

# **The *ALM Vanguard*: Health and Wellness Benefits Consulting 2019**



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## Overview

# Capability Drivers

The evolution of healthcare continues at a rapid pace, and both providers and employers are faced with the challenge of remaining agile in the face of that change. Healthcare payers and providers seek ways to keep their own costs under control to remain competitive in the market while striving to find the next innovation that places their customer experience a step above their competition. Consequently, employers are faced with the burden of choice as an overwhelming catalog of options continue to flood into their domain. Paired with the ever-growing expectations from employees for best-in-class benefits and perks and the perpetually present war for talent, the stakes for employers have never been higher as they try to differentiate themselves from their competitors and attract the top talent that will drive their own growth and success.

The challenge for employers is finding the right balance of costs, utilization, and employee satisfaction in their benefit plan offerings. In order to do so, employers need a strong sense of their workforce needs from a health and wellness perspective, ensuring that the choices they make are ones that will resonate with their employees. Additionally, employers are seeking new ways to cut costs in the healthcare arena through enhanced negotiations and improved vendor management capability.

Against the backdrop of the evolution of healthcare and its impacts on employers, wellness has continued its steady march from a strictly physical benefit offering to one that encompasses holistic well-being. Unfortunately for employers, in that shift to well-being, they are then faced with similar challenges as they are with health benefits selection: too many options.

There are many moving parts in the health and wellness market space, and leaders of consulting in this area can effectively navigate the increased complexity and create strong health and wellness capabilities that ensure their clients offer the most competitive options in their markets. While diverse in their approach, leaders of consulting services have several aspects in common.

**Ability to find cost effective health benefit plans that still offer strong services.** The rising cost of healthcare continues to pose a challenge to employers, particularly those faced with the question of how much cost-sharing with employees is acceptable in today's competitive environment. Alternatives like high deductible health plans and flexible spending accounts are commonplace today, and these services are likely to continue to overshadow traditional health benefits plan approaches. However, these types of services only control expenses to a point, and employers are still seeking new measures to cut costs. Leaders of health and wellness consulting possess a strong understanding of both the healthcare providers and plan sponsors. With that holistic knowledge, consultants are able to effectively guide employers through the negotiation process with vendors, assisting with a value assessment of the proposed plans versus others available in the market. Consultants seek to find new avenues for cost cutting, such as improved pharmacy benefit management and improved understanding of healthcare network potentials for savings. For healthcare providers, consultants with an understanding of market demands are able to offer strong insights into cost cutting measures, often in operating models through digital innovations and automation, which in turn allows providers to keep their costs at reasonable levels and thus remain competitive as they go to market.

**Ability to continue the wellness evolution to holistic well-being.** In the past, wellness was often an ancillary benefit against health benefits, and while health benefits continue to take center stage, the shift from wellness to well-being has greatly increased the role of that service in employee satisfaction. This is particularly true among younger workers, where compensation is diminishing as the primary factor (though not completely) in favor of employee experience perks. Gone are

## Overview

# Capability Drivers

the days of wellness boutiques offering gym memberships and on-site physical services to satisfy employee expectations of well-being. Instead, the evolution of wellness to well-being is reaching a crescendo in comprehensive individual care, often including (in addition to physical fitness) mental, social, and financial well-being. Recognizing this continued shift, wellness vendors are developing new services at a rapid pace to cover what are called the pillars of well-being. While increased selection may be a positive, employers are now challenged to know what services to offer while balancing the cost of this trend in the health and wellness space. Consequently, leaders of health and wellness consulting have taken their vendor management and evaluation capabilities customarily used for healthcare providers and focused them on well-being service providers. Able to provide objective analysis of provided services and their potential impacts on client organizations from an ROI and VOI perspective, the establishment of a strong well-being portfolio rounds out health benefit plan designs.

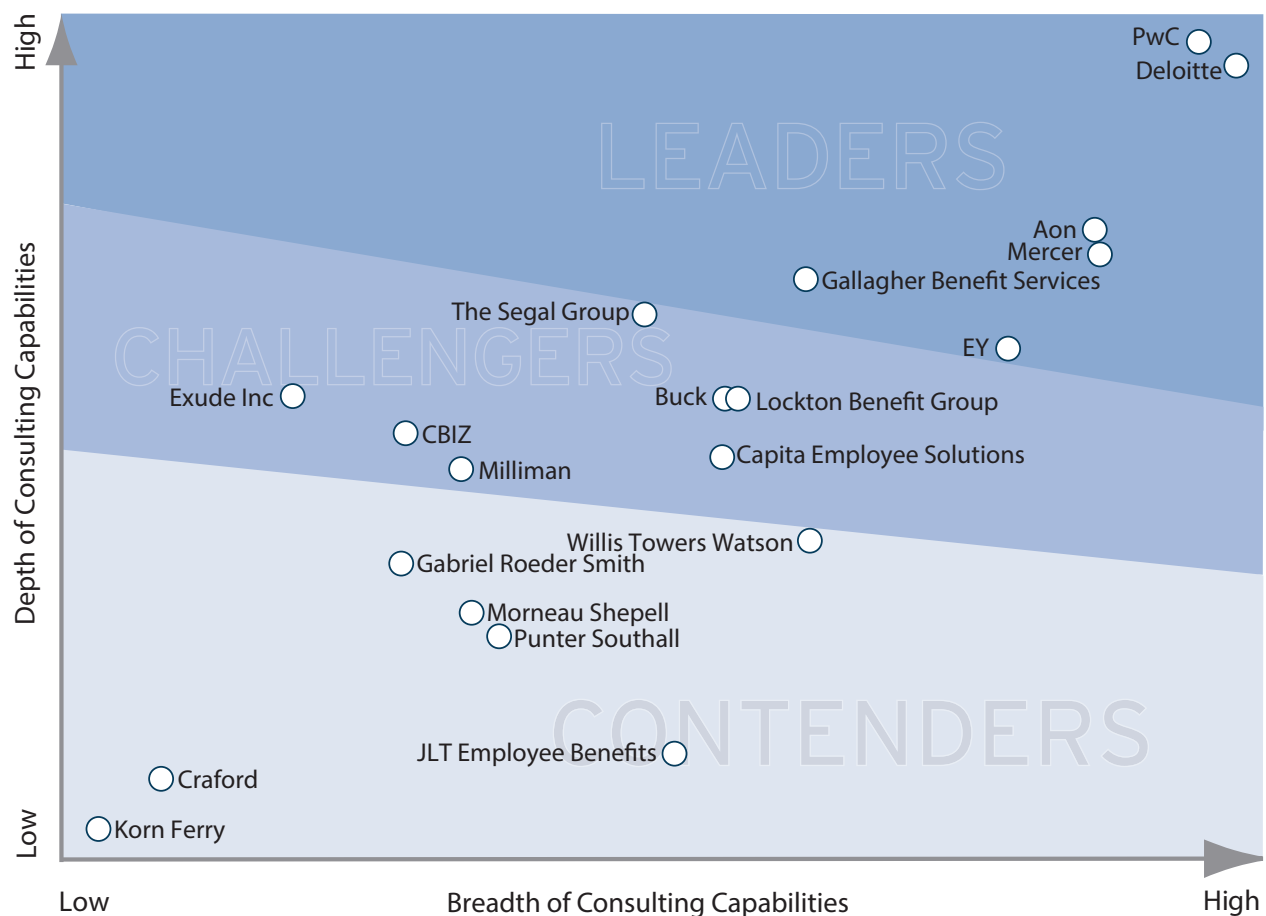
**Ability to understand client workforce demographics at a micro and macro level.** Data and analytics is the driving force for decision making in health and wellness, but converting that data into meaningful insights can prove challenging. Leaders of consulting in health and wellness have doubled down on their efforts to understand the impacts of workforce demographics gleaned through data analysis, differentiating by industry, age, geography, and gender, among others. These new insights are particularly helpful in the realm of well-being. The aforementioned pillars of well-being are important pieces of a holistic strategy, however, the value of each pillar from an employee perception varies greatly dependent upon their demographic. Consultants can provide the critical insights employers need to understand which pillars of well-being will have the greatest impact on their employee experience capabilities. This prioritization leads to shrewd cost management of new services that will provide a measurable ROI. Taking this understanding a step further, data analytics is drilling down to the individual level and providing employers with a blueprint of benefits offering priorities based on demographic factors. Mental well-being, for example, may be of greater priority for a younger segment of the workforce, while financial well-being a higher priority for a segment closer to retirement. This new level of understanding leads to intricate strategies that seek to engage the whole of workforce, which leads to the next defining characteristic of consulting leaders in this space.

**Ability to innovate employee engagement methodologies.** Following a strong understanding of workforce demographics, engagement of the workforce is critical to ensure effective utilization of health benefits and well-being plans. Analytics again plays a key role in this effort for employers, as generational differences particularly can impact communication and engagement with employees. Communications strategies are not one-size-fits-all and often necessitates a blend of traditional and modern approaches. Leaders of consulting services are investing in their communications strategy offerings, through the advancement of analytic capability, but also through the development of digital tools and innovations that provide both employers and employees greater transparency in services offered, their utilization, and their perception. Self-service enablement through digital tools is particularly valuable for clients, and consultants are seeking to create tools that reduce overhead costs but inform and educate employees as they use it, in what amounts to a two-for-one approach of combined automation/self-service with communication. These tools also provide an instant performance measurement capability by analyzing engagement on platforms, which areas of services are getting the most attention, and which are falling behind, which in turn will guide decision making in prioritization of services offered in the future as benefit plan designs are revisited.

## ALM Vanguard of Health and Wellness Benefits Consulting Providers

The *ALM Vanguard* of Health and Wellness Benefits Consulting 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 health and wellness benefits 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

Health and wellness consulting providers within the landscape are well-established with clearly defined service offerings, and in some instances, clear focuses on specific industries and geographies. Consequently, dramatic shifts are not to be expected from a comparative perspective without significant M&A activity or a shift in market expectation. However, there is a refinement in health and wellness consulting that several leading and challenging firms demonstrate that results in an edge over the competition and potential for continued growth and improved ranking.

Within the landscape as a whole, there is a delineation between firms that offer pure consulting support to clients, and those that pair advisory with exchange services and other products. While the latter in some instances continues to show a strong standing in the Vanguard for advisory, dispelling the perception of bias towards offered products will remain a challenge. That said, these firms also possess some advantages from a benchmarking perspective, with access to strong data sets through their administration and exchange services. Acting as both consultant and provider is a double-edged sword, but when navigated properly, it leads to strong advisory and notable competitive placement.

**Leaders.** The Vanguard leaders from last year have largely remained the leaders this year, although there have been some internal placement shifts. Deloitte's increase to the highest ranking for breadth is the most notable in this instance, largely due to the firm's extensive focus on total rewards management and its concerted effort to stay in the leading edge for well-being advisory. The firm's continued efforts to improve understanding of workforce demographics, currently branching out to a global capability, gives it an edge that will likely endure in this space. PwC continues to hone its capabilities in the health and wellness space within the framework of the New Health Economy, providing strong insights into the interplay between payers, providers, and disruptive elements impacting healthcare delivery models. Coupled with its strong strategy capability and deep benchmarking insights, PwC remains at the top for depth of capability. Aon and Mercer remain strong competitors among the Vanguard leaders, although they fall slightly behind PwC and Deloitte due to those firms' increased focus on providing health and wellness within the context of total rewards and greater development of well-being strategies.

**Challengers.** Among the challengers, a shift in breadth for some firms is the most significant change since last year. This is largely due to the decision to remain tactical in health and wellness consulting service offerings, with less emphasis on total rewards. Additionally, a geo-specific focus hinders breadth scoring to a degree due to the increased need of global understanding of health and wellness benefit expectations among highly divergent workforces. Well-being development is also not a high priority among many of the firms within this space. While offered, the dimensions are not as deep as those in the leader space. Buck is the sole new entrant in the challenger space. Recently divested from Conduent, the firm still possesses strong advisory for health and wellness but loses some of its breadth standing from losing adjacent service support and depth standing from an operating system advisory perspective. This reduction in capability will likely see a rebound effect in the future as the new firm finds its footing. The Segal Group holds the highest depth capability within the challenger segment, and is on the cusp of crossing into the leader category. The firm's continued efforts to provide objective, practical benefits advisory in addition to recent acquisitions to bolster communications ability bodes well for its future prospects within the competitive landscape.

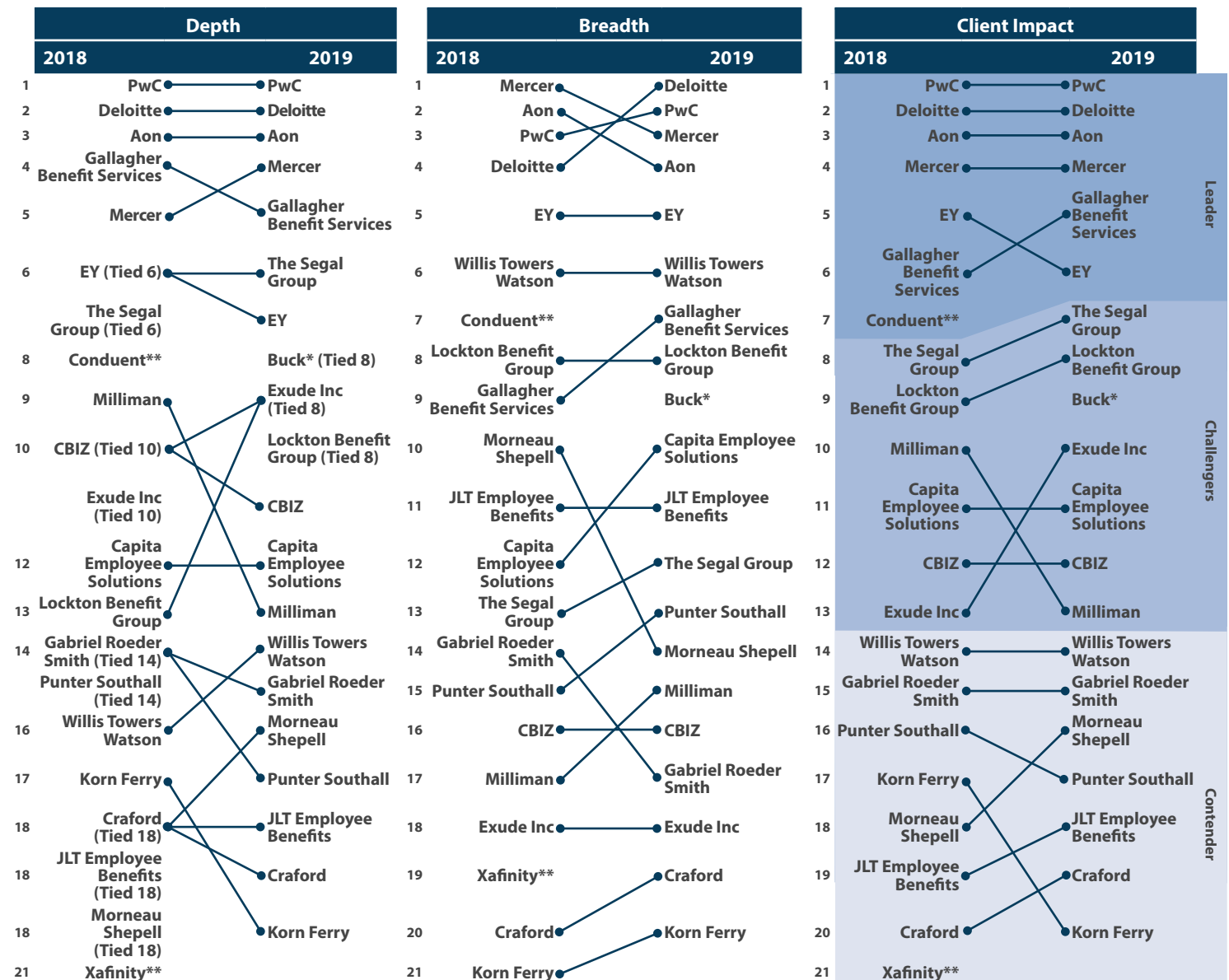
**Contenders.** Contenders for health and wellness consulting are largely geo and industry specific to their markets, which contributes to limited breadth of capability. Gabriel Roeder Smith, for example, remains focused on the US public sector, while

## Competitive Landscape

JLT Employee Benefits' primary service is to the UK market. Willis Towers Watson, while strong in its benefits administration and benchmarking capabilities, has opted to focus on those areas over advisory. Efforts to delineate product services and consulting services does not rise to the level undertaken by Aon and Mercer, which leads a lower placement in the overall landscape. XPS Pensions Group (formerly Xafinity) is no longer considered in the rankings for health and wellness consulting as the firm ramps up its focus on the retirement consulting space.

# 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.



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
<b>Leaders</b>	Aon EY Mercer	Deloitte Gallagher Benefit Services PwC	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.
<b>Challengers</b>	Buck CBIZ Lockton Benefit Group The Segal Group	Capita Employee Solutions Exude Inc Milliman	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.
<b>Contenders</b>	Craford JLT Employee Benefits Morneau Shepell Willis Towers Watson	Gabriel Roeder Smith Korn Ferry Punter Southall	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 Health and Wellness Benefits Consulting Providers comprises the following Leaders.

Leaders	Strengths
Deloitte	Deloitte continues to grow and refine its capabilities in this space through the lens of total rewards. The firm’s increasing capabilities in stakeholder buy-in methodologies as well as delivery models that are able to scale offerings based on client needs enhance its significant breadth of capability. Efforts to further understand client specific workforce needs through indexing and benchmarking provide greater authority in strategic decision-making guidance.

Source: ALM Intelligence

## Provider Capability Ratings

The table below provides detailed capability ratings for Health and Wellness Benefits consulting providers. (See the Definitions section of this report for explanations of the capabilities.)

Legend: ● Very Strong ● Strong ● Moderate ● Weak ○ None

Provider Capabilities: Health and Wellness Benefits Consulting									
	Discovery			Design			Delivery		
	Needs Assessment	External Market Insight	Internal Client Insight	Strategy	Operating System	Management System	Project Management	Client Capability Development	Enabling Tools
Aon	●	●	●	●	●	●	●	●	●
Buck	●	●	●	●	●	●	●	●	●
Capita Employee Solutions	●	●	●	●	●	●	●	●	●
CBIZ	●	●	●	●	●	●	●	●	●
Craford	●	●	●	●	●	●	●	●	●
Deloitte	●	●	●	●	●	●	●	●	●
Exude Inc	●	●	●	●	●	●	●	●	●
EY	●	●	●	●	●	●	●	●	●
Gabriel Roeder Smith	●	●	●	●	●	●	●	●	●
Gallagher Benefit Services	●	●	●	●	●	●	●	●	●
JLT Employee Benefits	●	●	●	●	●	●	●	●	●
Korn Ferry	●	●	●	●	●	●	●	●	●
Lockton Benefit Group	●	●	●	●	●	●	●	●	●
Mercer	●	●	●	●	●	●	●	●	●
Milliman	●	●	●	●	●	●	●	●	●
Morneau Shepell	●	●	●	●	●	●	●	●	●
Punter Southall	●	●	●	●	●	●	●	●	●
PwC	●	●	●	●	●	●	●	●	●
The Segal Group	●	●	●	●	●	●	●	●	●
Willis Towers Watson	●	●	●	●	●	●	●	●	●

Source: ALM Intelligence

## Best in Class Providers

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

Capability Areas	Provider	Strengths
<b>Needs Assessment</b>	Deloitte	Evolving its Greenhouse approach to stakeholder selection to its rewards management space, Deloitte's Rewards Lab service offering provides a foundation for strong stakeholder buy-in. Clients are able to better understand the potential gains through holistic transformation, and leave with a better understanding of the possible by committing to it.
<b>Client Capability Development</b>	Deloitte	Following the firm's strong stakeholder engagement capability, Deloitte further empowers clients and their workforces through improved knowledge and transparency of rewards management through digital tools and employee experience solutions, such as its Simply Irresistible model.
<b>Enabling Tools</b>	Deloitte	Deloitte leverages its significant breadth of digital tools and solutions to assist clients in improving operational transparency while providing guidance for strategic decision making. The firm's Rewards Optimization and Workforce Insights tools, for example, empower clients through predictive modeling to improve agility in plan design.

Source: ALM Intelligence

## Provider Briefs

### Leaders

Deloitte	
<b>Approach</b>	Deloitte's approach to health and wellness consulting ties these services into its broader rewards management framework, which includes benefits, compensation, retirement, and employee experience. The firm is able to scale its service offerings to provide holistic transformation in rewards, or provide discrete engagements tailored to the specific health and wellness needs of its clients.
<b>Practice Structure</b>	A part of the firm's Human Capital practice, Deloitte's health and wellness consulting services are primarily provided as part of its Workforce Transformation offering. Deloitte utilizes its significant breadth of capabilities and clients to bring a 360 degree view of the health and wellness space, with insights gleaned from the firm's work in healthcare, with insurance providers, wellness vendors, and employers. The firm continues to innovate its approach to rewards management, evolving from rewards to relationships, driven through extensive research into highly effective organizations, powered by Deloitte's dedicated people strategies research arm, Bersin, and thought leadership such as its annual Global Human Capital Trends report.
<b>Service Delivery Model</b>	Deloitte's service delivery for health and wellness in the context of rewards management provides end-to-end transformation advisory that transitions clients to effective benefit offerings that are appealing to workforces while remaining cost effective for employers. The firm's needs assessment and stakeholder buy-in capabilities are particularly effective in this space through its Rewards Optimization service offering, which provides clients with data-driven workforce analysis that in turn guides strategic decision-making for rewards offerings that will resonate with target employees. Deloitte has adapted its Greenhouse™ Experience to strategy development for benefits offerings. This Rewards Lab approach provides clients with opportunities to safely explore the impacts of a variety of decisions with regard to benefits and other rewards offerings. The firm's ability to provide meaningful analysis of the what ifs in rewards management leads to strong stakeholder buy-in, driven through greater understanding of the gains from holistic transformation versus strictly tactical solutions. This approach is further bolstered through Deloitte's Rewards Optimization analytical approach, which demonstrates the increased value in holistic rewards through found efficiencies and synergies that create cost savings and improve transparency in benefits efficacy and utilization. Deloitte continues to evolve its approach to wellness, what the firm calls "unified well-being." The firm's well-being advisory services are grounded in four pillars: body, mind, wealth, and purpose. Within the context of those pillars, Deloitte's well-being services are tailored based on in-depth workforce analysis. In the Australia practice, the firm's Well-being @ Work Index provides strong research into well-being efficacy and how to tailor that approach to specific workforces based on demographics, culture, geography, and industry, among others. By identifying which pillars of well-being will have the most impact, Deloitte is able to provide thoughtful strategic planning capabilities that create well-being programs that will have high utilization and measurable ROI. Deloitte's Index approach is currently expanding to include other geographies and will have increased utility from a multinational perspective as the research breadth expands. Deloitte rounds out its smart use of extensive workforce data sets through its Simply Irresistible employee experience model, tailoring rewards offerings to attract and retain talent. The firm enables client transformation through the use of digital tools and platforms to provide key metrics in addition to project management capabilities, creating an agile rewards framework that can be readily adjusted as needed.

Source: ALM Intelligence

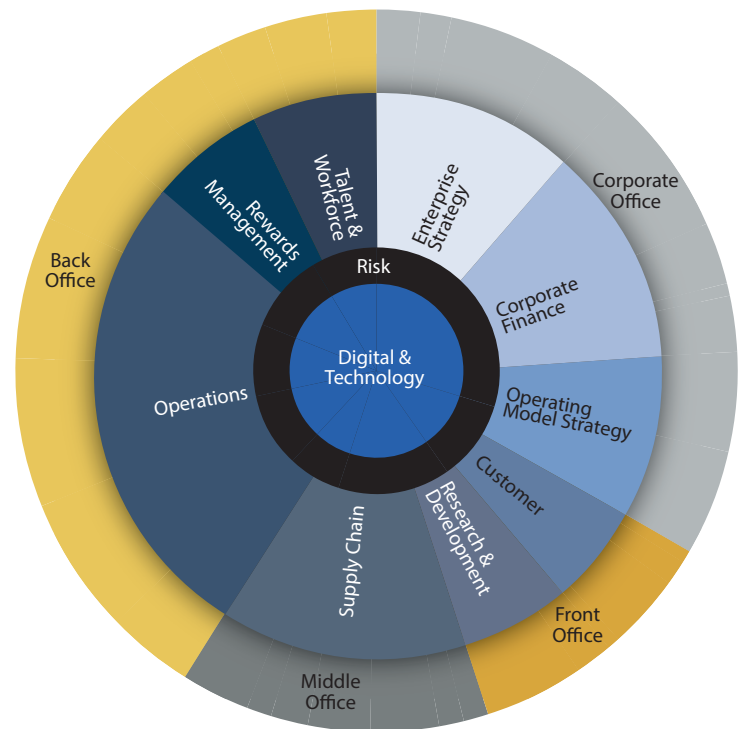
## Definitions

# What is Health & Wellness Benefits Consulting?

Health & Wellness Benefits Consulting is part of Rewards Management, which forms part of the management consulting services directed at clients' back office activities. Its objective is to improve the incentive systems designed to motivate employee behaviors aligned with a company's strategic objectives.

Rewards management consulting consists of three services.

- **Retirement benefits:** structuring, selecting, managing, and measuring the performance of benefit programs designed to support employees' financing of their retirement spending.
- **Health & wellness benefits:** structuring, selecting, managing, and measuring the performance of benefit programs designed to support employees' healthcare and wellness spending.
- **Compensation:** structuring compensation packages and managing the process for reviewing employee compensation packages



## Definitions

## Consulting Provider Capabilities

Capability Areas	Capabilities	Descriptions
Discovery	<b>Needs Assessment</b>	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?
	<b>External Market Insight</b>	How do consultants' knowledge and experience inform diagnostics through benchmarking and trend analysis?
	<b>Internal Client Insight</b>	How does the consultant obtain internal client insights through data analysis and interviewing and workshops and incorporate them in diagnostics?
Design	<b>Strategy</b>	How does the solution align with the client's market, customer and product, and functional strategies?
	<b>Operating System</b>	How are client information, physical, and people assets and processes configured to generate the value add intended by the strategy?
	<b>Management System</b>	How are client resources mobilized, managed, measured, and motivated through governance, incentives, organizational structures, and performance management to execute the strategy?
Delivery	<b>Project Management</b>	How are activities sequenced and resources allocated, aligned, and coordinated to execute and sustain the solution?
	<b>Client Capability Development</b>	How are client technical skills developed and mindsets and behaviors adapted to execute and sustain the solution?
	<b>Enabling Tools</b>	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

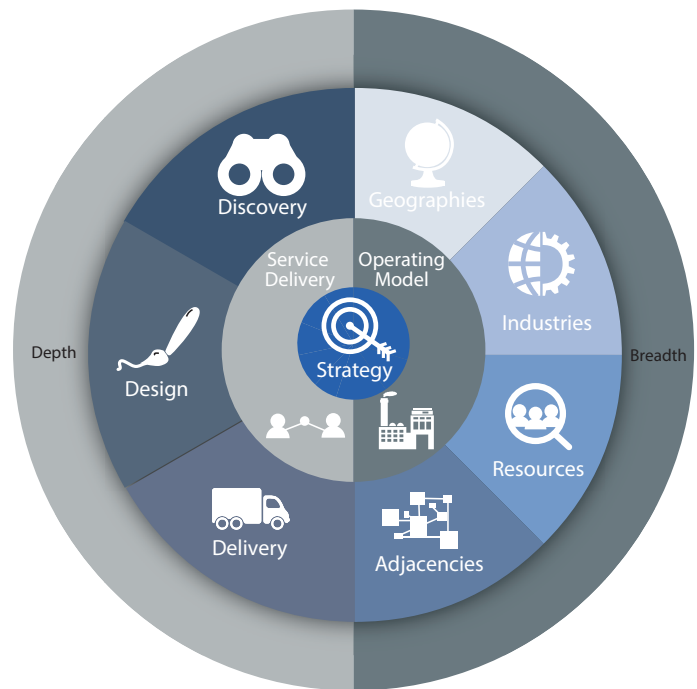
# How We Evaluate Consulting Providers

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/](http://www.alm.com/intelligence/industries-we-serve/consulting-industry/).

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