

BRAND PERCEPTION SUMMARY
IBM GLOBAL BUSINESS SERVICES

SOURCE GLOBAL RESEARCH

About this brand perception summary

The data contained in this summary represents the views of clients (senior end users of consulting services) as expressed to us via an online survey, more details of which you'll find in the section entitled "methodology". It does not represent the view of analysts.

The interpretation of that data, however, is ours. It's based on the unparalleled knowledge that we've acquired through years of surveying and interviewing consultants and their clients, and through the work we've done—and continue to do—advising the leaders of the world's biggest and most successful consulting firms about their businesses.

A full list of firms for which brand perception summaries are available can be found towards the back of this document.

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Methodology

In December 2015 we surveyed 2,649 clients—senior end users of consulting services from around the globe, all of whom had made extensive use of consultants—and asked them to tell us about three consulting firms of their choosing, giving us 9,278 responses in total. We asked about those firms' capabilities, across a range of consulting services, about the extent to which they deliver value relative to the fees they charge, and about the attributes they associate with each firm. We also asked about the likelihood of using a firm, whether they have recommended a firm, and if that firm is their first choice for each service.

1,024 of the responses we received were about IBM GBS. They came from a wide range of countries and industries but, because our sample size becomes quite small when we cut it to represent those countries and industries individually, we cannot go into great detail about how views change from one to the next. So, for example, while we can say how views about IBM GBS's overall capabilities differ between respondents in Germany and the US, we can't talk about how views differ for individual service lines between those two countries. This summary, then, is about IBM GBS as a global firm.

The difference between direct and indirect clients

In this report we talk about two types of clients: 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—we include a breakdown of these relationships on page 21. 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.

Whenever we refer to clients without specifying the relationship, we are referring to all clients—direct or indirect—that talked about IBM GBS.

Firms included in our global study and how we classify them:

Accenture	Technology
Aon Hewitt	HR
A.T. Kearney	Strategy
Bain & Company	Strategy
Capgemini Consulting	Technology
Deloitte	Big Four
EY	Big Four
Hay Group	HR
IBM Global Business Services	Technology
KPMG	Big Four
McKinsey & Company	Strategy
Oliver Wyman	Strategy
PwC	Big Four
Roland Berger	Strategy
Strategy&	Strategy
The Boston Consulting Group	Strategy
Towers Watson	HR

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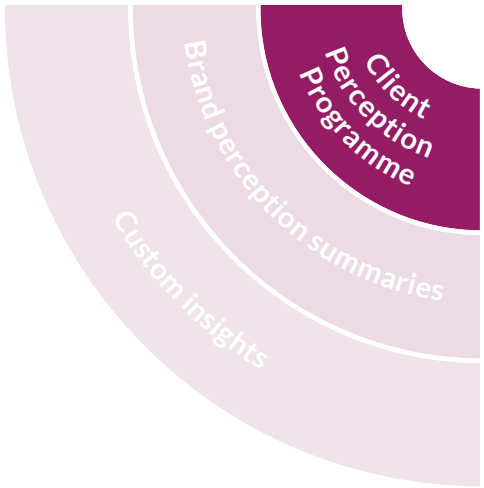
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Brand perception summaries are available for the following firms:

Accenture
Aon Hewitt
A.T. Kearney
Bain & Company
Capgemini Consulting
Deloitte
EY
Hay Group
IBM Global Business Services
KPMG
McKinsey & Company
Oliver Wyman
PwC
Roland Berger
Strategy&
The Boston Consulting Group
Towers Watson

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CLIENT PERCEPTION PROGRAMME



The newest of our major research programmes, our *Client Perception Programme* is a suite of eleven reports that 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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- **Germany**
- **France**
- **Energy & resources**
- **Financial services**
- **Perceptions of procurement**
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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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