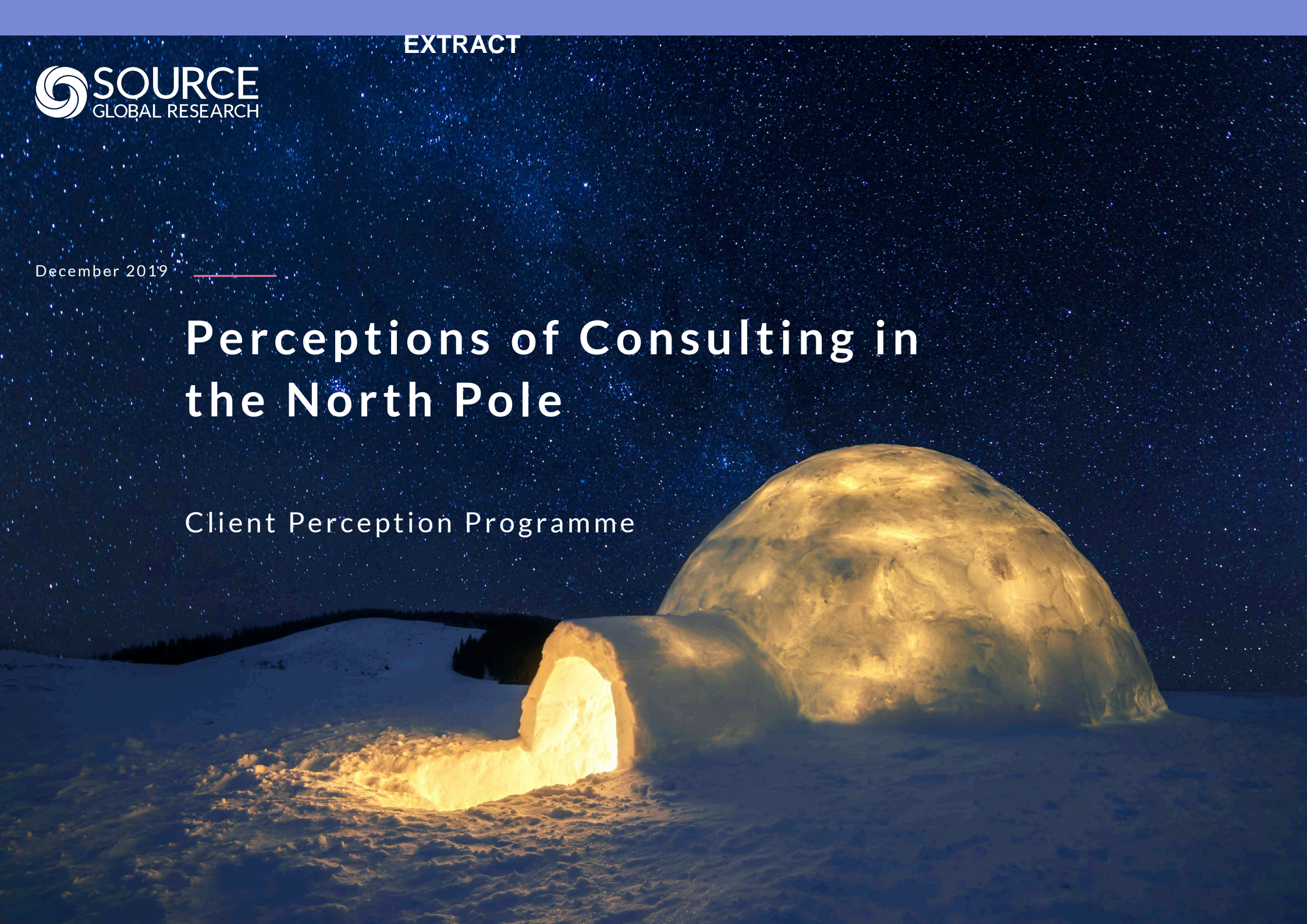


December 2019

Perceptions of Consulting in the North Pole

Client Perception Programme



Introduction and methodology

A long-ignored, chilly outpost of the consulting market with an over-reliance on seasonal demand, the North Pole hadn't been a major talking point in the industry. Until now.

Following two years of blockbuster growth, fuelled by demand for automation, the need to protect customer data, and the constant pressure for present innovation, the North Pole has become a major talking point not just in the Nordics, but the world over.

To reflect the growing interest in the market, we've surveyed 64 senior buyers of consulting services in the North Pole, asking them to tell us about three consulting firms they have either worked with or are familiar enough with to have an opinion on. We've aggregated the responses to gauge how clients feel about the industry as a whole, and their perceptions of individual firms.



2

CEO/Board level
Mr & Mrs Claus



8

Senior reindeer in
operations roles



3

Ghosts of Christmas in
risk management roles



1

Ebenezer Scrooge
in finance roles



50

Senior elves in product
development roles

What clients are telling us about consulting in the North Pole

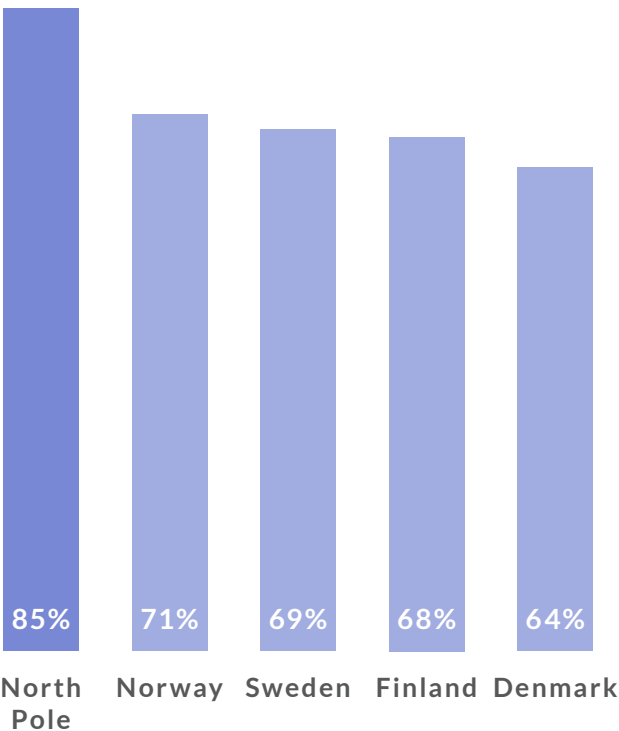
High on life, high on quality

North Pole clients' perceptions of the quality of work delivered by consulting firms are considerably higher than the verdicts given in nearby Nordic markets. Overall, 85% of North Pole clients say the quality of work delivered is "high" or "very high", a far higher proportion than the Nordics more generally.

A key driver may be the high proportion of senior elves in our sample. As major beneficiaries of the successful outsourcing of wrapping services in recent years, elves now have far more time to devote to developing and building presents, singing Christmas songs, and smiling. "The day-to-day life of the average elf has been transformed," says Buddy, the elf in charge of present innovation. "All the complexity of sellotape, bubble wrap, and wrapping paper—all that has disappeared and we have the consultants to thank for it."

Not everyone is happy though. Ebenezer Scrooge, SANTA Inc's new CFO, questions the long-term value of the deal. "The initial outlay of chocolate coins to outsource wrapping services is huge," he tells us with a frown. "It could be years before we see an impact on the bottom line. Bah humbug."

Percentage of clients speaking positively about quality of work



What clients are telling us about consulting in the North Pole

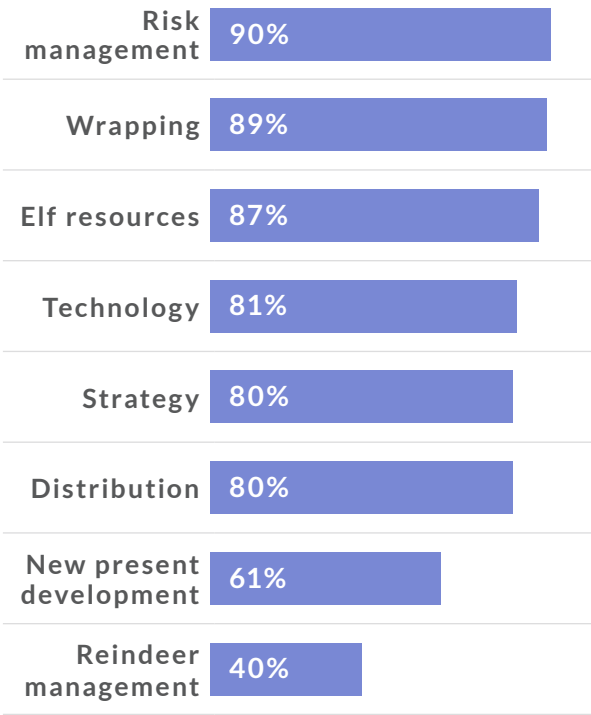
Risk pays off for consultants

Risk management is the service that clients in the North Pole are most positive about, with an enormous 90% of them describing work as high quality. With GDPR regulation to comply with, and the rising threat of hackers (there remain fears that Fancy Bear could team up with disgruntled polar bears in the region to wreak havoc), guarding SANTA Inc’s list of who has been naughty or nice has become a board-level issue. “The last thing we want is a data breach—it would be worse than Ashley Madison,” says the Ghost of Christmas Future, in charge of cybersecurity at SANTA Inc. With no in-house expertise to draw on, SANTA Inc is entirely dependent on support from consultants for this function, and as a result, managed services arrangements have grown vastly in popularity.

As in other markets, consultants struggle to shake off the “suit and tie” image in the North Pole, reflected in clients’ more lukewarm opinions of new present development work. It’s an area that demands high levels of innovative thinking—something clients everywhere see as a weakness among consulting firms.

But it’s reindeer management services that attract the greatest criticism. Recent cutbacks on carrots have gone down poorly with the reindeer community at large. “Our teams have lost a major perk of the job, while Santa continues to scoff mince pies and swill whisky, sometimes with the consultants that suggested taking our carrots away,” said one senior reindeer who wishes to remain anonymous. But not everyone is displeased: “We’ve saved half a million chocolate coins already, and that’s just in the first year,” Ebenezer Scrooge tells us while rubbing his hands with glee.

Percentage of clients speaking positively about quality of work, split by service



What clients are telling us about consulting in the North Pole

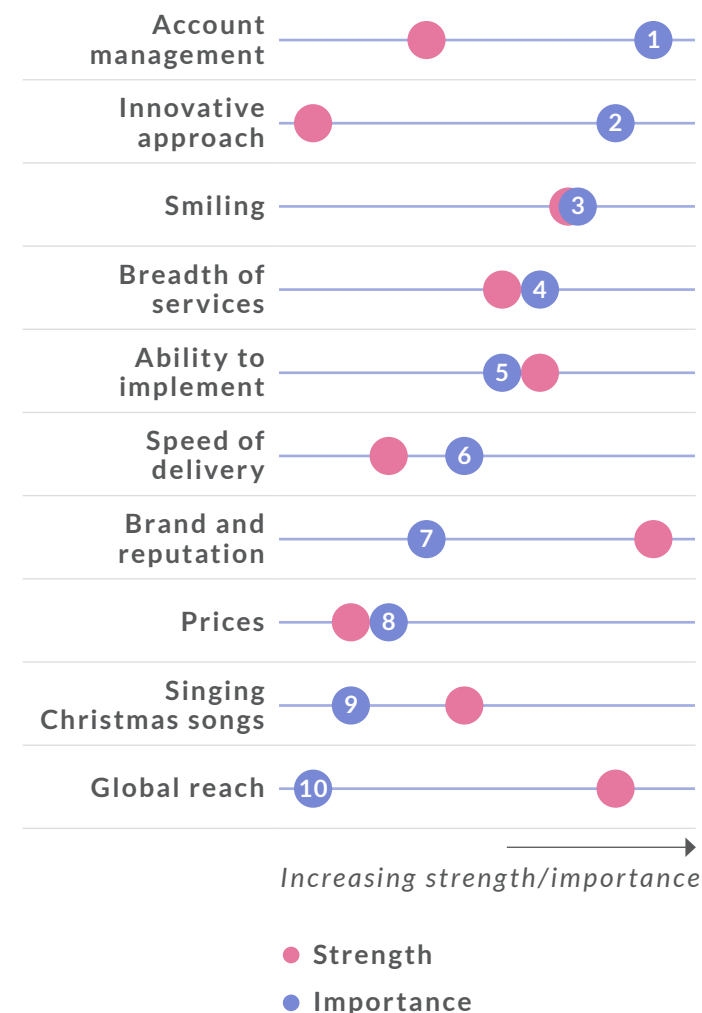
Increasing complexity makes account management more important to clients in the North Pole

“The range and scale of demand for Christmas presents only ever broadens, putting our supply chains, present development, and distribution operations under pressure,” explains Santa himself. A frazzled-looking Buddy the elf tells us: “We’ve seen it all: from the usual requests like a new scooter; gold, frankincense, and myrrh; to someone called Mariah who keeps asking us to wrap up her boyfriend and put him under the Christmas tree. Frankly, he doesn’t seem to like it any more than we do.”

The challenges SANTA Inc faces cut across its departments; similarly, the solutions required from consulting firms are multidisciplinary, requiring firms to pull on the full breadth of their capabilities to solve SANTA Inc’s issues. It’s no surprise, then, to see that clients in the North Pole say account management is the most important attribute when working with consulting firms. However, it’s only the seventh-strongest attribute overall, indicating that this should be a priority area for any firm wishing to grow in this market.

The other clear area for improvement is innovative approach, ranked the weakest attribute by clients in the North Pole—behind even prices. “No one has ever, ever put a PowerPoint deck on their Christmas list—my guess is they never will—and yet this is what consultants keep giving us,” says Merry the elf, head of present sourcing.

The relative importance and strength of attributes to clients in the North Pole—the DNA of consulting firms



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