The *ALM Vanguard:*
Corporate Services Consulting 2019

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ALM Intelligence

Contents

Author

Liz DeVito
Associate Director, Management Consulting Research
T +1 212-457-9170
edevito@alm.com

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www.alm.com/intelligence/industries-we-serve/consulting-industry/

Overview
Capability Drivers

Demand for corporate services consulting is growing against the backdrop of an uncertain economic outlook and the continuing drumbeat of digital disruption. Executives who lead G&A functions are carefully watching economic indicators for signs that a recession might be on the horizon, considering how to prepare before they are backed into a corner and forced to cut costs without a strategic plan. They have come too far and learned only too well from past recessions that financial gains earned from making fast, easy cuts at the start of a downturn are not sustainable and can take years to recover from because of reduced service levels and lost institutional knowledge. This is a particularly untenable prospect at a time when G&A leaders are simultaneously being asked to actively engage in, if not lead, their organization's digital transformation by CEOs who believe that moving too slow leads to obsolescence. The challenge for G&A leaders is to develop a strategy for creating value in an environment that pits leanness against a growth imperative.

> **Corporate Services Consulting Defined**
>
> ALM defines corporate services consulting as professional services designed to help clients improve the performance of back-office functions that support the workforce, including those in the corporate center, shared services centers, outsourced services, and captive operations.

Providers are responding with services framed for a transformation agenda. They approach corporate services through the lens of the customer experience, helping clients understand how internal operations and technology infrastructure directly influence brand value. They are collaborating to transform workflows, integrate data, adopt cognitive technologies, and reskill back-office employees in service of the customer experience. The consulting leaders have gone one step further with the introduction of perspectives and frameworks that position the back office as an innovation engine, where end-to-end processes are designed and digitally enabled tools are road-tested for impact potential throughout the organization's value chain.

As corporate services consulting becomes more integral to clients' transformation agendas, there is an expectation of providers to deliver full engagement life cycle capabilities against two objectives: sustaining G&A efficiency gains and driving enterprise-wide digital transformation.

Sustaining G&A efficiency gains

- **Corporate center redesign.** Providers are helping clients understand how lean and agile models, along with digital technologies, can reshape the corporate center to work faster and more efficiently, all in line with the broader business portfolio strategy and organizational capabilities. They have updated their diagnostic tools to help clients cut through the politics of organization design to honestly appraise the sweet spots and pain points in their corporate center's operating model and processes.

- **Zero-based budgeting (ZBB).** The consulting leaders are applying new approaches to maximize efficiency gains and drive productivity improvements, combining the principles and practices of ZBB with organization and operating model redesign. These approaches help clients reframe cost reductions as opportunities to reduce organizational and process complexity, while building resilience into corporate services.

- **Operational efficiency.** The leading providers have become more comfortable leveraging an agile consulting methodology focused on speed and flexibility for achieving operational excellence. Consulting frameworks often include

Overview
Capability Drivers

a phase that encapsulates the iterative, human-centric process of agile design to ensure operational efficiencies are improved and capabilities are developed. This approach also has the effect of strengthening the client's ability to sustain performance improvement over the long term.
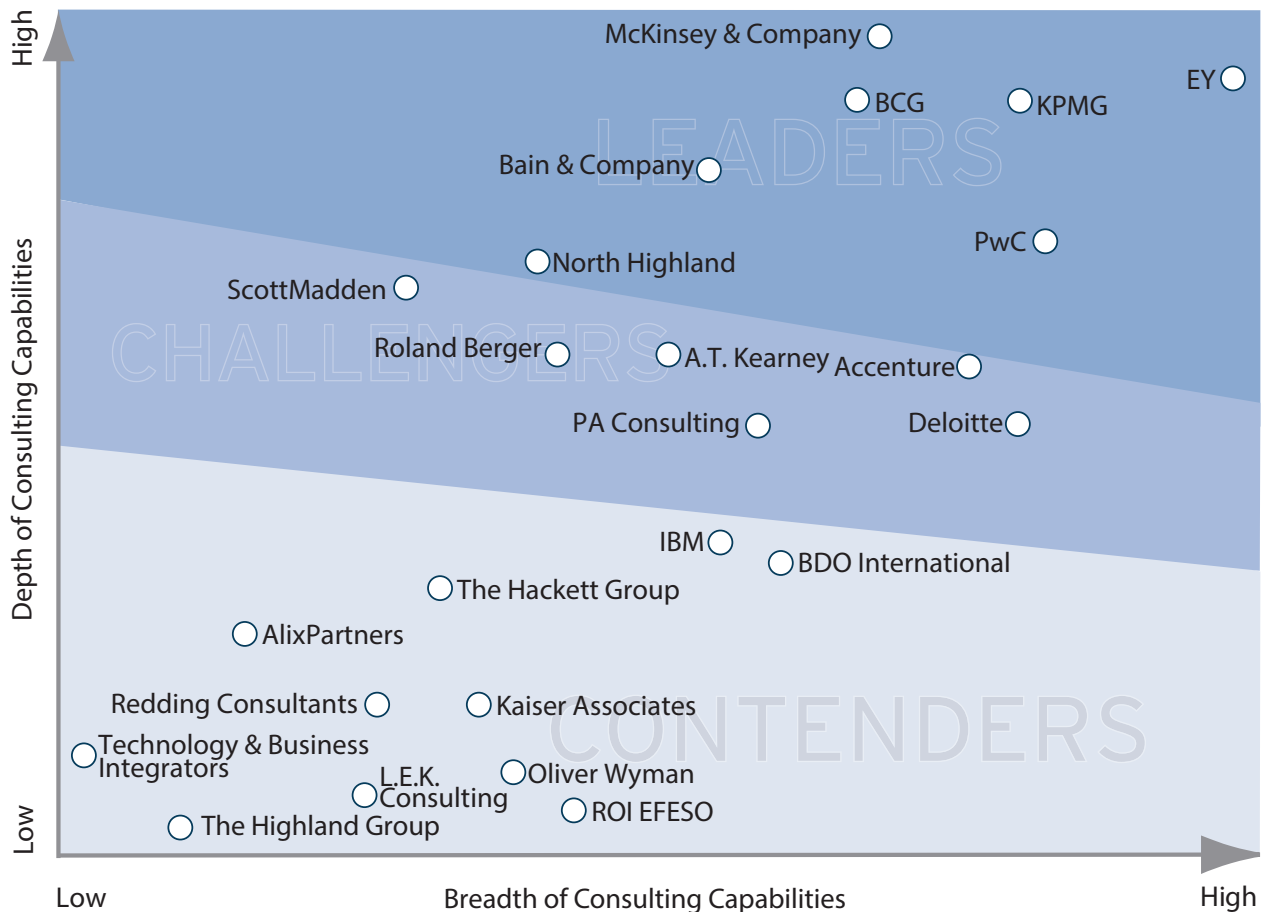
Leveraging corporate services for digital transformation

- **Global business services (GBS).** Providers are leveraging the GBS model to transform corporate services away from its traditional focus on cost-cutting to become a digital transformation engine. They are helping clients create customer-centric, digitized process flows across functions and geographies; realize cost-efficient operations through scale, automation and labor arbitrage effects; and build an agile service delivery model for support functions, where operating units are steered globally and independently of traditional business units.

- **Emerging technologies.** The leading providers are helping clients adopt emerging technologies such as intelligent automation, natural language processing, blockchain, and data analytics to create fully automated and transparent end-to-end process chains. The work begins with building a holistic automation vision backed by an outcomes-driven strategy, roadmap, and operating model. Close attention is paid to how performance will be measured, visualized, and reported to drive real-time and predictive decisions.

ALM Vanguard of Corporate Services Consulting Providers

The *ALM Vanguard* of Corporate Services Providers assesses firms in terms of their relative ability to create impact for their clients. For this, the *ALM Vanguard* displays the relative position of the providers featured in this report, deemed capable in corporate services consulting, based on an evaluation of their overall capabilities according to a consistent set of criteria. Capability depth denotes a provider's capacity to get results for clients, while capability breadth indicates its ability to deploy that capacity across multiple client scenarios.

Consulting is distinctive from other industries because of the variety of client contexts that providers encounter in terms of ambitions, needs, and abilities that alter what it takes to create impact. As providers seek to deploy their capacity to create client impact (depth) across industry sectors, geographic regions, and interfaces with adjacent functional and technical capabilities (breadth), they increase the complexity of their engagement models. The downward slope of the lines that separate the tiers of the market captures the trade-off between low-complexity engagement models (designed to maximize the capacity to create impact for a narrow set of client applications) and high-complexity engagement models (made to maximize deployability and create impact for a wide variety of client applications).

Source: ALM Intelligence

Competitive Landscape

The distribution of providers across the corporate services consulting landscape in 2019 is consistent with that of 2018. This is not to suggest there has been a lack of corporate and business development by the Vanguard players since last year. All, in fact, are focused on the automation opportunity and on helping clients shift from single-country, single-function models to something more integrated, more global, or both. Most are investing to some degree in ecosystem expansion to build capabilities in agile, analytics, and, of course, intelligent automation. The rising tide of innovation has raised everyone's game, rendering the roster of competitors within each of the three Vanguard panels the same as last year. The real differentiators between Vanguard Leaders, Challengers, and Contenders this year are twofold. One is having deep expertise in each of the functions that comprise corporate services, including at the industry level. The other is an ability to seamlessly combine strategy, operations, and digital consulting with the non-consulting services and capabilities of a proprietary ecosystem. Those that exhibit both have a clear lead in this market.

It should be noted that two providers have been dropped this year for no longer being in scope of the research topic. BearingPoint, because it is primarily focused on business operations consulting and not back-office functions, and Symphony Ventures, a consulting-led provider of RPA services for back-office transformation that was acquired by BPO provider Sykes Enterprises in October 2018.

Leaders. A cohort of strategy and Big Four consultancies, the Vanguard Leaders include Bain & Company, Boston Consulting Group, EY, KPMG, McKinsey & Company, North Highland, and PwC. These firms share a philosophy of corporate services as the engine of enterprise-wide digital transformation. Corporate services consulting is guided by deep capabilities in organization strategy, "future of" workforce management, and intelligent automation. McKinsey maintained its status as having the deepest capabilities, thanks to ongoing investments in its knowledge repositories and technology-enabled service delivery focused on the value agenda. EY advanced its client impact ranking due to an expanding spectrum of assets, products, and platforms that function as a combined management and operating system for corporate services transformation. KPMG also advanced its position with the introduction of Enterprise Services Management, a framework and technology-enabled platform that provides a scalable, consumer-grade experience to the delivery of corporate services across the enterprise.

Challengers. The Vanguard Challengers mix includes A.T. Kearney, Accenture, Deloitte, PA Consulting, Roland Berger, and ScottMadden. These providers are currently stronger in one of two capabilities – strategy or technology. Accenture, Deloitte, and PA Consulting are leaders in digital transformation consulting, as well, and thus more competitive to the Vanguard Leaders. A.T. Kearney, Roland Berger, and ScottMadden have strong capabilities in corporate and shared services strategy consulting and implementation services. These firms provide different levels of technology advisory services and will collaborate with the client's technology partners to translate strategy into roadmap design. Accenture stands out for its SynOps platform that succeeds in balancing artificial intelligence, advanced analytics, and human insights for end-to-end process transformation.

Contenders. The Vanguard Contenders is the largest peer group, a cohort of 11 providers that offer solid corporate services consulting capabilities, but do not share the same breadth or depth as their counterparts. Desired outcomes are more often determined by specific business contexts, such as a restructuring or turnaround where cost reduction is the focus rather than

Competitive Landscape

a broader transformation agenda. Some go to market with time-tested approaches targeted to specific sectors and markets. IBM is an outlier in this group not only because of its size, but also for the technology capabilities that underpin its vision of the Cognitive Enterprise. IBM's current challenge is a systems-led business case that muddles its strategic intent and obfuscates service delivery. The Contenders are AlixPartners, BDO International, IBM, Kaiser Associates, L.E.K. Consulting, Oliver Wyman, Redding Consultants, ROI EFESO, Technology & Business Integrators, The Hackett Group, and The Highland Group.

Provider Capability Rankings

The figures below indicate the change in consulting providers' ranks in terms of their overall capability depth, breadth, and client impact. (See the Definitions section of this report for a detailed breakdown of underlying capabilities.) Ranking position number one denotes the top-ranked provider.

Depth

#	2018	2019
1	McKinsey & Company	McKinsey & Company
2	EY	EY
3	Bain & Company (Tied 3)	BCG (Tied 3)
4	BCG (Tied 3)	KPMG (Tied 3)
5	KPMG (Tied 3)	Bain & Company
6	PwC	PwC
7	North Highland	North Highland
8	Accenture	ScottMadden
9	Deloitte (Tied 9)	A.T. Kearney (Tied 9)
10	PA Consulting (Tied 9)	Accenture (Tied 9)
11	Roland Berger (Tied 9)	Roland Berger (Tied 9)
12	ScottMadden	Deloitte (Tied 12)
13	A.T. Kearney	PA Consulting (Tied 12)
14	IBM	IBM
15	BDO International	BDO International
16	The Hackett Group	The Hackett Group
17	AlixPartners	AlixPartners
18	Symphony Ventures*	Kaiser Associates (Tied 18)
19	Kaiser Associates (Tied 19)	Redding Consultants (Tied 18)
20	Redding Consultants (Tied 19)	Technology & Business Integrators
21	Technology & Business Integrators	Oliver Wyman
22	BearingPoint* (Tied22)	L.E.K. Consulting
23	Oliver Wyman (Tied 22)	ROI EFESO
24	EFESO	The Highland Group
25	The Highland Group (Tied25)	
25	L.E.K. Consulting (Tied 25)	

Breadth

#	2018	2019
1	PwC	EY
2	Deloitte	PwC
3	EY	KPMG
4	KPMG	Deloitte
5	BDO International	Accenture
6	Accenture	McKinsey & Company
7	McKinsey & Company	BCG
8	BCG	BDO International
9	PA Consulting	PA Consulting
10	Bain & Company	IBM
11	A.T. Kearney	Bain & Company
12	IBM	A.T. Kearney
13	North Highland	ROI EFESO
14	Oliver Wyman	Roland Berger
15	Roland Berger	North Highland
16	BearingPoint*	Oliver Wyman
17	ScottMadden	Kaiser Associates
18	The Hackett Group	The Hackett Group
19	EFESO	ScottMadden
20	Kaiser Associates	Redding Consultants
21	Redding Consultants	L.E.K. Consulting
22	The Highland Group	AlixPartners
23	L.E.K. Consulting	The Highland Group
24	AlixPartners	Technology & Business Integrators
25	Symphony Ventures*	
26	Technology & Business Integrators	

Client Impact

#	2018	2019	
1	McKinsey & Company	EY	Leaders
2	EY	McKinsey & Company	Leaders
3	KPMG	KPMG	Leaders
4	PwC	BCG	Leaders
5	BCG	PwC	Leaders
6	Bain & Company	Bain & Company	Leaders
7	North Highland	North Highland	Leaders
8	Deloitte	Accenture	Challengers
9	Accenture	ScottMadden	Challengers
10	PA Consulting	A.T. Kearney	Challengers
11	Roland Berger	Roland Berger	Challengers
12	A.T. Kearney	Deloitte	Challengers
13	ScottMadden	PA Consulting	Challengers
14	BDO International	IBM	Contender
15	IBM	BDO International	Contender
16	The Hackett Group	The Hackett Group	Contender
17	AlixPartners	AlixPartners	Contender
18	Symphony Ventures*	Kaiser Associates	Contender
19	Kaiser Associates	Redding Consultants	Contender
20	Redding Consultants	Technology & Business Integrators	Contender
21	Technology & Business Integrators	Oliver Wyman	Contender
22	Oliver Wyman	L.E.K. Consulting	Contender
23	BearingPoint*	ROI EFESO	Contender
24	EFESO	The Highland Group	Contender
25	The Highland Group (Tied25)		Contender
25	L.E.K. Consulting (Tied25)		Contender

Not covered in 2019

Source: ALM Intelligence

Rating Level Summaries

ALM Intelligence rates providers according to a three-level scale based on their relative breadth and depth of overall capabilities. Each rating level corresponds to an area in the *ALM Vanguard* graphic bounded by a downward sloping line designed to equate engagement models of different degrees of complexity.

Rating Level	Providers		Description
Leaders	Bain & Company EY McKinsey & Company PwC	BCG KPMG North Highland	The leaders are at the top of the market in terms of their capabilities to create client impact through their depth of expertise and ability to deploy it across a range of engagement models. They are unique in their ability to independently execute a broad array of projects across the full spectrum of client contexts. They range from providers in the top quintile in terms of depth of capability for low-complexity engagement models to those that combine above average depth of capability with the ability to deploy it across high-complexity engagement models.
Challengers	A.T. Kearney Deloitte Roland Berger	Accenture PA Consulting ScottMadden	The challengers can execute end-to-end projects in low complexity engagement models or a substantial portion of project components in high-complexity engagement models. They range from those with above-average depth of capability for low-complexity engagement models to those that combine depth of capability between the bottom third and top half of the distribution, with the ability to deploy it in high complexity engagement models.
Contenders	AlixPartners The Hackett Group IBM L.E.K. Consulting Redding Consultants Technology & Business Integrators	BDO International The Highland Group Kaiser Associates Oliver Wyman ROI EFESO	The contenders can execute a substantial portion of projects in low-complexity engagement models or a single phase or project instance in high-complexity engagement models. They range from those with average depth of capability for low-complexity engagement models to those that combine depth of capability in the bottom third of the distribution with the ability to deploy it in high-complexity engagement models.

Source: ALM Intelligence

Leader Assessments

The *ALM Vanguard* of Corporate Services Consulting Providers comprises the following Leaders.

"EY continues to advance its position on continued investments in agile and digital capabilities focused on transforming corporate services into a transformation engine that enables organizations to innovate at scale. Clients perceive EY as ahead of the curve on multiple fronts, most notably their ability to guide c-suite stakeholders through "art of the possible" scenario planning in the firm's Wavespace centers and capabilities in end-to-end process design, infrastructure support and maintenance, and intelligent automation."

Source: Liz DeVito, Associate Director, Management Consulting Research, ALM Intelligence

Provider Capability Ratings

The table below provides detailed capability ratings for corporate services consulting providers. (See the Definitions section of this report for explanations of the capabilities.)

Legend: ● Very Strong ◕ Strong ◐ Moderate ◔ Weak ○ None

Provider Capabilities: Corporate Services Consulting	Discovery			Design			Delivery		
	Needs Assessment	External Market Insight	Internal Client Insight	Strategy	Operating System	Management System	Project Management	Client Capability Development	Enabling Tools
EY	◐	◐	◐	●	●	●	◐	◐	●
A.T. Kearney	●	◐	◐	◔	◐	◐	●	◐	◐
Accenture	◐	◐	◐	◐	◐	◐	◐	◐	◐
AlixPartners	◐	◐	◐	◐	◐	◐	◐	◔	◔
Bain & Company	◐	◐	◐	●	◐	◐	◐	◐	◐
BDO International	◐	◐	◐	◐	◐	◐	◐	◐	◐
BCG	●	●	◐	◐	◐	◐	◐	◐	◐
Deloitte	◐	◐	◐	◐	◐	◐	◐	◐	◐
EFESO	◔	◐	◐	◔	◔	◐	◐	◐	◐
The Hackett Group	◐	◐	◐	◐	◐	◐	◐	◔	◐
The Highland Group	◐	◐	◔	◐	◐	◐	◐	◔	◔
IBM	◐	◐	◔	◐	◐	◐	◐	◐	◐
Kaiser Associates	◐	◐	◐	◐	◐	◐	◔	◐	◐
KPMG	◐	◐	◐	●	●	◐	◐	●	●
L.E.K. Consulting	◐	◐	◐	◔	◐	◐	◐	◔	◔
McKinsey & Company	●	●	◐	●	●	◐	◐	●	◐
North Highland	◐	◐	●	◐	◐	◐	◐	◐	◐
Oliver Wyman	◐	◐	◐	◐	◐	◐	◐	◔	◔
PA Consulting	◐	◐	◐	◐	◐	◐	◐	◐	◐
PwC	◐	◐	◐	◐	◐	◐	◐	◐	◐
Redding Consultants	◐	◐	◐	◐	◐	◐	◐	◔	◔
Roland Berger	◐	◐	◐	◐	◐	◐	◐	◐	◐
ScottMadden	◐	◐	◐	●	◐	◐	◐	◐	◐
Technology & Business Integrators	◐	◐	◐	◐	◐	◐	◐	◔	◔

Source: ALM Intelligence

Best in Class Providers

Providers identified as best in class evidence deep capabilities in specific areas of corporate services consulting and stand out from their peers for their highly effective and often innovative consulting approaches and service delivery.

Capability Areas	Provider	Strengths
Client Capability Development	EY	EY offers clients a spectrum of assets, products, and platforms that enable and accelerate all phases of the discover-design-deliver consulting engagement process. They range from client-hosted sessions (GBS Learn From The Best) to immersive approaches to change management (underpinned by the EY Change Insights solution) and GBS transformation (GBS Strategy in a Day); digitally-enabled readiness and maturity assessment tools (future of work, culture, operating model, and more); a web-hosted, purpose-driven approach to project management (EY Delivers); and much more. These assets are brought together on an integrated solutions platform that underpins EY's Transformation By Design service offering.
Enabling Tools	EY	*See Client Capability Development*

Source: ALM Intelligence

Provider Briefs

Leaders

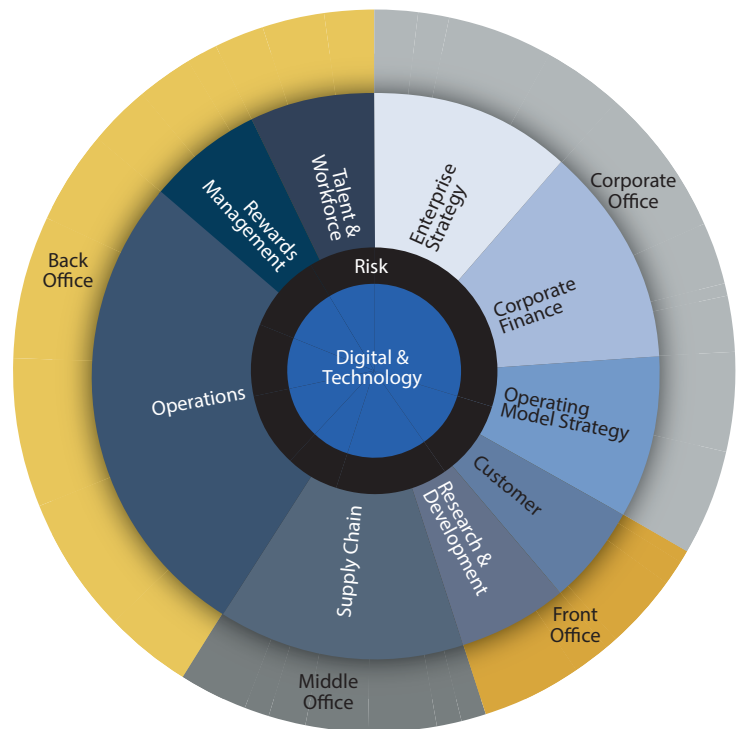| EY	
Approach	EY's perspective is that the collective business support functions in an organization are uniquely positioned to serve as a digital transformation engine for the entire enterprise. With their ongoing commitment to improve process efficiency and reduce operating costs, these functions have proven to be successful early adopters of emerging technologies with many now operating as centers of excellence that can help the organization realize the true potential of intelligent automation. As such, EY seeks to help clients design and build an enterprise-wide corporate services environment that not only streamlines processes and optimizes cost structures, but also establishes an operating platform for agile service delivery, end-to-end process management, and overall innovation of business models and the customer/employee experience.
Practice Structure	The engine of EY's service delivery is its Global Business Services (GBS) solution, which is part of the firm's Advisory business. GBS engagements draw on the knowledge and resources across all services lines, including Assurance, Tax, and Transactions, as well as the full scope of management consulting services offered by Advisory, including strategy, performance improvement, risk, customer, cybersecurity, big data and analytics, and emerging technology. GBS also leverages the expertise of the firm's industry and functional consulting practices, as GBS' go-to-market strategy is sector-led and issues-focused.
Service Delivery Model	EY GBS offers a modular approach to corporate services consulting that enables consistent service delivery at any stage of the client's journey, yet is nonetheless holistic in its consideration of all dimensions of corporate services strategy, operations (including shared services and outsourcing), controls, and measures. The multidisciplinary offering integrates knowledge of legal, tax, and risk, and is delivered by a dedicated global network of corporate services professionals with practical experience in the firm's program and change management methodologies. GBS methodologies use agile and design thinking principles that, for example, help clients develop solutions in iterations using future-focused customer and employee personas. EY has developed a substantial repository of enabling tools and templates that both accelerate project pace and build clients' internal capabilities. For example, to help clients estimate the level of effort, investment, and efficiency gains of a particular project, EY offers GBS Strategy in a Day, a live business case simulation tool that can be used on an iPad or in the firm's dedicated GBS Showcase @ CFO Space in Frankfurt, part of the firm's global Wavespace network. GBS engagements typically begin with a benchmarking exercise using EY Process Depot, a cloud-based platform housing sector-specific best practices, the EY Maturity Evaluator, external benchmark data, and other assets. With this information, EY defines an end-to-end process target state that incorporates a strong continuous improvement dimension to ensure the process state evolves with the business. For all GBS engagements, EY helps clients establish a performance management framework that formalizes governance, measurement, and reporting activities. The GBS Digital Command Center provides visibility into service performance through individual modules for service management, internal audit and risk management, RPA monitoring, process documentation, process mining, and business insights. The GBS offering integrates emerging technologies for solutions design, as well as to support specific activities, such as risk management, data capture from multiple transactional data source systems, and continuous improvement. GBS publishes articles and case studies, conducts research with academic institutions, and offers client exchange and innovation events, including GBS Learn from the Best, an exchange that enables clients to access the knowledge and experience of Procter & Gamble, considered one of the world's leading GBS organizations.

Source: ALM Intelligence

Definitions
What is Corporate Services Consulting?

Corportate services consulting is part of operating model strategy consulting which forms parts of the management consulting services directed at clients' corporate office activities. Its objective is to help companies set the policy guardrails that direct the investments and activities of their organizations.

Operating model strategy consulting includes two services.

- ■ Organization: addresses the arrangement and interaction of a company's human resources through the "hardware" of the location of organizational resources, lines of authority, and the spans and layers of P&L control, as well as the "software" of management processes through which resources interact to perform activities.

- ■ Corporate services: addresses the functions that support a company's human resources, including those in the corporate center, shared services centers, outsourced services, and separate functional organizations.

Source: ALM Intelligence

Definitions
Consulting Provider Capabilities

Capability Areas	Capabilities	Descriptions
Discovery	**Needs Assessment**	How does the consultant establish goals and objectives for the project and determine which stakeholders need to be involved from the client organization, consultant, and third parties?
	External Market Insight	How do consultants' knowledge and experience inform diagnostics through benchmarking and trend analysis?
	Internal Client Insight	How does the consultant obtain internal client insights through data analysis and interviewing and workshops and incorporate them in diagnostics?
Design	**Strategy**	How does the solution align with the client's market, customer and product, and functional strategies?
	Operating System	How are client information, physical, and people assets and processes configured to generate the value add intended by the strategy?
	Management System	How are client resources mobilized, managed, measured, and motivated through governance, incentives, organizational structures, and performance management to execute the strategy?
Delivery	**Project Management**	How are activities sequenced and resources allocated, aligned, and coordinated to execute and sustain the solution?
	Client Capability Development	How are client technical skills developed and mindsets and behaviors adapted to execute and sustain the solution?
	Enabling Tools	What consultant tools are used for diagnostic and design activities that support the client in executing, sustaining, and refreshing the solution?

Source: ALM Intelligence

Provider Capability Rankings Descriptions

Depth: a measurement of a consulting provider's strength based on its capabilities, including such factors as resources, proprietary methodologies, and intellectual properties

Breadth: a consulting provider's ability to deploy its capabilities in multiple client scenarios across industry sectors, geographic regions, and interfaces with adjacent functional and technical capabilities

Client impact: a consulting provider's capacity to get results for clients based on the combination of its capability depth and breadth adjusted by the degree of engagement model complexity incurred by its breadth across industry sectors, geographic regions, and interfaces with adjacent functional and technical capabilities

Methodology
Overview

ALM Intelligence has been researching the management, financial, and IT consulting industry for over 40 years, studying the global consulting marketplace at multiple levels. The resulting market analyses help buyers of consulting services to effectively target best in class providers, and help consulting providers to identify and evaluate business opportunities.

The proprietary research methodology comprises four components:

- Extensive interviews with consulting practice leaders, financial analysts, consulting clients, and clientside industry experts

- Data and background material from the proprietary library of research on the consulting industry and individual firms

- Quantitative data collection from primary and secondary sources

- Key economic data relevant to the sector(s) being analyzed

The research output for a project is derived predominantly from primary research.

Data is obtained through a centralized effort, with teams of analysts collecting, assessing, fact-checking, and refreshing baseline information on leading consultancies and consulting markets. This information populates an extensive knowledge base of consulting providers, widely regarded as among the most comprehensive in the world.

Working collaboratively, analysts narrow their research to the most discrete and pertinent intersection of consulting service/industry/geography.

The experience and knowledge of the analyst team are critical to the success of these research endeavors. Directors and associate directors average over a decade of consulting and/or analyst experience, with an emphasis on professional services. Junior analysts typically bring an average of five years of consulting and/or analyst experience.

The group's long-term relationships with consulting clients and industry leaders are based on trust and respect. ALM Intelligence's fundamental goal is to deliver objective assessments and insightful viewpoints on the management, financial, and IT consulting market.
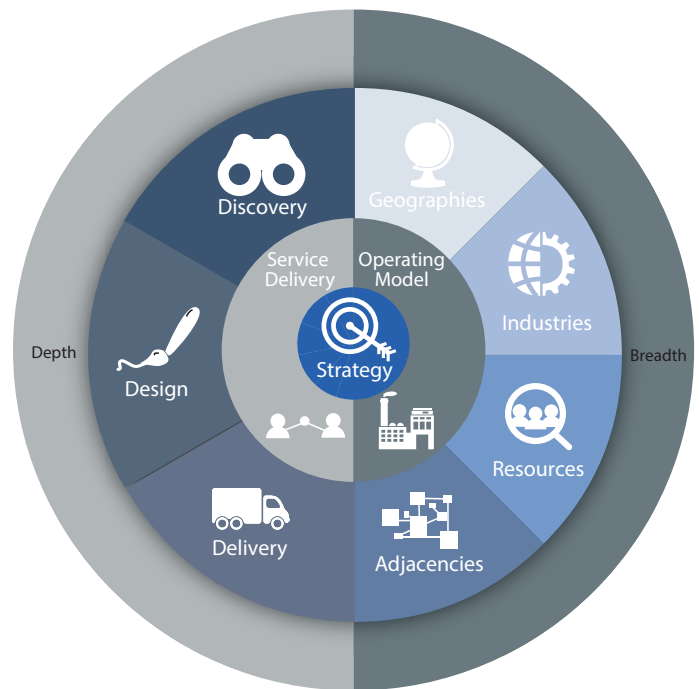
Methodology
How We Evaluate Consulting Providers

ALM Intelligence's goal is to deliver objective assessments to help buyers of consulting services effectively identify and maximize the benefits of working with best in class providers.

ALM Intelligence evaluates consulting providers with respect to a particular consulting area in terms of the following baseline criteria. The general criteria below are refined and customized over the course of the research effort based on input from clients and providers:

- **Consulting approach:** What are providers' points of view on the root causes of client challenges? How do those points of view inform choices about how best to resolve them? How do providers view the intersection of these needs and solutions with other consulting or non-consulting offerings or cross-cutting themes?

- **Consulting organization:** How do providers organize and deploy their capabilities? What sort of consultants and other human resources do they possess, and how do they obtain and use them? What sorts of partnerships, collaborations, and alliances with external parties do they use to bolster their capabilities?

- **Consulting service delivery model:** How do providers deliver their services? Do they employ any particular processes or methodologies, preconfigured tools, or other unique elements of service delivery? Do they follow any particular sequence or direction in their service delivery? How do they measure outcomes?

- **Client pain points and needs assessments:** What factors most influence successful engagements in the opinion of clients? What capabilities do providers need to bring to their engagements to be compelling? What sources of differentiation matter most to consulting buyers?

- **Future development:** What investments are providers making or planning to make to enhance their future capabilities?

In addition to briefings with consulting buyers and providers, ALM Intelligence uses a mosaic approach to derive its findings. This incorporates primary research conducted with industry practitioners, academics, and other experts and secondary research on providers' public information and other third-party sources of data and analysis.

Source: ALM Intelligence

About ALM Intelligence

ALM Intelligence provides accurate and reliable market sizing and forecasts on consulting services worldwide, needs-analysis and vendor profiling for buyers of consulting services, timely and insightful intelligence on the top consulting firms in their respective markets, and operational benchmarks that measure consulting performance. ALM Intelligence's research spans multiple service areas, client vertical industries, and geographies. Our analysts provide expert commentary at consulting industry events worldwide, and offer custom research for Management Consulting and IT Services firms. More information about ALM Intelligence is available at www.alm.com/intelligence/industries-we-serve/consulting-industry/.

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