The *ALM Vanguard:* HR Operations Consulting 2019

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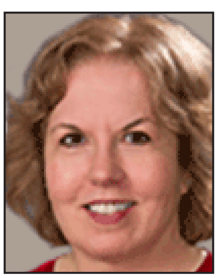
Contents

Author



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Overview

Capability Drivers

HR's mandate to create value for the business has intensified, driving HR operations consulting to new levels of demand worldwide. Fundamental shifts in business practices, the work environment, and information technology are of immediate concern to executives who realize that success in the digital economy lives at the intersection of talent and technology. These shifts have redefined the social contract between employee and employer with profound implications for corporate brand and performance, positioning HR in the crosshairs of the customer experience alongside its fellow back-office functions. The appetite for HR transformation is strong, and clients are reaching out to their consulting providers with an agenda for change that takes the function out of its traditional silo to engage in a broader set of strategic responsibilities.

Clients' needs and expectations are rapidly evolving, and providers are developing new frameworks, operating models, and digital assets to remain at the forefront of providing solutions that accelerate HR's transformation. Many are reorganizing service delivery models to bring the full scope of their global firm's capabilities to an integrated offering delivered by a mix of consulting, data science, design, and technology talent.

Providers are also responding to competitive dynamics blurring the boundaries between consulting and managed services. HR technology start-ups continue to proliferate, offering unique solutions to digitize HR service delivery and automate HR processes that need to be integrated into cloud platforms. Meanwhile, clients are demanding services in areas where they lack the resources or expertise required to implement across the project lifecycle, for example, capturing insights from people analytics and transitioning RPA prototypes to scalable solutions. The leading providers are building capabilities in line with their own growth strategies or expanding ecosystem partnerships to stay ahead of this curve. They are also developing software-as-a-service solutions to strengthen clients' platforms and capabilities in areas such as change management, people analytics, and predictive [environmental] intelligence.

The consulting firms identified as Vanguard Leaders demonstrate an ability to coordinate and deliver the following HR operations consulting capabilities.

Reimagine HR. Transforming HR today involves nothing less than reimagining the function's purpose and capabilities to enable the business to thrive amidst uncertainty. At the very least, consulting providers must have a perspective and roadmap to help clients get started with actionable steps for navigating the complexity of the modern enterprise and its operating environment. The leading providers go further with interactive, art-of-the-possible sessions facilitated by consultants and design thinking professionals using personas, journey mapping, and data visualization tools to formulate hypotheses, scenarios, and use cases. These workshops are often held in the provider's off-site innovation centers and laboratories where clients can experiment with tools and co-develop solutions using digital technology and intelligent automation. They also provide insights and evidence for building the business case, in some instances identifying productivity gains and cost savings that can fund the transformation.

Redefine operating models. Transforming the HR function to deliver business impact requires an operating model designed to bring HR closer to the business. Traditional models that focus on service delivery efficiency and cost reduction are important; however, the objective for strategic HR is a model that aligns with the business's organization design to be truly fit-

Overview

Capability Drivers

for-purpose. The leading providers are responding in two ways. First, by providing a set of principles for HR operating model design that is suitable for all organizations, such as defining the HR capabilities essential to achieving profitability. Second, they have designed customizable target operating models that illustrate the application of corporate strategies; for example, connecting HR to the customer experience, integrating HR into a global business services model, or unifying HR, finance, and ERP systems. They have also introduced frameworks for coordinating the design of multiple operating models based on the agreed set of principles to ensure they are complementary and mutually reinforcing. In some instances, these models include a governance component that uses logic-driven analytics and risk leverage to identify critical issues and shared areas of opportunity for HR and the business.

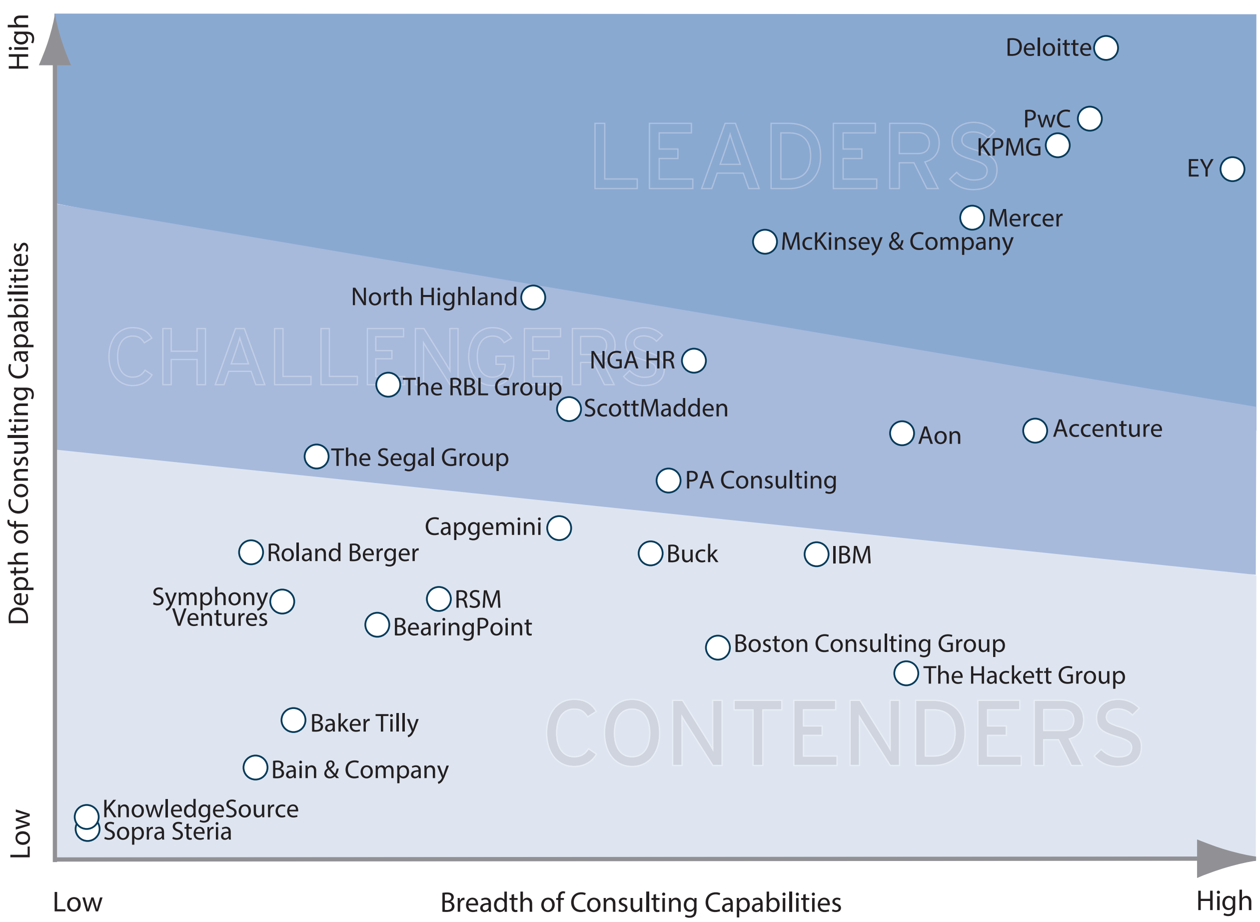
Develop an intelligent automation strategy. While digital HR transformation remains a top priority, the technology conversation in 2018 focused on intelligent automation technologies. Clients are convinced of its potential to release HR from the burden of its transactional workload, lowering the cost of service delivery in the process. Adoption has been slow, however, due to a lack of knowledge and a general reluctance to introduce automation anxiety into the culture. A handful of consulting firms are taking advantage of this quiet period to build an automation consulting capability focused on the HR function. The leading providers are experimenting with the technology in their own environment, leveraging robotics to simplify tasks related to onboarding, benefits reconciliation, and learning administration. This experience coupled with a growing portfolio of client work is shaping value propositions and service offerings for HR automation strategies.

Develop HR talent. HR's readiness and ability to reinvent itself remains an active topic of debate. The research points to stunted capabilities in business strategy, leadership, and data analytics. Of more concern are recent findings that exposed a gap in stakeholder perceptions of readiness, pitting the C-suite's high degree of confidence against HR's generalized lack of confidence. The pressure is on to develop – or recruit – the skills and competencies HR needs to serve its most critical clients. Consulting firms are evolving their learning and training programs to go beyond core HR competencies with professional development services in business strategy and operations, data analytics and storytelling, and digital and change leadership. In terms of helping HR understand how it delivers value to the business, senior consultants are immersing themselves in the engagement process, triggering a Pygmalion effect that both educates and empowers the client team. A select few of the leading firms provide clients the opportunity to consult with networks of senior HR executives they have formed to assist in the consulting process.

ALM Vanguard of HR Operations Consulting Providers

The *ALM Vanguard* of HR Operations 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 HR operations 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

Competitve Landscape

On the surface, there has been little change in the overall construct of the ALM Vanguard for HR operations consulting, save for a peer group of Leaders that shrank from seven to six providers with North Highland's move to the Challenger peer group. This is less a comment on the firm's consulting strengths than it is a signifier of the challenges that middle market and specialist providers face in today's climate, where the prevailing context for transforming HR is defined by the new rules for managing talent in the digital age. Business and HR leaders want more from their consultants than a focus on process efficiency and cost optimization. They are seeking a transformation that enables HR to deliver business impact while leading the enterprise journey into the future, a mandate that has required providers to refresh value propositions, scale innovations, and reorganize service delivery.

This dynamic also influenced incremental movements in the depth capability rankings within each of the Vanguard peer groups, while the marked shifts in breadth capability rankings reflect the increasing presence of managed services and as-a-service offerings in providers' service offerings to support implementation throughout the project lifecycle.

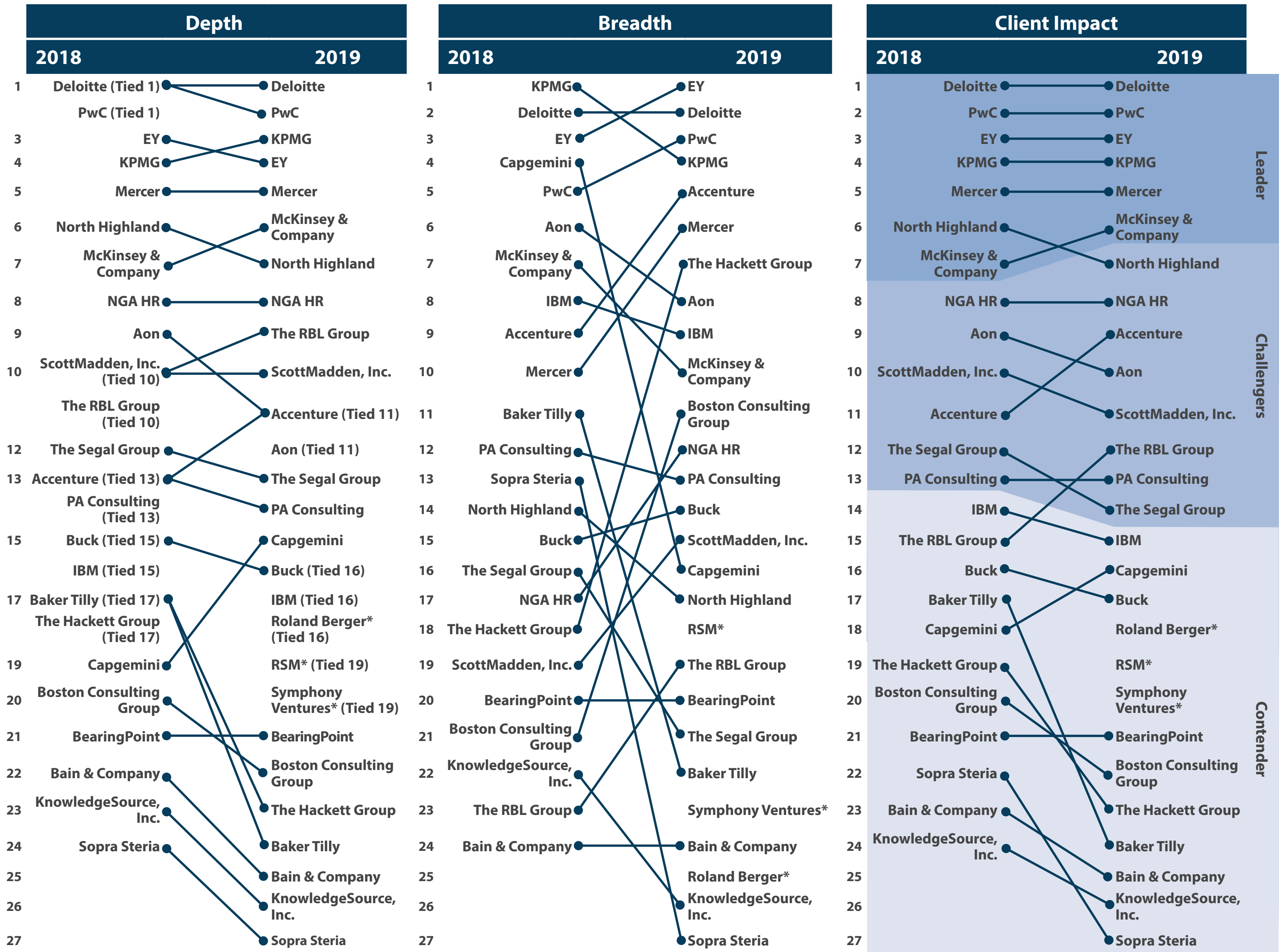
Leaders. These providers maintain their lead following a year of continued research into the future of HR that informed the development of new consulting approaches focused on elevating HR's role in enterprise transformation. Each provider has strengthened its capabilities and/or expanded its ecosystem to bring a truly integrated offering to market by delivery teams comprised of a mix of talent that includes consultants, design thinkers, and data scientists. Deloitte regains its leading edge with a new approach focused on elevating the role of the CHRO and embedding HR into the business. KPMG gains ground on the strength of its Future of HR campaign that provides a coherent approach to prioritizing and sequencing the phases of an HR transformation and enhancements to Powered Enterprise that incorporate intelligent automation and target operating model innovations. McKinsey gains ground for deepening its capabilities in HR technology advisory and the launch of new training programs focused on building the business acumen and technical capabilities of HR leaders and their teams. The Vanguard Leaders are Deloitte, EY, KPMG, Mercer, McKinsey, and PwC.

Challengers. The diversity within this peer group illustrates the multiple entry points in an organization that identify the various buyers and contexts for HR transformation, e.g., sector specific, systems-oriented, process-oriented, and operating model-oriented. North Highland's move into this group is largely relative, a factor of the advances made by the Vanguard Leaders rather than a lack of innovation on its own. The firm remains a leading HR operations consulting provider to the middle market and has made significant strides in its people analytics capabilities. Accenture and The RBL Group advanced their overall client impact ranking. Accenture for its market-leading strength in digital HR transformation and The RBL Group for introducing relationship theory into HR operating model design and leadership development. The Vanguard Challengers are Accenture, Aon, NGA HR, North Highland, PA Consulting, ScottMadden, The RBL Group, and The Segal Group's Sibson Consulting division.

Contenders. This group is comprised mainly of providers whose services are narrowly focused on HR technology and strategy firms that have HR operations expertise but not in those capability drivers deemed relevant to this year's analysis, e.g., developing HR talent or an intelligent automation strategy. Capgemini is the only provider to gain ground in its depth capability and client impact rankings following a revitalization of its People & Organization practice that brings an articulate perspective on the future of work to its consulting proposition and digital HR transformation framework. The Vanguard Contenders are Bain & Company, Baker Tilly, Boston Consulting Group, BearingPoint, Buck, Capgemini, IBM, KnowledgeSource Inc., Roland Berger, RSM, Sopra Steria, Symphony Ventures, and The Hackett 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.



*Firms not previously covered

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	Deloitte KPMG Mercer	EY McKinsey & Company 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.
Challengers	Accenture NGA HR PA Consulting The RBL Group	Aon North Highland ScottMadden, Inc. The Segal Group	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	Bain & Company Boston Consulting Group Buck The Hackett Group KnowledgeSource, Inc. RSM Symphony Ventures	Baker Tilly BearingPoint Capgemini IBM Roland Berger Sopra Steria	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 HR operations Consulting Providers comprises the following Leaders.

Leaders	Strengths
Deloitte	Following a year of targeted investments in HR operations consulting, Deloitte regains the lead over its Vanguard peers. The firm's Future of HR thought leadership, solutions, and professional development programs provide a comprehensive platform for transforming HR into a data-driven strategic function embedded in the business. Deloitte's clients value the firm for its innovative culture, listening skills, ability to diplomatically challenge groupthink, and a continuum of offerings that meet the needs of HR stakeholders from the C-suite and back office to the front lines of the business.

Source: ALM Intelligence

Provider Capability Ratings

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

Legend: Very Strong, Strong, Moderate, Weak, None

Provider Capabilities: HR Operations Consulting

	Discovery			Design			Delivery		
	Needs Assessment	External Market Insight	Internal Client Insight	Strategy	Operating System	Management System	Project Management	Client Capability Development	Enabling Tools
NGA HR	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Moderate	Moderate
Firm	Strong	Strong	Strong	Moderate	Very Strong	Moderate	Moderate	Moderate	Strong
Firm	Moderate	Strong	Strong	Strong	Moderate	Strong	Moderate	Strong	Moderate
Firm	Moderate	Moderate	Moderate	Moderate	Weak	Moderate	Moderate	Moderate	Weak
Firm	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate	Weak
Firm	Moderate	Moderate	Moderate	Moderate	Strong	Moderate	Moderate	Weak	Moderate
Firm	Moderate	Strong	Moderate	Strong	Moderate	Moderate	Moderate	Moderate	Moderate
Firm	Strong	Moderate	Moderate	Strong	Strong	Moderate	Strong	Moderate	Moderate
Firm	Strong	Moderate	Moderate	Moderate	Very Strong	Moderate	Strong	Moderate	Strong
Firm	Strong	Strong	Strong	Very Strong	Strong	Strong	Very Strong	Very Strong	Strong
Firm	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Very Strong
Firm	Moderate	Moderate	Strong	Moderate	Moderate	Moderate	Moderate	Weak	Moderate
Firm	Moderate	Moderate	Moderate	Moderate	Strong	Moderate	Strong	Moderate	Strong
Firm	Moderate	Moderate	Weak	Weak	Moderate	Moderate	Moderate	Weak	Moderate
Firm	Very Strong	Strong	Strong	Strong	Strong	Strong	Strong	Very Strong	Strong
Firm	Strong	Very Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong
Firm	Strong	Strong	Very Strong	Strong	Strong	Strong	Strong	Strong	Moderate
Firm	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Moderate	Moderate
Firm	Strong	Moderate	Moderate	Strong	Strong	Strong	Strong	Moderate	Moderate
Firm	Strong	Strong	Strong	Strong	Very Strong	Very Strong	Strong	Strong	Strong
Firm	Strong	Strong	Strong	Strong	Weak	Moderate	Strong	Very Strong	Strong
Firm	Strong	Moderate	Strong	Strong	Moderate	Moderate	Strong	Moderate	Moderate
Firm	Strong	Strong	Moderate	Moderate	Moderate	Strong	Moderate	Moderate	Moderate
Firm	Strong	Strong	Strong	Strong	Moderate	Strong	Strong	Strong	Weak
Firm	Strong	Strong	Strong	Strong	Moderate	Strong	Strong	Moderate	Weak
Firm	Moderate	Weak	Moderate	Weak	Moderate	Moderate	Moderate	Weak	Weak
Firm	Moderate	Moderate	Moderate	Strong	Strong	Moderate	Moderate	Moderate	Moderate

Source: ALM Intelligence

Best in Class Providers

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

Capability Areas	Provider	Strengths
Strategy	Deloitte	Deloitte's Future of HR platform is distinctive for its ability to raise leadership's awareness of HR's strategic role in leveraging disruptive forces to drive business growth. It is equally adept at providing a balanced view of the impact that intelligent automation has on HR operations and the employee experience, and how that tension can be managed in a transformation strategy guided by a philosophy of HR as a source of value creation.
Operating System & Management System	PwC	PwC is a step ahead of its competitors in these capabilities, which the firm combines in its approach to building a digital HR engine that drives the employee experience. The firm plays the role of an ecosystem curator, combining its own internal capabilities with those of its alliance partners to integrate social, mobile, analytics, cloud, and cognitive technologies on a global engagement platform. The management system measures success by the rate of adoption, engagement, and satisfaction, also providing cognitive, point-in-time insights that enable managers to course correct communications and change management tactics.
Project Management	Deloitte	Deloitte excels for its ability to consistently and successfully execute HR transformation engagements at a global scale due to the effectiveness of its model for delivering integrated services. Clients call out the firm for its ability to coax change-resistant cultures into new ways of thinking and responsiveness to resolving cultural tensions.

Source: ALM Intelligence

Provider Briefs

Leaders

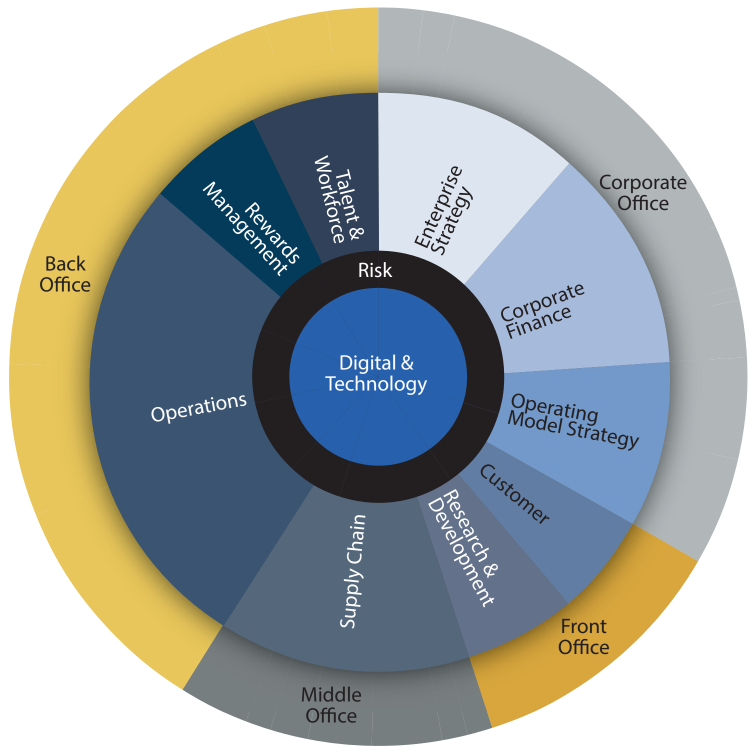
Deloitte	
Approach	Deloitte has evolved its consulting approach in keeping with a new reality that finds HR at the center of market forces compelling organizational transformation. The approach is codified in the firm's Future of HR viewpoint, positioning the function as the most appropriate lead for addressing the needs of the enterprise for adopting new business and labor models, technologies, and ways of blending human and machine intelligence. The viewpoint provides frameworks detailing the capability shift required to become a future-state HR function able to achieve business outcomes and an "exponential" HR professional with knowledge of advanced techniques and technologies. Deloitte goes to market with integrated, cross-functional, and industry-focused consulting services, solutions, and assets to deliver on a long-standing commitment to fortifying HR's role developing the organization of the future.
Practice Structure	Deloitte provides HR operations consulting through the Human Capital (HC) Service Area with the firm's Consulting function. HC consultants draw on the functional, industry, and digital expertise of sister practices in strategy, operations, and technology consulting. In addition, the Bersin™ research and advisory arm within HC provides frontline HR operations and service delivery professionals with advisory services, tools (maturity maps, operating models), diagnostics (key performance indicators, benchmarks) HR, technology vendor research, and access to a network of peers.
Service Delivery Model	Deloitte's Human Capital practice provides end-to-end HR transformation services from a design-thinking orientation to visioning and strategy through to solutions development and implementation. Consulting specialties specific to HR operations include workforce experience, operating model and organization design, process transformation, benchmarking and best practices, technology/vendor advisory and implementation, payroll, time and attendance, workforce management, and HR professional/leadership capability development. Deloitte's Human Capital Issues Framework clarifies five areas of HR activity that directly relate to helping business leaders drive organizational performance: transition to the future of work, create a differentiating employee experience, manage the cost-risk equation of the human capital balance sheet, activate the digital organization, and sustain organizational performance. The framework helps clients manage the sequencing of their transformation agenda in line with the enterprise strategy and with respect to the function's capacity. The engine of Deloitte's approach to HR transformation is Momentum, a methodology and platform that organizes a portfolio of digital tools, playbooks, and other consulting resources around a transformation continuum (Imagine-Deliver-Run) guided by three objectives: creating a customer/employee-centric engagement platform, learning to sustain cloud implementations, and optimizing ROI. Momentum can be integrated with adjacent methodologies – including Future of Work/workforce transformation and change management via Deloitte's ChangeScout platform – and service offerings where there is a connection to workforce experience, such as marketing and customer experience. Momentum ensures that Deloitte pulls every lever at its disposal to help clients not only digitally transform their HR operations, but also develop the cultural and leadership DNA required to realize long-term value from the transformation. The firm has also expanded its Future of Work managed services offerings, adding strategic communications, analytics, and assessments to Human Capital-as-a-Service and Bersin Research & Sensing-as-a-Service for analyzing human capital trends in the context of the client's Future of HR maturity model. Professional development services are delivered both virtually and physically in Greenhouse Labs, professional academies, mobile apps, and a Global HR Transformation Executive Roundtable launched in the last year.

Source: ALM Intelligence

Definitions

What is HR Operations Consulting?

HR Operations consulting is part of Operations consulting which forms part of the management consulting services directed at clients' back office activities. Its objective is to improve the efficiency and effectiveness of clients' functions designed to support the execution of their strategies and the performance of their decision-making systems through services targeted at the missions, resources, processes, and governance of these functions.



Source: ALM Intelligence

Operations consulting consists of five services.

- **Procurement:** facilitating the execution of sourcing strategies designed to secure the inputs that will be transformed by the supply chain, including the source-to-procure and procure-to-pay process flows
- **Service operations:** improving the experience and outcomes of services-sector companies' activities for creating and delivering services to customers such as insurance underwriting or claims processing
- **Finance:** controlling the flow of financial resources, maintaining financial accounts, and reporting financial performance to guide management decision-making and comply with financial reporting regulations
- **IT:** activities and resources for creating, storing, structuring, and transmitting information across an organization to improve management decision-making and enable the execution of strategies
- **HR:** services for organizing, developing, and deploying a company's human resources to improve the execution of their strategies

Definitions

Consulting Provider Capabilities

Capability Areas	Capabilities	Descriptions
Discovery	**Needs Assessment**	Establishing goals and objectives for the project and determining which stakeholders need to be involved from the client organization, consulting firm, and third parties
	External Market Insight	Using knowledge and experience to create hypotheses through trend analysis, benchmarking, maturity assessments, and case studies
	Internal Client Insight	Obtaining internal client insights through assessments, data analyses, interviews, and workshops, and incorporating findings in the business case and roadmap design
Design	**Strategy**	Aligning the strategy with the goals of the client's talent and business strategies
	Operating System	Configuring client resources – information, technology, talent and other assets – to generate the value-add intended by the strategy
	Management System	Mobilizing, managing, measuring, and motivating client resources to execute the strategy through governance, organizational structures, and performance management
Delivery	**Project Management**	Allocating, aligning, and coordinating resources in sequenced activities to execute and sustain the strategy
	Client Capability Development	Developing the client's technical skills and adapting mindsets and behaviors to execute and sustain the strategy and process design
	Enabling Tools	Employing tools for diagnostic and design activities that support creating, executing, and sustaining the strategy

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.

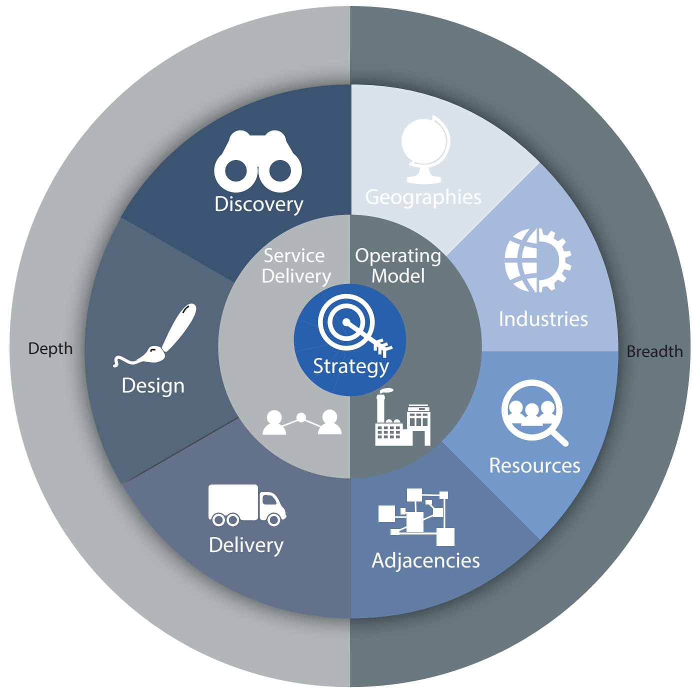
The group's long-term relationships with consulting clients and industry leaders are based on trust and respect. ALM Intelligence's fundamental goal is to deliver objective assessments and insightful viewpoints on the management, financial, and IT consulting market.

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:



Source: ALM Intelligence

- **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.

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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