EXTRACT

STRATEGIC PLANNING PROGRAMME 2013

Part 1: Trends shaping the consulting industry over the next 12 months

BASED ON QUANTITATIVE AND QUALITATIVE MARKET ANALYSIS
FROM MULTINATIONAL ORGANISATIONS

Contents

Methodology

This report is based on both quantitative and qualitative research: an extensive survey carried out in December 2012 and our on-going programme of interviews with senior users and buyers of consulting services.

Survey

We surveyed over 650 senior users and buyers of consulting services from Europe, the Middle East, and the US. 84% of respondents work in organisations with more than 1,000 employees and over 50% of respondents work in organisations with more than 5,000 employees. Respondents are distributed across operations, general management, sales & marketing, IT, finance and HR. They represent seven sectors: energy and resources; manufacturing; financial services; services; private and public healthcare; telecoms, media and technology; and publicly-funded organisations.

Interviews

Between October 2012 and January 2013, we interviewed 190 senior users and buyers of consulting services. Interviewees are based in UK, Ireland, France, Germany, Switzerland, Belgium, Netherlands, Luxembourg, Norway, Sweden, Denmark, Finland, Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE and the US.

The role of this report in our series

This is the first report in a series of five reports we will be publishing during the course of 2013 which use a combination of feedback from clients and consulting firms to analyse the underlying trends shaping the consulting industry over the next 12 months.

Publication date	Report	
March	Part 2	Private and public sector end-users' views on consulting firms' strategies for growth and how well leading firms are best positioned to grow
April	Part 3	Overview of global trends in consulting
June	Part 4	Private and public sector procurement people's predictions about their organisations' consulting needs over the next 12 months
November	Part 5	Planning for growth in 2014

Definitions of sectors and services

Sectors	Sub-sectors
Energy and resources	Includes utilities
Manufacturing	Includes pharma/life sciences and construction
Financial services	Includes banking, insurance, investment and capital markets
Services	Includes business and consumer services, real estate, professional services, transportation and retail
Private and public healthcare	
Telecoms, media and technology	Includes technology services
Publicly-funded organisations	Includes federal/central and state/regional government

Services	Sub-services
Financial management	Responding to regulation
	Finance function
	Budgeting/financial planning process
Risk	IT risk
	Operational risk
	Financial risk
	Programme risk
Strategy	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
Operational performance	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
	Operational review
Technology	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
	Technology and security risk services
	Hardware/software and systems implementation
	Requirements definition
	Web and internet consulting
HR and change management	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
Marketing and selling	Customer service
	New product development
	Branding
	Marketing and channel management
	Customer relationship management
	Pricing
	Sales force effectiveness
	Category management
	Sales and distribution planning
Programme management	Project and programme management (eg where consulting firm has been engaged to run a specific project which it is otherwise not involved in)

About Source

Source Information Services Limited (Source) 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*. Joy Burnford was Marketing and Operations Director at the UK Management Consultancies Association between 2003 and 2010, and prior to that worked for PA Consulting Group and has extensive experience of marketing consulting services.

For further information please visit www.sourceforconsulting.com

sourceforconsulting.com

288 Bishopsgate • London • EC2M 4QP
Tel: +44 (0)20 3178 6445

PO Box 340505 • Dubai • United Arab Emirates
Tel: +971 (0)52 989 5224

Email: info@sourceforconsulting.com

www.**source**for**consulting**.com