

The *ALM Vanguard*: Product Development Operations Consulting 2019



Contents

Overview	3
<i>ALM Vanguard of Product Development Operations Consulting Providers</i>	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	27
Methodology	29
About ALM Intelligence	31

Author



Nathan Simon

Senior Director, Management Consulting Research

T +1 212-457-9185

nsimon@alm.com

For more information, visit the ALM Intelligence website at
www.alm.com/intelligence/industries-we-serve/consulting-industry/

Overview

Capability Drivers

The truth of the matter is that most management consultants have no business serving clients' Research & Development (R&D) function. Outside select industry sectors like engineered products and life sciences, the primary role of most R&D teams is to coordinate between the front office that sets the product strategy and the middle office that delivers it. The proper domain of R&D, then, is to render economically viable what is desirable for customers and technically feasible for the supply chain (although the ethos of most engineers tends to elevate technical feasibility above all else). Most consultants know something about the functions with which R&D coordinates: downstream marketing and sales and upstream production operations and procurement. Consultants also possess a framework for operational excellence (although effectively applying it to the knowledge work of engineering has proven nonobvious), and some of them are steeped in the product lifecycle and data management (PLM/PDM) IT backbone of R&D (although institutional control over this largely resides elsewhere in the client supply chain organization). But consultants for the most part lack expertise in the engineering function itself. **The engineers in R&D know this, which is why there is not much business to be had for consultants, and the bits they get most often originate elsewhere and take R&D reluctantly in tow.**

Design-to-value (DTV), long the foundation of the R&D operating system, is the focus of most consulting in this market. This system brings together the three traditional pillars of R&D: the demand side of customer and competitor insights, the supply side of production operations and procurement, and engineering to bridge demand and supply. In this way, DTV is a framework for managing three complexities: external complexity driven by customer and market requirements, internal complexity of the supply chain organization, and complexity intrinsic to engineering. There are, however, two problems with this framework. One is the definition of value, with lead time, quality, and cost competing for priority and finance usually out of the picture. The other is that DTV is a framework masquerading as a methodology. That is, DTV specifies the demand and supply side inputs to the process but not the engineering process itself and who owns the outcomes it delivers. In practice, R&D suffers, because those inputs, while delivered, are not integrated. The traditional stage gate process, while consuming a great deal of time and effort, more often than not fails to perform its intended function of eliminating late stage surprises and paving the way for a smooth launch and ramp up to scale. **While much consulting effort is targeted at the analytical inputs from R&D's periphery (market and customer insights, product tear downs, and cost modeling), R&D performance is always and everywhere a governance phenomenon.**

That R&D is atwitter with the portents of digitization is breathing new life into this consulting market, but consultants for the most part are doubling down on what they always did. While Internet of Things (IoT) connectivity and the vaunted closed-loop of product development capture most of the mindshare, the integration of software and hardware engineering is where the action is. Old line industrial companies are eager buyers of consulting services geared towards charting their digital product strategies, acquiring new or benchmarking existing software engineering capabilities, and filling gaps with specialized cost modeling for new-to-the-world products. Consultants are using the introduction of software development as a vehicle on which to convey agile governance methods and tools for digitizing DTV. But much of this is occurring in isolation and disconnected from the broader development process, which remains frozen in traditional mechanical engineering product architectures and ways of working. The stakes are high. For example, while its exact cause remains uncertain; the

Overview

Capability Drivers

tragic failure of Boeing's 737 MAX looks to be rooted in the software of its flight control system and its interface with the planes' physical hardware and human operators. **While digitization pushes out the frontiers of product strategy and the performance of the R&D operating system, absent fundamental changes in governance, gains from consulting are limited and risks abound.**

Data analytics do not make decisions; product managers do. Consultants are promulgating increasingly sophisticated tools for analyzing product financial, cost, and part data to optimize product portfolios and component architectures. These typically elicit one-off improvement decisions (SKU rationalization, component standardization), but in the absence of clear authority and responsibility do not change ongoing decision making. The product management function is taking center stage as a mechanism for institutionalizing value-based management. Modeled on the experience of tech companies, a product management function that is the ultimate owner of the product P&L can bridge the competing interests of the technical and commercial sides of the business to drive project and portfolio decision making. The emergence of product management parallels the evolution of revenue management organizations pioneered by consultants in the pricing domain after lots of good studies on the drivers of value were shelved and forgotten or acted on once but never repeated because no one owned that value. **Two lessons from consultants' pricing experience should, however, temper expectations: the performance of these organizations hinges on making tough choices grounded in a shared definition of value. Irrespective of their objectives and authorities on paper, project managers' impact depends on an uncanny ability to simultaneously embody technical and commercial mindsets.**

Agile is essential but not a panacea. While tailor-made for managing high degrees of complexity, for safety and efficiency reasons agile can neither replace linear controls nor a system for capitalizing and reusing knowledge. Consultants have bolstered their agile bona fides, but the critical client-side gap is not agile itself but rather its integration with the client's stage gate process and system for managing part and interface modularization and standardization. While mundane, engineering process adherence is a much more powerful performance driver than digitizing engineering tools. Consultants are proving their mettle by applying data analytics to elucidate when and why engineers depart from standard processes as a basis for designing ones that work. Like the rest of the supply chain, moreover, R&D consists of make-to-stock processes built around standardized component modules and make-to-order ones for customizing engineering. **Optimizing the location of the decoupling point between make-to-stock and make-to-order engineering processes and differentiating best practices for the two types of processes are fertile ground for consultants, but doing this requires operator level client engagement and deep engineering expertise: two abilities that readily catch out many consulting interlopers.**

The limiting factor that restricts the ultimate impact of changes to the client's product management function and engineering process is the IT infrastructure that captures and transmits data for decision making and coordination.

The push in recent years by consultants to consolidate client engineering teams on a single PLM/PDM backbone largely foundered, due both to the complexity of the task and the gravitation of the ownership of these systems away from R&D towards the broader supply chain organization. The combined effect of these developments is a shift away from greenfield

Overview

Capability Drivers

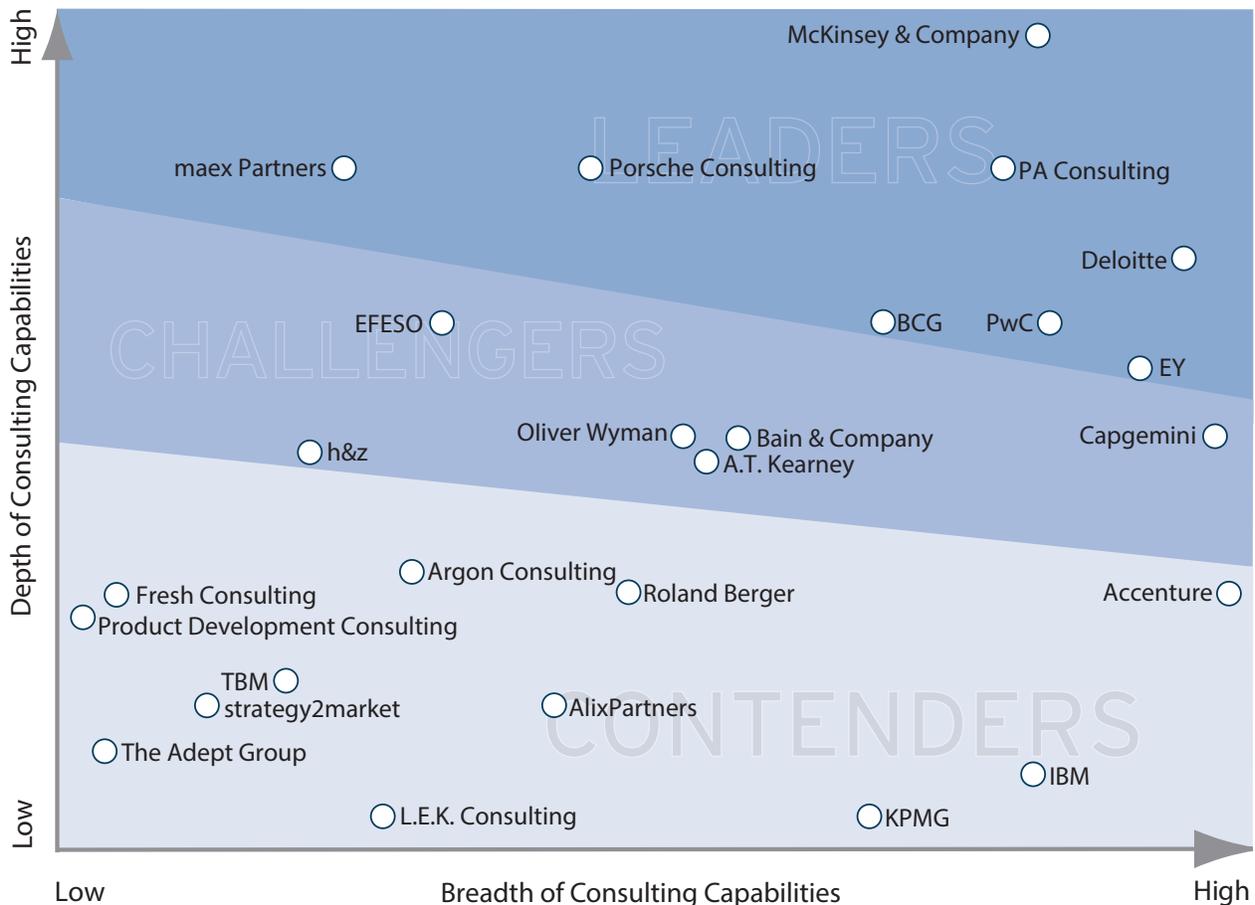
towards brownfield data management solutions, typically in the form of a digital layer on top of existing infrastructure that can facilitate collaboration and process integration. **Less a technical than an organizational capability, consultants' ability to engage clients' data management infrastructure ultimately hinges on their positioning with the broader supply chain leadership.**

The hard truth is that getting measurable gains from R&D takes time. Part of the reason product development operations consulting has played second fiddle to services directed at innovating at the periphery of the business or automating marketing and sales or back-office operations is that the latter can yield results in weeks or months, not years. Innovation as consultants have practiced it by focusing outside the core business allows for much more rapid decision making unhindered by core business protocols and controls. Back- and front-office operations, on the other hand, submit much more readily to productivity-enhancing digitization that do not require system wide transformations. **Consultants are pushing digital engineering tools, collaboration platforms, and data-driven products, but the reality is that most of the adoption is occurring at the periphery not the core of R&D.**

ALM Vanguard of Product Development Operations Consulting Providers

The *ALM Vanguard of Product Development 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 product development 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

Competitive Landscape

Discrete manufacturing clients traditionally dominated demand for product development consulting, reflecting their positioning between the extremes of sectors like pharmaceuticals that compete exclusively on R&D differentiation and the more commoditized process manufacturing sectors such as chemicals and consumer goods for which R&D operates more in the fashion of a utility. The in-between discrete manufacturers faced the dilemma of how to increase R&D productivity (either by cutting costs, improving returns, or both) without unduly disrupting a relatively complex function that contributed in essential ways to their future value. This demand furnished an entrée for management consultancies, most of which accessed the market from their respective positions in adjacent functional markets in marketing and sales, production operations, and procurement. A niche market serving CIOs and COOs with PLM/PDM offerings existed alongside but for the most part did not intersect with these functional markets. While some firms sought to span these disciplines following the logic of DTV, most remained firmly rooted at the intersection of one functional discipline with discrete manufacturers. In contrast to other consulting markets, moreover, few notable specialist consultancies of any significant size emerged that could cover more than a narrow industry sector. **This combination of the inability of larger consultants to effectively bridge the pillars of DTV and the paucity of significant specialists reflected a gap at the center in engineering.**

Two related demand-side trends are disrupting the constellation that characterized the traditional supply side of the product development consulting competitive landscape. One is mass customization, which, while not new in principle, is reaching a tipping point as digitization makes possible engineer-to-order strategies in traditionally commoditized sectors such as chemicals and consumer goods. The other is the diffusion of products with embedded software along with the agile methods used to develop that software. The effect of these trends is to extend consulting demand beyond its traditional redoubt in discrete manufacturing and transform the substance of that demand from the application of tried and true best practices cultivated from discrete manufacturers' experience to the introduction of unfamiliar practices that originated in other sectors, especially software. Software development is something many consultancies themselves do, and specialists abound, finally furnishing a sort of cable with which to suspend the span connecting their up and downstream R&D services. At the same time, the extension of demand to new sectors raises the prospect of sufficient scale and a strategic rationale at the bleeding edge of digitized product strategies that could warrant more targeted investments by consultancies in resources and organizational structures to support sustained market growth. **That said, most consultancies that are active in these new product development spaces to date have yet to stitch their offerings together into a coherent whole and expanding from product development into the burgeoning services and customer experience development marketplaces remains totally untested.**

Leaders. The leaders, while consisting of a blend of large multi-service and smaller, more specialized consultancies, share a bias towards operations. McKinsey retains the top ranked position overall and extends its lead over number two, PA Consulting, as it continues to deepen its governance transformation capabilities. Deloitte and Porsche Consulting both gain ground in the rankings. The former improves its breadth position as it continues to enhance its product offerings for automating development operations. The latter's extension into new sectors beyond its parent company's discrete manufacturing roots

Competitive Landscape

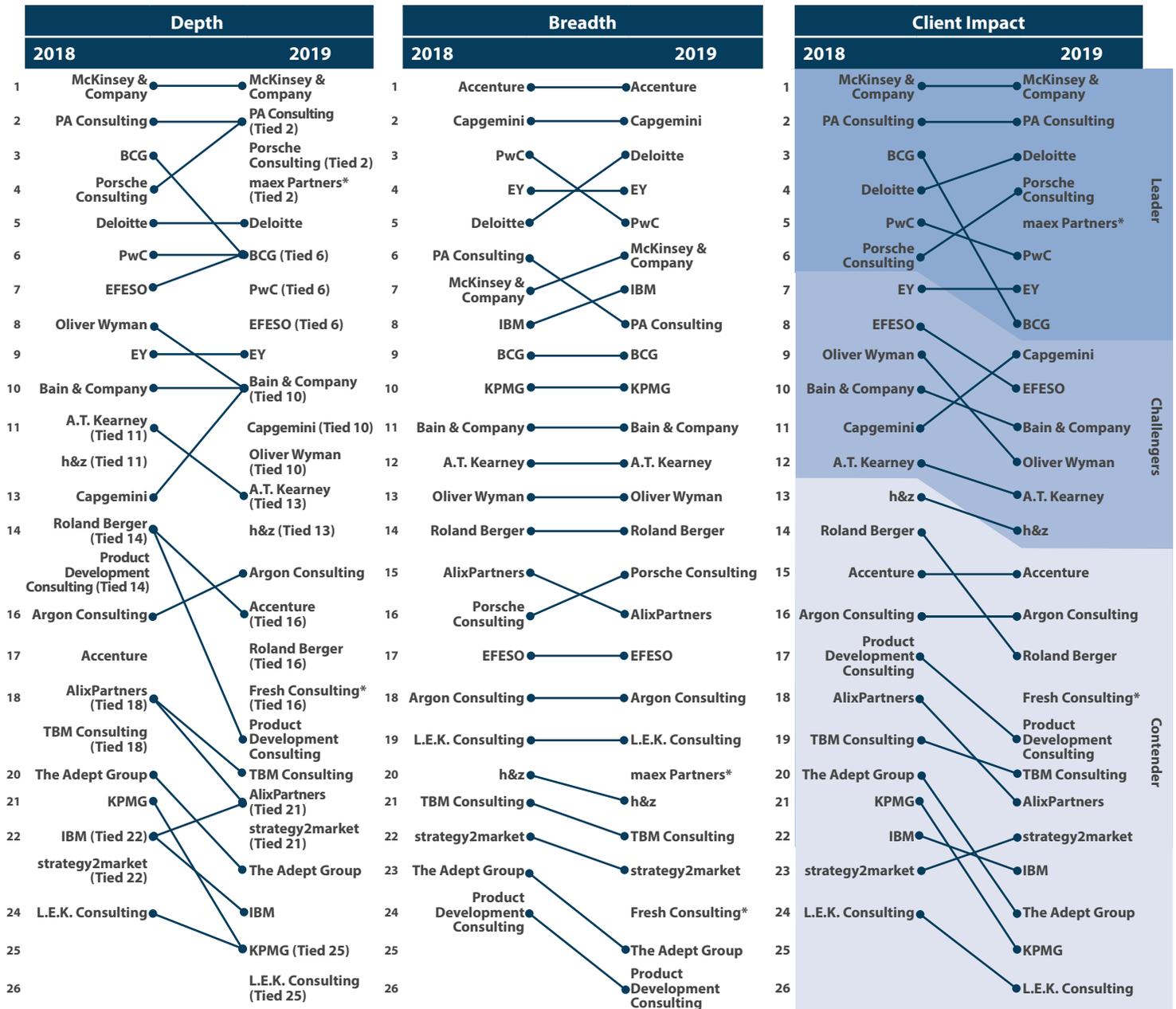
together with more formalized collaboration with its sister company, IT-focused MHP Consulting, give it breadth, while its foray into the startup ecosystem of Silicon Valley contributes depth at the intersection of engineering and procurement. EY and maex Partners both obtain leader rankings for the first time this year. EY is pivoting from a pure-play PLM/PDM shop to a more integrated supply chain strategy provider focused squarely on transforming engineering in non-traditional sectors. maex Partners, covered for the first time this year, comes closest among the leaders to combining operational breadth with true engineering depth. BCG and PwC both dropped in the rankings. BCG is midstride in shifting its go-to-market strategy away from its traditional linkages with operations and innovation consulting towards a more focused engineering offering, but the final shape of this shift has yet to emerge. PwC is running up against the challenge of simultaneously sustaining its core R&D operating and management systems competencies, while extending its reach into digital engineering tools and new sectors.

Challengers. As a group, the challengers are highly diverse but relatively stable inasmuch as they are holding to longstanding sector-specific go-to-market strategies. A.T. Kearney, h&z Consulting, and to a degree Oliver Wyman all continue to focus on the intersection of procurement and R&D, especially in the context of embedded software development in discrete manufacturing sectors. EFESO is holding its own with a distinctive application of its broader management system know-how to R&D. Bain's recent push around agile builds on the firm's marketing and sales insights capabilities. Capgemini is the biggest mover in the group as it formalizes the new product development offerings it delivers through its Applied Innovation Exchanges, but the firm has yet to integrate its related PLM/PDM and pure play engineering services.

Contenders. The contenders consist of three sub-groups. One includes more specialized providers that are squarely focused on product development but tend to concentrate on a narrow sector. Fresh Consulting, which is added to coverage this year, while it falls into this group, is an early mover in adapting a software development heritage for hardware applications. Another group includes diversified firms that have developed a niche offering on the backbone of their broader operations services. Most of these firms are stagnating absent commitments to more engineering-specific resource investments. Argon is an exception as it capitalizes on its portfolio of clients with complex engineering organizations. The last group focuses almost exclusively on PLM/PDM, which has not proved on its own to be a powerful platform on which to build a broader product development consulting offering.

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	BCG EY McKinsey & Company Porsche Consulting 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	A.T. Kearney Capgemini h&z Bain & Company EFESO Oliver Wyman	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	Accenture AlixPartners Fresh Consulting KPMG Product Development Consulting strategy2market The Adept Group Argon Consulting IBM L.E.K. Consulting Roland Berger TBM	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 Product Development Operations Consulting Providers comprises the following Leaders.

“Combining engineering depth, IT know-how, and broad supply chain positioning, EY is unique for its ability to link PLM/PDM enablement with supply chain strategy. With an engagement model tuned for delivering incremental performance gains, the firm is adept at sustaining client commitment to long-haul transformations.”

- Nathan Simon, Senior Director, Management Consulting Research, ALM Intelligence |

Provider Capability Ratings

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

Provider Capabilities: Product Development 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
EY	●	●	●	●	●	●	●	●	●
A.T. Kearney	●	●	●	●	●	●	●	●	●
Accenture	●	●	●	●	●	●	●	●	●
The Adept Group	●	●	●	●	●	●	●	●	●
AlixPartners	●	●	●	●	●	●	●	●	●
Argon Consulting	●	●	●	●	●	●	●	●	●
Bain & Company	●	●	●	●	●	●	●	●	●
BCG	●	●	●	●	●	●	●	●	●
Capgemini	●	●	●	●	●	●	●	●	●
Deloitte	●	●	●	●	●	●	●	●	●
EFESO	●	●	●	●	●	●	●	●	●
Fresh Consulting	●	●	●	●	○	○	●	●	●
h&z	●	●	●	●	●	●	●	●	●
IBM	●	●	●	●	●	●	●	●	●
KPMG	●	●	●	●	●	●	●	●	●
L.E.K. Consulting	●	●	●	●	●	●	●	●	●
maex Partners	●	●	●	●	●	●	●	●	●
McKinsey & Company	●	●	●	●	●	●	●	●	●
Oliver Wyman	●	●	●	●	●	●	●	●	●
PA Consulting	●	●	●	●	●	●	●	●	●
Porsche Consulting	●	●	●	●	●	●	●	●	●
Product Development Consulting	●	●	●	●	●	●	●	●	●
PwC	●	●	●	●	●	●	●	●	●
Roland Berger	●	●	●	●	●	●	●	●	●
strategy2market	●	●	●	●	●	●	●	●	●
TBM	●	●	●	●	●	●	●	●	●

Source: ALM Intelligence

Best in Class Providers

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

Capability Areas	Provider	Strengths
Operating System	EY	In a market in which information and operational processes and technologies are remote both in terms of technical skills and client ownership, EY excels for its ability to not only cover both bases but also do so in an integrated way.

Source: ALM Intelligence

Provider Briefs

Leaders

EY	
Approach	EY's consulting approach is an outgrowth of its conviction that the supply chain can be a competitive weapon for transitioning from narrowly focusing on developing new products to more broadly innovating the value chain. To this end, EY seeks to transition product development from an isolated technical activity to one that is integrated with the overarching business and supply chain strategies, process model, performance management system, and IT infrastructure. The point, for EY, is to enable companies to accommodate more variance in customer demand, while minimizing internal variance by harnessing IoT connectivity and closed-loop PLM to transform the business.
Practice Structure	EY coordinates its resources through its Supply Chain and Operations practice, drawing on resources acquired from Germany-based J&M Management Consulting. Alliances with PLM, product digitization, and modularization technology vendors, as well as Procter & Gamble with which it collaborates on deploying that company's Initiative Reliability program for managing product development at client companies, are an integral source of additional resources and methods.
Service Delivery Model	EY directs its service delivery around two areas. The first is PLM, for which EY combines activities targeted at changing the organization, process, IT, and performance management systems to foster more integrated product development programs. The end game of this work is a transition from a costly and cumbersome engineer-to-order model to a modularized, configure-to-order one. To achieve this, the firm starts with a modular product design grounded in a consistent functional model of the complete system, including mechanical, software, and electrical components. Next, it focuses on the assembly level with design-to-cost methods to reduce variant complexity. The last step applies target costing at the individual part level enabled by PLM IT and executed early in the product development lifecycle. While these engagements tend to be multi-year in scope, the firm's delivery model prioritizes incremental functionality releases rather than deferring new functionality to the end. To make the process repeatable, EY prioritizes closed-loop processes, particularly at the interface between maintenance and planning, that can funnel data collected at each stage of development and usage back into next-generation planning. The second area around which EY directs its service delivery is helping primarily process manufacturing clients improve their cross-functional team management to reduce project risks and increase the speed to profitability. For this, the firm uses its alliance with Procter & Gamble to deploy the latter's common process model and demonstrate what good looks like.

Source: ALM Intelligence

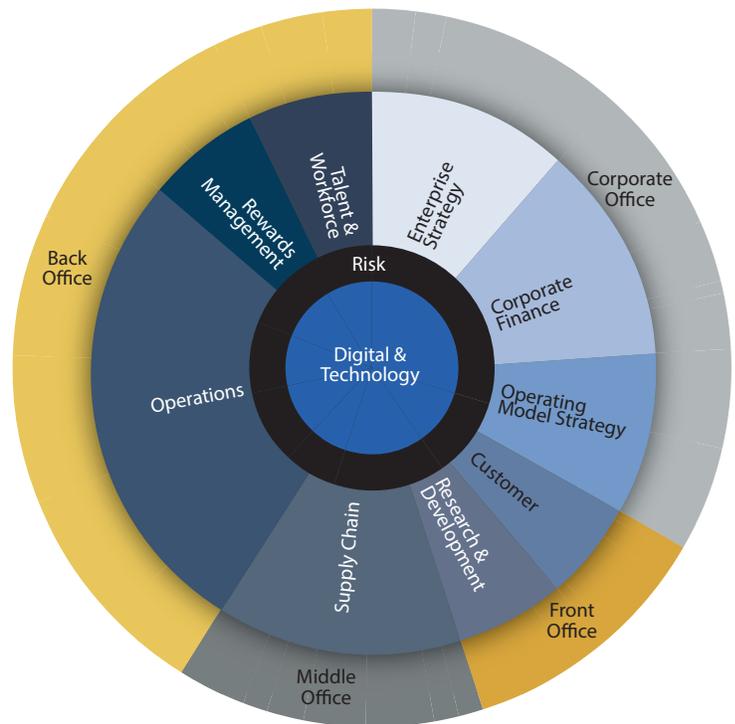
Definitions

What is Product Development Operations Consulting?

Product Development Operations consulting is part of R&D consulting forms part of the management consulting services directed at clients' front office activities. Its objective is to improve clients' organic growth engines.

R&D consulting consists of two services.

- **Innovation Strategy:** Aligning innovation to strategies, furthering technology development, structuring and managing an innovation portfolio, and injecting user-centric and nonlinear design thinking that fosters more collaborative, cross-disciplinary innovation
- **Product Development operations:** Developing products and services that succeed in the marketplace by effectively coordinating upstream with sourcing and production engineering and downstream with commercial execution, increasing efficiency by streamlining and accelerating R&D activities across locations and functions, and maximizing the return on the development and IP portfolio



Source: ALM Intelligence

Definitions

Consulting Provider Capabilities

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

Source: ALM Intelligence

Provider Capability Rankings Descriptions

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

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

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

Methodology

Overview

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

The proprietary research methodology comprises four components:

- Extensive interviews with consulting practice leaders, financial analysts, consulting clients, and clientside industry experts
- Data and background material from the proprietary library of research on the consulting industry and individual firms
- Quantitative data collection from primary and secondary sources
- Key economic data relevant to the sector(s) being analyzed

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

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

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

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

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

Methodology

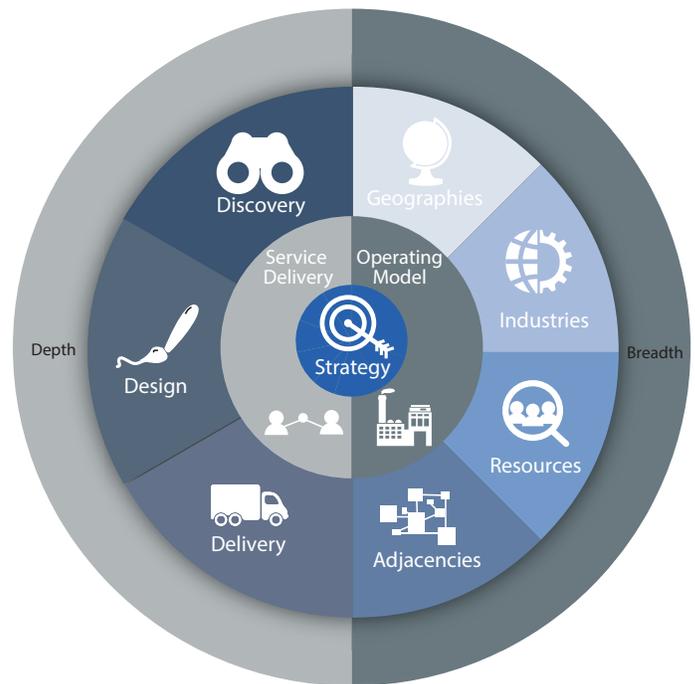
How We Evaluate Consulting Providers

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

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

- **Consulting approach:** What are providers’ points of view on the root causes of client challenges? How do those points of view inform choices about how best to resolve them? How do providers view the intersection of these needs and solutions with other consulting or non-consulting offerings or cross-cutting themes?
- **Consulting organization:** How do providers organize and deploy their capabilities? What sort of consultants and other human resources do they possess, and how do they obtain and use them? What sorts of partnerships, collaborations, and alliances with external parties do they use to bolster their capabilities?
- **Consulting service delivery model:** How do providers deliver their services? Do they employ any particular processes or methodologies, preconfigured tools, or other unique elements of service delivery? Do they follow any particular sequence or direction in their service delivery? How do they measure outcomes?
- **Client pain points and needs assessments:** What factors most influence successful engagements in the opinion of clients? What capabilities do providers need to bring to their engagements to be compelling? What sources of differentiation matter most to consulting buyers?
- **Future development:** What investments are providers making or planning to make to enhance their future capabilities?

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



Source: ALM Intelligence

About ALM Intelligence

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

ALM, an information and intelligence company, provides customers with critical news, data, analysis, marketing solutions and events to successfully manage the business of business. For further information and to purchase ALM Intelligence research, contact ConsultingResearch@alm.com, 855-808-4550.

