



ALM INTELLIGENCE
**PACESETTER
RESEARCH**

Supply Chain **2021-2022**





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ALM Pacesetter Research (APR) is a market research initiative of ALM Intelligence with an inclusive perspective of the professional services landscape. Rather than narrowly focusing on one segment of the market, APR covers a broader range that includes law, consulting, insurance, financial advisory, and other actors operating in the market defined by the research topic. The purpose of ALM Pacesetter Research is twofold:

- *Deliver practical insights into the buying and selling of professional services in an increasingly converging marketplace*
- *Help buyers evaluate their sourcing options with objective assessments of providers' services and capabilities*

Pacesetter Advisory Council (PAC)

Market Leaders are selected by a panel of experts comprised of ALM editors, journalists, market intelligence analysts, and external professionals and academics who have experience working with professional services providers.



Research Methodology

APR analysts combine qualitative and quantitative research methods to profile Market Leaders in a given market. These providers are evaluated and scored against five core criteria to determine Pacesetter status.

- 1 Business model
- 2 Value proposition
- 3 Service delivery
- 4 Client enablement
- 5 Brand eminence

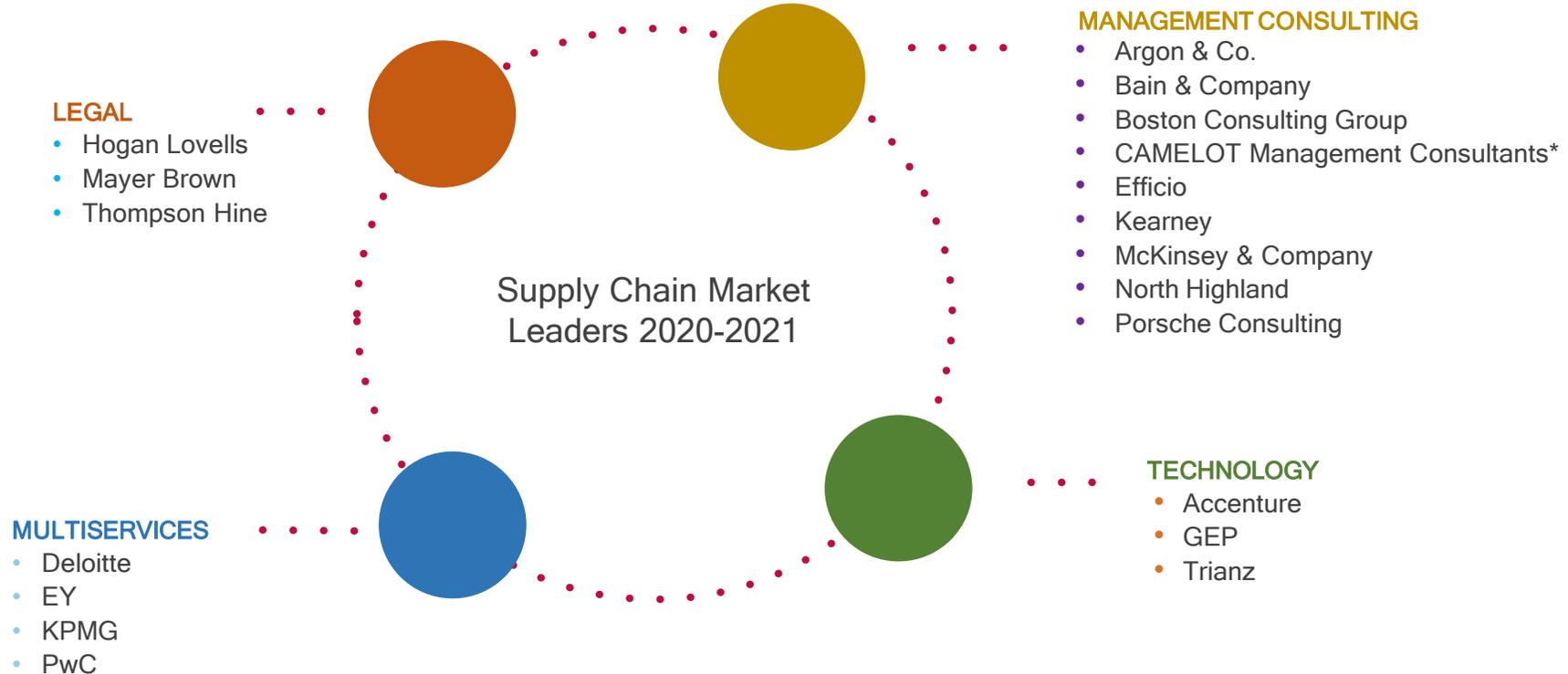
Audience

APR provides independent and objective analyses to providers and buyers of professional services coupled with practical insights that inform the decision-making process for strategic planning and procurement professionals.





ALM Intelligence analyzed and profiled 19 Market Leaders across four market segments for ALM Intelligence Pacesetter Research: Supply Chain 2021-2022. One provider was identified as an ALM Pacesetter(*): CAMELOT Management Consultants



Note: Multidisciplinary service providers are segmented based on the core capabilities that characterize their business model's center of gravity

Market Overview



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July, 2021

Prior to 2020, procurement departments and supply chains were already under intense scrutiny, with the focus falling almost exclusively on cost. Automation and outsourcing were seen as the antidote, but projects tended to underdeliver in that regard. C-suites grew skeptical of large-scale transformation projects.

But the problems ailing supply chains were far more fundamental. Supply chains tended to be reactive and focused on the short term. The CPO's mandate was simply to get supplies as cheaply as possible - though in practice, the CPO spent much of their time "firefighting" - constantly reacting to unforeseen supply crises. The consolidation of suppliers in recent years put procurement departments at a disadvantage in negotiations. There was no linkage between the supply procurement process, product development, distribution or the end-user customer experience. Procurement department staffing models focused on (as usual) cost, resulting in under-resourced and underskilled departments with high turnover rates. Supplier relationships were static and often lacked any vetting or refreshing process. Data capabilities were weak, further hobbled by multiple independent enterprise resource planning (ERP) systems. Inventory management was bound dogmatically to the "just in time" (JIT) model in the name of cost reduction, which became a major liability in 2020. In short, supply chains tended to be complicated jumbles of heavily siloed, disconnected one-on-one relationships, opaque and inflexible.

COVID-19 exposed all these vulnerabilities at once, like ripping a bandage off raw skin. Even the most mature procurement departments had only planned for a few weeks', perhaps a month's, disruption of some key supplies. Nobody had planned for a global economic shutdown lasting more than a year.

The good news is that most providers are converging on the same set of solutions.

Supply chains need to be agile, transparent, simplified where possible, collaborative, risk-aware and ultimately managed as the networks they are supposed to be. The challenge is that many of these solutions have been in play for years, and have not yielded the expected results. Evidence anecdotally suggests that the focus has been on the latest, shiniest new advanced technologies rather than developing truly integrated, cross-functional value chain strategies and systems spanning suppliers to customers, across internal department S&OP planning through external partner networks. In this scenario, technology serves as an enabling tool where the emphasis is on connectivity.

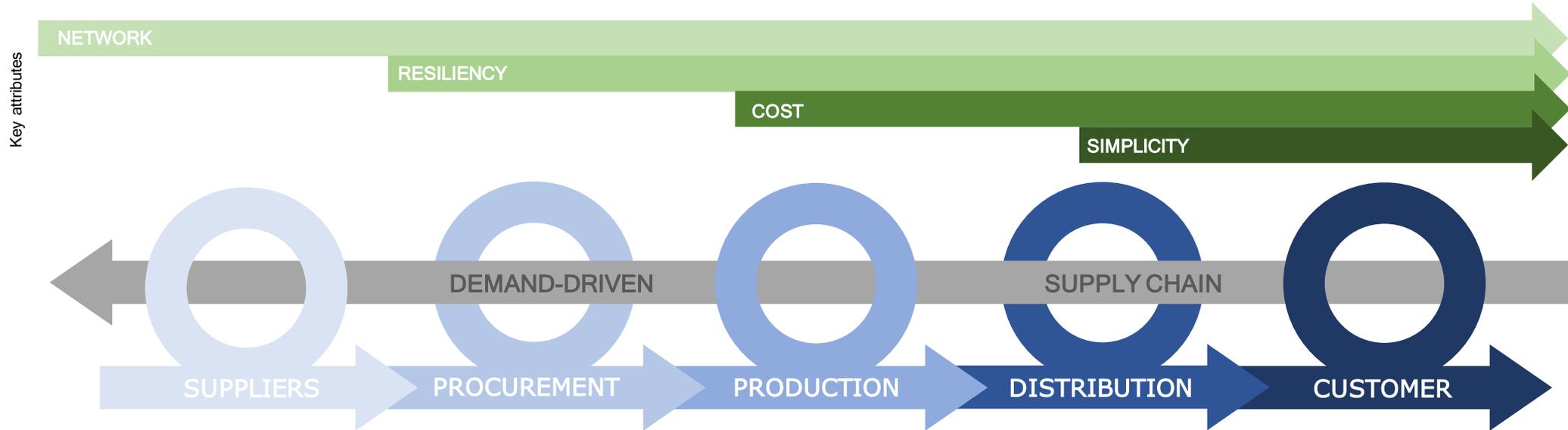
For law firms, supply chains are still mostly about contracts and negotiation support, though a handful of market leaders have more strategic risk conversations with clients. Management consulting, multiservice providers and technology firms are stepping on each other's toes with essentially the same solutions built around platforms and massive technology transformations, layered to varying degrees with change management and upskilling. The main thrust in their approach is in advanced technology, though only a few market leaders seem to have intuited that the very interconnectedness of the multitude of nodes in a supply chain requires a very human component: trust. ALM Intelligence's Pacesetter Supply Chain 2021-2022 report examines this rapidly evolving market and the implications of the COVID-19 era for clients and providers.



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The real story in supply chains is that with COVID-19 as a catalyst, they are being brought in out of the cold and finally being empowered to support organizational value creation activities as Michael Porter envisioned in 1985



Demand Drivers in Supply chain in the 21st Century

- COVID-19 has only exacerbated long-standing vulnerabilities in supply chains
- Political, economic volatility disrupting market access, chain relationships
 - Rise of e-commerce and customer expectations of greater choice, customization
 - Need for supply chains to pivot to a dynamic value creation model from a static, defensive value preservation model
 - Lumpy supply markets due to COVID-19 wreaking havoc with inventory management
 - Rise of technologies enabling very different relationships across (Porter's) value chain

Sources of Competitive Advantage

- Most supply chain solutions emphasize technology, but market leaders use technology to drive human outcomes - e.g., to build trust throughout networks, creating hybrid human-technology models, upskilling
- Market leaders understand complex business networks are held together by many sinews: contracts, effective risk management, scenario modeling, etc.
- Data is a key but often weak link: data sourcing, management, ability to utilize external data
- Flexibility in supply chains in 2021 includes being able to incorporate ESG criteria

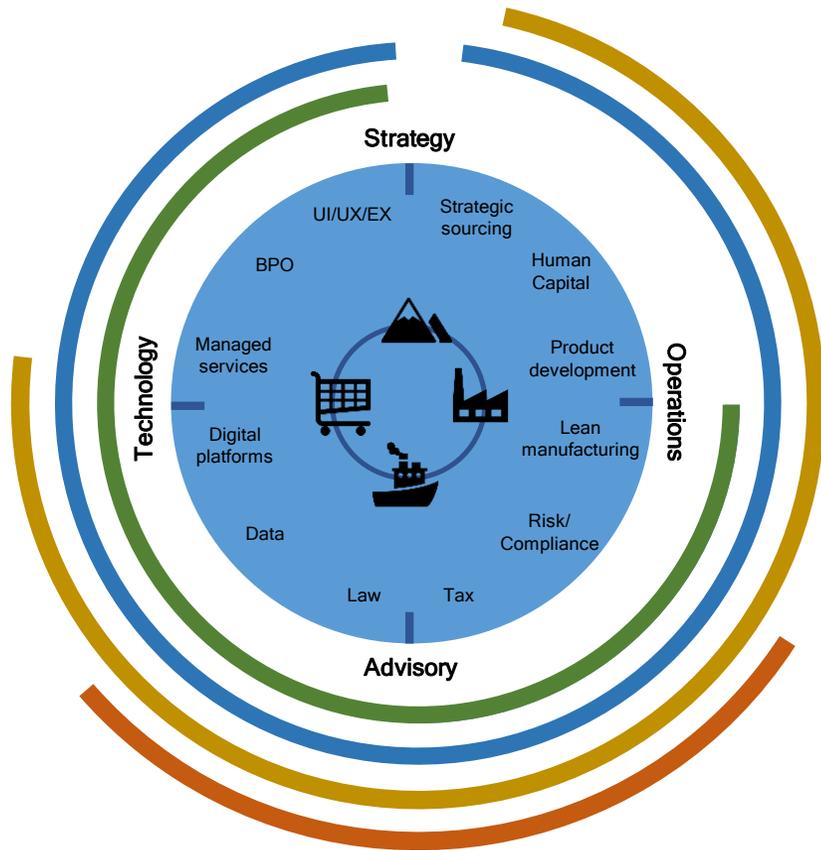


Except for a handful of asset-intensive industries, supply chain decisions were typically spread throughout organizations but in recent years, punctuated by COVID-19, supply chains have the board's attention and decisions are made through a centralized function like a CSCO

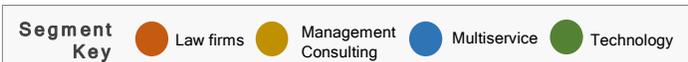
Directly involved in scoping and purchasing services
 Key influencer; accountable/responsible for executing strategy
 Some influence on purchasing decision
 Not involved in purchasing decision

Acronyms:
 CEO – Chief Executive Officer
 CFO – Chief Financial Officer
 COO – Chief Operating Officer
 GC – General Counsel
 CLO – Chief Legal Officer
 CSCO – Chief Supply Chain Officer
 CPO – Chief Procurement Officer

Stakeholders	Supply Chain service provider segments				Stakeholder roles and interests
	Legal	Management Consulting	Multiservice	Technology	
CEO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	For the CEO, supply chains have become a Priority 1 strategic-level concern, and one of the top items on CEOs' task list for 2021 is coming up with a supply chain strategy
CFO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Finance's interest in supply chains until recently was simply cost containment, but now supply chains inform growth strategy, with issues like tax strategy not far behind
COO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Supply chains were once an operations back-office function but are now front-and-center for COOs
GC/ CLO/Legal Dept.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	The legal department role in supply chains is still grounded in compliance and contracts but increasingly they are also being asked to provide input on risk and long-term strategy
CSCO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	A fairly new function for many organizations, CSCOs are being given executive-level management responsibilities spanning suppliers to customers
CPO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	In some organizations supply chain management responsibilities reside with procurement, a misalignment of scope and interests, but a step forward in the sense of a centralized supply chain management function
Sales & Marketing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	With the recognition of the supply chain role in shaping customer experience through the omnichannel distribution model, sales & marketing have a limited but rising voice in supply chain planning and strategy
Product, unit-level managers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Supply chain was once the domain of product and unit-level managers but while SCM has been elevated to executive levels, they retain influence through product strategy
External stakeholders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Suppliers are the 800 lbs. gorilla in this group but logistics providers, foreign governments and others also have influence in supply chains, as well as increasingly investors and end-user customers who are concerned about issues like ESG in supply chains



Source: ALM Intelligence, 2021



The Risk Barometer positions peer groups in terms of their capabilities to create client impact through a mix of services supporting a spectrum of risk and risk-related strategies. See the Appendix for detailed definitions.

- **Law firms** are mostly confined to a limited range of reactive advisory functions in supply chains - contract negotiation and management, compliance, tax - but some market leaders are delving into risk-related strategy, including reputation risk, third-party risk, broader supply chain risk, etc.
 - Regulatory risk is a prime focus for many providers, with some developing sophisticated legislative and enforcement advisory services
 - Some also use business continuity and services related to disruption planning as a springboard for further client engagement
- There is considerable overlap between **management consulting**, **multiservice** and **technology** providers in supply chain, with all three leading with digitalization, technology platforms and the deployment of advanced technology (e.g., AI)
- Supply chain services for **management consulting** providers are often embedded in their industry practice areas or are tied to either restructuring or M&A practices
 - **Management consulting** and **multiservice** providers compete on product development, operations, human capital, change management, as well as sales and distribution channel-related consulting in supply chains
- **Multiservice** providers often approach supply chains from the perspective of their operations or tax practice areas, though they too sometimes begin from M&A or a restructuring event
- **Technology** providers lead heavily with digitalization and platformization, Procurement-in-a-Box and similar templated solutions
 - Some providers have been developing change management-related consulting services
 - These solutions are very attractive to cost-conscious middle-tier clients
 - Regarding supply chains, **technology** and **multiservice** providers compete intensely in managed services, shared services and outsourcing offerings, with both segments making substantial investments in recent years to bolster their capabilities
 - **Management consulting** providers have mostly avoided managed services or outsourcing, though some have been developing targeted interim services for procurement, tax, etc.



Trends

The overall goal in supply chains is to transform them from a reactive, cost-minimizing machine into a value-creation engine that deepens relationships with key stakeholders (e.g., suppliers), aligns processes with product/service needs, and plays a key role in shaping the customer experience while driving margin. Supply chains can be a competitive advantage.

- Volatile national and international politics and a global economy still recovering from COVID-19 have injected uncertainty into supply chains, making long-term resiliency in supply chains the main client priority
- New rules (like Australia's Pay On-Time law) are also causing network relationship headaches
- Modeling and scenario planning are key tools for flexibility
- Large demand for help with tax compliance and strategy
- Political and economic disruption has put supply chain squarely on the board's radar, and has generated a revolution in supply chain management (SCM) that goes beyond category management to a fully inter-connected supply chain ecosystem: a demand driven supply chain
- Despite the rise of economic nationalism, for many the benefits of global supply chains still outweigh the costs though political and complexity concerns are leading to shortening supply chains, with some near- or reshoring

- The top supply chain themes in 2021 are flexibility, speed-to-market, cost, resiliency, predictability, transparency, connectivity and long-term sustainability
- After years of platformization and outsourcing (which locked supply chains into rigid processes and relationships), a key theme in today's projects is simplification and flexibility
- Technology is still front and center for supply chains, in the form of accelerated automation and digitalization
- COVID-19 has highlighted how poorly many organization supply chains make use of data: accessing, overcoming silos, deriving actionable insights from it, utilizing third-party or external data adequately and meaningfully
- Lumpy supply markets are clashing with the popular just in time (JIT) inventory model, leading to inventory hoarding which has been exacerbating supply disruptions
- Centralizing the supply chain management role is key, breaking down silos and speeding up S&OP cycles
- COVID-19 also (abruptly) transformed the digital labor vs human labor argument from theory to fact, forcing supply chain organizations to confront staffing models poorly equipped to manage supply needs and processes, leading to changing talent strategies and upskilling programs
- Shareholders and other stakeholders are putting greater emphasis on ESG criteria and goals in supply chains

Implications for Buyers

- A centralized supply chain management is key
 - Procurement is only one part of a supply chain strategy, with sourcing and supplier relationship strategy integrated into the larger process
 - The vendor selection process should be formalized, and lists should be continuously updated and revetted (e.g., consider a supplier panel)
- The low hanging fruit for any supply chain transformation project is data: accessing and analyzing internal and external data is crucial
- Supplier relationship management is the first step towards a demand-driven supply chain
- Another key area is talent strategy, requiring a fundamental rethink of requisite skill sets and how to acquire/maintain them
- Does your supply chain management regime really include the voice of the customer?



Convergence

From a service perspective, most of the effort around supply chains is technology driven, ranging from automation, digitalization, platformization, data analytics, cybersecurity, modeling and scenario planning, and CMS (e.g., blockchain) to the distribution (customer) omnichannel. Fixing supply chains in 2021 is more a technology and process problem than a supply chain expertise one. This means that most providers go to market on a technology footing, and compete primarily based on technology capabilities, making for some strange RFP matchups. Put another way, providers - management consulting, multiservice and technology firms - bid on projects leading with their technology capabilities. Law firms are the exception with their narrow areas of focus, but even they are being drawn into discussions around technology problems (e.g., risk, cybersecurity, etc.) and need at least the in-house expertise for these technologies to be competitive. Differentiation is harder for providers in supply chain because the central thrust of their offerings - in a nutshell, digitally enabled supply chains - is table stakes, and most are on a similar path with their offerings. What ultimately separates the market leaders from the rest is less likely to be in the outcomes of 2021 or 2022 and more in the degree to which they are able to help clients with next steps in the post-digitalization world (e.g., with a hybrid talent model strategy, advanced scenario planning capabilities, risk modeling).

Digital: In recent years M&A deals and restructuring projects became de facto digital transformation events for clients. In the

era of COVID-19, supply chains have absorbed some of that attention as they need to suddenly reconfigure themselves. In fact, since March 2020 supply chains have been vying with M&A and restructuring practices as the largest drivers of client demand for providers - and many of the same capabilities are being utilized. The challenge is less deploying advanced technologies and more tying these technologies to strategies and outcomes, which requires incorporating a human and process element which many overlook. Technology providers have a greater impact in this respect with less experienced middle-tier clients, but often lack the operational and human capital capabilities for more complex supply chains. Management consulting and multiservice providers are better equipped but struggle with overhead, and often need to anchor these projects in more profitable M&A, restructuring or operational transformation deals. Market leaders among law firms are developing ecosystem alliances with ALSPs to extend their technology capabilities and client touchpoints.

Contracts: In highly networked supply chains, contracts are key. Contract management systems (CMS) are the low-hanging fruit with management consulting, multiservice and technology providers and even some law firms, and each offer their own CMS systems, with blockchain and its distributed ledger highly favored. But contract negotiation support and AI-driven standardization are also areas of big investment.

Trust: An important theme among market leaders in all segments is the ability to use technology, business and legal expertise to foster trust across networks.

Implications for Providers

- Technology is central to any supply chain solution, but merely being able to install and deploy that technology is not enough without anchoring the results in specific client outcomes
 - Some providers have deepened their market relationships through good will gestures, helping clients or even non-clients solve immediate supply chain problems by “shaking” their own network trees for supplies, expertise or relationships
- Supply chain providers have a substantial Venn Diagram-style overlap in technology, causing differentiation to lie in enhanced risk management, talent strategy, upskilling, deepened collaboration across networks, and flexibility that is able to respond to innovation and change
- Supply chains are long-term challenges requiring constant and continuous reassessment; that dynamic element is challenging for clients but gives providers opportunities for long-term engagement



ALM Intelligence Pacesetters

What makes a Pacesetter in supply chain?

Change Management: While clients occupy a wide spectrum of position along the supply chain maturity curve, most are forced to undergo a significant shift in their thinking and approach to their supply chain. Change management in recent years has come to mean supporting and adapting operations to new technology realities, but market leading providers in the supply chain space help clients redesign the processes (and management of those processes) that are at the very heart of the client organization with impact at every level. It is more than technical reengineering; it is fundamentally changing how people think and work. Change management in supply chains is change management³.

Thought Leadership: The changes supply chains are undergoing are legion, confusing, often contradictory, and in many respects unprecedented. This is a space where real thought leadership in the form of surveys, expert insights, client panels, case studies and moderated debates over challenging issues such as the impact of new regulations are particularly impactful. Market leaders in supply chain can produce thought leadership that rises above marketing material and drives real discussion and informed decision making for clients.

Industry Expertise: Industry expertise has been a major area of investment for most providers in recent years across all

segments, and indeed the competition for industry experts through lateral hires has heated up considerably. It is not unusual in 2021 to encounter professionals with resumes spanning different segments. What sets supply chains apart is the need for micro-level experience and expertise on specific topics (e.g., specific platforms for HIPAA compliance for rural providers), often anchored in specific jurisdictions or involving certain client operations. Most providers have a heavy weighting in their supply chain practice offerings in the asset-intensive industries (manufacturing, oil & gas, retail, consumer goods, life sciences, etc.), but market leaders go down the intensely narrow rabbit holes that bedevil client supply chains.

Networking: One of the fundamental changes facing clients in the supply chain of 2021 is the need to forge close, collaborative partnerships over the full length of the supply chain, both internally and externally with suppliers. This requires new management mechanisms, careful alignment of goals and interests, security for all parties (e.g., contracts, a cybersecurity framework), advanced risk management capabilities, transparency and insight into the needs and capabilities of every node in the network, designated gatekeepers, technological connectivity, enhanced skill sets, and ultimately a shared interest in the end-user customer experience. Few organizations (including leading providers) have all these capabilities, but market leaders are building them both for their own supply chains and for client deployment.

Supply Chain Pacesetters 2021-2022

Market Segment	Provider
Management consulting	CAMELOT Management Consultants

Methodology Notes

The ALM Pacesetter Research methodology evaluates Market Leaders against five core criteria.

1. Business model
2. Value proposition
3. Service delivery
4. Client enablement
5. Brand eminence

Providers whose aggregate score is 85 and above qualify as an ALM Pacesetter.

In some instances the scoring may be weighted due to their importance in achieving competitive differentiation in this report's topic. For details, weighting in this particular report are addressed in the Methodology section.

See Appendix for detailed definitions of the five core criteria

The ALM Intelligence Pacesetters



ALM INTELLIGENCE
PACESETTER

SUPPLY CHAIN 2021-2022



SUPPLY CHAIN 2021 – 2022

CAMELOT Management Consultants	Primary Practice/ Competency	Boutique						
<p>Mannheim, Germany-based CAMELOT Management Consultants is a value chain strategy consulting firm strongly rooted in digital-based solutions. Its offering spans value chain strategy, business transformation & organization, supply chain management; procurement, operations & manufacturing; distribution & logistics, sales & the customer experience, finance & performance management, data management & analytics, and digital value chain transformation. Its offering is heavily focused on four key industries: chemicals, CPG, life sciences, and industrial manufacturing. CAMELOT’s strategy regarding value chain is grounded in innovation (i.e., helping clients create new capabilities for sustainable value chains), and that tends to mean larger clients with more complex supply chain problems and as such, CAMELOT approaches supply chains more from the strategy and design perspective rather than event-driven crisis remediation. As part of this approach, CAMELOT relies heavily on injecting digital technology into its offering, helping clients more effectively utilize digital capabilities during projects, for instance, with CAMELOT’s digital transformation tool DigitalExperience2. CAMELOT has created its Innovative Technologies Lab for digital solutions and has also partnered with execution management systems (EMS) platform designer Celonis to develop the Demand-Driven Material Requirements Planning (DDMRP) Value Mining Execution Application to help clients optimize execution capacity in supply chain management and minimize the impact of severe supply chain disruptions.</p> <p>Particularly in what the firm describes as our current “hyper-VUCA” (volatility + uncertainty + complexity + ambiguity) times combined with digitalization, CAMELOT views resiliency as the definitive trait successful value chains should strive for, and that is achieved through an end-to-end, cross-functional, collaborative framework. CAMELOT’s services span three key categories: supply chain management (SCM), distribution & logistics, and data management. Again, organized around a demand-driven supply chain model, CAMELOT helps clients integrate their sourcing strategy with their entire value chain to achieve advantages in cost, efficiency, transparency and risk management. Technology is a big component, and the firm works to help clients at various stages of digital maturity quickly adapt. Procurement’s role in this model is to move from a traditional reactive role relying on staid sales forecasts to becoming active value contributors and managers of the supply process for players across the value chain. Finally, to help supply chains incorporate ESG goals, CAMELOT has a suite of offerings called GreenMind².</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence	■	■	■	●
○	●	●	●	○				

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus

■ Data, technology tools & solutions	□ Accounting, auditing & risk assurance
■ Consulting services	□ Forensics & Disputes
□ Function-focused advisory services	□ Interim, managed & outsourcing services
□ Legal services	□ Technical
□ Construction & Engineering	
■ Consumer goods	
■ Energy & Chemicals	
■ Healthcare & Life sciences	
■ Manufacturing	
□ Retail	
□ Other industry	

- Services offered
- Services not offered

How CAMELOT is moving the needle



**Pacesetter
Criteria**

Qualitative Assessment

Pacesetter Criteria	Qualitative Assessment
Value Proposition	CAMELOT effectively deploys technology to drive change management, one example being its cloud-based CAMELOT Closed-Loop Transformation Control solution that seeks to align people, organization and strategy in the midst of a value chain transformation, getting employees on board with strategy and measuring their reactions to policy changes.
Service Delivery	One of the key areas of impact for CAMELOT is in service delivery, where the firm’s early adoption of the end-to-end value chain concept led to the design of offerings that encourage a cross-functional approach internally between procurement and departments, as well we collaboration across the entire value chain ecosystem, seeking to achieve client goals in simplification, automation, synchronization and innovation at both the micro and macro levels.
Client Enablement	With particular impact on change management and business case development, CAMELOT (along with its sibling firm CAMELOT ITLab) effectively utilizes data-driven insights to make the case for change and manage the day-by-day implementation across stakeholders, the client organization and the broader value chain network through effective monitoring and engagement, measuring and tweaking progress along the way.



The ALM Intelligence Market Leaders

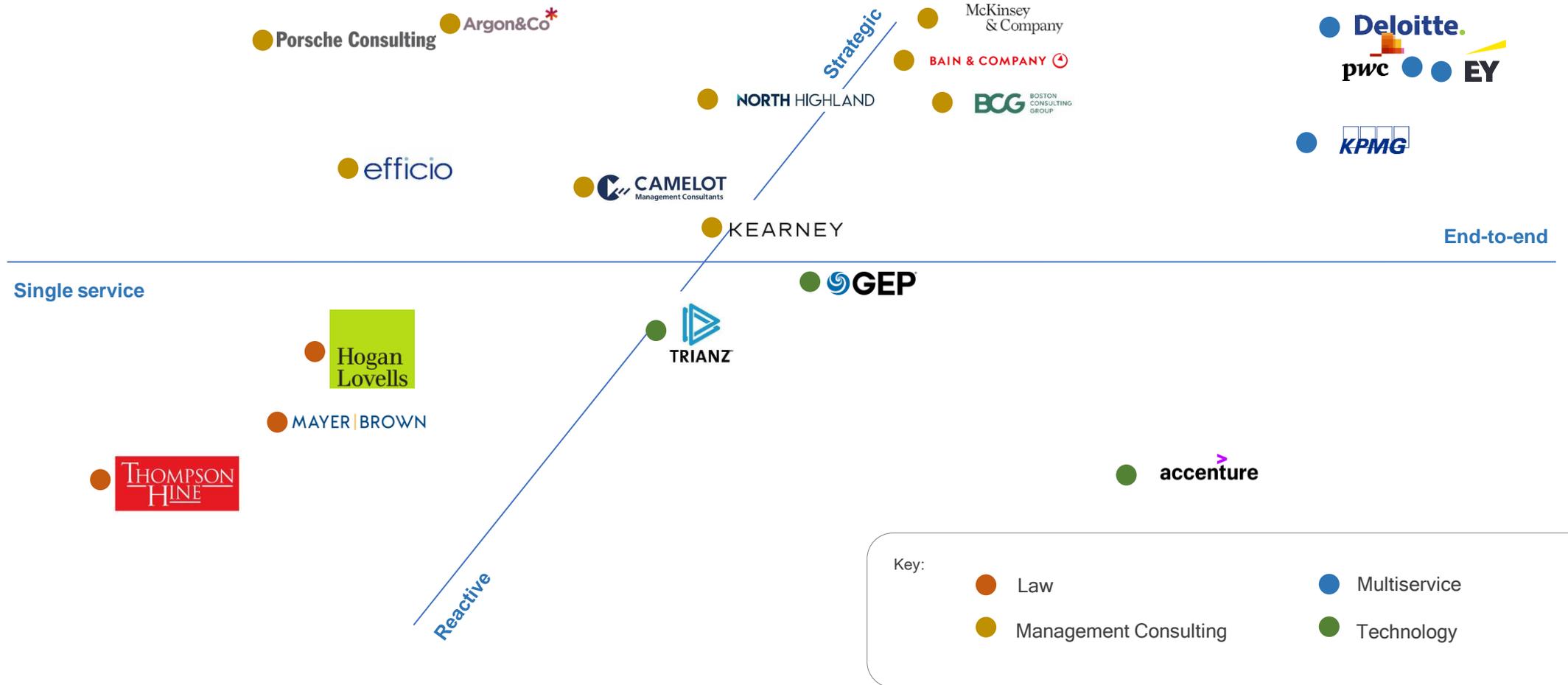


ALM INTELLIGENCE
MARKET LEADER

SUPPLY CHAIN **2021 - 2022**



Law firms simply operate in a very unique part of supply chain space, though that exclusive zone is shrinking through the encroachment of technology and the advent of non-practice of law legal services, while too many law firms cede conversations around risk, compliance and strategy to other segment providers



The legal segment role in the ecosystem

Supply chains are a growing area of business for law firms, but there are a few challenges. One is their limited number of touchpoints in client organizations as the hiring process is usually funneled exclusively through legal departments, though occasionally with input from risk, compliance, procurement or the CISO. Secondly, another challenge is the scope of engagement; lawyers have a guaranteed seat at the table in supply chain transformation projects but are typically only brought in to address a handful of technical issues: contract negotiation and management, negotiation support, compliance (e.g., reporting, legislation monitoring and anticipation, supply chain transparency, anti-corruption, trade sanctions, bans and embargoes, and ESG-related issues such as slavery act compliance), and tax. Market leaders are moving past the checklist mentality to help clients look beyond immediate compliance issues in supply chains (to help clients engage in better-informed horizon scanning) and onto challenges such as supply chain risk, reputation risk, third-party risk, and long-term supply chain (e.g., tax) strategy. Business continuity & disruption planning are a foot-in-the-door for providers to breach these topics. Some market leaders do this by simply putting their partners in front of clients as not just lawyers but topical business experts, while others are going a step further and hiring non-lawyers (e.g., technologists, engineers, finance experts) and folding them into an integrated quasi-consulting offering.

A further impediment for law firms is that their primary point of contact in client organizations, the in-house legal departments, are themselves struggling to break out of traditionally narrow, reactive roles in client organizations. COVID-19 has presented an opportunity for both in-house teams and external providers to change that role as in-house legal are being asked for input on a wider range of risk and compliance issues. Legal providers can help themselves by helping legal departments formalize a greater voice in risk, compliance and strategy in SCM.

Overall, the central thrust of services for supply chains is focused on technology: infrastructure and platforms, data (sourcing, management and analysis), internet of things (IoT), advanced technologies (e.g., RPA, AI), and cybersecurity. Market leaders in law are either developing these expertise in-house or are building alliance ecosystems with technology providers, while also targeting talent at all levels with the relevant skills. These capabilities are crucial for the legal world to get a seat at the table for client strategic discussions.

Characteristics:

- Market leaders are moving beyond contracts and negotiation support to address larger supply chain challenges for clients: business continuity, strategic risk, cybersecurity, ESG/CSR, third-party relationship management, logistics, IP, etc.
- Market leaders are also applying technology in their traditional domains (e.g., contract generation and management) to generate greater transparency, standardization and flexibility in supply chain relationships
- The more advanced market leaders are also aggressively developing their alliance ecosystems to extend their capabilities and expertise

Supply Chain Market Leaders Legal Providers

Hogan Lovells

Mayer Brown

Thompson Hine

Procurement Priorities

- Clients should take provider hiring decisions out of the hands of individual lawyers by creating a supplier relationship management (SRM) framework, with a list of law firms and ALSPs (tiered by matter area and topical complexity) which has a clear set of evaluation criteria for providers and is refreshed regularly
- This should also include a price negotiation playbook, including the most successful alternative fee arrangement strategies
- Clients should also develop the in-house capabilities for unbundling projects, separating out practice-of-law work from legal services for cost but potentially improved outcomes as well

* ALM Pacesetter; see profile in Pacesetter section



STRENGTHS

- Elements of supply chains (e.g., contracts, negotiations, etc.) are almost exclusively the domain of lawyers
- Economic nationalism and general political volatility have put regulatory risk in supply chains front and center for clients
- Similarly, demand-driven supply chains are heavily reliant on contracts - contract language, lifecycle management, disputes resolutions, etc.
- Market leaders have been developing tools and processes targeting supply chain needs (e.g., CMS, SRM)
- The nature of the demand-driven supply chain model puts the onus for risk squarely on in-house legal departments, with which legal providers have the strongest relationships

Internal Factors

WEAKNESSES

- While legal providers have strong relationships with in-house legal departments, their relationships beyond are weak and tenuous, and providers risk getting boxed into that exclusive domain in SCM
- Consulting and multiservice providers have been aggressively upskilling their employees in new, advanced technologies for years; legal providers need everyone, from equity partners down to paralegals, to be conversant in both technology and the business impact of their services in SCM
 - Most legal providers still approach SCM from a static, reactive perspective - contracts and negotiation support - ignoring the opportunities for deeper risk and strategic engagement

Legal providers have a critical role in helping structure and manage relationships in increasingly highly networked supply chains

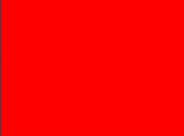
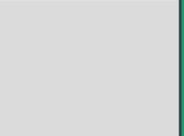
OPPORTUNITIES

- Contracts are central to SCM, and with the right ecosystem partners a legal provider could put together an offering that targets the technological, risk, human and strategic elements of contracts' role
- These contract offerings can also be a bridge for long-term, frequent engagement with clients, in part fulfilling the requirement of client-side SRM frameworks for frequent update meetings with providers
- Procurement departments in particular struggle with recognizing the non-financial benefits of modern SCM; legal providers can drive conversations on improved risk management, resiliency, collaboration, upskilling, innovation, and issues like CSR/ESG

THREATS

- Contracts are central to modern SCM but contract-related technology is a huge area of investment for ALSPs, as well as consulting and multiservice providers, including technical consulting providers like economic or valuation firms
- Similarly, disputes resolution (including arbitration support) is another area multiservice providers in particular (as well as restructuring-focused consulting providers) have been putting resources into and building expertise, especially for complex, cross-border disputes
- Technology firms are investing in automating as much of contracts (and contract negotiations and lifecycle management) as possible, minimizing the need for lawyers

External Factors

Hogan Lovells	Primary Practice/ Competency	Supply Chain Support						
<p>Hybrid Anglo-American law firm Hogan Lovells, headquartered in both London and Washington, DC, specializes in government regulation and policy, with other service areas of focus being Corporate & Finance; ESG (environmental, social, and governance); Hogan Lovells Solutions (cyber risk services, financial services regulatory consulting, managed legal services, strategic communications, transfer pricing); Intellectual Property, Media, and Technology; and Litigation, Arbitration, and Employment.</p> <p>Supply chain for Hogan Lovells is a competency, pulling together resources from across industry and litigation practice areas, with government policy and cross-border regulatory challenges a central theme. Supply chain is addressed for Hogan Lovells primarily as part of an event, in M&A or restructuring events. The firm provides law services around contracts and regulations, but also includes an offering called Corporate Responsibility and Supply Chain Security, which helps clients understand the full compliance-related, third-party risks in supply chain relationships.</p> <p>Where Hogan Lovells is unique in its approach to supply chains is that it takes clients beyond contracts and compliance and helps them put those into a broader supply chain and procurement risk, operational and strategic context. Its Supply Chain Toolkit helps clients understand the key risks and solutions between any two given parties in a supply chain, with the full contractual implications. Then the firm's Supply Chain Disruption Tool is an If-Then(-Else) conditional analysis tool that walks clients through potential supply chain disruption scenarios and helps them formulate informed strategies. Hogan Lovells' Commercial practice also offers its Complex Contracting Hub, which has five modules (supply chain, procurement, global expansion, outsourcing and joint ventures) and brings together the firm's expertise across its many practices and platforms to identify risk and pain points in contracts, for instance exploring in depth potential pitfalls in supply chain contracts, potential structures for procurement, or how to model third-party relationships. A built-in SAFE tool helps clients self-assess contracts and manage contract risks. The hub includes opportunities throughout to connect with the relevant Hogan Lovells' experts.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				
								

Impact Scale:

-  Very High
-  High
-  Moderate
-  Low
-  None

Supply Chain Service Focus

<input checked="" type="checkbox"/> Data, technology tools & solutions	<input type="checkbox"/> Accounting, auditing & risk assurance
<input type="checkbox"/> Consulting services	<input checked="" type="checkbox"/> Forensics & Disputes
<input checked="" type="checkbox"/> Function-focused advisory services	<input type="checkbox"/> Interim, managed & outsourcing services
<input checked="" type="checkbox"/> Legal services	<input type="checkbox"/> Technical
<input checked="" type="checkbox"/> Construction & Engineering	
<input checked="" type="checkbox"/> Consumer goods	
<input checked="" type="checkbox"/> Energy & Chemicals	
<input checked="" type="checkbox"/> Healthcare & Life sciences	
<input checked="" type="checkbox"/> Manufacturing	
<input checked="" type="checkbox"/> Retail	
<input checked="" type="checkbox"/> Other industry	

- Services offered
- Services not offered

SUPPLY CHAIN 2021 – 2022

Mayer Brown	Primary Practice/ Competency Supply Chain & Distribution				
<p>Chicago-based Mayer Brown is a full-service commercial law firm, though with particularly impactful practices in antitrust, capital markets, international trade, IP, litigation & dispute resolution, tax and technology transactions. Trade regulation is an important topical area of expertise for the firm, and the firm is organized around hubs in New York, London and Hong Kong - the world's leading trade centers.</p> <p>While Mayer Brown deals with supply chain issues across its industry practice areas, it confronts supply chain head-on, primarily through two basic lenses with services spanning contracts, compliance and disputes resolution. One lens is through industry cybersecurity, where the focus is on emerging risks. An important way Mayer Brown is different is that while most of its work in supply chain cybersecurity begins with an event, it focuses on both mitigating the immediate legal problem while also using legal tools to help clients address the broader business risks. One example is the firm helps clients draft agreements that help minimize the legal liability of fixing the technology problems inherent in networked ecosystems in supply chains. The firm also takes a broader, strategic business perspective in cybersecurity planning, for instance encouraging the participation of all key stakeholders in tabletop exercises beyond legal and technology - engineering, operations, procurement, safety functions. Mayer Brown also partners closely with other players (e.g., technology firms) on solutions. The other lens is through addressing rising ESG concerns in supply chains, with a particular focus on issues raised increasingly by border customs (e.g., human rights, slavery, forced labor, etc.), which challenge client supply strategies.</p> <p>In terms of BC/DR, Mayer Brown creates a plan with the client and tests that plan at various intervals to further refine. Finally, the firm has also developed in-house expertise around AI, technology platforms and other advanced technology to support technology vendor negotiations and advise on compliance issues from ESG to data privacy.</p>					
Pacesetter Criteria					Pacesetter Impact Score
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence	

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus

<input checked="" type="checkbox"/> Data, technology tools & solutions	<input type="checkbox"/> Accounting, auditing & risk assurance
<input type="checkbox"/> Consulting services	<input checked="" type="checkbox"/> Forensics & Disputes
<input checked="" type="checkbox"/> Function-focused advisory services	<input type="checkbox"/> Interim, managed & outsourcing services
<input checked="" type="checkbox"/> Legal services	<input type="checkbox"/> Technical
<input checked="" type="checkbox"/> Construction & Engineering	
<input checked="" type="checkbox"/> Consumer goods	
<input checked="" type="checkbox"/> Energy & Chemicals	
<input checked="" type="checkbox"/> Healthcare & Life sciences	
<input checked="" type="checkbox"/> Manufacturing	
<input checked="" type="checkbox"/> Retail	
<input checked="" type="checkbox"/> Other industry	

- Services offered
- Services not offered

Thompson Hine	Primary Practice/ Competency	Supply Chain Management
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Cleveland-based Thompson Hine serves clients nationally but still retains a strong Midwestern flavor. It is a full-service law firm spanning the full gambit of corporate legal needs (with a handful of topical specialized offerings, for instance around labor law and tax) and covers all the key industries. When law firms talk about innovation, they usually are referring to technology investments that target competition with legal services providers, but Thompson Hine seeks innovation in how it engages clients. Front and center is its SmartPaTHTM approach, which helps clients to utilize Thompson Hine services more efficiently through enhanced legal project management, value-based pricing, flexible staffing and process efficiency. Through these approaches, Thompson Hine attempts to create greater transparency and visibility into their management of matters, increasing budget, schedule and resource predictability while more closely managing client expectations. This approach is further supported by the firm’s LPO consulting subsidiary, Project Management Consultants (PMC), which also helps clients formulate a capital projects finance strategy. Finally, the firm has taken an active interest in innovation among its clients’ in-house legal departments and conducts annual surveys to gauge the level of innovation among general counsel offices.

While Thompson Hine covers most industries, it has a stronger weight in asset-intensive industries such as construction, energy and transportation, which contributes greatly to the firm’s expertise in supply chain challenges. Thompson Hine’s approach to supply chain is not reactive or defensive, but rather seeks to help clients build flexibility into their supply chains, encouraging expansion and growth, transparency and accountability, and innovation in network relationships. The goal is ultimately to position client supply chains for growth and competitive advantage, understanding that its services must support client business (rather than just legal) needs. The spearpoint of the firm’s services are in drafting and reviewing contracts and dispute resolution, but it also advises on compliance, IP protection, logistics, warehousing and transportation management arrangements, network qualification standards, product standards, import-export controls, regulator and government interaction, and also covers competition law, business litigation, risk management, restructuring, transactions & securities law, tax and trade law. Thompson Hine has a particular focus on anticipating disruptions to supply chains caused by compliance issues, with a special focus on the impact of COVID-19.

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				
●	●	●	●	●				●

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

The consulting segment role in the ecosystem

Management consulting firms have tended to approach the supply chain from a few traditional lines of business, aside from some boutiques. One was from the perspective of procurement, where the focus was driving down costs and covering high turnover rates through automation. Another focused on either turnaround & restructuring or M&A, where the need to integrate or separate (i.e., restructure) new organizations also required rebuilding supply chains. The third business line focused on digitalization, as providers increasingly realized any meaningful change in supply chain management sorely required digitally enabled organizations. Most of these providers have been moving towards a value chain model, recognizing that supply chain management needed to move from the highly siloed decision points scattered throughout organizations to a single strategy managed as a continuum from raw material provider to the product in the customer's hands. Before March 2020 many of these providers still began their conversations with clients in the context of an event - a financial crisis, an M&A deal, an earthquake in Japan - but the solutions increasingly crystalized around some variation of demand-driven supply chains. The global-level trade disruption caused by COVID-19 has made supply chains the top priority for clients, meaning it is rivalled only by restructuring and M&A as a contributor to provider revenues in 2021. The fact that political and economic volatility has raised supply chains to a board-level concern favors those management consultants who have had long board relationships.

To almost the same extent as multiservice and technology providers, management consulting providers lead in supply chains with technology, though usually with more targeted tools rather than overarching, end-to-end platforms. An important difference between management consulting providers and multiservice and technology providers is that consulting providers seek to fix a problem through a single, sharp transformation whereas the other two segments include long-term engagement with clients (managed services and outsourcing or shared data/platforms) as part of their solutions. At best, some consulting providers offer short-term interim services.

That said, multiservice providers have recognized the limitations of technology in solving supply chain problems and compete head-on with consulting providers in the change management and human relationship dimensions of supply chains - areas in which most are investing heavily. This includes ESG-related due diligence offerings addressing stakeholder concerns about third-party liabilities in supply chains.

Characteristics:

- Management consulting providers tend to fall into either strategic or restructuring approaches, with the former emphasizing the value chain model and the latter internal (client organization) connectivity and alignment, though digitalization is a key part of the solution for both
- In the midst of the COVID-19 crisis, board-level involvement in supply chain solutions has led to a flight to quality with clients choosing consulting providers with greater brand and reputation recognition, though it remains to be seen which solutions will have the longest term impact

Supply Chain Market Leaders Consulting Providers

Argon & Co.	Kearney
Bain & Company	McKinsey & Company
Boston Consulting Group	North Highland
CAMELOT Management Consultants*	Porsche Consulting
Efficio	

Procurement Priorities

- With the rapid growth in services in consulting providers in recent years, it is key procurement departments create supplier panels and actively maintained provider lists, updated through periodic contact with providers and external research
- The emphasis on technology in supply chain solutions leads to unusual matchups on RFPs, requiring greater scrutiny from clients about technology capabilities in supply chain engagements
- Clients need to understand how providers define and measure success

* ALM Pacesetter; see profile in Pacesetter section



STRENGTHS

- As part of their legacy restructuring and/or M&A practices, these providers have been building supply chain services for years
- Many of the key themes in current supply chain solutions - digital enablement, data-informed decision making, risk, greater transparency, agile processes, resiliency, customer experience (UX), the employee experience (EX) and upskilling to better match humans and machines, CSR/ESG- are all important themes in consulting providers' overall offerings in recent years
- Change management in particular is a big area of development
- Management consulting providers themselves have been on similar journeys, developing interconnected value chain ecosystems of their own

Internal Factors

WEAKNESSES

- With supply chain solutions in 2021 broadly hitting on the same themes, it is difficult for consulting providers (outside of the context of restructuring or M&A) to differentiate themselves
- Some client C-suites, burned by over-promised and under-delivered cost reduction projects in supply chains in the years leading up to 2020, are skeptical of management consulting claims
- Some providers' own offerings are heavily siloed and fragmented, targeting specific supply chain areas or functions (e.g., procurement) and require a more integrated service approach
 - Though this may be a sign of 2021's talent markets, there were client complaints of high turnover in providers, posing challenges with team composition and service continuity

Supply chains have been on management consulting providers' radar for decades, and they have developed highly tuned solutions well suited for the challenges posed by the COVID-19 economy

OPPORTUNITIES

- Many providers already recognize the importance of putting together a CSR/ESG offering that spans client organization and activities, but there is need for a unified strategy approach (rather than the current piecemeal approach) to CSR/ESG addressing supply chain strategy implications, among others
- The overwhelming service focus in supply chains in 2021 is built around technology (digitalization/platformization, data, connectivity, transparency, flexibility), but the next steps will likely focus on the human component in supply chains: trust in relationships, building the most effective human-machine hybrid models, and upskilling workforces, which are areas management consulting providers can dominate

THREATS

- Multiservice providers bring together a wider array of end-to-end services in supply chain, stretching from technology and consulting to tax, legal, finance and outsourcing services, which management consulting providers can only compete with through strategic alliances with targeted providers
- More so than most others, supply chain is a topical area requiring global, cross-border capabilities, but even some of the larger, global consulting providers have difficulty matching the reach of the largest multiservice providers
- Similarly, technology providers' prefabricated solutions and managed services/BPO offerings compete on price, scale

External Factors

Argon & Co	Primary Practice/ Competency		Supply Chain Planning				
<p>Argon & Co is the product of the 2018 merger between operations consulting firms Crimson & Co in the UK and Argon Consulting in France, though the fully integrated firm only rebranded late in 2020. With offices spanning the US, France, UK, Australia, India, New Zealand, Singapore and the UAE, Argon & Co is focused on operational performance improvement through transformation. Services span operations strategy, sustainable operations, new product development, procurement, supply chain planning, manufacturing, logistics, channels to market, maintenance and after sales, transformation management, digital and IT, finance, SG&A, and HR. Argon also helps clients find opportunities for shared services. In early 2021, Argon acquired Dutch supply chain and operations consulting firm R&G Global Consultants.</p> <p>Argon has separate services targeting supply chains and procurement. The firm puts supply chain planning in the context of the Sales & Operations Planning (S&OP) process, alongside production and distribution, viewing the three as part of a single continuum. Services span supply chain models, forecasting and demand management, production planning, materials and planning, and distribution planning.</p> <p>On the procurement side, Argon focuses on transforming procurement to not just to cut costs but enhance margins, manage risk and develop an agile approach to both sourcing and supplier relationships. The emphasis is on the strategic plan, sourcing strategy, more closely integrating the procurement organization into the rest of the organization, supplier category management and the full supplier relationship collaboration cycle.</p>							
Pacesetter Criteria					Pacesetter Impact Score		
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence			

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

Bain & Company	Primary Practice/ Competency	Operations						
<p>Bain & Company’s approach to supply chain is firmly rooted in operations strategy and is focused on helping clients reinvent their supply chains as a competitive advantage. This is reflected in Bain having moved its supply chain offering from a performance improvement footing a few years back into its Operations practice, which also houses Bain’s services in M&A and manufacturing services. In fact, a sizable portion of Bain’s work in supply chain is embedded in M&A deals, along with digital transformation. Bain’s traditional strength among private equity clients informs its approach to supply chain, though the firm serves strategic clients as well.</p> <p>Bain takes the opportunity of restructuring upheaval (e.g., in M&A events) in clients to help redesign them to support growth strategy goals more closely and proactively - rather than growth being constrained by calcified, traditional supply chain practices and relationships. Using its Buy Better + Spend Better® methodology (meaning more strategic, agile and benchmarked data-informed sourcing and better balanced cost and risk management), Bain seeks to help clients accelerate revenue growth, improve customer satisfaction, unlock savings and cash flow, and improve both risk management and reliability. Bain’s mantra is simplification and modularization, reducing complexity in client products and delivery. The key supply chain strategy services are network optimization & manufacturing footprint, reverse logistics, supply chain diagnostic, supply chain fulfillment, supply chain reinvention, integrated business planning, digital supply chain, supply chain acceleration, supply chain resiliency and supply chain sustainability. Advanced analytics and technology are integral to Bain’s supply chain offering, and the firm brings several in-house proprietary tools to bear in supply chain: EdgeSM (a diagnostic tool, with supply chain and inventory versions), and Spend Cube (a financial analysis tool for supply chains). The firm also partners with external analytical tools and manages three centers of excellence around supply chain, procurement and benchmarking.</p> <p>Bain has a separate but integrated procurement offering focused on helping clients ascend the maturity curve and build more dynamic, enabling procurement organizations. This requires working closely to both overcome traditional management views of procurement and its role as well as procurement departments themselves. These services focus on operational efficiency, improving internal collaboration, cost savings (across OpEx, apEx and NWC) as well as developing a sustainable strategy for the non-financial puzzle pieces: improved risk management and long-term resiliency, talent strategy and upskilling, driving innovation, and incorporating a strategy for stakeholder priorities such as ESG. As with all its transformation offerings, Bain’s approach is to find efficiency savings early that “fund” further efficiencies later.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus



Services offered
 Services not offered

Boston Consulting Group	Primary Practice/ Competency Operations				
<p>Boston-based strategy and operations consulting firm Boston Consulting Group (BCG) is heavily focused on business strategy and transformation, weaving in industry expertise and digital transformation. A central drive for BCG is helping clients focus on long term, sustainable performance optimization, building on in-house digital tools and capabilities to both measure performance and determine the correct levers to pull to improve performance over the long term, particularly in the current politically and economically volatile times. BCG is fairly unique in leveraging its own in-house tools, physical showcase factories and capability building centers as well as its engineering and implementation teams. BCG has balanced its core organizational and operations focus with a strong customer-facing element (customer experience and the customer journey, sales & marketing, pricing) that injects the voice of the customer in BCG’s offering.</p>					
<p>BCG addresses supply chains in its Operations practice, which covers Supply Chain Management, Procurement, Manufacturing, Service Operations, Large Capital Project management, Change Management, and End-to-End Operational Excellence. Digital is central to BCG’s approach to supply chain & procurement, helping reduce costs, segment suppliers, inform negotiating positions, as well as create greater transparency, end-to-end visibility and resiliency in supply chains. This digital focus on supply chains begins with BCG’s Supply Chain Operations Diagnostic and Performance Benchmarking maturity assessment (across cost and performance benchmarking baselines), and then spans Strategy and Organization, Advanced Network Optimization, Bionic Supply Chain, End-to-End Supply Chain Optimization and Planning, Logistics, Risk management and Resilience, Sustainability, Transformation and Enablement. The firm also promotes capability development through its Supply Chain Academy, as well its Innovation Center for Operations (ICOs) network of model factories (globally), which includes BCG’s iLAB, where clients can experiment with digital tools for supply chains. On the procurement side, BCG has a two-pronged approach with one helping clients transcend traditional category management by building efficient operating models empowered by digital analytics and smart tools to develop more differentiated, purpose-fit relationships with suppliers. The other focuses on fostering cross-functional collaboration in procurement, which includes building the right agile team strategy for procurement. BCG has also built the AI Negotiation Coach tool which provides negotiation support for procurement professionals. Other digital tools manage supply chain risks, assess carbon footprints, or establish spend-cubes. In 2016 BCG further strengthened its Supply Chain and Procurement offering through its acquisition of European based procurement and supply chain consulting boutique INVERTO, which operates under its own brand. BCG has also recently entered into a global partnership with Miebach supply chain consulting.</p>					
Pacesetter Criteria					Pacesetter Impact Score
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence	
					

Impact Scale:

-  Very High
-  High
-  Moderate
-  Low
-  None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

-  Services offered
-  Services not offered

Efficio	Primary Practice/ Competency		Boutique					
<p>London-based Efficio is a consulting boutique focused on procurement and the CPO function. Efficio takes a more tactical approach to procurement, helping (primarily private equity) clients better manage cost, performance and risk. However, Efficio does this by focusing on the entire end-to-end procurement process, taking an enterprise-wide approach across operations, technology, value chain relationships and, perhaps uniquely, talent. The firm also offers short-term interim managed services through its Resource Augmentation offering for client events such as M&A, transformation projects, etc.</p> <p>Services fall into three basic categories: cost management, risk, and operations transformation (and a side practice focused on procurement in M&A). A key goal is for Efficio to help clients build long-term resiliency into their procurement functions by creating a universal procurement strategy throughout the client organization, adopt a category management and strategic sourcing approaches, and develop both the requisite talent and technology structures to support these goals. Efficio recognizes the talent challenge in procurement and has developed a genuine change management offering that includes working to get external stakeholder buy-in and developing a recruiting and retention strategy with a strong emphasis on upskilling and continuous skill development, in part through the Efficio Academy. These efforts in technology and talent are supported by Efficio’s strategic sourcing platform, eFlow, which utilizes internal client and external industry data to benchmark performance, manage supplier relationships and provide Efficio expertise as well as serving as an upskilling tool. The ultimate goal is to both help clients build the internal capabilities they need for an efficient and integrated procurement practice and empower them to continue to assess performance and develop further.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				

Impact Scale:
 ● Very High
 ● High
 ● Moderate
 ● Low
 ○ None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

Services offered
 Services not offered

SUPPLY CHAIN 2021 – 2022

Kearney	Primary Practice/ Competency					Procurement			
<p>Chicago-based Kearney - rebranded from its historical A.T. Kearney last year - is one of the grand-daddies of the strategy consulting world, with its roots stretching back nearly a century. Kearney was one of the earliest management consulting firms to provide some level of implementation support for their project recommendations. Kearney offers a solid core of traditional consulting services focused on leadership development, operations and performance, product design and distribution, M&A, and overall strategy and transformation. Like most consulting firms, Kearney has been baking data analytics capabilities into its offering, bolstered by the acquisition of data analytics and digital transformation firm Cervello in 2019.</p> <p>Alongside its product development practice, Kearney has a strong, legacy procurement practice that has been a backbone of the firm's approach to strategy transformation for years. Kearney believes the procurement function has been mired too long in reactive, cost savings mode when it should not only support growth strategy but be a value creation center itself. The firm's focus on client procurement functions falls into four basic areas: assessment (involving multiple proprietary methodologies and tools such as its Assessment of Excellence in Procurement [AEP] tool, or its Return on Supply Management Assets [ROSMASM] performance check), its category management strategy approach called category excellence, its supplier relationship management (SRM) collaborative strategy (supported by its Purchasing Chessboard game, which helps clients navigate shifting supplier power dynamics), and team excellence (which looks both to build the optimal balance between technology and humans and boost human capital skill development). For instance, the firm has developed a bespoke benchmarking tool that helps clients ensure diversity among suppliers. Also, Kearney has developed its Listen (to unit needs, stakeholders, culture), Shape (putting together a plan for vision, metrics and team), and Deliver (execute, communicate, adapt) framework. Kearney's approach to these areas is underscored by technology: ensuring procurement uses the most effective technology it needs along with detailed benchmarks to monitor and manage performance. The firm conducts a series of benchmarking surveys in supply chains to continuously help identify shifting best practices for clients in their industries. Indeed, Kearney's entire procurement offering has come to be grounded intensely in data.</p>									
Pacesetter Criteria					Pacesetter Impact Score				
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence					
									

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

McKinsey & Company | **Primary Practice/Competency** | **Product Development & Procurement**

Historically one of the Big Three strategy & operations consulting firms, in truth McKinsey has long since shifted its focus to digital and business model transformation. Less than half the firm’s revenues derive from traditional strategy and operations consulting. Still, while more involved with the operational, technology and human capital elements of transformation, McKinsey continues to take the big picture view of business model transformation, as best defined by its “Change that matters” approach, which seeks to drive sustainable transformation enabled by technology and supported by in-house capabilities. The firm has invested heavily in its technology, especially digital, capabilities in recent years, to the extent that McKinsey has become a formidable and often underrated support partner for the implementation side of projects.

As part of that transformation, McKinsey realized a few years ago that procurement, supply chains and the customer experience were all part of a single continuum. It combined its sourcing and procurement with its product development operations practices to form the current Product Development & Procurement service group, which is housed in its Operations practice. The end result is a service offering that combines product life cycle, strategic sourcing and an agile digital operating model. In support of this approach, McKinsey acquired German spend-analytics technology and digital procurement firm Orpheus in early 2020, and jointly launched “Spend Intelligence by McKinsey.” While McKinsey relies heavily on the digital component in its approach to supply chains, it recognizes the cultural and human dimension to digital strategies, and to that point places a strong emphasis on skill development and filling capability gaps. McKinsey supports its offering through numerous capability enhancers such as its Centers of Competence, DTV (design-to-value) Labs, Global Sourcing Centers network, long-term performance partnership McKinsey Implementation, the Product Development & Procurement (PDP) Academy, its strategic sourcing tool Source2Pay (S2P), its Digital Sourcing Centers and its supply chain workflow process series of tools Always On.

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				
●	●	●	●	●				●

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

North Highland		Primary Practice/ Competency			Operational Transformation			
<p>Atlanta-based, transformation-focused consulting firm North Highland has itself undergone a transformation in recent years, moving from a traditional strategy & operations consulting model (underpinned with advanced analytics, process and business analysis and human capital consulting capabilities) to its current transformation journey model. North Highland serves a wide array of clients from local, regional middle-tier clients up to Fortune 500 companies.</p> <p>In terms of supply chain, its focus is on the back end of the supply chain in distribution & fulfillment, focusing on driving operational efficiencies. Digital has played an increasingly outsized role in how North Highland approaches supply chains, and in fact the firm has developed a strong emphasis on benchmarking results in engagements, utilizing data to measure and achieve client ROI. Its supply chain practice is housed within the Operational Transformation group. Though the firm covers several industries, most of its work in supply chain happens in the consumer goods and retail industries. The firm brings together three key elements in its approach: the customer, the operational, and the workforce. The bulk of its punch hits in the operational category, across three key areas: distribution strategy (improving service times by strategically expanding e-commerce fulfillment capabilities in new and existing facilities, positioning inventory within a multi-tier supply chain to optimize delivery speed to urban and rural customer locations, creating product-line specific inventory availability and replenishment strategies based on product attributes and customer demand patterns), distribution facility design and start-up (identifying macro-level distribution cost takeout opportunities via regular network optimization analysis and multi-faceted performance benchmarking, driving warehouse/DC operational standardization and launching continuous improvement programs, assessing the role of automation and new technologies within direct and fixed supply chain activities), and distribution operations performance improvement (operating multi-tiered inventory strategies to avoid stock-outs of key items while minimizing working capital, balancing the insourcing and outsourcing of distribution activities and transportation services, enabling distributed order management capabilities, cross-channel inventory management and seamless reverse logistics processes). North Highland has built an ecosystem of partnerships to extend its technology capabilities and acquired retail supply chain and distribution consulting firm LogistiPoint Consulting in mid-2020.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence	■	■	■	
●	●	●	●	●				

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus



- Services offered
- Services not offered

Porsche Consulting		Primary Practice/ Competency			Boutique			
<p>Born of a crisis in the 1990s that sparked a serious restructuring at car manufacturing parent Porsche, Porsche Consulting is the product of lessons learned. Suitably, Porsche’s service focus is on process-intensive manufacturing industries, first and foremost auto manufacturing. Services span corporate development, digitalization & innovation, procurement & quality, people & culture, research & development, production & logistics, and sales, marketing & service. The firm’s technology capabilities are bolstered through collaboration with its technology and operations consulting sibling company in the Porsche family of companies, MHP. In 2020 it also opened an innovation lab in Berlin to help clients formulate new ideas across business models, products and service delivery. This innovation center reflects Porsche’s collaboration philosophy that innovation cannot be imposed from the outside but must be both conceived and the requisite capabilities ultimately developed in-house.</p> <p>Porsche seeks to elevate the procurement process to a strategic level, focusing on four key topics: quality, transparency, strategic orientation and supplier relationship management. Reducing costs is a central theme and is achieved not by squeezing suppliers but through internally collaborative, more agile supplier management. Quality is a key procurement trait according to Porsche and on top of an offering centered on operational quality management, the firm works to help clients build what it calls a culture of quality that moves beyond mere metric-driven checks in procurement. On the purchasing side Porsche utilizes lean purchasing methods to help clients with developing strategy, process, risk management and supporting organizational structures. An important element of Porsche’s consulting approach to supply chains and procurement is that its methodologies and tools are road tested in its parent.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence	Red	Yellow	Grey	Green with black circle
●	●	●	●	●				

Impact Scale:
 ● Very High
 ● High
 ● Moderate
 ● Low
 ○ None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

■ Services offered
 □ Services not offered

The multiservice segment role in the ecosystem

Multiservice providers approach supply chains as opportunities for business model transformation, as the thread that connects pretty much everything in client organizations. Projects in 2021 are prompted by the obstacles presented by the COVID-19 economy, but multiservice providers recognize that COVID-19 has only highlighted and accelerated problems that were festering in supply chain management and relationships years before 2020. Multiservice providers lead with technology in supply chains, usually a suite of technology tools linked together by a project management or workflow platform. In many respects, the Big Four firms in particular have come to closely resemble technology providers. They then combine these capabilities with two key elements, the first being a highly integrated offering bringing together consulting, assurance, tax, legal, financial and industry expertise followed with managed services and outsourcing offerings, which are often on a scale competitive with the big technology providers. The spearpoint for multiservice providers is their global, cross-border capabilities which put them at the heart of supply chain challenges across geography, market fluctuations and increasingly erratic government interventions in markets. While the main thrust of their offering is overwhelmingly grounded in technology, most are investing in change management and human capital consulting to varying degrees. Another key, though underappreciated, part of their offering is the huge breadth of their relationships and both market and client institutional knowledge gathered through all the tentacled touchpoints they maintain through their auditing, consulting and tax practice areas, positioning them well to help clients with supply chain relationship challenges.

As the end-to-end transformation organizations multiservice providers have become, their go-to-market strategy almost perfectly aligns with their prescriptions for supply chain ills in 2021. In fact, one wonders if they are too perfectly aligned. Their approach to M&A, business transformation and supply chains is astonishingly similar: digitalization, cost reduction and improved cash flow management, enhanced risk management, greater transparency and predictability in processes, internal alignment to organization strategy, data and cyber security, improved collaboration, resiliency, upskilling, innovation, and ultimately turning everything into a competitive advantage. All of this is supported by massive provider technology capabilities underscored by robust managed services and outsourcing offerings. To be fair, multiservice providers approach M&A, business transformation and supply chains as facets of a single strategic continuum whose challenges are widely acknowledged. Both multiservice and consulting providers have been converging in their solution approaches for years, with consensus interrupted only by points of emphasis. While their track record is short, these solutions seem to be having an impact. Still, aside from making differentiation even more difficult, it raises the question of the degree to which their digital-led “combined arms” services approach reflects multiservice providers’ own service development journeys, rather than client need - the “if all you have is a hammer, everything looks like a nail” mentality. Time will tell.

Characteristics:

- Market leaders are focused on the value chain model, recognizing that a supply chain is an organization’s “guts,” their raison d’être
- The primary service approach begins with technology, but many client conversations begin through operations or tax strategy

Supply Chain Market Leaders Multiservice Providers

Deloitte	KPMG
EY	PwC

Procurement Priorities

- Multiservice providers, and not just the Big Four firms, are built for complex, global problems and are excellent partners for complicated supply chains problems but may be overkill for less complex challenges
- A key service trait of multiservice providers is their integrated offerings, but clients still need to dig into the details, for example, many are building out their legal capabilities, but precisely what services they include and in what jurisdictions needs to be clarified
- As alliance ecosystems are also a key ingredient in multiservice providers’ offerings, it is worth exploring in detail who those third-party providers are and how their offerings mesh with a client’s supply chain solution needs

* ALM Pacesetter; see profile in Pacesetter section



STRENGTHS

WEAKNESSES

Internal Factors

- Multiservice providers are by their nature global, networked organizations used to struggling with service standardization and continuity on a global scale, and are experts in cross-border challenges and sourcing, developing strategies across all the facets of an organization for optimized performance and results
- Multiservice providers, to varying degrees, offer integrated services spanning auditing/accounting (including forensic investigations), assurance (GRC), consulting, tax, legal, finance, cybersecurity and technology, making them potent partners in supply chain transformation
- Most are also investing heavily in managed services and BPO

- Some (not all) multiservice providers reacted to the initial challenge of COVID-19 with extensive staff cuts, damaging their brands in their key service areas in talent markets
- Supply chain challenges in particular speak to the strengths of multiservice providers but also require massive investments in technology assets and other capabilities that drive cost of for providers, prompting them to seek long-term engagements with clients to achieve profitability
 - As multiservice providers lead the way on non-cost related solutions in supply chain like CSR/ESG, some are struggling with these issues themselves, often in very public ways

Multiservice providers bring together end-to-end solutions that recognize the importance of optimizing and connecting every node in a supply chain with powerful supporting tools and capabilities

OPPORTUNITIES

THREATS

- Many are already moving towards a service model that sees business transformation, M&A and supply chains as mere facets of the same basic business model challenge and are calibrating their offerings to reflect this interconnectivity
- Supply chain in particular provides the opportunity for multiservice providers to craft the post-COVID-19 hybrid model for human versus digital labor
- Some are already investing in predictive analytics and AI-based scenario planning and “war gaming” tools (e.g., around shifting regulations, interest rates) to help clients continuously refresh their supplier and supply chain strategies in a volatile world

- Though their offerings tend to be more targeted, management consultant providers offer an often cheaper alternative and, with the right ecosystem partners, can match multiservice capabilities
- For conversations that begin with the client board or C-suite, the weight of some management consulting providers’ brands and reputations in restructuring or strategy can prove decisive in RFPs
- Technology providers offer often less complicated but very affordable Procurement-in-a-Box and similar standardized supply chain solutions that can be very affordable for clients, especially when supported by managed services offerings

External Factors

Deloitte		Primary Practice/ Competency			Operations			
<p>London-based Deloitte has traditionally approached supply chain challenges with a technology lens, but Deloitte’s immediate peers have trodden a similar path, so that Deloitte’s offering is unique primarily in its breadth. Deloitte’s approach to supply chain, therefore, has a backbone of proprietary in-house technology tools (including more recent investments in IoT and blockchain for CMS), like its SupplyPRISM™ platform, which combine analytics and advanced technologies with managed services and supporting strategy and industry vertical consulting to provide a comprehensive, end-to-end host of solutions spanning product development to distribution, and beyond. These solutions are also in effect digital transformation events, so that Deloitte’s solutions are designed to facilitate scaled, flexible digital supply network (DSN) ecosystems. Deloitte approaches supply chain with a fully integrated offering across its Tax, Consulting, Audit & Assurance, Mergers & Acquisitions and Risk & Financial Advisory practice areas.</p> <p>The focus for Deloitte in supply chain is on cost and risk management, standardization, digitalization, and optimizing the supply network. On the procurement side, Deloitte houses its Sourcing and Procurement Strategy services in its Operations practice area, with services spanning six basic solution areas: direct and indirect materials sourcing, tech-enabled transformation, M&A support, extended business relationship management, managed services, and talent development. On the Supply Chain & Network Operations side, Deloitte covers DSN strategy, insights and advanced solutions, integrated business strategies and supply planning solutions, logistics and distribution, supply management & digital procurement, manufacturing strategy & smart operations, product strategy & lifecycle management, and supply chain transformation. In recent years Deloitte has been building out its talent capabilities in supply chain, focused on talent strategy and training for procurement.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence	■	■	■	●
●	●	◐	◑	◑				

Impact Scale:

- Very High
- High
- ◐ Moderate
- ◑ Low
- None

Supply Chain Service Focus

■ Data, technology tools & solutions	■ Accounting, auditing & risk assurance
■ Consulting services	■ Forensics & Disputes
■ Function-focused advisory services	■ Interim, managed & outsourcing services
■ Legal services	■ Technical
■ Construction & Engineering	
■ Consumer goods	
■ Energy & Chemicals	
■ Healthcare & Life sciences	
■ Manufacturing	
■ Retail	
■ Other industry	

- Services offered
- Services not offered

EY	Primary Practice/ Competency		Global Procurement Solutions				
<p>London-based EY has seen demand for supply chain services grow in prominence in recent years and has naturally been investing aggressively in those capabilities. Over the past couple years EY, acknowledging where its strengths lay, reorganized itself to deliver end-to-end transformations - strategy and business model, operational, risk and assurance, financial, tax, human capital, distribution, technology - with digital transformation an important common thread running throughout. As part of this reorientation, EY has also been doubling down in recent years to deeply integrate its service approach in a handful of critical service areas, driving greater cohesiveness in its service delivery, and supply chain is one of those areas. EY sees supply chain as a single continuum, from procurement, sourcing and payments through supplier relationships and ultimately to the user/customer experience, with the emphasis on digital ecosystems “and market networks that enable hybrid forms of cooperation and competition.” More so than in most other practice areas, EY’s approach to supply chain is asset-intensive using data analytics, cloud, machine learning, automation and blockchain, with more than thirty in-house proprietary tools. EY has also developed a large ecosystem of alliance partners with which it extends its own technical capabilities, including an innovation hub with Nottingham Spirk for product reengineering. Managed services and outsourcing have also become prominent in EY’s offering. EY also collaborates with Procter & Gamble to help foster digital innovation and supply chain excellence for clients.</p> <p>EY relies on a solution-oriented model that seeks to collaboratively develop a solution with clients focusing on the key elements of a strategic & flexible operating model, supply continuity, surge sourcing support, multi-tier supplier risk mitigation, and rapid cost reduction. COVID-19 has sparked particular interest in long-term supply continuity risk as clients navigate both potential supply disruptions and a more politicized trade environment. Clients have also been seeking “Controls 2.0” in their supply chains, being able to manage risk in real time, in process. ESG has also become an important driver in projects. On the procurement side in its Global Procurement Solutions practice, EY covers five basic elements: Procurement Strategy & Operating Model, Category Management & Sourcing Services, Contract & Supplier Management Services, Purchasing & Payment Services, and Procurement IT, Automation & Analytics. For these services EY utilizes capabilities from across its practice areas for fully integrated solutions. EY ultimately sees itself as helping shepherd clients towards the supply chain model of the future which is autonomous (leveraging automation and machine learning), transparent and touchless.</p>							
Pacesetter Criteria					Pacesetter Impact Score		
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence			
●	●	◐	◐	◐	●		

Impact Scale:

- Very High
- ◐ High
- ◑ Moderate
- ◒ Low
- None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

KPMG	Primary Practice/ Competency					Operations			
<p>Amstelveen, Netherlands-based KPMG sees supply chains as a component of a larger value chain system of relationships from suppliers to customers. This means there is a strong customer experience component. Supply chains for KPMG are important, but in the same way a fuel injector is important for a car - as a key part, but not the only part. In that sense, KPMG’s approach to supply chain is about connectivity: digitalizing and connecting the key players and information touch points to create a universally transparent flow of information that allows for a continuous reassessment of needs and options throughout the chain. Procurement and supply chain services are firmly embedded in KPMG’s operations group, specifically its Global Operations Center of Excellence, and to a degree possibly superseded by only Deloitte, KPMG sees the solution for supply chain reimagining and redesign fundamentally as a technology one. Managed services and Supply Chain as a Service (SCaaS) are growing parts of the KPMG offering. KPMG’s approach does not diminish the importance of supply chain for clients; quite the opposite: KPMG’s offering seeks to transform supply chain from a passive cost reduction governor to a differentiating part of the customer experience.</p> <p>For KPMG, supply chain transformation is indeed also a digital transformation exercise, but the key is utilizing the right platforms and data, in the most effective way. The goal is a flexible, agile supply chain network that provides transparency while creating a decentralized operations approach it calls micro supply chains - specific customer segment-focused operations able to deliver customized experiences for the most profitable customers. KPMG partners with more than 25 technology providers for supply chain services.</p> <p>Technology is the backbone of KPMG’s approach to supply chain but being the Big Four provider KPMG is and having its legacy strong operational capabilities, KPMG ties in the human element through a hybrid human-digital workflow design, accompanied by a culture reorientation towards a digitally enabled culture that views supply chains as a network of business partners, both within and outside the client organization. KPMG also recognizes the need for clients to redesign their human capital strategy for shifting supply chain roles, emphasizing the nexus of operations and logistics capabilities with those of data and technology. Ultimately, KPMG recognizes that the complexity of all the technology and multi-layered approach to supply chains also requires a new approach to management, one that encourages upskilling but also fosters a collaborative, cross-functional decision-making model.</p>									
Pacesetter Criteria					Pacesetter Impact Score				
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence					
									

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

PwC	Primary Practice/ Competency				Operations			
<p>Supply chain for London-headquartered PwC is a digitally-enabled operations transformation event, tying together supplier, procurement and the end-customer's experience. Seated in its Operations practice, PwC sees the route to effective supply chains through new business models, new customer channels with higher customer centricity, and faster delivery capabilities, achieved through an integrated end-to-end ecosystem. Naturally for PwC, the principal supply chain-focused investments are in technology, and PwC has developed a suite of platforms and tools targeting procurement, supply chain, manufacturing, digital networks, industries, and functional elements (e.g., digital planning and workforce upskilling tool PwC ProEdge). As well, PwC has built a strong ecosystem of alliances (e.g., with Azure) to support its supply chain offering, and has also been integrating managed services into its offering.</p> <p>The attributes PwC sees as crucial for the success of supply chains are resilience, agility, operational efficiency -- and uniquely, quality and trust. The trust is not abstract, but based on using digital technology to provide visibility and transparency throughout the network while helping ensure network stakeholders realize value. This notion of digitally-enabled trust is an important facet, as demand-driven supply chains are fairly new and face many legal and operational hurdles -- but first and foremost, the issue of trust. Connecting network partners in a way that both enables them to achieve value as well as know they can rely on the network is crucial and an under-appreciated piece to the supply chain puzzle. Technology alone cannot provide trust, but it can be used to create the visibility and reliability that will encourage trust in networks.</p> <p>From a service standpoint, PwC approaches supply chain by combining its supply chain and industry sector expertise, its performance optimization capabilities around both cost reduction and process improvement, and its tax group to optimize total cost (e.g., its Tariff Impact Assessment tool), its end-to-end organizational and product management capabilities (including its Fit For Growth capability-driven strategy methodology, human-centric design approach, PwC Agile & BXT -- business-experience-technology framework, and its Global Experience Centers and global delivery and acceleration centers), as well as its digital platforms and tools. The tax element is important as well, for while all the Big Four and other providers have hefty tax practice areas they bring to bear for supply chain projects, PwC has combined Tax & Supply Chain consulting into one organization, so the solution is seamless. They bring a strategic lens to tax in supply chains that focuses on decision making and supply chain structure.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				●
●	◐	◐	◐	◐				

Impact Scale:

- Very High
- ◐ High
- ◑ Moderate
- ◒ Low
- None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

The technology segment role in the ecosystem

In many respects the antidote for supply chains in 2021 has been technology. A huge part of spend in supply chain projects has been around automation (RPA) and AI. Digital platforms (especially for procurement) are a close second. Data is also a particularly weak link for clients, with poor data quality and visibility hampered by a multitude of incompatible ERP systems spanning departments, accompanied by equally weak analytics capabilities especially involving externally sourced data. Many procurement departments still function on spreadsheets. Worse, for years some providers built rigid, inflexible, globally integrated supply chain network systems (including outsourced functions) that were designed to meet the needs of the day they were built, but already proved unresponsive to shifting market conditions prior to 2020, before COVID-19 profoundly upended the global economy. So, while the watchword among providers in supply chain projects is digital enablement, in truth these efforts are not greenfield ventures.

There are some challenges for technology providers in the supply chain space. One is competition; technology providers offering some sort of supply chain solution are legion. But nearly every provider across all segments leads with a technology solution, some more targeted but others quite comprehensive. Multiservice and consulting providers are aggressively developing tools and platforms in supply chain and are competitive in technology-focused RFPs. Some multiservice providers have also put outsourcing services at the forefront of their offering. But technology providers face a similar challenge as legal providers, the need to recognize that at their core, what ails supply chains are business problems, not technology problems. Technology providers' approach to supply chains is still very product driven, whether it is a platform, managed or outsourced services. Market leaders recognize that supply chains are undergoing a profound transformation where technology needs to support and enable broader strategic, operational and human dimensions, both within client organizations and beyond to their ecosystem partners. Modern supply chains are becoming hyper-connected networks that involve parties not used to speaking with one another or having visibility into one another's domains, and while this is only possible because of modern advanced technology, it also ultimately takes human business relationships to a new level. This means there is a core relationship development and management component to supply chains in 2021 that depends on technology but also requires deep change management capabilities.

Characteristics:

- Market leaders early on realized that stand-alone solutions targeting one element of supply chains were obsolete, and their solutions needed to be both scalable as well as be able to integrate into a larger network, process and data environment
- Market leaders are also paying close attention to the UI/UX, often customized for specific roles throughout the supply chain
- Further to that human dimension, market leaders are incorporating training and upskilling into their solutions

Supply Chain Market Leaders Technology Providers

Accenture

GEP

Trianz

Procurement Priorities

- Investigate in depth any provider's change management offering, as many are paper thin; a provider should be able to map out clearly how they will get you to the project goals, either using in-house capabilities or in collaboration with other providers
- APIs are old school but investigate in detail the ability of any solution to work with your existing processes and frameworks
- Another angle to investigate while choosing a technology provider is the degree to which their solutions are based on the capabilities (and limitations) of their own proprietary platform(s)

* ALM Pacesetter; see profile in Pacesetter section



STRENGTHS

- Technology provider solutions tend to be the most affordable for cash-challenged clients
- Solutions are often more scalable for clients ranging from Fortune 500 down to middle-tier clients, compared to multiservice solutions
- More so than other providers, technology providers have the ability to create a single, standard end-user experience throughout a value chain
- Though less true with big investments from multiservice and consulting providers, technology providers often have an edge in terms of capacity (bandwidth) for data analytics as well as the highest threshold for asymmetrical (e.g., external) data

Internal Factors

WEAKNESSES

- Whereas multiservice providers are gaining credibility with their technology capabilities in supply chain, many technology providers struggle to achieve the same credibility with consulting and change management-related services, even among the largest providers
- The traditional labor arbitrage model may become more difficult for solution delivery with the rise of economic nationalism
- With so many supply chain platforms and solutions, technology providers struggle to rise above the noise
 - For non-cloud-based solutions, client have concerns that they will invest in a technology platform that will be out of date in a few years

Technology providers are well positioned to shepherd the digital side of the transformation in supply chains and are building the operationalizing capabilities to lead change management

OPPORTUNITIES

- Experience working with or managing data connected to suppliers creates opportunities for emerging risks-related solutions down the road
- Solutions created for supply chains have wider enterprise applicability
- The R&D performed on UI/UX would not be wasted and are applicable beyond supply chains

THREATS

- Heavy competition not just from other segments but the technology provider field is very crowded, particularly in North America, Europe and southern Asia, with supply chain solutions becoming a hot area of focus
- The Big Four, but other multiservice providers are developing competitive end-to-end platforms and solutions, including managed services and outsourcing offerings in supply chain
- The danger that the current wave of digitalization and technology innovation in supply chain will shift in a couple years towards more human capital and process-related issues, favoring consulting and multiservice providers over pureplay technology providers

External Factors

SUPPLY CHAIN 2021 – 2022

Accenture	Primary Practice/ Competency	Supply Chain Management				
<p>Dublin-based Accenture is a technology firm organized around digital transformation, with outsourcing - 45% of the firm’s overall revenues for 2020, according to its annual report*- playing a big role in its delivery model. Born of the (Arthur) Andersen Consulting subsidiary, Accenture begins most projects with a technology (usually digital transformation-related) component. The firm has been investing increasingly in recent years in its Strategy and Consulting practices to provide business, strategy and operations consulting in support of its digital, analytics, automation, cloud and IT infrastructure-led solutions. The firm’s Strategy practice is strongly anchored in Accenture’s 2016 acquisition of strategy consulting firm Kurt Salmon. In 2019, the firm launched its SynOps offering, which combines its data-driven Accenture Insights data platform with human experts to “...identify high-impact opportunities for business process reinvention.”**</p> <p>Supply chain was already becoming a growing contributor to Accenture’s revenues before the pandemic hit, and grew even more in prominence during 2020 - particularly for outsourcing revenues. True to form, Accenture views supply chain as a function ripe for digital transformation, but also sees important business model implications. The firm divides its approach to supply chain between supply chain strategy (delivered by the Strategy practice) and the Sourcing & Procurement group of the Operations practice. An important dimension to Accenture’s approach to supply chain is recognizing the need to create an integrated supply chain model extending the full length of the value chain, with emphasis not on cost but the end-user customer experience. Again, digital architecture is central to the Accenture solution, but it seeks to build flexibility into supply chains to minimize their susceptibility to disruption, design supply chains to encourage innovation and the most effective network relationships, including trust-building transparency along the way. Accenture sees the primary challenges for supply chains being resiliency, cost management, ESG planning, talent, flexibility, and the right technology. Services span planning & design, logistics, procurement optimization, and the connection to the production process (with special emphasis on Industry 4.0). There is a supply chain-facing module of Accenture’s Intelligent Operations offering, which seeks to fuse advanced technology and human expertise while breaking down internal silos across the client supply chain.</p>						
Pacesetter Criteria					Pacesetter Impact Score	
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence		

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Supply Chain Service Focus



Services offered
 Services not offered

* The Power of Change: Annual Report 2020. Accenture. Retrieved from: <https://www.accenture.com/us-en/about/company/annual-report>

** "Accenture Launches SynOps, a Human-Machine Operating Engine Designed to Help Enterprises Achieve Sustainable Competitive Advantage" (Press Release). Accenture website. January 29, 2019. Retrieved from: <https://newsroom.accenture.com/news/accenture-launches-synops-a-human-machine-operating-engine-designed-to-help-enterprises-achieve-sustainable-competitive-advantage.htm>

GEP	Primary Practice/ Competency				Boutique	
<p>Clark, New Jersey-based GEP is a software company that has developed a three-prong approach to procurement involving software platforms and managed services, both overlaid by strategy consulting. GEP describes this as a unified approach to sourcing, procurement and supply chain solutions delivery focused on client strategic, operational and financial supply chain needs. The engagement and proportion of each is unique from project to project, the key being an integrated approach of all three elements, with GEP working with clients to design the best approach to their supply chain needs. An important difference for GEP is that its goals in supply chain extend beyond cost management to include optimizing operational performance, competitive advantage, and overall growth. GEP’s three pillars of focus in supply chains are strategic alignment, optimization and resilience.</p> <p>GEP has two primary software platforms, the source-to-pay spend management platform GEP SMART™ and supply chain management platform GEP NEXXE™. Managed services span both supply chain (covering planning & forecasting, inventory management, logistics, data and risk management) and procurement. GEP also utilizes its MINERVA™ AI tool for predictive analytics, cognitive capabilities and decision support tools.</p> <p>All of GEP’s unified offering is focused on helping clients develop an overall supply chain strategy. This means that GEP looks at supply chain from the C-suite perspective. Procurement’s role in GEP’s view is to proactively enable the supply chain strategy and its growth goals, while serving as a trusted advisor to the C-suite for risk, cost and opportunities. GEP’s procurement consulting services target procurement transformation, opportunity assessment, strategic cost management, M&A and risk. In supply chains GEP seeks to help clients develop long-term resiliency, which contributes to overall operational agility while enhancing the customer experience. Consulting services include supply chain strategy, diagnostics, network optimization, inventory optimization services, risk management and a dashboard development offering that ties together data and RPA to provide clients customized visibility into supply chain KPIs across networks and workflows. GEP also bolsters its own in-house expertise with an external network of category experts.</p>						
Pacesetter Criteria					Pacesetter Impact Score	
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence		

Impact Scale:
 Very High
 High
 Moderate
 Low
 None

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

■ Services offered
□ Services not offered

Trianz		Primary Practice/ Competency			Supply Chain Management			
<p>Santa Clara, California-based Trianz is an end-to-end digital transformation services firm that helps clients gauge their relative digital maturity and use that to create a digitally enabled strategy and acquire or develop the technology tools necessary to support that strategy. Data is at the forefront of everything Trianz does. Its offering spans digital benchmarking, business transformation, the digital studio innovation lab and digital services (which include managed and platform services), and touches on strategies incorporating benchmarking and KPI management, cloud, data analytics, digital applications and infrastructure.</p> <p>Supply chain is only one of several business functions Trianz addresses, but its digital transformation approach resonates well with resource-starved procurement departments with legacy reactive supply chain management frameworks seriously disrupted by COVID-19. Trianz sees supply chains as a definitive ingredient in the business leaders of the Industry 4.0 world. Trianz’s supply chain offering includes digital competitiveness maturity and benchmarking services, transformation strategy development, execution blueprint services, and managed services (e.g., freight management and contract logistics, distribution and logistics, courier management and postal services, inventory and warehouse, transportation support services), and relies on input from its industry practices. A key element to Trianz’s approach is the recognition that technology ultimately only enables strategies, and it is only one component of a successful supply chain strategy; human capital and training are also key to supply chain resiliency and success as well as effective supply chain management.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				

Impact Scale:

- Very High
- High
- Moderate
- Low
- None

Impact Scale: ○ None ● Low ● Moderate ● Significant ● High ● Very High

Supply Chain Service Focus

Data, technology tools & solutions	Accounting, auditing & risk assurance
Consulting services	Forensics & Disputes
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Technical
Construction & Engineering	
Consumer goods	
Energy & Chemicals	
Healthcare & Life sciences	
Manufacturing	
Retail	
Other industry	

- Services offered
- Services not offered

Appendix



ALM INTELLIGENCE
PACESETTER
RESEARCH



The goal of ALM Pacesetter Research is to help buyers of professional services navigate an increasingly complex landscape with confidence. We use a multidisciplinary perspective to identify best-in-class providers of legal, consulting, financial, insurance, employee benefits, and other professional services, and analyze how they are evolving as an ecosystem of interdisciplinary service providers. Our research is grounded in over 50 years of accumulated market insights and qualitative research models that combine knowledge of management science with case studies and other sources of knowledge to understand patterns of market supply, demand, behavior, and ways of doing business.

IDENTIFY

- The ALM Pacesetter Advisory Council (PAC) convenes in advance of the research project kick-off; members include ALM journalists and editors, and external experts such as consultants, general counsel, and industry thought leaders
- The PAC selects the set of Market Leaders that will be covered in the research topic from a larger group of providers that members have identified in the normal course of their work
- PAC members also provide expert knowledge and insights to the ALM Pacesetter team throughout the research and analysis process

RESEARCH

- The ALM Pacesetter Team within ALM Intelligence conducts primary and secondary research
- Primary research includes in-depth interviews with practice leaders at the provider firms covered in the research; satisfaction interviews with clients referred by those providers; and in-depth interviews with thought leaders, recruiting professionals, and other sources
- Secondary research includes data gathered from annual reports and earnings calls, management presentations, public filings, case studies, press releases, journals and publications, online information databases and other publicly available resources

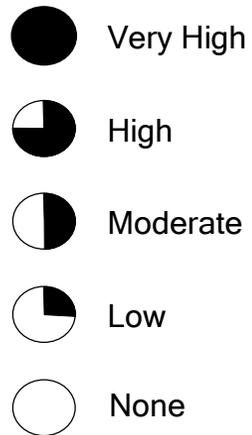
ANALYZE

- ALM Pacesetter analysts evaluate and score the Market Leaders against five core criteria
 1. Business model
 2. Value proposition
 3. Service delivery
 4. Client impact
 5. Brand eminence

See criteria definitions on next page
- Market Leaders that achieve a Pacesetter Impact Score equal to or over 85 are designated as ALM Pacesetters
- Pacesetter analysts map markets and stakeholders and write market trends
- Market segment overviews are peer reviewed by the appropriate PAC member



Impact Scale:

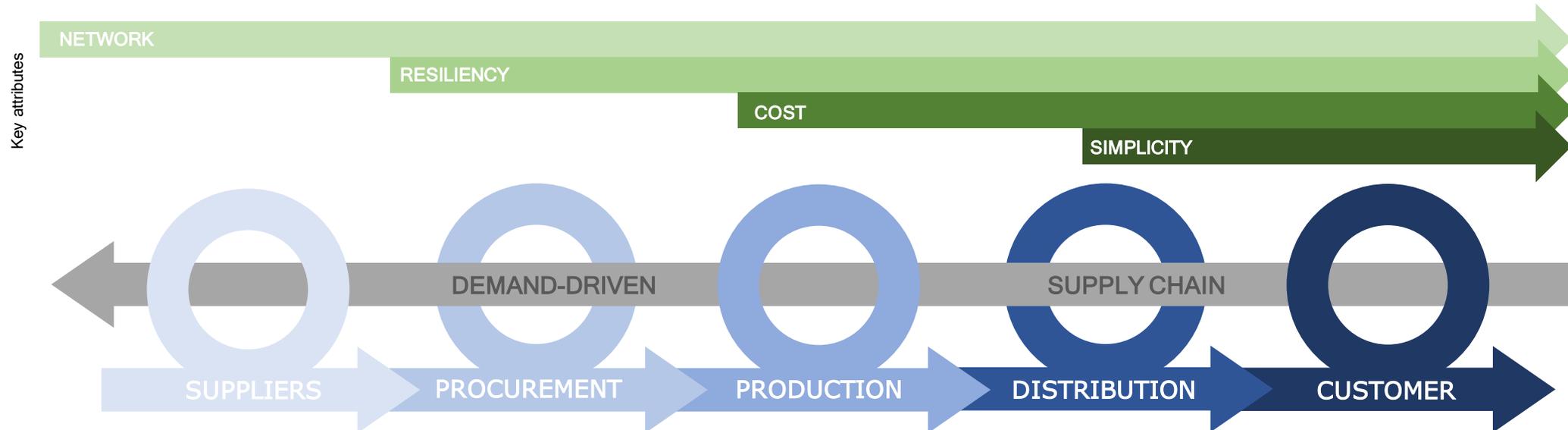


The goal of this research was to identify which professional services providers were having the most impact in a rapidly shifting market environment, and measure precisely what that impact was. Each provider, once identified either through the research or by the Pacesetter Advisor Council (PAC), was evaluated in five client impact categories and within each, five sub-categories (See Page 48 for category details and definitions.), using a 100-point scale for each sub-category. This means that that maximum unweighted score for each category was 500 points, all of which rolled up to a maximum (unweighted) score of 2,500 points. The scoring framework does allow for targeted weighting of subcategories, though no weighting was used for the *Supply Chain 2021-2022* report. In order for a provider to be identified as a Market Leader - in other words, to be included in this report - they had to score a minimum overall 70%. To achieve Pacesetter status in this report, they had to score a minimum 85%. The Harvey Balls moon graphics represent the following scores:

- 85%-100%: Very High impact
- 80%-84%: High impact
- 75%-79%: Moderate impact
- 66%-74%: Low impact
- <65%: None



The original intention of this report was to examine exclusively how professional services providers were helping clients develop and hone their strategic sourcing capabilities, but due to the COVID-19 crisis the Pacesetters team found it impossible to separate out strategic sourcing from the broader transformation supply chains have been undergoing. For the purpose of this report we define supply chains as the full, end-to-end series of processes involved in the production and distribution of a service or product, from sourcing raw materials through putting that end product or service in a customer's hands. In this sense we take Michael Porter's "value chain" concept to heart, viewing supply chains as the core value creation system in an organization.





Core Criteria	Definition
Business Model	<p>Provider's ability to reposition core competencies around new products, services, and business models to adapt to shifting patterns of market supply, demand, behavior, and ways of doing business</p> <hr/> <p>Detailed Criteria: Scope of services, Supply chain, Ecosystem, Corporate Development, Innovation Capability</p>
Value Proposition	<p>Provider's ability to deliver on its value proposition, i.e., the positioning statement that communicates the benefits and economic value a prospect will receive by purchasing the provider's products and services over a competitor's</p> <hr/> <p>Detailed Criteria: Differentiated services, Risk management, Measurable outcomes, Evidence-based solutions, pricing options</p>
Service Delivery	<p>Provider's ability to mobilize resources and configure assets to serve clients</p> <hr/> <p>Detailed Criteria: Solutions design, Engagement model, Talent and culture, Project management, Enabling tools</p>
Client Enablement	<p>Provider's ability to help clients affect continuous, sustainable change, improve performance, and achieve growth</p> <hr/> <p>Detailed Criteria: Client relationship management, Business case development, Stakeholder conversations, Change management and capability development, Living laboratory</p>
Brand Eminence	<p>Provider's ability to leverage brand and marketing strategies to differentiate in its marketplace as an expert practitioner and thought leader</p> <hr/> <p>Detailed Criteria: Thought leadership, Intellectual property (IP), External research partnerships, Sales and marketing, Case studies</p>



Acronym	Definition	Line of Defense	Areas of Risk Responsibility
CCO	Chief Compliance Officer	2nd	Responsible for establishing standards and implementing procedures to ensure compliance programs effectively identify, prevent, detect and correct noncompliance with applicable laws and regulations
CEO	Chief Executive Officer	1st	Collaborates with Board in fiduciary oversight role; responsible for enterprise risk management strategy overall
CFO	Chief Financial Officer	1st	Manages funding of risk resources, programs and insurance; analyzes impact of risk events on bottom line; monitors and reports on ROI of risk investments, including insurance
CIO	Chief Information Officer	1st	Responsible for monitoring and enforcing risk policies, procedures and practices related to information technology
CISO	Chief Information Security Officer	1st	Responsible for monitoring and enforcing risk policies, procedures and practices related to corporate data
CMO	Chief Marketing Officer	1st	Manages, monitors and mitigates organization's brand and reputational risk; leads external crisis communications
COO	Chief Operating Officer	1st	Assesses, controls and mitigates risks impacting day-to-day operations and business processes
CSCO	Chief Supply Chain Officer	1st	Responsible for executive-level oversight of supply chain management (and SCM team) strategy
CPO	Chief Procurement Officer	1st	Manages and audits third party risk; collaborates with CFO and GC on insurance procurement
CRO	Chief Risk Officer	2nd	Primary responsibility for enterprise risk management strategy and operations; leads corporate risk function; collaborates with GC and CPO to procure insurance in line with organization's risk strategy and appetite
GC	General Counsel	2nd	Advises Board and senior management on governance, compliance, risk and legal matters; responsible for developing, implementing and monitoring programs to support the business' risk owners
IA	Internal Audit	3rd	Provides independent assurance that the organization's risk management, governance and internal control processes are operating effectively



Risk Matrix Definitions	
Risk Services	
Strategy	Project-based management consulting services designed to enhance business growth opportunities
Operations	Project-based management consulting services focused on improving the functional capabilities and resources required to operationalize the business strategy
Advisory	Ongoing services provided by professionals who are licensed or certified in a specific functional discipline that may be regulated by a body of law or practiced according to industry-based technical standards
Technology	Services designed to enhance productivity and/or business performance through the utilization of enabling technologies for strategic and operational decision support, business process automation, digital risk management, and information technology (IT) enterprise and network security
Managed/ Outsourced	Managed and outsourced services involve the provision of technology-enabled process management services by an external provider. Managed services differentiate from outsourcing in several ways. They are provided by highly skilled talent with deep domain expertise who are capable of making risk-based decisions on behalf of the client; contracts are structured on an outcomes-based pricing model rather than hourly billing; the relationship is long-term compared to outsourcing's typical five- to seven-year contract; and they are typically deployed using cloud technologies.
Risk Strategy	
Reactive	Actions in response to a risk occurrence, e.g., mitigating damage from risk event, implementation of business continuity plans during a risk event, and root-cause analysis of risk events
Proactive	Actions that address perceived risks before they occur, e.g., identification and prioritization of risks, risk monitoring, and implementation of risk controls
Predictive	Actions that forecast future, potential risk occurrences, e.g., risk assessments, case studies/use cases/claims scenarios, risk scenario planning, and simulated war games



Service(s)	Definition
Data, technology tools & solutions	Any and all internal or client-facing technology assets and data management tools applied to a client solution
Accounting, auditing & risk assurance services	All accounting and auditing services requiring licensing from state and national authorities (in most jurisdictions), including services related to the controls and compliance side of auditing and risk management
Consulting services	All management consulting services which provide expert strategic and operational advice designed to drive significant change in client organizations
Forensics & Disputes	Any investigative services designed to recover evidence concerning misconduct, a crime, or operational failures; with different types of forensic investigations including financial, physical, operational, data & technological, etc., and as well the resolution (e.g., arbitration) of legal disputes
Function-focused advisory services	Non-consulting advisory services such as investment banking, transaction advisory, tax advisory, law practice (separate from legal services), asset management, etc.
Interim, managed & outsourcing services	All short and long-term services by which an external vendor takes over some degree of client functions, whether for reasons of capacity, affordability, temporary stewardship (e.g., interim CFO), monitorship, expertise, etc.
Legal services	Services provided in support of the practice of law, usually high volume, low value work (e.g., contract review), and usually dependent on advanced technology for delivery
Technical	Specialized services or competencies such as economic consulting, engineering, valuation, strategic communications, etc.

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About ALM Intelligence

ALM Intelligence provides proprietary data, analysis, tools, and knowledge that empower our clients to succeed. The product suite and vast data repository arm professionals with the critical business information required to make the most impactful and informed decisions possible. The exhaustive data repository and product functionality enable professionals to combat competitive challenges head-on with the confidence to remain ahead of the field. The depth of ALM Intelligence's expertise across the benefits, insurance, consulting, and legal industries provide a broad spectrum of actionable intelligence to facilitate & execute strategy. Please visit www.alm.com/intelligence for more information.

About ALM

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30+

Publications

65+

Events hosted
globally

250+

Intelligence reports
developed

2.65M

website visitors per
month

2.85M

Newsletter
subscribers

1.08M

Mobile visitors per
month



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