

Unlocking the Three Tiers of Nonemployees: Reimagining and Winning the Competition for Talent

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Abstract

The competition for talent is often viewed as a zero-sum game, which is incorrect. Rather than fighting over a limited talent pool, companies should seek to harness novel talent pools to win the competition for talent. This article presents the "three tiers of nonemployees" framework to assist managers in identifying, analyzing, and unlocking unconventional talent pools in a systematic manner. The article describes the characteristics of each tier of nonemployees (soon-to-be nonemployees, constrained nonemployees, and unconsidered nonemployees) and provides examples of companies that have successfully exploited these novel talent pools. Additionally, actionable suggestions are provided based on the experience of these companies.

Introduction

Be where your enemy is not – Sun Tzu, The Art of War

A company's performance depends not only on its conduct in product markets but also on its ability to develop valuable, rare, and inimitable resources and capabilities.¹ Human capital is the meta-resource that identifies, builds, and leverages the other resources and capabilities of a

company in the pursuit of competitive advantage.² Therefore, to win in the marketplace, organizations must first win the “war for talent.”

The term “war for talent” was used to vividly describe the intense competition for talent at the turn of the millennium.³ This competition has only intensified over time. A 2018 global study predicted that the demand for skilled talent will outstrip supply, leading to a shortage of 85 million skilled workers by 2030 and an estimated loss of \$8.4 trillion in unrealized revenue.⁴ Shrinking talent pools, tighter immigration policies, the effects of the pandemic and the great resignation phenomenon have heightened competition for talent. Not surprisingly, “attracting and retaining talent” remains a top strategic priority for CEOs.⁵ Thus, it is essential for companies to rethink their strategies for winning the talent war, more than ever before.

Rethinking competition for talent

Most current recommendations to attract and retain talent assume that the talent war is a zero-sum game. This assumption is flawed. While war is an appropriate metaphor to emphasize the urgent need to attract and retain talent, it mischaracterizes the nature of competition. In a war for one side to win, the other must lose.⁶ However, competition in the world of business need not be a zero-sum game.⁷ Successful companies think about the nature of competition differently. They do not imitate their rivals with market-defending moves. Instead, they pursue uniqueness and enact market-creating moves to create new market categories.⁸ Successful companies that craft new value propositions and create new market categories often disregard the conventional advice to focus on customers and adopt a “noncustomers first” approach.⁹ These companies believe that demand is created, not fought over, and they tap into noncustomers of the industry to win in the marketplace.

The central idea of looking beyond existing customers and exploiting demand of noncustomers to win in product markets can be beneficially extended to talent markets as well. Such efforts would receive a boost if managers are equipped with a framework that helps them analyze unconventional talent pools in a systematic manner. This article presents one such framework. The article builds on and extends the “three tiers of noncustomers” framework,¹⁰ a comprehensive framework for thinking about various categories of noncustomers. It offers the “*three tiers of nonemployees*” framework to redefine and win the competition for talent.

We identified the opportunity to extend the noncustomers framework to talent markets when we observed a company employed the noncustomers first approach to its talent strategy as well. We then sought additional illustrative examples of companies that have implemented unconventional

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talent strategies. Through interviews with key informants in these companies and the study of publicly available information of others, we deepened our understanding and developed the adapted framework.

The article is structured as follows: First, it briefly introduces the original noncustomers framework. Then, the three tiers of nonemployees framework is presented. Each category of nonemployees (soon-to-be nonemployees, constrained nonemployees, and unconsidered nonemployees) are described and illustrative examples are presented. Furthermore, the article offers actionable advice for managers, drawn from the experience of the illustrative examples, to effectively identify and leverage the potential of these nonemployees.

Three Tiers of Noncustomers

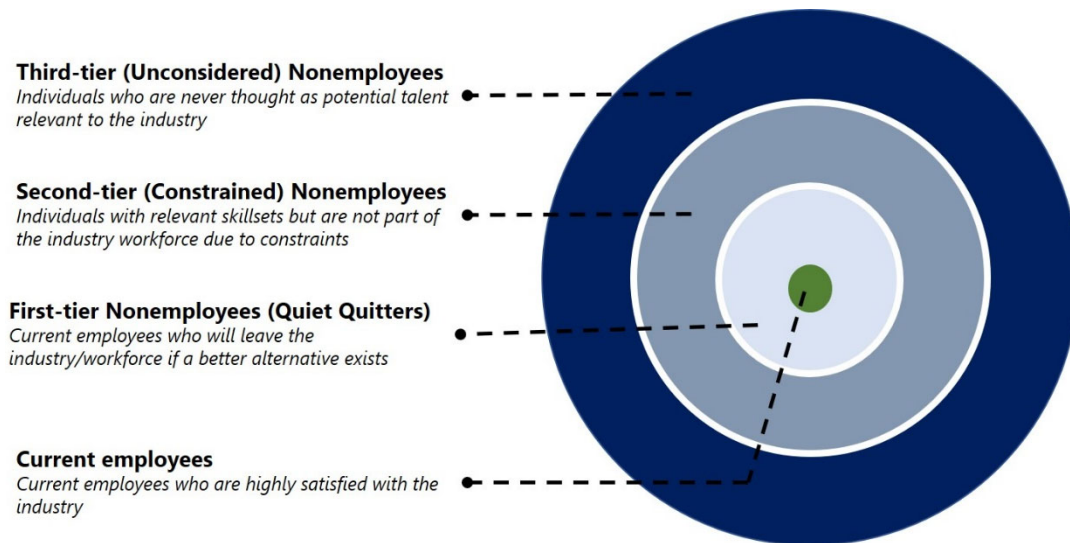
The role of noncustomers in driving innovation and growth is well documented in strategy¹¹ and marketing research.^{12,13} Chan Kim and Renee Mauborgne offer the "three tiers of noncustomers" framework as a comprehensive framework for understanding and analyzing noncustomers.¹⁴ The framework defines and delineates noncustomers into three tiers, from the most obvious to the least obvious. Managers can use the framework to widen their perspective incrementally to systematically analyze, understand, and unlock new demand.

The *first-tier noncustomers* are *soon-to-be noncustomers*—existing customers of the industry who could soon stop patronizing the industry. These soon-to-be noncustomers encounter numerous challenges in using the industry's offerings but reluctantly use them out of necessity. They utilize the industry's offerings minimally and will switch to another industry if it addresses the current pain points. The *second-tier noncustomers* of an industry are *refusing noncustomers*—individuals or organizations who are aware of the industry's offerings but have rejected them due to specific constraints that prevent their usage. These constraints could be financial (too expensive), physical (inability or difficulty in accessing product's functionality), social (non-conformance with social norms), or emotional (triggers negative emotions).¹⁵ While refusing noncustomers consider an industry's offering and consciously reject them due to constraints, the third-tier noncustomers are *unexplored noncustomers*—individuals or organizations who do not even consider the industry as relevant to their needs. Similarly, the companies also do not consider these individuals or organizations as potential customers. However, these unexplored noncustomers could offer a profitable growth opportunity for companies.

Three Tiers of Nonemployees

We adapt the three tiers of noncustomers framework to introduce the “*three tiers of nonemployees*” framework. This framework can assist managers in identifying and leveraging newer talent pools in a structured manner. Figure-1 provides an overview of the framework.

Figure 1. Widening talent pools – Three tiers of nonemployees



Next, we describe three tiers of nonemployees, present illustrative examples, and offer guidance based on these examples.

First-tier nonemployees – Soon-to-be nonemployees

Adapting the framework to the context of talent, the first-tier nonemployees are *soon-to-be-nonemployees*. A typical dissatisfied employee is not content with their current organization and is actively seeking opportunities to transition to another organization within the same industry for career advancement. In contrast, the first-tier nonemployees are those who are *dissatisfied with the current industry or the idea of working for any organization*. They may just “quit quietly” and engage in calibrated contribution.¹⁶ Such “quiet quitters” fulfil their primary responsibilities but lack the motivation to engage in additional activities or contribute to the company's success. This is similar to the behavior of first-tier noncustomers, who utilize the industry offering to a limited extent. Some first-tier nonemployees may eventually choose to leave the industry or workforce entirely to pursue non-traditional career paths or start their own businesses.

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Like first-tier noncustomers who reluctantly accept the industry's offerings, these employees continue in their current roles until they find a more suitable alternative opportunity.

A study conducted in six countries revealed that only 35% of individuals who left their jobs between 2020 and 2022 took employment in a different organization within the same industry; 48% transitioned to a different industry, and 17% did not return to the workforce at all.¹⁷ Some of these individuals who have left their jobs announce their decision to leave publicly, even without any concrete plans, and prepare themselves to transition to a different industry where their skills can be better utilized. For example, nurses who have left hospitals have utilized their experience and technology to transition into gig work or launch their own caregiving services.¹⁸ The loss of such trained talent hurts the industry.

When employees perceive a widening gap between their contributions and rewards at work, they become soon-to-be nonemployees. It is not just financial rewards that employees value. They also value intangible rewards such as respect for their individual identity and autonomy to pursue their interests within the context of work.¹⁹ Furthermore, they look for a connect between their work and broader purpose in life. If the work do not inspire self-motivation or lack intangible rewards, employees turn quiet quitters or get ready to leave the industry or the workforce altogether. Organizations will miss out on the full potential of their talent when employees leave (either quietly or publicly) and lose trained talent with firm-specific and industry-specific knowledge. By addressing the concerns of soon-to-be nonemployees, companies can retain trained and capable employees, as well as attract those working in other companies.

One effective method to identify first-tier nonemployees is through "continuous employee listening." For instance, McKinsey & Company employs weekly pulse check surveys featuring a few questions to gauge employee concerns and sentiments continually.²⁰ McKinsey then uses advanced analytics to design interventions that build trust and enhance employee experience. Pulse surveys are anonymous and administered at the company level. Conversely, companies like Dell proactively conduct "stay interviews" with specific employees to learn their feelings about the company early.²¹ Identifying first-tier nonemployees is just the beginning; leveraging their potential requires ongoing, organization-wide efforts. We present an example of a company that radically transformed its employee experience and offers valuable lessons in this regard.

Illustrative example - Microsoft

When Satya Nadella assumed the role of Microsoft's CEO in 2014, the company was profitable but experiencing flat growth, indicating a lag in technology leadership. Microsoft missed out on innovations such as e-books and smartphones. Many observers attributed the company's declining innovation performance to disillusioned employees, whose discontent was evident in blog posts²² and a CEO approval rating falling below 50%.²³ Essentially, Microsoft employees were either becoming or already were first-tier nonemployees.

In his first message to employees as CEO, Nadella wrote: "I truly believe that each of us should find meaning in our work. The best work happens when you know that it's just not work, but something that will improve other people's lives."²⁴ Nadella announced a renewed vision for Microsoft that rallied the company around artificial intelligence, cloud, and mobile technologies. As part of the cultural transformation, Nadella emphasized the importance of empathy towards both customers and colleagues, as well as fostering a growth mindset that encouraged learning, personal growth, mutual respect, and collaboration.²⁵ Employees took a break from their work to share innovative ideas related to their interests that helped Microsoft to introduce new products. Consequently, Microsoft regained employee confidence as a great place to work,²⁶ and the CEO approval rating increased to 88%.²⁷

Kathleen Hogan, Microsoft's Chief People Officer since 2014, has outlined the company's talent approach through her "5Ps of Employee Fulfilment" framework—Pay, Perk, People, Pride and Purpose.²⁸ It is important for an organization to offer a fair market-driven salary, employee benefits, and perks for themselves and their families in order to attract top talent. However, to retain and engage this talent, organizations must create inspiring narratives of collective growth and a strong sense of belonging. Additionally, what motivates employees to go above and beyond and contribute to the organization's success, rather than just showing up for work, is a purpose-driven organizational mission that aligns with their aspiration to make a meaningful impact and take pride in their work.

How to identify and leverage soon-to-be nonemployees

The following questions will help managers to develop a plan to leverage the potential of soon-to-be nonemployees:

- Do we have periodic surveys and interviews to understand our employees?
- What drives reduced employee engagement? Do we take timely actions on the findings of our surveys and interviews?

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- Does our organization have a purpose-driven mission that resonates with our workforce?
- Does our culture foster collaboration and empathy, creating a sense of belonging within the organization?
- Do our benefits support employees and their families in leading better lives?
- Is our compensation structure competitive and market-driven?

Second-tier nonemployees – Constrained nonemployees

The second-tier nonemployees are constrained nonemployees—*individuals who possess the requisite skillset relevant to the industry and are aware of the potential job opportunities in the industry but choose not to be part of the industry's workforce due to constraints.* These constraints may include individuals' work-life demands, which may require flexibility in space and time that the current industry norms may not offer. Additionally, individuals may have physical capability challenges that prevent them or make it difficult for them to work in the industry.

Companies can broaden their talent pool if they can redesign work processes to address the constraints of second tier nonemployees while fulfilling their business objectives. Engaging with this segment of nonemployees offers distinct advantages: they possess relevant skills and thus can be deployed immediately. Additionally, the likelihood of these employees seeking opportunities elsewhere is reduced as their idiosyncratic preferences are addressed.²⁹

Companies must adopt *constraint thinking*³⁰ to identify the constraints that restrict certain talent pools' participation in the industry and explore how those constraints could be overcome or transformed into advantages. Leveraging constrained employees would require companies to adapt their technologies, work systems, and performance policies with these constraints in mind. However, it is important to acknowledge that implementing such changes may not be equally feasible across all industries. For instance, a study on women returning to the workforce after maternity highlighted the sector-specific constraints.³¹ The job demands for constant travel and time-sensitive deliverables in the media industry posed higher challenges in accommodating these women compared to sectors like the social sector. Companies must examine ways to execute organizational changes without disrupting ongoing operations or generating conflicts with their existing workforce or straining their existing workforce. If these changes are feasible and compatible with the company's current business model, and if companies provide the necessary slack to their current workforce, they will gain a valuable first-mover advantage, propelling them ahead of others on

the learning curve in exploiting this segment of talent. We offer illustrative examples of two companies that successfully employed constraint thinking to create businesses aiding other companies in harnessing the potential of constrained nonemployees.

Illustrative examples – Flexibeets & Neomotion

A significant number of qualified women professionals take a temporary or permanent leave from their professional careers following marriage, maternity, or to care for their families. A study in India shows that 48% of working women leave the traditional workforce within four months of returning from maternity leave, and about 50% drop out before age 30.³² These women professionals represent a substantial talent pool that remains untapped. Flexibeets, an Indian start-up, facilitates companies' access to this second tier of nonemployees. A curated marketplace, Flexibeets sources quality flexible (part-time/remote) work opportunities from companies looking for additional talent and matches them with women professionals who are vetted for their skills and ability to deliver effectively. Flexibeets engages in awareness-creating and knowledge-sharing initiatives to champion flexible work arrangements at workplace. Additionally, they provide women professionals with support and tools to effectively return to work while retaining flexibility.

Neomotion, an Indian assistive device company, offers another example of tapping into second-tier nonemployees. Neomotion's main products are Neofly, an affordable and heavily customizable wheelchair, and Neobolt, a motor-powered clip-on that converts Neofly into a safe roadworthy vehicle. Neomotion recognized that locomotor disability constrains a significant number of individuals from being part of the workforce, thereby depriving them of their livelihoods. The company launched Neofleet, an initiative that helps individuals with locomotor disabilities use Neofly and Neobolt to become part of the gig workforce in companies like Zomato, a food delivery aggregator. Neomotion experimented with the idea, made modifications to Neobolt to facilitate the food delivery task, brought on board Zomato and solicited support from corporate sponsors to scale the initiative. By tapping into this second tier of nonemployees, platform companies can widen their talent pool even as competition for talent intensifies in the gig economy.

How to identify and leverage constrained nonemployees

A company could ask the following questions to identify and benefit from second-tier nonemployees:

- Are there segments of talent with required knowledge and skills who are not part of our industry due to some constraints?

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- What are these constraints? Are they related to flexibility in work time or location or challenges in physical capabilities?
- Can we adapt our technology, work systems, and performance policies to attract this segment of talent without affecting our current business model?
- Is collaboration with other organizations with similar objectives a viable option to engage this talent pool?

Third-tier nonemployees – unconsidered nonemployees

The third-tier nonemployees are *individuals who are typically not considered to possess or capable of acquiring the skillset relevant to the industry and thus are never thought of as part of the potential talent pool*. Unconsidered employees, by definition, are not obvious to the industry participants. Unlike the constrained nonemployees who are considered as potential talent but not accessible due to their constraints, this set of potential talent pool remains cognitively distant to companies.³³ Consequently, any company that identifies and implements a unique initiative to absorb such non-obvious talent pools will gain a sustainable competitive advantage.³⁴

Companies must employ *contrast thinking*³⁵ to identify unconsidered employees. Strategists must identify conventional assumptions about talent in their industry, question whether they could benefit by flipping those assumptions, and identify ways to implement a novel talent strategy.³⁶ We illustrate how two companies overturned conventional thinking in their industries to gain advantage.

Illustrative examples – Zoho and MyRealTrip

Zoho is an Indian company that offers web-based software tools for businesses. Zoho's products compete with the likes of Salesforce but stand out for their remarkably affordable prices. Zoho's ability to balance affordability with profitability is a result of, among other factors, their unique approach of tapping into a talent pool of unconsidered nonemployees. Zoho challenged the industry's implicit belief that only college-educated individuals could develop software products. Zoho University (later renamed Zoho Schools) is an innovative initiative that recruits high school students with basic mathematical and critical reasoning skills and immerses them in a year-long training program. The interns work alongside Zoho employees, learning to build and sell software products. After completing the program, interested participants join Zoho as employees without needing to possess conventional college degrees. Zoho has a workforce of about 10% without college degrees. The company treats them as equals to their college-educated

peers. This unique approach has helped Zoho reduce human capital costs, increase loyalty, and retain crucial firm-specific and product-specific knowledge within the company. This has in turn facilitated continuous product improvements resulting in competitive advantage.

MyRealTrip, a South Korean travel company, provides another example. Prior to MyRealTrip, the incumbent tour operators offered pre-designed overseas tour packages delivered through local partners and professional guides at the destination countries. MyRealTrip offered a platform that allowed travelers to customize their program and connected them directly with the guides. Furthermore, MyRealTrip tapped into an unconsidered talent pool of guides—South Korean expatriates who lived in destination cities. These expatriates possess local knowledge, relevant expertise, and a passion for travel.³⁷ For instance, a traveler in Paris can explore museums with a Korean expatriate who holds a Ph.D. in art. The company earns commissions on bookings, expatriates gain extra income, and travelers get an experience of exploring a new place with a local friend. MyRealTrip's distinctive business model enables it to expand its reach to destinations where professional tour guides are not available. The company's novel approach of leveraging unconsidered nonemployees has helped it succeed in a fiercely competitive overseas tourism industry.

Leveraging unconsidered nonemployees can challenge the status quo and present legitimization hurdles with both internal and external stakeholders.³⁸ Companies must address these challenges proactively. Both MyRealTrip and Zoho did that. MyRealTrip adopted a rigorous process to identify expatriates who could be part-time guides. It also allowed travelers to preview their tour experience and interact with guides before making selections. Furthermore, firms must adeptly manage potential tensions between conventional and unconventional workforces. This was notably absent in MyRealTrip, where the entire guide pool was unconventional. Zoho, however, successfully mitigated such tensions through unwavering top management support, strong interlinkages between Zoho University and the business, and a healthy corporate culture.

How to identify and leverage unconsidered nonemployees

Leveraging unconsidered nonemployees is a complex endeavor. But, once successfully executed, it establishes imitation barriers such as causal ambiguity and social complexity, deterring imitation by rivals.³⁹ A company could ask the following questions to identify and leverage third-tier nonemployees:

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- What are the implicit or explicit assumptions about talent that underlie conventional thinking in the industry? Can we unlock a potential pool of talent by relaxing or inverting these assumptions?
- Are there any segments of people who are not considered as potential talent pools by our industry? “What if” we considered them as potential talent? Can they be trained to become part of our workforce?
- Are there challenges in managing these nonemployees alongside our regular workforce? How can we address these challenges effectively?

Table 1 provide a concise overview of the three tiers of nonemployees framework.

Summary

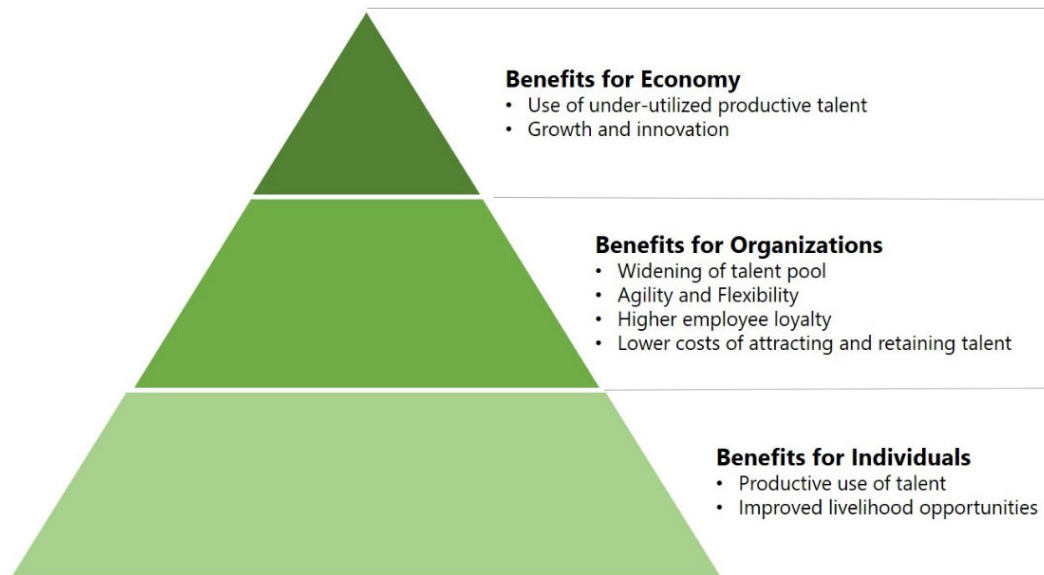
The quest for talent is a constant, costly, and crucial battle for companies. This article challenges the conventional wisdom that the competition for talent is a zero-sum game between companies fighting over a limited talent pool. Instead, it presents a fresh perspective on talent competition, suggesting that companies can gain a competitive edge by harnessing unconventional talent pools. The three tiers of nonemployees framework is presented as a structured tool to assist managers in this endeavor. Furthermore, the article provides invaluable guidance on how companies can identify unconventional talent pools in their industry, evaluate their potential, and overcome potential challenges. Additional recommendations based on illustrative examples help managers uncover the potential of novel talent pools. Leveraging these hitherto under-utilized and unutilized talent pools will benefit individuals, companies, and the overall economy (Figure 2).

Table 1. Harnessing three tiers of nonemployees

First-tier (soon-to-be) nonemployees	Second-tier (constrained) nonemployees	Third-tier (unconsidered) nonemployees
Key hurdles		
<ul style="list-style-type: none"> ➤ Keeping employees engaged and stopping them from becoming soon-to-be nonemployees requires continuous and holistic efforts. 	<ul style="list-style-type: none"> ➤ Specific occupational demands require redesigning policies and processes to accommodate constraints without affecting current business model and outcomes. 	<ul style="list-style-type: none"> ➤ A radical rethink of conventional industry wisdom is required to discover hitherto unconsidered talent pools. ➤ Gaining acceptance from internal and external stakeholders is challenging while questioning the status-quo.
Guiding questions to leverage nonemployees		
<ul style="list-style-type: none"> ➤ Do we have periodic surveys and interviews to understand our employees? ➤ What drives reduced employee engagement? Do we take timely actions on the findings of our surveys and interviews? ➤ Does our organization have a purpose-driven mission that resonates with our workforce? ➤ Does our culture foster collaboration and empathy, creating a sense of belonging within the organization? ➤ Do our benefits support employees and their families in leading better lives? ➤ Is our compensation structure competitive and market-driven? 	<ul style="list-style-type: none"> ➤ Are there segments of talent with required knowledge and skills who are not part of our industry due to some constraints? ➤ What are these constraints? Are they related to flexibility in work time or location or challenges in physical capabilities? ➤ Can we adapt our technology, work systems, and performance policies to attract this segment of talent without affecting our current business model? ➤ Is collaboration with other organizations a viable option to engage this talent pool? 	<ul style="list-style-type: none"> ➤ What are the implicit or explicit assumptions about talent that underlie conventional thinking in the industry? Can we unlock a potential pool of talent by relaxing or inverting these assumptions? ➤ Are there any segments of people who are not considered as potential talent pools by our industry? “What if” we considered them as potential talent? Can they be trained to become part of our workforce? ➤ Are there challenges in managing these nonemployees alongside our regular workforce? How can we address these challenges effectively?
Illustrative examples		
<ul style="list-style-type: none"> ➤ McKinsey’s pulse check surveys and Dell’s stay interviews enabled continuous employee listening. ➤ Microsoft’s employee engagement initiatives, anchored on “5Ps of Employee Fulfilment” framework and nurturing growth mindset, helped the company turn its soon-to-be-nonemployees to committed employees and also attract similar talent from outside. 	<ul style="list-style-type: none"> ➤ Flexibees’ awareness-creating and knowledge-sharing initiatives for both women re-entering workforce and corporates facilitated company’s efforts to champion flexible work arrangements at workplace. ➤ Neomotion’s experiments guided its efforts to suitably modify Neobolt for food delivery. Partnership with Zomato and other corporates helped it scale the impact of the initiative. 	<ul style="list-style-type: none"> ➤ MyRealTrip’s rigorous interview process allowed it identify the most suitable talent amongst expatriates to be part-time guides. Tour previews and prior interaction with guides helped reduce customer apprehensions. ➤ Zoho developed its own internal training and apprenticeship program to upskill nonconventional talent as programmers. Strong emphasis on values and culture aided company’s efforts in integrating conventional and nonconventional workforces.

Figure 2. Benefits of tapping into three tiers of nonemployees

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