# PERCEPTIONS OF CONSULTING IN FRANCE

Assesses the reputation of consulting firms, as seen by clients

SOURCE GLOBAL RESEARCH

# EXECUTIVE SUMMARY

As convergence between consulting firms in France is on the rise, clients are finding their traditional notions of firm types being challenged—and what's more, they are impressed by what they see when firms deliver work outside of their traditional core consulting areas.

Technology is at the heart of much client activity in France, and firms aren't content to let the technology players have all the action—particularly when so much of the work happening is the people- and process-based stuff that comes along with technology projects. While the Big Four may consider themselves the obvious candidates to steal market share from the technology powerhouses, given the wide breadth of services they offer, they face resistance when it comes to clients' perceptions in France. These perceptions, as in previous years, tend to be rather critical.

It's the strategy firms then that are having markedly more success in the technology space. Client survey responses put strategy firm A.T. Kearney second for quality where existing technology is concerned, and it clinches the top spot for digital technology & transformation.

Digital, of course, is the service line that all the firms are eager to crack, and following a slow start, the tide has finally started to turn on digital uptake in France. Financial services is in the vanguard, and as other industries begin to follow suit, there is a huge opportunity for firms that can gain credibility with clients in this service line.

With so much choice in the market, clients' expectations of consulting firms are high. Typically, their perception of quality is boosted significantly when they work alongside a firm. Clients say they have recommended all firm types, however, and there's no apparent link between firm type and clients' perceptions of quality. It seems that in the French consulting market, cultural fit and a successful partnership between client and firm is key to inspiring loyalty.

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# METHODOLOGY

*Who did we talk to?*

We have 1,642 responses from our survey of executives, directors, and senior managers in France in November and December 2015, all of whom have been responsible for buying substantial volumes of consulting services in the previous year. They represent a wide range of industries and business functions, and 87% work in organisations that generate more than $500m in revenue.

**Figure 1** Respondents' level of responsibility

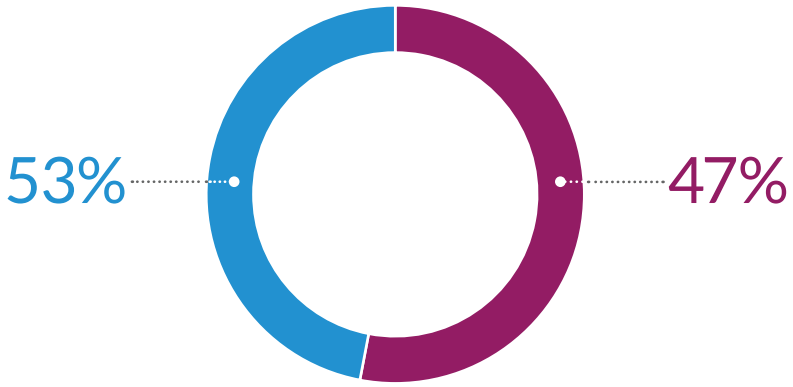


**Figure 2** Respondents by industry

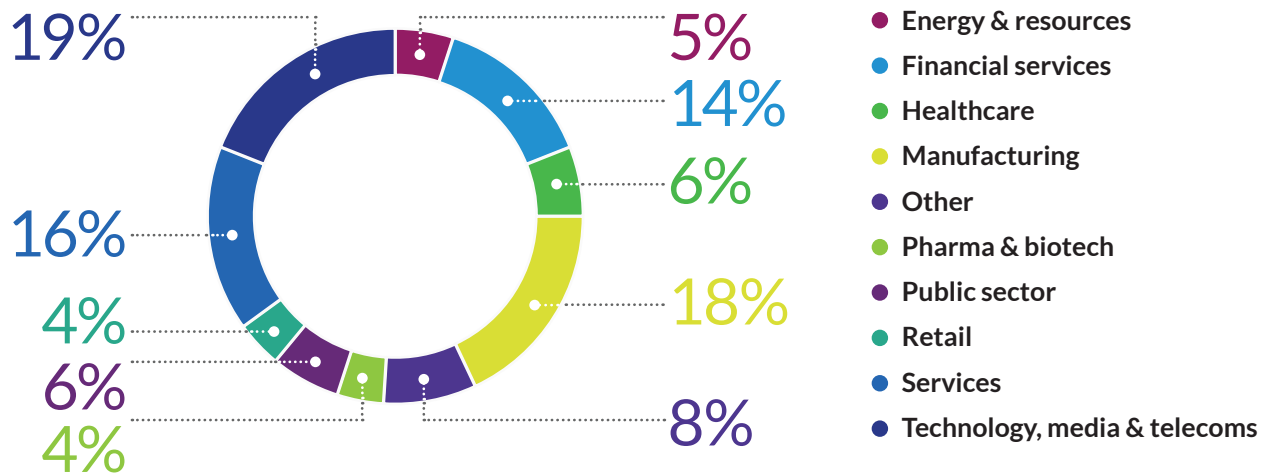


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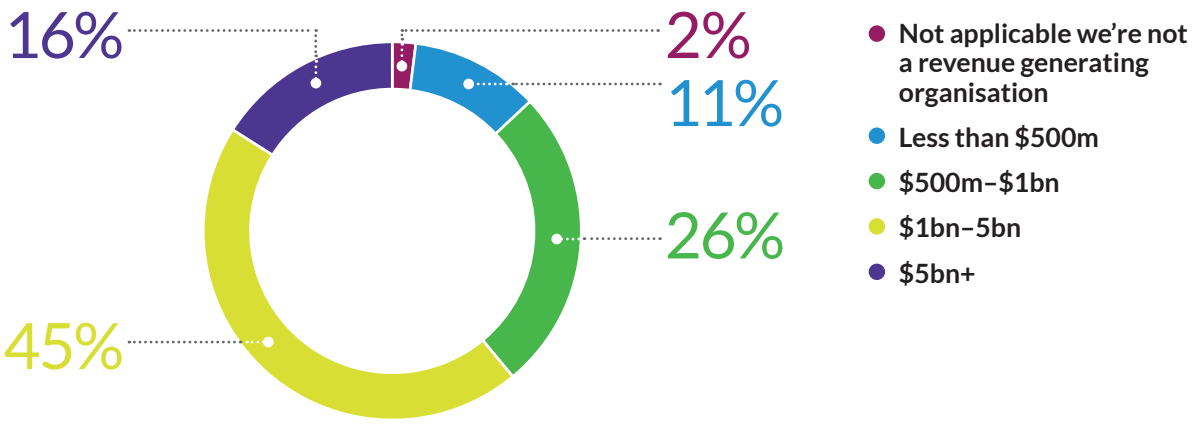
**Figure 3** Respondents by organisation size (revenue)




## *What did we ask them?*

Each respondent was asked to tell us about three consulting firms and was presented with a list of 19 leading consulting firms in France. Clients did have the opportunity to tell us about consulting firms that weren't on the list, but this report focuses on the firms for which the number of responses was sufficient for us to carry out detailed analysis.

We asked each respondent to share their views on each of the three firms selected, focusing on the following areas:

- **Quality: Their perception of the quality of service provided by each firm in ten different consulting services**
- **Value: Their view of how much value each firm added in relation to the fees paid for its services**
- **Recommendations: Whether they have recommended any of these firms for any consulting service**
- **Attributes: How they rate each firm and the individuals from it across a range of attributes**

## *Which firms are included in this report?*

For each firm we tried to get responses from at least 20 direct clients and 20 indirect clients, to give the reader a "20:20" rounded view of each firm. In most cases we have several times this amount of data, but for a very small number of firms (three, in this report) we have fallen slightly short of 20 for one type of client. Where this is the case, we've highlighted in the firm's profile. Nonetheless, we do have enough data to provide a detailed profile of each firm we asked about.

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| Firm | Did we ask about this firm in this market? | Included in general analysis? | Detailed profile available? |
|---|---|---|---|
| Accenture | ✔ | ✔ | ✔ |
| Aon Hewitt | ✔ | ✔ | ✔ |
| A.T. Kearney | ✔ | ✔ | ✔ |
| Bain & Company | ✔ | ✔ | ✔ |
| BearingPoint | ✔ | ✔ | ✔ |
| The Boston Consulting Group | ✔ | ✔ | ✔ |
| Capgemini Consulting | ✔ | ✔ | ✔ |
| Deloitte | ✔ | ✔ | ✔ |
| EY | ✔ | ✔ | ✔ |
| Hay Group[1] | ✔ | ✔ | ✔ |
| IBM GBS | ✔ | ✔ | ✔ |
| KPMG | ✔ | ✔ | ✔ |
| L.E.K. | ✘ | ✘ | ✘ |
| McKinsey & Company | ✔ | ✔ | ✔ |
| Mercer | ✔ | ✘ | ✘ |
| Oliver Wyman | ✔ | ✔ | ✔ |
| PA Consulting | ✘ | ✘ | ✘ |
| PwC | ✔ | ✔ | ✔ |
| Roland Berger | ✔ | ✔ | ✔ |
| Strategy& | ✔ | ✔ | ✔ |
| Towers Watson | ✔ | ✔ | ✔ |

## *How we rank firms in this report*

In this report, we reveal the top-ranked firms in five areas: mindshare, quality, value, and most recommended firm. We look at the top-ranked firms overall, but where we can, we also split the data to look at perceptions in each consulting service, by client type, by industry, and by function (that is, looking at how views of respondents in different industries and different business functions vary). In breaking down the data to this level our sample sizes can become quite small, so where it isn't big enough for us to be confident making a ranking, we've declined to do so. That means that in this report we are unable to provide a ranking for energy & resources, healthcare, pharma, public sector and retail. If you have questions about the industries we've omitted from this report, please contact Sarah Burgess.

**Mindshare:** We base our rankings on the numbers of respondents talking about each firm, relative to each other. To calculate that, we awarded a score of 100 to the most-mentioned firm, and work out how many times each other firm was mentioned in relation to it.

**Quality:** We base our rating on the sum of the proportion of people who describe quality as either "high" or "very high". Where that produces an equal result between two firms, we take into account the share who have described quality as "very high" to determine the order in which they are ranked.

1 Our survey was launched before Korn Ferry's acquisition of Hay Group completed in December 2015.

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**Value:** We base our rating on the sum of the proportion of people who say that the value a firm delivers is greater (to any extent) than the fees it charges. Where that produces an equal result between two firms, we take into account the extent to which value is seen to be greater than fees (respondents had the choice of saying it was twice, five times, or ten times greater than fees) to determine the order in which they are ranked.

**Most recommended:** We base our ranking on the proportion of people who say they have recommended a firm. Where that produces an equal result between two or more firms, those firms simply tie.

**New for 2016:**

The Source badge—an award given to those firms that have been rated number one by clients in a given region/industry for mindshare, quality, and value. If your firm has a badge next to its name and you'd like to find out more about how to use it externally please contact Ella-Sian Jolley.

## *The difference between direct and indirect clients*

We talk about two types of clients in this report: direct and indirect.

Direct clients are clients who either have very recent experience of working with the firm they chose to tell us about or are working with it now.

Indirect clients are clients who feel qualified to share an opinion about a firm but aren't among their direct clients. They may have had exposure to the work the firm has done elsewhere in their organisation or have simply formed an impression based on reading a firm's thought leadership or being exposed to its marketing in some other form. In simple terms, indirect clients are prospects.

The differences between the opinions of these two types of clients tell us a lot about the differences between expectation (indirect clients) and reality (direct clients). But it also tells us something about the differences between a firm's marketing and what it actually delivers.

## *Discover more online*

The data contained and referred to within this report is also available online, where it can be sorted and filtered according to your preferences. In fact, some of the charts contained in the report link directly through to the online database. Note that wherever you see a quick code next to the title of a chart, that code can be entered into the search function of the database to reproduce exactly the same chart.

When you log on, you'll notice that in some areas there's data that's in a faded grey colour. This is where we have data, but it's not a big enough sample to include in a ranking in this report. Nonetheless, we share it online in case you do want to see what, for example, indirect operations clients in the public sector (or a similarly complex split) think of a particular firm. If you have any questions about any of the data, please contact Sarah Burgess.

To find out how you can get access to the online database, please contact the person in your organisation who bought the report or email ella-sian.jolley@sourceglobalresearch.com

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# Definitions of industries and services

## Industries

### Energy & resources

**Energy**
*Includes the exploration and production of energy, including oil, gas, coal, and renewables.*

**Utilities**
*Includes the delivery of electricity, gas, water, sanitation, and other related services.*

**Primary resources**
*Includes agriculture, chemicals and chemical products, commodities, forestry, fishing, metals, mining, and plastics.*

### Financial services

**Banking**
*Includes retail banking, commercial banking, and lending.*

**Insurance**
*Includes general insurance (e.g., motor, home, pets, health—anything on an annual contract), life insurance, pension products, retirement planning.*

**Private equity**
*Includes both consulting work for private equity firms and consulting work with private equity portfolio businesses.*

**Capital markets**
*Includes investment banking, trading of stocks and financial products, corporate finance, and broking.*

**Investment and wealth management**
*Includes private banking, high net-worth banking, investment management, trust funds, the management of pension funds, and asset management.*

### Manufacturing

**Aerospace**
*Includes space research and technology, the manufacture of aircraft, aircraft parts, rockets and other space equipment, and tanks and ammunition.*

**Automotive**
*Includes the manufacture of motor vehicles, industrial vehicles, and vehicle supplies and parts.*

**Construction**
*Includes surveying, architectural, and engineering services, heavy construction, house building, and the building of infrastructure.*

**Consumer packaged goods**
*Includes the manufacture of clothes, foods, alcohol, tobacco, furniture, home furnishings, cleaning products, small arms, children's toys, and sports equipment.*

**Consumer and industrial electronics**
*Includes electrical components, household and industrial appliances, commercial and professional equipment.*

**Industrial products**
*Includes industrial machinery, steel and metal products, and plastic products.*

### Pharma & biotech

*Includes research into and the production of drugs, biological products, medicinal chemicals, and life sciences.*

### Healthcare

*Includes private—and publicly-funded healthcare, hospitals, laboratories, and medical equipment.*

### Public sector

**Government**
*Includes federal/national, state/regional, local government, emergency services, justice, social services, public transport, and conservation.*

**Education**
*Includes public and private schools, universities, and libraries.*

**Defense**
*Includes national security and consulting around defense issues.*

### Retail

*Includes the selling of clothes, food, consumer goods, and automobiles.*

### Services

**Logistics**
*Includes warehousing, storage, packing and crating, and distribution including cargo, freight, and haulage.*

**Business services**
*Includes services relating to law, accountancy, IT maintenance, security systems, advertising, employment agencies, and vehicle leasing.*

**Leisure**
*Includes museums, art galleries, theatre, golf courses, hotels, hospitality, travel agencies, restaurants, and bars.*

**Real estate**
*Includes estate agencies and operators of residential and commercial buildings.*

**Transportation**
*Includes private and people-related transportation, including airlines, airport management, train operators, rail infrastructure management, water transportation, courier services, and private bus services.*

### Technology, media & telecoms

**Telecoms**
*Includes telephone, mobile, digital, and other communication services.*

**High-tech**
*Includes IT related devices, computer and computer related devices, audio and video equipment, broadcasting and communication equipment.*

**Media**
*Includes radio, television and digital broadcasting stations and services as well as printing and the publishing of newspapers, periodicals, and books.*

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## Services

### Financial management
*Includes finance function and budgeting/financial planning process.*

### Risk & regulatory
*Includes responding to regulation, technology and security risk services, operational risk, financial risk, programme risk.*

### HR & change management
*Includes HR strategy and effectiveness, benefits, compensation and pensions, change management, internal communications, organisational design and culture, stakeholder management, team effectiveness and collaboration, leadership and governance, performance management, talent management/training and development.*

### Operational improvement
*Includes business continuity and recovery, knowledge management, Lean and Six Sigma, property and estate management, quality and performance management, supply chain management, cost-cutting, innovation, M&A integration, managing quality, post-M&A integration, process design and re-engineering, procurement/purchasing, research and development, benchmarking, distribution strategy, environmental, sustainability and CSR, and operational review.*

### Strategy
*Includes business and financial modelling, corporate re-structuring, corporate recovery and turnaround, corporate strategy, market analysis and strategy, market research, policy formulation, strategic sourcing/offshoring strategy, due diligence and valuation, infrastructure/asset financing and management, PFI, mergers and acquisitions, customer service, new product development, branding, marketing and channel management, customer relationship management, pricing, sales force effectiveness, category management, sales and distribution planning.*

### Technology
*Includes ERP consulting, IT training, application of new technology, hardware/software selection, IT design and build, IT strategy, planning and review, IT testing and integration, management information and business intelligence, requirements definition, mobile and internet consulting, project and programme management (e.g., where consulting firm has been engaged to run a specific project that it is otherwise not involved in).*

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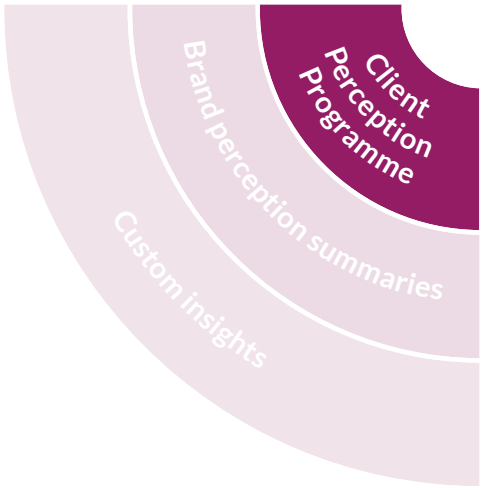
# CLIENT PERCEPTION PROGRAMME




**The newest of our major research programmes, our *Client Perception Programme* is a suite of eleven reports which assess the reputation of consulting firms, as seen by clients.**

**At the heart of the programme are two important questions:**

- **What is the reputation of a consulting firm?**
- **What do clients think about the quality of service and the value added by consulting firms?**

The first section of each report looks at the perceptions of clients in the market as a whole (either by geography or industry) and ranks the top three firms in each of the following areas: mindshare (how likely clients are to be thinking about a consulting firm), quality, value added, and likelihood to be recommended. The report then looks at perceptions by consulting service (and where relevant, by industry), ranking the top three firms for each. In our analysis we draw on our extensive knowledge of the consulting market to explain why particular firms are perceived as they are, and highlight interesting stories within the data along the way.

Finally, the report looks at clients' perceptions of individual firms in the relevant market. It compares each firm's mindshare, quality, and value perceptions with those of the leading firms, as well as comparing the views of direct and indirect clients to highlight the challenges that need to be addressed either during a project, or by marketing. The report also highlights which services clients are recommending each firm for, and what they perceive to be each firm's strongest attributes.

## How to subscribe

You can either subscribe to the whole programme (the cheapest way of getting access to everything) or buy reports individually. All reports in the *Client Perception Programme* come with a global licence, so once you've bought them you can use them anywhere in your firm.

For more details about how you can subscribe please contact Alice Noyelle.

## The *Client Perception Programme* can help you to:

- **Understand how your consulting firm compares with competitors in the market**
- **Understand what clients and prospects see as your core strengths**
- **Where your clients think you can improve, and where they want you to make improvements**

### Geographies and industries covered in this Programme:

- GCC
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- Energy & resources
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## About Source

Source Global Research is a leading provider of information about the market for management consulting. Set up in 2007 with offices in London and Dubai, Source serves both consulting firms and their clients with expert analysis, research, and reporting. We draw not only on our extensive in-house experience but also on the breadth of our relationships with both suppliers and buyers. All of our work is underpinned by our core values of intelligence, integrity, efficiency, and transparency.

Source was founded by Fiona Czerniawska and Joy Burnford. Fiona is one of the world's leading experts on the consulting industry. She has written numerous books on the industry including: *The Intelligent Client* and *The Economist* books, *Business Consulting: A Guide to How it Works and How to Make it Work* and *Buying Professional Services*.

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