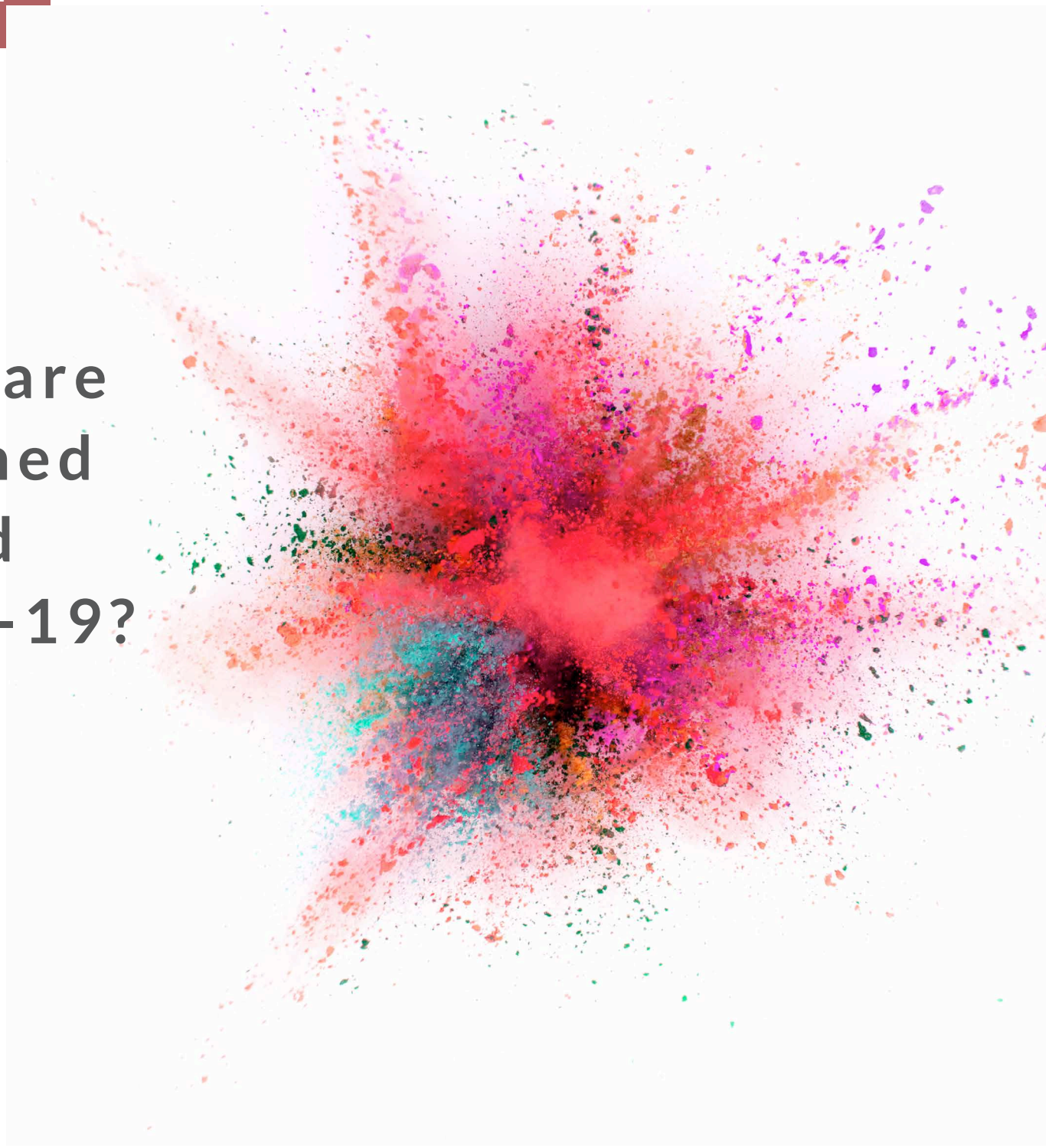


May 2020

Which firms are best positioned for the world after COVID-19?

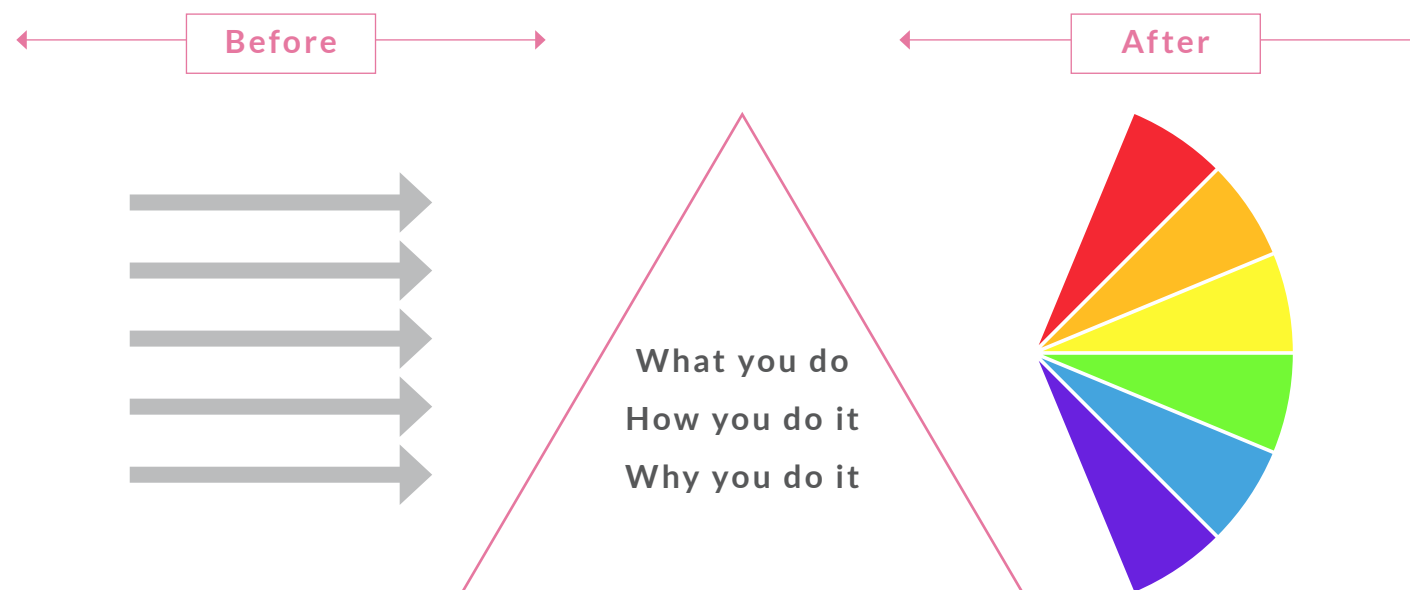




We see COVID-19 as a prism of change in the consulting industry

Just as Isaac Newton demonstrated that white light shining into a prism is changed and coloured by it, we believe the COVID-19 crisis is changing the consulting industry. Trends that were present before are now amplified; shifts in clients' needs and expectations are now focusing on certain areas; and the need for rapid, demonstrable results is even more important than it was in the past.

For consulting firms, this changes what clients want from a firm, how they want it delivered, and why they want these services. This white paper explores how well firms are set up to deal with the changed landscape that will emerge after the crisis.





Methodology

When we conducted our annual client survey at the end of last year, we—like most—hadn't factored in the impact a global pandemic might have on the consulting market. This white paper takes the data we gathered before the start of the crisis and maps the questions we asked as closely as we can to what clients are telling us will be the most important in the aftermath.

To answer which firms are best positioned in terms of **what** they do, we've drawn on questions we ask clients about the quality of work delivered in different services and their views on firms' ability to deliver specific outcomes. To consider **how** firms deliver, we've analysed clients' perceptions of different attributes. To assess the changing reasons **why** clients will look to hire a firm, we've analysed the types of value clients most associate with different firms.

In each case we've simply ranked firms from highest scoring to lowest scoring, and then calculated an average for what, how, and why from each ranking. The three then roll up to tell us which firm is best positioned overall. The higher the average rank, the better positioned that firm is.



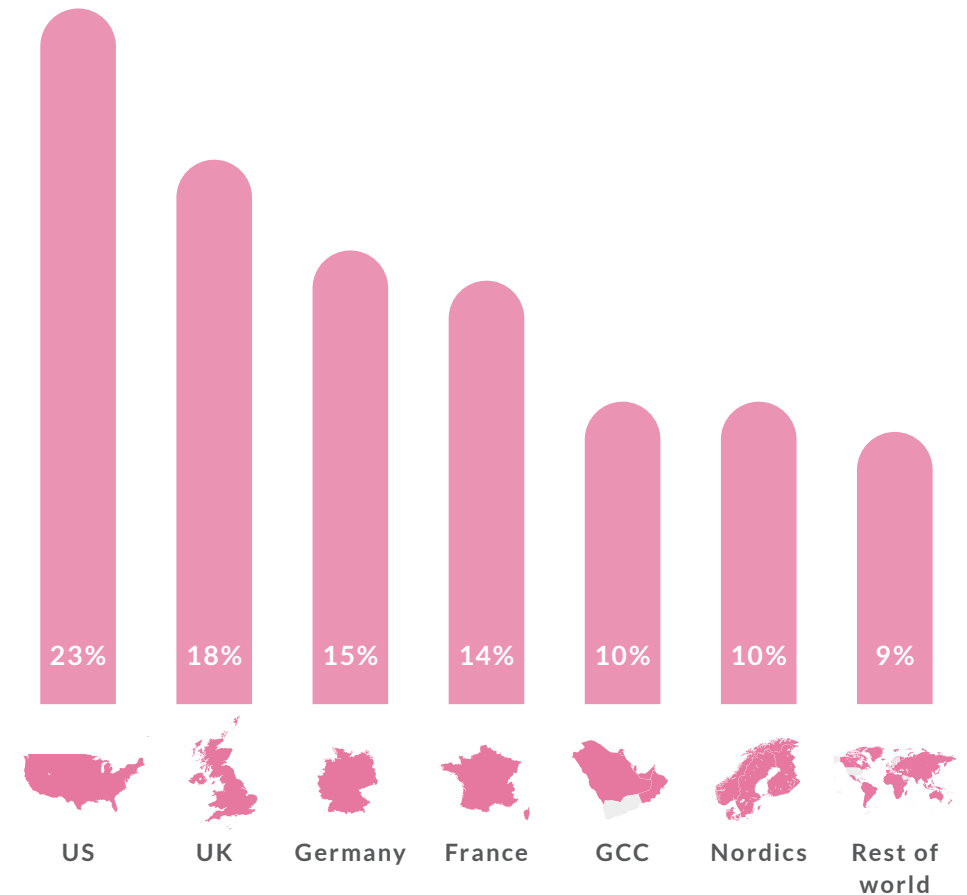
Methodology

Every year we survey thousands of senior end-users of consulting around the world, all of whom are extensive users of consulting services. Our latest dataset—gathered in November and December 2019—includes the views of 2,755 clients around the world, each of whom tells us about three consulting firms, giving us 8,265 responses in total. Respondents come from all sectors and functions, and a wide range of countries.

We ask clients to select three firms from the following list. This analysis is therefore focused on how these firms perform on each metric.

- Accenture
- AlixPartners
- Bain
- BCG
- Capgemini Invent
- Deloitte
- EY
- Kearney
- KPMG
- McKinsey
- Oliver Wyman
- PwC
- Roland Berger

Where our respondents are based





What you do: Which services are going to be most in demand, and which firms are best placed to meet this need?

After the immediate crisis, client demand is likely to be focused on five key areas:

- The desire to take the best of what was learned during the crisis in terms of **productivity improvement**
- The ability to imagine, design, and implement the **rapid technology change** on which behavioural change depends
- **Reconnecting with customers**—huge programmes to learn about better use of technology and customer engagement
- **Sustainability and purpose**—with climate change already high on the agenda, clients will be looking to be much more socially responsive
- **Risk management**—ensuring that organisations can, and can demonstrate their ability to, adapt quickly to economic upheaval.

We've mapped these areas as closely as we can to our client data, and ranked firms based on the proportion of clients describing work as "high" or "very high" quality.

How firms rank against each other in the eyes of clients

| |  Productivity improvement |  Rapid technology change |  Reconnecting with customers |  Sustainability and purpose |  Risk management |
|---|--|---|---|--|---|
| 1 | EY | EY | EY | Kearney | EY |
| 2 | Kearney | Kearney | Kearney | Accenture | Kearney |
| 3 | BCG | Deloitte | BCG | Oliver Wyman | Deloitte |
| 4 | Deloitte | Accenture | McKinsey | McKinsey | KPMG |
| 5 | KPMG | Capgemini Invent | AlixPartners | AlixPartners | McKinsey |
| 6 | Accenture | Oliver Wyman | Deloitte | Bain | BCG |
| 7 | McKinsey | McKinsey | Bain | BCG | Capgemini Invent |

Contact us

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Set up in 2007, Source serves the professional services industry 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.

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