

The *ALM Vanguard*: Workforce Management Consulting 2019



Contents

Overview	3
ALM Vanguard of Workforce Management Consulting Providers	6
Competitive Landscape	7
Provider Capability Rankings	9
Rating Level Summaries	10
Leader Assessments	11
Provider Capability Ratings	12
Best in Class Providers	13
Provider Briefs	14
Definitions	15
Methodology	17
About ALM Intelligence	19

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Overview

Capability Drivers

Workforce management consulting continues to evolve from a scattered collection of traditional consulting services delivered in isolation towards a codified solution that is integral to transformation consulting. This is apparent in that the capability drivers defining Vanguard Leaders in 2018 have since manifested in an increasing number of providers, most notably with the formation of dedicated workforce management service offerings grounded in research-backed, “future of work” frameworks and integrated into the provider’s transformation consulting value proposition. This model, with some variations, is emerging as the market standard for providers seeking to compete and differentiate on workforce management consulting.

Overall, technology was the driving force behind advances in the science and practice of workforce management consulting. Providers leveraged their innovation capabilities and ecosystems to develop artificial intelligence and robotics solutions that provide opportunities to improve labor productivity. The digitization of workforce management processes accelerated the use of talent analytics to gain a deeper understanding of the employee experience and human capital risk factors that impact organizational performance. Providers also are helping clients invest in and manage cloud-based case management systems that automate the process-driven aspects of workforce management, such as international assignments and employee mobility.

Many have focused their investments on the technology that drives big data analytics – machine learning, predictive analytics, natural language processing, and business intelligence. They are helping clients integrate structured and unstructured data to predict which high performers are at risk of leaving months before they resign, project workforce demand for new business models, and define future-oriented career paths. This capability has become essential to providers’ “future of work” consulting value propositions, rendering strategic workforce planning the fulcrum of workforce management consulting, for now.

Organization design also has assumed greater importance in workforce management consulting. The forces driving business leaders to embrace new management concepts and operating models require new ways of working that directly impact the employee experience and reinforce the organization’s cultural imperatives. The move to embrace agile management, for example, flattens hierarchical structures and requires teams of co-mingled workers from the front, middle, and back offices to collaborate on the design and execution of customer experience strategies. Workforce management consultants must understand how the implications of organization design translate into the practical design of physical workspaces as much as for the design of workforce platforms supporting any number of purposes, such as sharing knowledge, managing employee journeys, and distributing HR services.

WFM Consulting Defined

ALM defines workforce management (WFM) consulting as professional services directed at the strategic management of human capital. Its objective is to improve an organization’s ability to plan for the human resources, skills, and workplace environment needed to achieve business objectives and goals. WFM consulting competencies include:

- Human capital strategy and organization design
- Workforce planning and analytics
- Competency modeling and jobs analysis
- Employee/workplace mobility
- Organizational culture
- Communications and change management
- Employee experience design
- HR operations and technology

Source: ALM Intelligence

Overview

Capability Drivers

These developments signal the growing importance of workforce management consulting to executing and operationalizing strategy. Virtually all providers in the ALM Vanguard of workforce management consulting are mobilizing to provide a sophisticated capability with those rated as Leaders focused on four priorities over the past year: aligning “future of work” workforce and business strategies, closing skills gaps, improving the employee experience, and building an internal “future of work” capability.

Aligning “future of work” workforce and business strategies. Organizations can no longer assess their workforce needs according to the skills and competencies defined by job roles and titles outlined in position classification hierarchies created for legacy business models. There are many more workforce variables today that affect an organization’s ability to achieve its strategic objectives – the shorter lifecycle of skills, growth of the gig economy, and technological advances. The wild card of digital transformation is effectively eliminating or realigning a sizeable number of roles while it is naturalizing the introduction of automation, artificial intelligence, and agile ways of working into workforce planning. The leading firms recognize that improving an organization’s ability to plan for and respond to changing workforce dynamics will only increase in importance. They have clear points of view on the implications of the fourth industrial revolution for workforce management based on proprietary research and thought leadership. They offer “future of work” frameworks that explicitly focus on the business strategy and value agenda; organization design software that enables workforce modeling; and AI-powered analytics solutions to predict the impact of emerging technology on any job, workforce, company, industry, location, or economy.

Closing skills gaps. One of the most pressing workforce management concerns for organizations today is the prospect of widening talent gaps, driven by a combination of low unemployment and the new hard and soft skills required to thrive in the digital age. The shortage of skilled talent is a global issue and there are a broad range of organizations from the World Economic Forum to educational institutions, government agencies, and corporate employers committing to its study and resolution. The leading providers are actively engaged in this ecosystem, bringing a combination of learning consulting and managed services to their clients, as well as through nonprofit social agencies working at the community level. This is another area where providers are using AI-backed analytics to help their clients understand the skills they need to cultivate in their current and future workforce. They have evolved the design and delivery of learning solutions from one-size-fits-all curricula to real-time, personalized, gamified learning experiences delivered online and through mobile apps. In one instance, the provider has developed a platform that links the impact of disruptive technologies and roles to the identification of new learning pathways that facilitate career transitions in times of disruption. Overall, providers are reinforcing a message of lifelong learning is a cultural imperative that yields economic benefits and competitive advantage.

Improving the employee experience. Employers’ understanding of and commitment to employee experience has largely been in the context of customer experience. The favored mantra is that happy employees make happy customers, placing the external driver for valuing one on the other. A number of forces are expanding this point of view and focusing greater attention on the employee experience as a management tool for building cultures of trust and purpose, addressing the dilemmas of workplace distraction, and smoothing the working relationship between bots and humans. The leading providers

Overview

Capability Drivers

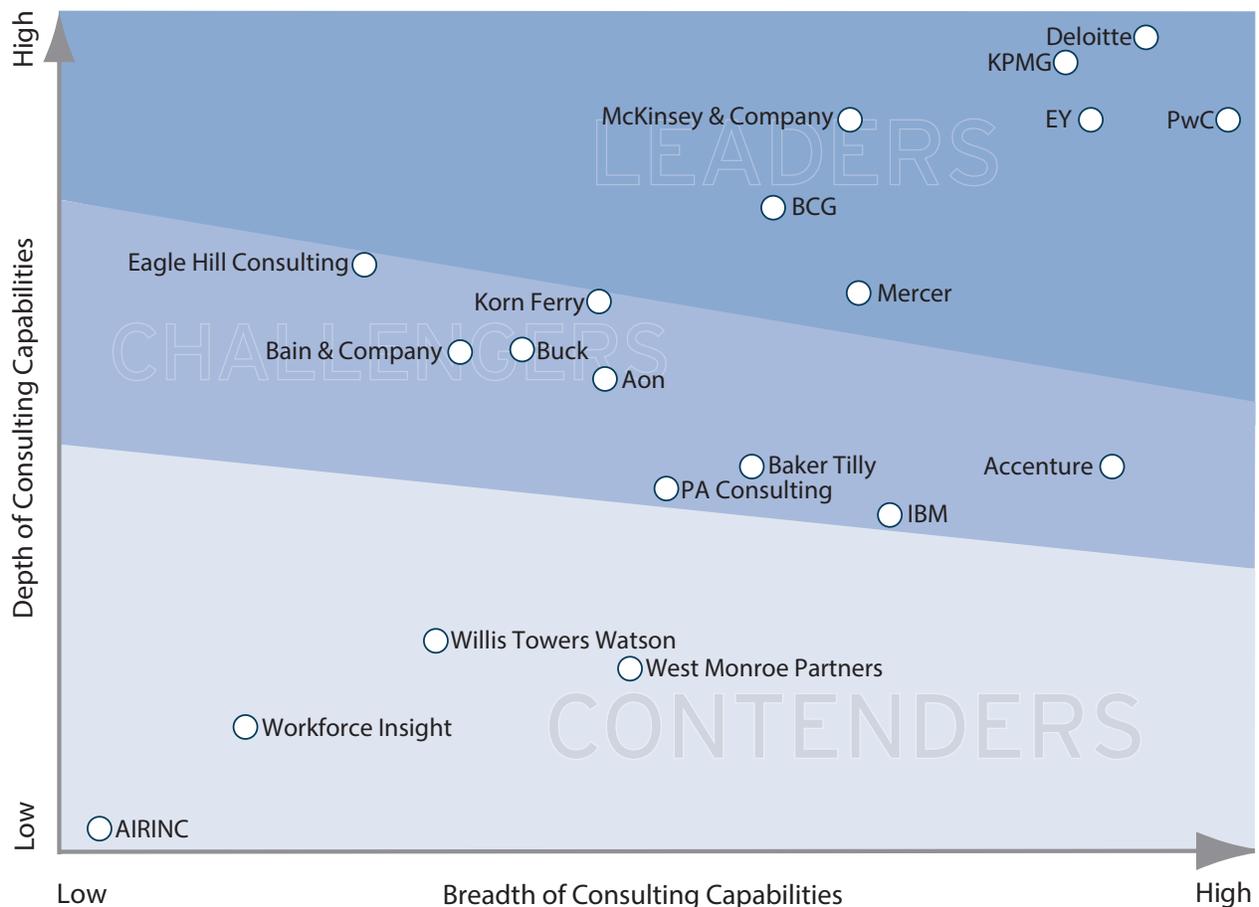
are helping clients design digital workforce processes and workflows around the employee experience, rather than designing around the back-end technology. They bring marketing and product management practices, including journey mapping, market sensing, segmentation, and micro-targeting, to the design process, as well as an understanding of how the physical workspace impacts the employee experience. As the depth and breadth of employee experience have evolved, the leaders also have evolved their people analytic capabilities and services to help clients derive new insights from big data and make better decisions about their human capital strategies and practices.

Building an internal “future of work” capability. An important development over the past year has been clients’ increasing awareness that workforce management is a mission critical business process. Most organizations have concentrated their capability-building efforts on developing the competencies specific to harnessing the benefits of digital transformation, for example, by integrating employee data from multiple HR systems, using gamification and apps to personalize HR services, and developing digital collaboration tools. The leading firms are motivating clients to more proactively consider a center of excellence approach to workforce management. Several offer blueprints and implementation services in the context of the consulting engagement that are ultimately self-sustaining and adaptable to evolving business strategies.

ALM Vanguard of Workforce Management Consulting Providers

The *ALM Vanguard of Workforce Management 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 workforce management 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 landscape shifts in the 2019 ALM Vanguard of Workforce Management Consulting providers reflect the maturing of capability drivers to serve an increasingly sophisticated clientele. Out of the 20 providers covered in 2019, only four improved their client impact ranking, and of those four, only one changed its status from Vanguard Challenger to Vanguard Leader. This suggests an environment where firms need to invest and innovate simply to remain in place. Please note that BGRS was dropped from this year's coverage following its acquisition by The Relo Group in April.

Leaders. Boston Consulting Group (BCG) entered the Vanguard Leader panel this year with the introduction of its People Strategy service offering that provides a multidisciplinary approach to workforce management with a particular focus on strategic workforce planning. The offering is backed by a strong analytics capability underpinned by Strategic Workforce Planner, a cloud-based solution also launched this year that enables the identification of future workforce needs. Beyond BCG, the Vanguard Leader group remained intact with McKinsey advancing its position following a year of strategic investments across all capability drivers. McKinsey also is rapidly building a strong brand in people analytics that clients differentiate for its strategic orientation, proprietary data, and speed of service delivery. Mercer's marginal decline in depth and client impact rankings, which can be attributed to the Vanguard methodology for scoring capabilities on a relative basis, did little to impact the firm's position as a Vanguard leader. Mercer's continued investments in a global organization strategy consulting capability and AI-powered workforce analytics testifies to the firm's commitment to this market. The Big Four firms continue to lead the pack, standing out for end-to-end services and a more complete suite of solutions. Investments in the past year reveal common areas of business development, e.g., workforce planning solutions and future-oriented competency models, and specific areas of focus that reinforce key priorities of each firm's "future of work" framework, e.g., learning, organization design, or business and workforce scenario planning.

Challengers. The composition of the Challengers panel is a more accurate reflection of the diverse providers operating in this market with representation from the strategy, human capital, innovation, and technology consulting segments. The number of Challengers grew from seven in 2018 to nine in 2019 with the distribution of those whose market momentum advanced or declined nearly balanced on either side of those whose positions remained neutral. Korn Ferry and PA Consulting advanced their leads by deepening capabilities that track to the Discover and Design phases of the consulting process. Baker Tilly's advancing position owes to a focus on Deliver criteria that elevate HR's strategic role in workforce management through implementation services that build capability and accountability. Eagle Hill's marginal placement near the Vanguard Leaders remains intact despite a slight decline in its client impact rating, a factor of relative strength in breadth criteria. This smaller, US-based consultancy continues to develop its cadre of workforce planning consultants and effectively manage ecosystems relationship to deliver advanced workforce analytics capabilities and data visualization solutions for workforce planning. IBM's declining client impact score results from a change in its value proposition to an almost exclusive focus on artificial intelligence as the driving force behind workforce management.

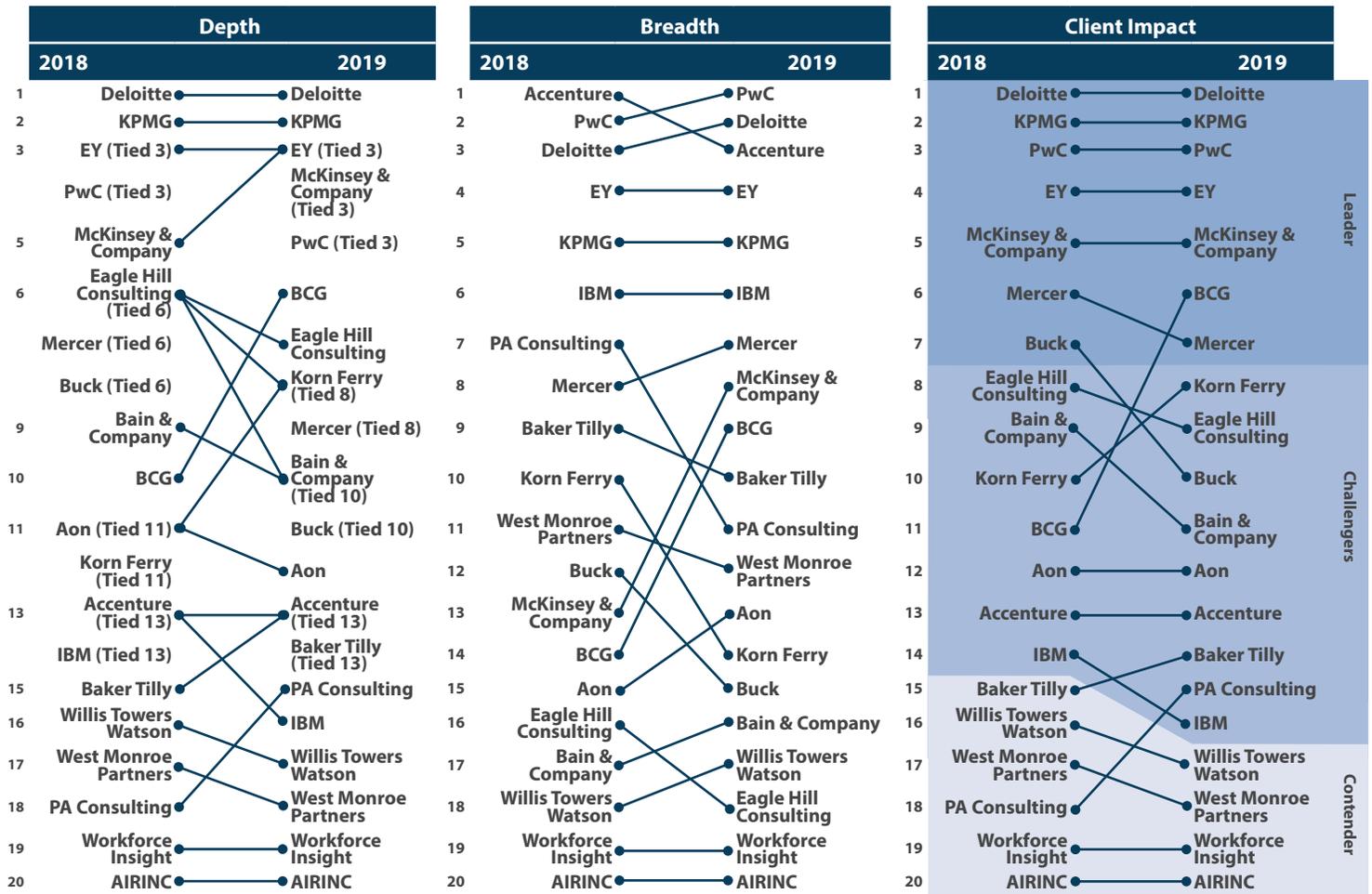
Contenders. The four Contenders are a combination of smaller firms whose focus is on a particular competency or market. AIRINC and Workforce Insight specialize in workforce planning, analytics and technology; AIRINC for global mobility service

Competitive Landscape

providers and Workforce Insight for manpower planning targeted by industry. West Monroe's focus is workforce optimization rather than the "future of work" mandate that motivates the capability drivers. Willis Towers Watson is an anomaly in this group. The firm's Talent Management practice launched a holistic, competitive perspective on the future of work in 2018, however, the parent company has not called out the competency as a global investment priority. When coupled with the divestiture of its HR technology consulting business in 2015, the firm's client impact rating is poised to continue the decline that marked its Vanguard performance this year.

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.



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	BCG EY McKinsey & Company PwC Deloitte KPMG Mercer	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 Bain & Company Buck IBM PA Consulting Aon Baker Tilly Eagle Hill Consulting Korn Ferry	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	AIRINC Willis Towers Watson West Monroe Partners Workforce Insight	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 Workforce Management Consulting Providers comprises the following Leaders.

Leaders	Strengths
Deloitte	Deloitte’s technology innovations over the past year have strengthened the depth, scale, and scope of its workforce analytical services. What is resonating most with clients, however, is the deep functional and industry knowledge Deloitte brings to imagining the future of work, not only in the normal course of service delivery, but in its greenhouse labs, professional forums, research, and thought leadership. In this regard, the firm has evolved the value proposition for its dedicated Workforce Transformation service offering to one where technology is primarily an enabler, rather than the key differentiator of its brand.

Source: ALM Intelligence

Provider Capability Ratings

The table below provides detailed capability ratings for Workforce Management consulting providers. (See the Definitions section of this report for explanations of the capabilities.) Legend: ● Very Strong ● Strong ● Moderate ● Weak ○ None

Provider Capabilities: Workforce Management Consulting									
	Discovery			Design			Delivery		
	Needs Assessment	External Market Insight	Internal Client Insight	Strategy	Operating System	Management System	Project Management	Client Capability Development	Enabling Tools
Accenture	●	●	●	●	●	●	●	●	●
AIRINC	●	●	●	●	●	●	●	●	●
Aon	●	●	●	●	●	●	●	●	●
Bain & Company	●	●	●	●	●	●	●	●	●
Baker Tilly	●	●	●	●	●	●	●	●	●
BCG	●	●	●	●	●	●	●	●	●
Buck	●	●	●	●	●	●	●	●	●
Deloitte	●	●	●	●	●	●	●	●	●
Eagle Hill Consulting	●	●	●	●	●	●	●	●	●
EY	●	●	●	●	●	●	●	●	●
IBM	●	●	●	●	●	●	●	●	●
Korn Ferry	●	●	●	●	●	●	●	●	●
KPMG	●	●	●	●	●	●	●	●	●
McKinsey & Company	●	●	●	●	●	●	●	●	●
Mercer	●	●	●	●	●	●	●	●	●
PA Consulting	●	●	●	●	●	●	●	●	●
PwC	●	●	●	●	●	●	●	●	●
West Monroe Partners	●	●	●	●	●	●	●	●	●
Willis Towers Watson	●	●	●	●	●	●	●	●	●
Workforce Insight	●	●	●	●	●	●	●	●	●

Source: ALM Intelligence

Best in Class Providers

Providers identified as best in class evidence deep capabilities in specific areas of Workforce Management 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 stands out for its Imagine-Compose-Activate framework that transforms workforce planning from a linear, HR-driven process into an organizational capability for translating business strategies into workforce strategies that optimize the potential for automation, alternative talent sources, and collaborative workplaces to combine and create value.

Source: ALM Intelligence

Provider Briefs

Leaders

Deloitte	
Approach	Deloitte believes the dynamics of the digital economy have rendered a universal truth in business that, simply stated, every transformation is a workforce transformation. The trends that have converged to fundamentally alter business models and customer relationships apply equally to work, says Deloitte: how it gets done, who does it, and where. To illustrate its perspective, Deloitte offers a Future of Work model focused on these dimensions. The construct encourages a holistic view of the challenges involved in workforce transformation, moving beyond the basics of labor supply and demand to consider the interplay of transformative technologies, the boundary-less office, and the open talent market. The firm's consulting approach thus applies the principles of digital transformation to the design and adoption of workforce strategies that are agile, human-centric, and experience-driven.
Practice Structure	Workforce management consulting is offered through Deloitte's Workforce Transformation practice, which represents the formal organization of services and solutions dedicated to helping companies transform their workforces in the context of the Fourth Industrial Revolution. Anchored in the Human Capital Consulting business, Workforce Transformation further functions as a governing structure for harnessing consulting and advisory capabilities from across the enterprise in service of a singular value proposition. In addition to human capital consulting, these services include digital, operations, risk, strategy, tax, and technology consulting. Lastly, Workforce Transformation claims a dedicated team of data scientists responsible for workforce and HR analytics, scenario modeling, and other data-based services.
Service Delivery Model	Deloitte's Workforce Transformation practice provides end-to-end consulting services and solutions that enable clients to create a modernized approach to workforce management that strengthens the connection between the employee experience and business strategy. The firm brings a full range of competencies to the table, from human capital strategy and workforce planning to talent sourcing, learning, mobility, workforce analytics, and HR transformation. Service delivery organizes around a proprietary framework designed to shift mindsets from traditional workforce planning value chains to a process of Imagine, Compose, and Activate. In the Imagine phase, clients are guided through art-of-the-possible exercises for envisioning workforce models that bring future-focused business strategies to life. The Compose stage guides clients through the design of workforces and workplaces that take advantage of automation, location, and alternative talent models. The Activate stage replaces a traditional attract-develop-retain model with access-curate-engage implementation strategies that deliver on the employer brand and employee experience. The framework provides a useful construct for demystifying the complexities of workforce trends, assessing their potential impact on the client's business strategy and enabling the application of agile and design thinking principles to the development of workforce management solutions. Each phase of the process is underpinned by services and solutions that provide a data-driven, technology-enabled, and scalable approach to all aspects of workforce management. Solutions advanced in the past year include Hexis, a subscription-based tool that provides clients with real-time predictive insights into the impact of future-of-work trends on their industry and what it means to their organization. AONA (Adaptable Organization Network Analysis) combines tools covering formal structure analysis, network analysis, work complexity, and customer mission alignment to help clients understand how their organization actually works to achieve customer outcomes. Deloitte also is building tools to automate the manual classification of competencies (Cognitive Personnel), as well as the manual processes of the global mobility life cycle. Workforce Transformation services are delivered by every member firm in Deloitte's global network, with access to the complete portfolio of approaches, methodologies, tools, and intellectual capital available through the WT Digital Hub.

Source: ALM Intelligence

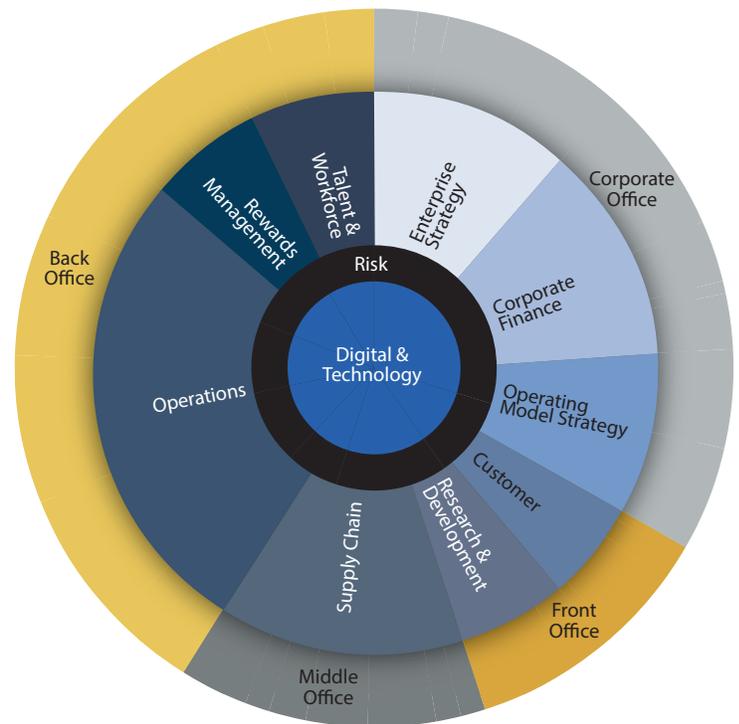
Definitions

What is Workforce Management Consulting?

Workforce Management consulting is part of talent and workforce consulting which forms part of the management consulting services directed at clients' back office activities. Its objective is to improve clients' ability to source, develop, engage, and retain the human resources required to deliver the enterprise strategy.

Talent and workforce consulting consists of three services.

- **Workforce management:** organizing the supply and deployment of human resources through workforce planning, job architecting, and mobility services
- **Communications & change:** orchestrating company-wide changes in culture and ways of working to improve the engagement of employees to execute on strategic objectives
- **Talent & Leadership:** acquiring, developing, and measuring capabilities in human resources at all levels consistent with strategic performance priorities



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

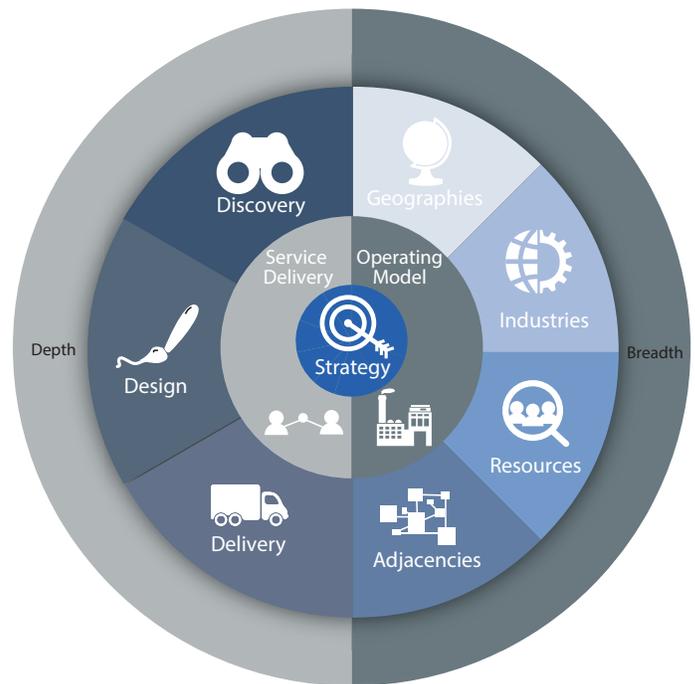
How We Evaluate Consulting Providers

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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