initiatives



50% say their current/most recent employer embraces innovation and change



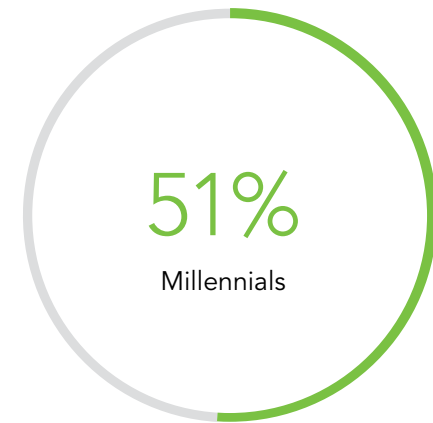
37% cite the opportunity to innovate/work on innovative projects and initiatives during work hours as a key work-life design element



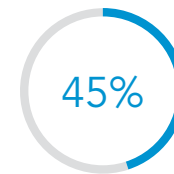
Collaborative work cultures seen as progressive

A collaborative work environment is not the status quo, at least not yet. With eight out of 10 global workers keen to work for an innovative/progressive firm, organizations could simultaneously improve business outcomes while attracting and retaining the best talent.

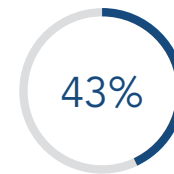
Generational insight*



Globally, just over half of millennial talent say their current/most recent employer's organizational structure promotes collaboration and inclusion, versus:



Gen X



Baby Boomers

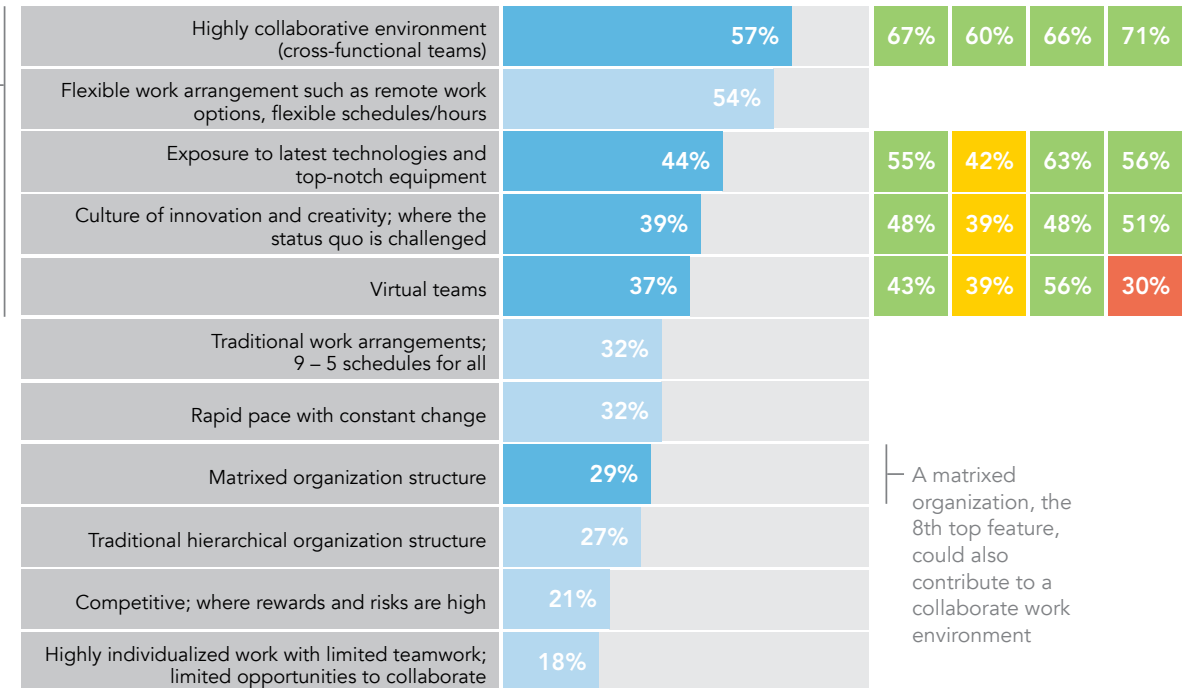
*See p. 18 for more generational insight.

Top factors of an ideal work environment lead to a collaborative culture

When asked what constitutes their ideal work environment, global workers paint a picture of a collaborative culture. Four out of the top five features of an ideal work environment are those that foster, directly and indirectly, an environment of collaboration. In particular, professional/technical talent stands out with an above average appetite for these aspects.

4 out of the top 5 features of an ideal work environment are those that support a collaborative work environment

Features of an ideal work environment cited by global talent (the global average), by percent:



Those with professional/technical skill sets weigh in on collaborative work environment factors **above**, **below**, or **on par** with the global average, by percent:

Engineering
Finance & Accounting
Information Technology
Science

A matrixed organization, the 8th top feature, could also contribute to a collaborate work environment



“With collaboration comes the chance for fresh thinking to emerge and disparate skills to be utilized, which can improve the way your company does business—often in unexpected ways and from unexpected sources. That’s why a reliable talent supply chain is so important. It can help ensure that you maintain a consistent business footprint, which is especially critical when you are faced with unexpected challenges that require cost-effective solutions.”

—Mark Lanfear, KellyOCG Global Practice lead, Life Sciences⁸

There are still challenges to establishing a collaborative environment

Effective teamwork makes everyone look better, but change can be hard. Collaboration can initially be uncomfortable. When putting top talent together with varying arrangements, workers can be resistant and overlook learning opportunities because they feel competitive with each other. But if workers can adjust to the culture of collaboration, the benefits can be extraordinary.

While 53 percent of organizations are confident that collaboration is having a positive and tangible impact, a significant minority (20 percent) isn't convinced. Part of this may be due to the fact that making a major commitment to collaborative working and effective teamwork is a new challenge for many organizations.¹ And, companies whose culture fosters collaboration may not

be effectively tracking the impact on top collaborators and the risk of having them experience burnout, lower engagement, and attrition due to collaboration overload.

There are still challenges to establishing a collaborative environment (continued)

Challenges

As organizations grow and adapt to current market conditions, new work arrangements have emerged that span the talent supply chain, including remote and geographically disparate teams, independent contractors, and other flexible arrangements. At the same time, organizations continue to attempt to do more with less, expanding workloads, and shrinking budgets. All this adds to the challenge of fostering a collaborative environment.

Specific challenges include:

- Breaking down entrenched knowledge and management silos
- Moving beyond collaboration's "messiness" and reputation for being time-consuming
- Managing different work arrangements and styles within the same team
- Sharing a team reputation when it hinges on everyone in that team
- Changing the rules of engagement that might have worked for some talent
- Finding people with the right soft skills that demonstrate the ability to collaborate
- Ensuring that collaboration is used effectively to drive business results, rather than becoming an excuse for meeting overload; talent should be pulled in to meetings where appropriate, and only when their contacts, insights, or information cannot be obtained in a briefer, less formal, or more effective manner?



Opportunities

Collaboration can re-invigorate organizations by fully engaging employees, improving retention, and increasing innovation. Even with all the known benefits of collaboration, many organizations feel pressure to keep the status quo. To move towards a more collaborative environment to reap the benefits, consider these approaches:

- Benefits must be clear and defined: how something can be done better together than separately has to be transparent
- Leadership—organization and team leaders—must nurture, encourage, and reward collaborative behaviors
- Make the investment, whether in collaborative technology or with support people, to move projects along between working sessions
- Track outcomes from collaborative efforts and showcase the return on investment

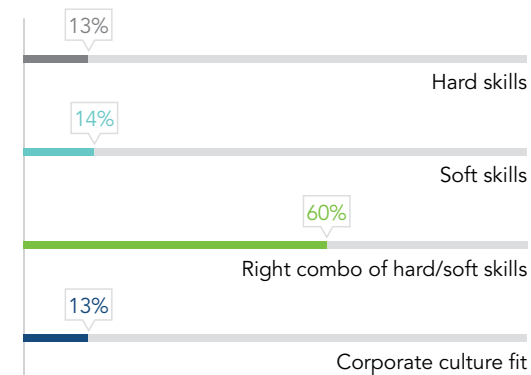
Soft skills—with collaboration skills—are some of the most challenging skills to find

Despite all the talk about hard skill needs, soft skills are increasingly critical in a dynamic, global marketplace. Social Intelligence—the ability to get along well with others and get them to cooperate with you—is at the heart of soft skill development.

Six out of 10 professional/technical hiring managers, across all professional/technical sectors, say they have the hardest time finding candidates with the right combination of hard and soft skills.

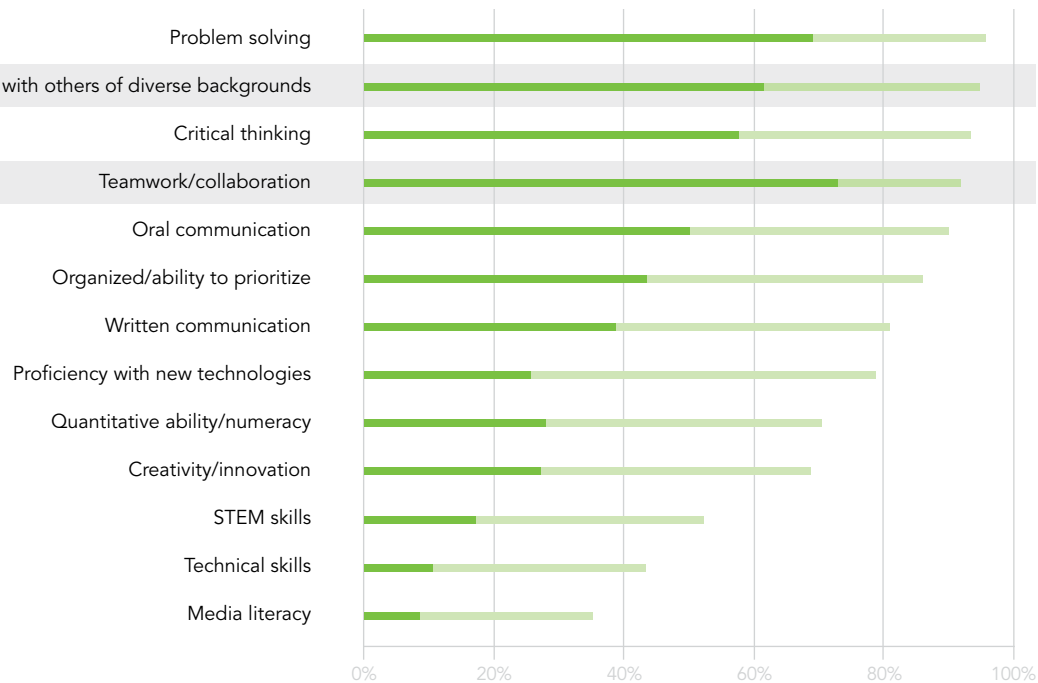
- Of five key soft skills, professional/technical hiring managers most frequently cite the ability to listen/comprehend (81%) and 72% claim that teamwork/ability to collaborate is critical (significantly higher for engineering talent, at 85%)
- For underqualified candidates, 27% of professional/technical hiring managers report a lack of teamwork/ability to collaborate; again, especially for engineering talent (40%)

Most challenging skills to find in candidates



Soft skills—with collaboration skills—are some of the most challenging skills to find (continued)

Essential competencies to be hired at members' organizations
(response from 52 members)



In a survey of its members, the Committee for Economic Development said that two of the top four competencies most needed, and most difficult to find in the workplace, are “the ability to work with others of diverse backgrounds” and “teamwork/collaboration.”¹⁰

- **Essential:** applicant is unlikely to be hired at my organization without a high level of skill or knowledge in this area
- **Very important:** high levels of skill or knowledge in this area are not absolutely required but strongly increase the likelihood of being hired

Collaboration and the bottom line

Collaboration is seen as a direct factor in profitability. According to a Google for Work and Raconteur 2015 study of North American C-suite executives, 73 percent of respondents agreed that their organization would be more successful if employees were able to work in more flexible and collaborative ways.¹

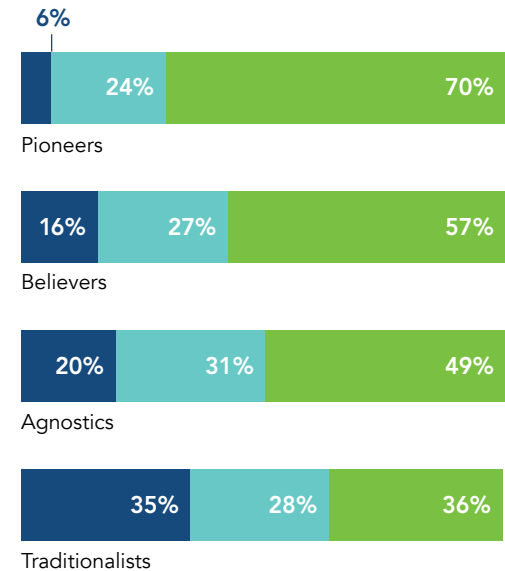
The respondents of Google for Work's survey were defined by four categories:

- **Pioneers (18%)** are staff that work in the same way they live, with technology playing a vital part in operations as well as collaboration and agility
- **Believers (34%)** have begun working new technologies into their business model
- **Agnostics (27%)** are businesses that are slow to implement technological changes across the workplace
- **Traditionalists (21%)** are organizations that use basic technology, but that are still highly hierarchical

How confident are you that collaboration between employees and teams has a positive and tangible impact on your organization?

1= Not confident at all
7= Very confident

- 1-3
- 4
- 5-7

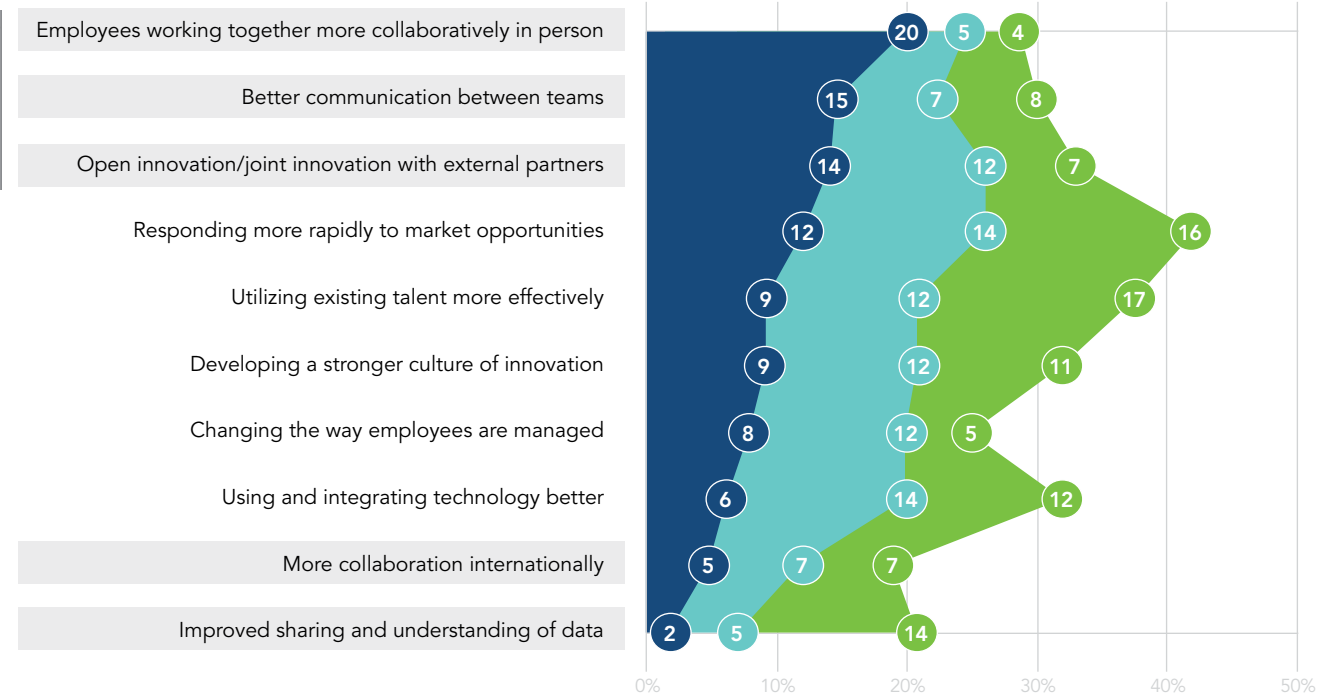


Collaboration and the bottom line (continued)

Specifically, 56 percent of respondents ranked a collaboration-related measure as the number one factor for their organization's overall profitability. The top three factors were all related to collaborative skills.

The same study found that the more technology focused and tech-savvy the company, the higher their confidence level in the direct correlation between collaboration and improved financial results.

Which of the following changes have the biggest impact on an organization's profitability?





“Efficient ongoing collaboration has a fundamental impact on business innovation, performance, culture and the bottom line.”¹

Millennials want a collaborative environment more than older generations

Collaboration does not come naturally for most employees, particularly those born before the millennials.¹¹ Older generations came up in careers where competition was good and individual efforts were rewarded with career advancement. This environment created management and knowledge silos that put a drag on organizational agility and innovation—capabilities now critical in a highly fluctuating market environment.

A collaborative approach can help break down those silos and connect efforts across functions to improve organizational innovation, flexibility, and productivity. So it's no wonder that millennials—now the largest generational group in the workplace—prefer collaboration to competition at a whopping 88 percent.¹²

A generational view of what current/most recent employers are doing to foster a collaborative environment

Respondents rated higher, lower, or on par with the global average

● HIGHER ● ON PAR ● LOWER

	Global total	Millennials	Gen X	Baby Boomers
The workplace (physical and virtual) promotes collaboration and inclusion	52%	●	●	●
The organizational structure promotes collaboration and inclusion	47%	●	●	●
The culture embraces innovation and change	50%	●	●	●
Managers continually foster and encourage a culture of engagement	49%	●	●	●
The company makes special efforts to retain innovators and key knowledge workers	42%	●	●	●
The work environment (training, communication, leadership, etc.) supports employees to deliver high levels of performance	55%	●	●	●
The degree that working for an innovative/progressive company is important	83%	●	●	●

According to ESI International research, 81 percent of organizations said their employees needed to improve communication skills, a critical skill in talent's ability to collaborate, revealing an opportunity for training and development.¹¹



Across the board, millennial talent stands out with above average desire for collaborative environment attributes. While changing the mindset of older generations is not a short-term, easy endeavor, research does show that collaborative behaviors such as empathy can be learned.¹³ A generational approach to those programs could be useful to companies looking to foster a collaborative environment while at the same time improving their retention strategies with millennials.

Myth busting: generational perceptions of collaborative habits

Generational blind spots

How generational cohorts feel about each other's capabilities and habits around collaboration and associated skills will greatly affect a team's or organization's effectiveness in leveraging the benefits of collaboration. By a large margin, generations do not tend to agree with their co-workers when it comes to their own abilities; when creating collaborative work environments, it could be necessary to address generational stereotypes in order to leverage best collaborative practices.

Above and below global average, by percent

Generational stereotypes: talent shares its perception of its own generation and other generations				
Relative to their co-workers:	Global average	Millennials	Gen X	Baby Boomers
Millennials tend to value team collaboration	32%	40%	24%	22%
Millennials tend to communicate electronically versus face-to-face	51%	46%	56%	64%
Gen X tends to prefer to work independently versus as part of a team	39%	45%	34%	31%
Gen X tends to prefer collaboration versus independent work	23%	18%	27%	28%
Generational preferences: how they want to collaborate				
In which type of collaboration at work would you most like to participate? ¹⁴	U.S. average	Millennials	Gen X	Baby Boomers
In person	72%	60%	69%	79%
Online	23%	34%	23%	17%
Via phone or video conference	5%	6%	8%	4%

Aspects that relate to collaborative work environments

Millennials have a unique perspective of themselves and Gen X when considering collaborative and independent work tendencies, while baby boomers tend to trend with Gen X.

While less than their older cohorts, six out of 10 millennial workers prefer in-person opportunities to collaboration. And consistent with their stereotypes, twice as many prefer online collaboration than baby boomers.¹⁴

Recommendation to employers: avoid burnout of top collaborators

Research recently published in the *Harvard Business Review* points to the potential downside of overdoing collaboration. Employees who are viewed as valuable resources for information, ideas, and connections can easily become overloaded with demands for their time and unnecessary meeting requests. This leads to a surprising research finding: those viewed by peers as the most effective collaborators often have the lowest engagement and career satisfaction scores, in turn leading to burnout and lower morale and/or attrition.⁹

Collaboration is often lopsided

- Up to a third of value-added collaborations come from only 3% to 5% of employees (based on research conducted across 300+ firms)

- A single “extra miler”—an employee who frequently contributes beyond the scope of his or her role—can drive team performance more than all the other members combined
- Women often bear more of the collaborative work burden; stereotyped as communal and caring, they’re often leaned on for extra help, including attendance at optional meetings

All collaborative resources are not equal

Effective collaborators possess three types of resources—the key is to ensure that others in the organization use the most efficient resource.

- **Informational resources**—knowledge and skills—can be captured and passed along to others
- **Social resources**—one’s network and access—can be accessed to help colleagues better collaborate without a significant time investment

- **Personal resources**—direct access to one’s time and energy—should only be available to others if the other two options are not sufficient
- If more than 25% of colleagues’ requests are for personal time/meetings, the collaborative resource risks burnout, as they do not have enough time left for their own work

Reward effective collaboration

Roughly 20 percent of organizational “stars” don’t help colleagues at all—they are rewarded for hitting their individual targets, even though they don’t help their colleagues succeed. At the same time, top collaborators may be helping the organization succeed, but under perform because they are overwhelmed. Firms must learn how to identify and reward people who are both stars and collaborators.

Recommendation to employers: avoid burnout of top collaborators (continued)

Consider structural changes

One option is to designate “utility players” who are available to field requests and lessen demand for the busiest employees. One example: some hospitals now assign a nurse preceptor—someone with no patient responsibilities—to each floor, to be free to respond to requests as they emerge.

Identify top collaborators at risk for overload

Network analysis tools can help here, e.g., Do.com monitors calendars and reports on time spent in meetings versus solo work. CRM

programs can pinpoint volume, type, origin, and destination of requests. Identify talent at greatest risk for overload and focus on potential levers of change.

Encourage behavioral change

Show the most overburdened talent how to filter and prioritize requests, giving them permission to either say no or refer the request to someone else who is better suited to handle it. Reset norms regarding meeting requests. Sometimes a little culture shock is needed, e.g., Dropbox eliminated all recurring meetings for two weeks.

Leverage both technology and physical layout

Slack and Chatter facilitate open discussion threads; Syndio and VoloMetrix help talent make informed decisions about collaborative activities. Co-locate highly interdependent talent to facilitate shorter, face-to-face collaborations and information exchange, rather than formal meetings.

Overview and methodology

A high-level look at workforce trends from Kelly

Background

To better understand the motivations behind the empowered workforce, and how employers can best act and react to worker expectations, Kelly Services® developed the Kelly Global Workforce Index (KGWI), an annual global survey that is the largest study of its kind. In 2015, Kelly collected feedback from 164,000 workers across 28 countries and a multitude of industries and occupations. In 2014, nearly 230,000 were polled in 31 countries.

This study takes a high-level look at the collaborative work environment as it pertains to the global worker today. In addition to analyzing worker preferences and psychographic insights based on 2015 and 2014 KGWI survey data, this study pulls

insights from 2015 PT Hiring survey data (U.S. and Canada) and develops macro employer/employee trends using standard secondary research sources.

Skilled candidates are in short supply across the globe. Employers in most any industry in search of workers to support growth and innovation have to contend with a market in which organizations face intense competition to secure and retain the best talent. Understanding the collaborative work environment as a strategic opportunity that fosters innovation, engagement, and empathy—a strategy that can be applied to attraction, retention, and workflow strategies—can unlock much needed advantage for companies and talent alike.

KGWI response detail

By category	Number of responses	
	2015	2014
Global Workforce Total	164,021	229,794
Employment status		
Employed full time	57,908	66,216
Employed part time	11,814	16,482
Temporary/casual/contract work	16,299	23,680
Unemployed	12,754	21,451
Looking for work	22,425	22,161
Retired	1,060	1,262
Industry breakout		
Engineering	11,942	10,792
Finance and Accounting	10,287	16,150
Information Technology	9,847	10,501
Science	5,694	6,920
Geographic breakout		
The Americas	102,321	135,049
EMEA	50,107	71,134
APAC	11,593	21,080
Generational breakout		
Gen Y (1980-1995)	56,998	64,475
Gen X (1965-1979)	37,428	51,073
Baby Boomers (1946-1964)	20,382	28,789

Footnotes

¹Raconteur, "Collaboration is good for business," October 27, 2015 <http://raconteur.net/business/collaboration-is-good-for-business>

²Harvard Business Review, "Empathy is still lacking in the leaders who need it most," Ernest J Wilson III, September 2015 <https://hbr.org/2015/09/empathy-is-still-lacking-in-the-leaders-who-need-it-most>

³Cisco blog, "Collaboration: what does it really mean," Carlos Domingos, February 9, 2011 <http://blogs.cisco.com/news/collaboration-what-does-it-really-mean>

⁴Cogniview, "Ten Tips to Create a Collaborative Culture at Work," Lior Weinstein, March 7th, 2013 <http://www.cogniview.com/blog/ten-tips-to-create-a-collaborative-culture-at-work/>

⁵Stuart Foundation, "Start Empathy," November 12, 2015 <http://www.stuartfoundation.org/NewsAndReports/InTheNews/NewsArchive>

⁶McKinsey Quarterly, "Decoding leadership: What really matters," By Claudio Feser, Fernanda Mayol, and Ramesh Srinivasan, January 2015 http://www.mckinsey.com/insights/leading_in_the_21st_century/decoding_leadership_what_really_matters

⁷McKinsey Global Institute, "The social economy: Unlocking value and productivity through social technologies," Michael Chui, James Manyika, Jacques Bughin, Richard Dobbs, Charles Roxburgh, Hugo Sarrazin, Geoffrey Sands and Magdalena Westergren, July 2012 <http://www.mckinsey.com/industries/high-tech/our-insights/the-social-economy>

⁸Lab Manager, "Working Together Makes Change Work," Mark Lanfear, February 12, 2015 <http://www.labmanager.com/business-management/2015/02/working-together-makes-change-work?fw1pk=2#.Vxjy-PkrLIU>

⁹Harvard Business Review, "Collaboration Overload," January 2016 <https://hbr.org/2016/01/collaborative-overload>

¹⁰The Committee for Economic Development of the Conference Board, 2015 survey

¹¹UNC Kenan-Flagler Business School, Executive Development White Paper, 2014 <http://www.kenan-flagler.unc.edu/~media/Files/documents/executive-development/unc-white-paper-creating-a-collaborative-organizational-culture.pdf>

¹²Forbes, "What Millennials Want In The Workplace (And Why You Should Start Giving It To Them)," Rob Asghar, January 13, 2014 <http://www.forbes.com/sites/robasghar/2014/01/13/what-millennials-want-in-the-workplace-and-why-you-should-start-giving-it-to-them/#d5597c2fd9bc>

¹³Center for Creative Leadership, "Empathy in the Workplace A Tool for Effective Leadership," William A. Gentry, Todd J. Weber, and Golnaz Sadri, 2016 <http://insights.ccl.org/wp-content/uploads/2015/04/EmpathyInTheWorkplace.pdf>

¹⁴Cornerstone OnDemand, "The State of Workforce Productivity Report," 2013 <https://www.cornerstoneondemand.com/sites/default/files/research/csod-rs-state-of-workplace-productivity-report.pdf>



About Kelly Services

As a global leader in providing workforce solutions, Kelly Services, Inc. (Nasdaq®: KELYA, KELYB) and its subsidiaries, offer a comprehensive array of outsourcing and consulting services as well as world-class staffing on a temporary, temporary-to-hire, and direct-hire basis. In 2016, the Company is commemorating 70 years of industry leadership. Kelly has a role in managing employment opportunities for more than one million workers around the globe by employing 550,000 of these individuals directly with the remaining workers engaged through its talent supply chain network of supplier partners. Revenue in 2015 was \$5.5 billion. Visit kellyservices.com and connect with us on Facebook®, LinkedIn®, and Twitter®.



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