

The Forrester Wave™: Business Transformation Consultancies, Q3 2015

The 10 Providers That Matter Most And How They Stack Up

by Marc Cecere

July 21, 2015

Why Read This Report

In Forrester's 23-criteria evaluation of business transformation consultancies, we identified the 10 most significant service providers — Accenture, Capgemini, Cognizant, Deloitte, EY, IBM, Infosys, KPMG, PwC, and TCS — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help CIOs select the right partner for their business transformations.

Key Takeaways

Deloitte, Accenture, PwC, IBM, And Cognizant Lead The Pack

Forrester's research uncovered a market in which Deloitte, Accenture, PwC, IBM, and Cognizant lead the pack. Capgemini, KPMG, EY, TCS, and Infosys offer competitive options and are improving.

Customer/Industry Knowledge, Completeness, And Innovation Are Key Differentiators

Business transformations change channels, business structures, and how customers are served. To do so, broad and deep industry/customer knowledge and data are required of consultancies. And because these are high-risk, complex projects, companies don't want to be general contractors and are looking for partners with a complete package of services.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online, and download the Excel tool using the "Download" link for Figure 3 or the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.

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by [Marc Cecere](#)
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July 21, 2015

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Forrester conducted service evaluations in spring 2015 and interviewed 38 user companies as well as the 10 evaluated vendors: Accenture, Capgemini, Cognizant, Deloitte, EY, IBM, Infosys, KPMG, PwC, and TCS.

Related Research Documents

- [The Forrester Wave™: Business Technology Transformation, Q3 2012](#)
- [The Forrester Wave™: IT Organization Redesign Consultancies, Q4 2012](#)
- [Market Overview: Business Transformation Consultancies](#)

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Today's Business Transformations Require New Partner Capabilities

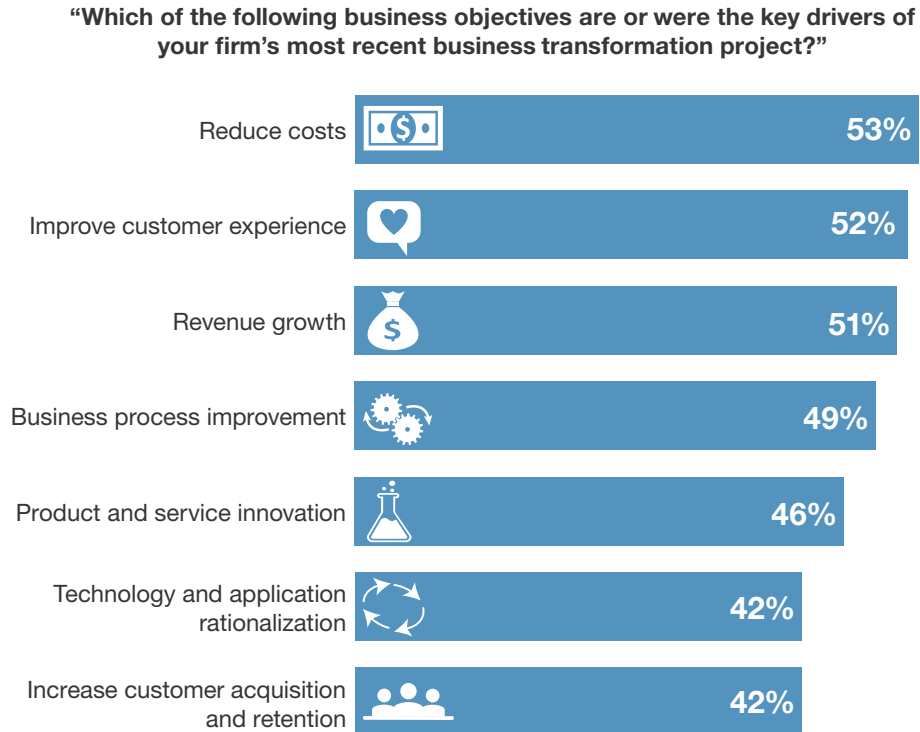
A business transformation consists of fundamental changes to business processes, technology, models, structures, channels, and even to culture. In a business environment where the focus is on improving the user experience, increasing speed, and applying new technology to traditional business issues, these are the most complex and highest-risk projects an organization can take on. As one transformation leader told us, "A failure here is career ending." Since few organizations have the expertise or resources to execute such projects on their own, they partner with a consultancy, and because of the complexity and impact of these initiatives, companies look for providers that have proven track records and provide a complete suite of services.

The most common objectives that drive companies to undergo a transformation are reduced costs, improved customer experience, and revenue growth (see Figure 1). Examples that illustrate the scope of these transformations include:

- › **A mutual fund company that reorganized to improve customer service.** A global fund management company had structured its business divisions around its products. These silos were inefficient, leveraged skills poorly, and fragmented customer services into divisions that were not providing a unified experience. The transformation involved restructuring the business divisions around the organization's services and replacing the core systems including customer acquisition, customer service, and trading. This project also started a culture change, enabling employees to view the company as one organization rather than several independent entities.
- › **A media company that moved to digital to increase local-market agility.** A large media company was experiencing dramatic reduction in print revenue. Old legacy systems and slow, inflexible processes hampered growth. With the help of a consultancy, the organization re-engineered processes and introduced digital systems in sales, marketing, production, circulation, IT, and finance. As a result, it became more flexible and efficient and was able to cater to local-market needs.
- › **A large insurer reduced costs by 15% while implementing a global operating model.** The 2008 financial crisis severely hurt this insurer, and it needed to reduce costs, increase business agility, and establish platforms for future growth. It implemented a standard global operating model; deployed modern, flexible core insurance systems to replace a complex mix of legacy ones; and created new processes for global strategy and IT architecture.

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FIGURE 1 Cost, Customer Experience, And Growth Are Driving Business Transformations



Base: 841 global services decision-makers whose firm is currently undergoing or has completed a business transformation in the past 24 months (multiple responses accepted)

Source: Forrester’s Business Technographics® Global Business And Technology Services Survey, 2014

Transformation Consultancies Are Expected To Do It All

In “The Forrester Wave™: Business Technology Transformation, Q3 2012,” where we evaluated business technology transformation consultancies, the most important criteria were industry knowledge, vision, and bench strength.¹ These are still important, but the age of the customer adds emphasis on change management, innovation, thought leadership, and completeness of services. For that reason, we renamed this Forrester Wave to focus on business transformation consultancies that can execute these tasks from strategy through implementation and help clients be both innovative and operationally excellent. Specifically, business transformation projects using consultants have changed in that they are:

- › **Global in scope.** Nearly all of the 38 companies interviewed for this evaluation stated that part of the goal of the transformation was to become more globally consistent in systems, processes, and organizations. Whether it was to reduce the number of instances of SAP or establish a single

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global finance function, they wanted less complexity and expected their consulting partners to be able to deal with multiple cultures, regulatory environments, tax structures, and the added scale requirements of a global organization.

- › **Expanding in focus.** To provide these services, the top consultancies have been building, buying, or partnering for what they need. For example, Deloitte bought the senior management consultancy Monitor Group; Cognizant bought TriZetto for healthcare solutions and services; KPMG bought Cynergy for agency capabilities. Some have merged these capabilities to provide a seamless picture of what a transformation looks like. Others have created a police sketch put together from conflicting sources.
- › **Increasingly based on next-generation reusable assets.** All of the consultancies in this evaluation have built up reusable assets including business models, process flow charts, data, and business applications. Instead of relying on what's in a consultant's head or what "seems" to be the right thing to do, they are drawing from scientifically valid studies to find the optimal practices. Most of these consultancies are extending these assets with artificial intelligence and other software to enable greater self-service for clients. Furthermore, they are increasingly connecting their practices with internal and external research to implement evidence-based consulting. Over the next 10 years, more pieces of traditional consulting will be carved off to asset-based consulting, where fewer consultants are needed to do increasingly leveraged work. This will gradually change firms' engagement and revenue models.
- › **Focusing more on organizational change.** Finally, organizational change management (OCM) has become a hot topic with clients, and the consultancies are responding. Their methods are more sophisticated and complete than four years ago. They are covering the project-specific aspects of OCM (e.g., training and communication) as well as the behavioral aspects (e.g., peer influence and pattern recognition). Clients today view OCM as a major challenge — as one client noted to us, "the Achilles' heel of the program." It's the biggest gap in the consultancies' capabilities and is key to the success of their projects. However, given how poorly firms have communicated this value to clients and the ambiguity over what's even included in OCM, there's still a question of how much clients are willing to pay for this.

How We Evaluated Business Transformation Consultancies

To assess the state of the business transformation consultancy market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of 10 of the top business transformation consultancies. We evaluated them against 23 criteria that are important to this type of project. For most of the criteria, we compared these firms against the average of the Forrester Wave participants. This shows where they stand *relative to the best firms*, not to all firms that perform this work.

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Our Evaluation Considered Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, surveys, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We employed 23 criteria, which we grouped into three high-level buckets:

- › **Current offering.** Some criteria turned out to be “table stakes,” including completeness of services, a transformation methodology, and solid software capabilities. These were generally implemented well and provided little differentiation. However, there were a number of criteria, including OCM, thought leadership, and customer knowledge, that are either critical or rapidly becoming critical. The value from the application of reusable assets was somewhat mixed in the vendors’ clients’ perception. As one client reported, “We have a love/hate relationship with templates.” However, Forrester considers this a required base for how the firm will perform consulting in the future.
- › **Strategy.** With the management consulting business changing so quickly, planning for the future has become an important criterion. Industry-specific knowledge has always been critical for business transformation and continues to be important. Cost to clients, measured primarily on value for the money, was very important for some clients but a secondary factor for others. Large companies in a dynamic market, where the transformation had a direct impact on their business model, were more concerned with getting it right quickly than with the cost. One client reported, “We probably could have done it cheaper, but not right.”
- › **Market presence.** The number of consultants and brand visibility dominated this category. This Forrester Wave focuses on business transformations for large organizations. These are inherently large, geographically distributed projects that require good bench strength. And because of the high risk and visibility of these projects, brand credibility with senior management and boards of directors is a significant differentiator. This latter criterion obviously makes it harder for companies without tens of years of track record to win large business transformations.

Evaluated Vendors Are Global, With Complete Business And Technology Capabilities

Forrester included 10 vendors in the assessment: Accenture, Capgemini, Cognizant, Deloitte, EY, IBM, Infosys, KPMG, PwC, and TCS. Each of these vendors has (see Figure 2):

- › A portfolio of representative business transformation projects for enterprise-class clients.
- › A technology-enabled business transformation methodology.
- › At least four references.
- › A reputation — based on inquiries, conversations, and other feedback from Forrester clients — as a major global management consulting company that performs business transformations.

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FIGURE 2 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor	Date evaluated
Accenture	Q1 and Q2 2015
Capgemini	Q1 and Q2 2015
Deloitte	Q1 and Q2 2015
EY	Q1 and Q2 2015
IBM	Q1 and Q2 2015
Infosys	Q1 and Q2 2015
PwC	Q1 and Q2 2015
TCS	Q1 and Q2 2015
KPMG	Q1 and Q2 2015
Cognizant	Q1 and Q2 2015

Vendor selection criteria

The vendor must have a portfolio of representative business transformation projects for enterprise-class clients.

The vendor must have a technology-enabled business transformation methodology.

The vendor must be able to provide at least four references.

The vendor must have a reputation — based on inquiries, conversations, and other feedback from clients — as a major global management consulting company that performs business transformations.

Vendors Must Be Complete, Innovative, And Operationally Excellent

The vendors in this evaluation are in the very top tier of all consultancies that perform business transformations. *For this report, however, we compared them to each other in their current state and not to every consultancy providing this service. We also recognize that these vendors are continually changing themselves as the market changes and so we include their plans and ability to change as criteria (see Figure 3).*

- › **Deloitte, Accenture, PwC, IBM and Cognizant lead the pack.** These five vendors stood out with their customer and industry knowledge, innovation, thought leadership, and consistency of high-quality delivery. They've also shown the ability to handle the largest and most complex projects.

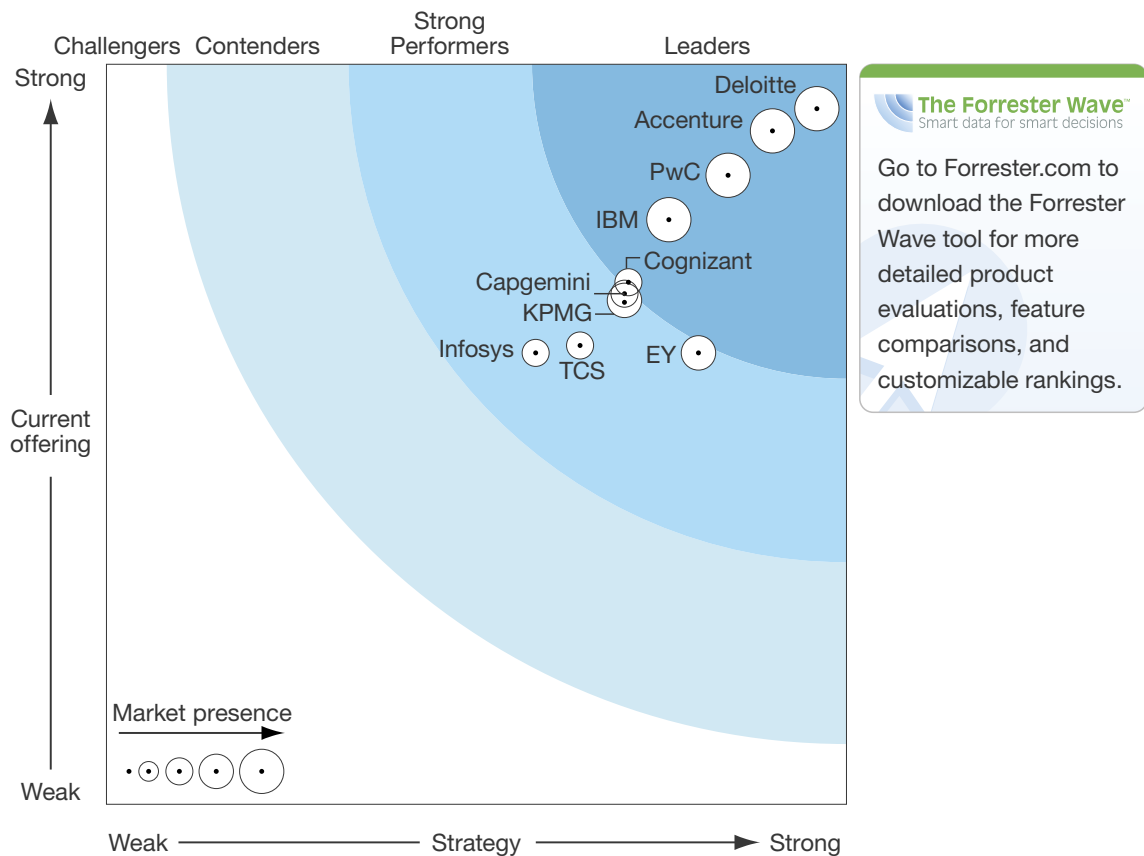
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- › **Capgemini, KPMG, EY, TCS, and Infosys are Strong Performers with specific weaknesses.** We attribute many weaknesses of this group to capabilities that they're building but that are not yet fully mature. OCM, consistency in the critical steps of their methodologies, and the number of people who specialize in business transformations (with the exception of KPMG) are signs of capabilities that exist but are not fully developed. This showed up, in particular, in the *application* of some capabilities. For example, KPMG's methodology for OCM shows great sophistication; however, implementing this across many projects and consultants is a work in progress. Finally, though this group has acquired significant visibility and credibility in management consulting, these vendors don't yet have the same visibility in *business transformations* as the Leaders.

This evaluation of the business transformation consulting market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

FIGURE 3 Forrester Wave™: Business Transformation Consultancies, Q3 '15



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FIGURE 3 Forrester Wave™: Business Transformation Consultancies, Q3 '15 (Cont.)

	Forrester's Weighting	Accenture	Capgemini	Cognizant	Deloitte	EY	IBM	Infosys	KPMG	PwC	TCS
CURRENT OFFERING	50%	4.55	3.45	3.50	4.70	3.05	3.95	3.05	3.40	4.25	3.10
Completeness of business transformation services	5%	5.00	4.00	3.00	5.00	3.00	3.00	3.00	3.00	4.00	3.00
Organizational change management (OCM)	15%	4.00	3.00	3.00	4.00	2.00	4.00	2.00	3.00	3.00	2.00
Case for change	5%	5.00	4.00	4.00	5.00	4.00	3.00	2.00	4.00	5.00	4.00
Readiness for change	5%	4.00	4.00	4.00	4.00	4.00	4.00	4.00	3.00	4.00	3.00
Reusable assets	10%	4.00	3.00	3.00	5.00	2.00	4.00	4.00	4.00	4.00	4.00
Methodology	5%	4.00	3.00	3.00	4.00	3.00	4.00	3.00	3.00	4.00	3.00
Use of benchmark data	5%	4.00	3.00	4.00	5.00	3.00	5.00	3.00	4.00	5.00	4.00
Research-based best practices	5%	5.00	4.00	4.00	5.00	3.00	5.00	3.00	3.00	5.00	3.00
Design of future organizations	5%	5.00	4.00	3.00	5.00	4.00	3.00	3.00	4.00	5.00	2.00
Innovation	10%	5.00	4.00	4.00	5.00	4.00	5.00	4.00	4.00	5.00	4.00
Software capabilities	5%	4.00	3.00	4.00	4.00	2.00	4.00	4.00	2.00	4.00	4.00
Customer knowledge	10%	5.00	4.00	3.00	5.00	4.00	3.00	4.00	4.00	5.00	4.00
Thought leadership	15%	5.00	3.00	4.00	5.00	3.00	4.00	2.00	3.00	4.00	2.00
STRATEGY	50%	4.50	3.50	3.50	4.80	4.00	3.80	2.90	3.50	4.20	3.20
Cost to clients	20%	4.00	3.00	4.00	4.00	3.00	3.00	4.00	3.00	4.00	4.00
Business organization	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Related services	20%	5.00	4.00	3.00	5.00	5.00	4.00	3.00	4.00	5.00	3.00
Future plans	30%	4.00	3.00	4.00	5.00	4.00	4.00	2.00	3.00	4.00	3.00
Industry capabilities	30%	5.00	4.00	3.00	5.00	4.00	4.00	3.00	4.00	4.00	3.00
MARKET PRESENCE	0%	5.00	2.75	2.40	5.00	3.35	4.45	2.35	3.70	4.35	2.70
Number of consultants	30%	5.00	2.00	2.00	5.00	3.00	4.00	2.00	5.00	5.00	3.00
Brand visibility	40%	5.00	3.00	2.00	5.00	3.00	5.00	2.00	3.00	4.00	2.00
Geographic coverage	25%	5.00	3.00	3.00	5.00	4.00	4.00	3.00	3.00	4.00	3.00
Client references	5%	5.00	4.00	5.00	5.00	5.00	5.00	4.00	5.00	5.00	5.00
Revenue	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Vendor Profiles

Leaders Are Innovative, Consistent, And Complete

- › **Deloitte.** Deloitte drives business transformations with its customer and industry knowledge and shows remarkably high quality for all related services. Building on its history as a business consultancy (with expertise in tax, enterprise risk, and financial advisory), Deloitte's relationships with clients are long-term, embedded in organizations, and strongest at the executive level. While Deloitte is known to be a higher-cost provider, clients told us it provides very good value for the money. As with other providers, it has made numerous acquisitions and been strong at integrating and applying the acquired capabilities. Deloitte is particularly strong in using research from internal and external sources in its consulting. For example, it is pushing the envelope in innovation with thought leadership from its alliance with Singularity University, a capability that allows it to stay ahead of clients (rather than be reactive) in setting business strategy. From this and its practical experience, its designs for future organizations, organizational change management, and thought leadership in a wide variety of areas are the best we've seen.
- › **Accenture.** Accenture excels in taking on the most complex business and technology problems. From the lens of complete, end-to-end technology transformations, Accenture is one of the most viable options in this Forrester Wave. Accenture benefits from its historical focus on technology strategy, implementation, and execution. Because of its broad set of technology capabilities, it has a brand that business leaders, boards of directors, and CIOs trust. Accenture's consultants are disciplined, assertive, and innovative and will push back on clients when they think the project is in jeopardy. The firm's reuse of assets including extensive benchmark data is mature, and it leverages internal and external research from organizations including MIT, INSEAD, and industry groups. It has very strong technical credentials and an extensive global delivery capability.
- › **PwC.** PwC has completed the integration of several large acquisitions that provide new strengths in strategy work. It is innovative in areas including its use of customer data and its agency capabilities. The firm is also highly visible in business transformations and is building on this through activities including events, forums, reports, and a well-designed app. PwC also benefits from its history as a business consultancy, and the company places much stronger emphasis on its strategy and advisory work — as evidenced by its recent acquisition of Booz & Company (rebranded as Strategy&), which positions the company strongly for government-related strategy work. This builds on the smaller acquisition of PRTM in 2011. Though solid overall, PwC clients have experienced some mixed results in areas including change management, the application of reusable assets, and software execution.
- › **IBM.** IBM has the strongest overall technology brand of all participants in this Forrester Wave, though less so for business transformations. Its base in software-based technology innovation is well-known and is applied to business transformations through the IBM Global Business Services business unit. This services organization draws on the software capabilities of the rest of the

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company, providing transformation “solutions” that are rooted in great technology capabilities. In particular, its use of customer and other analytics within transformations is insightful and practical. The firm faces some challenges though, particularly when it comes to business (rather than pure technology) leadership. Its track record for execution and ability to manage clients is more mixed than the other Leaders’, and in some cases, specialized resources were not available when needed. Finally, the business leaders we speak to still think of IBM more for its technical abilities than for management consulting. Looking at all these factors, today IBM’s greatest strength is in large, complex, technology-enabled transformational programs, particularly where it may also be a software or outsourcing partner. It will take time to overcome perceptions, but the increasing importance of digital technology in transformations plays to IBM’s strength.

- › **Cognizant.** Cognizant was the surprise in this field of more traditional business-consulting names because of how quickly it has built up high-quality assets for large-scale business transformations. It has been remarkably good at investing in its business relationships and at integrating acquisitions, and now it has a complete set of capabilities for business transformation. Its research into the “future of work” and other areas demonstrates some of the best applications of practical thought leadership that we’ve seen. The firm is extremely aggressive in building up software and other reusable assets and is positioned to exploit the long-term trend toward asset-based consulting. It is innovative in how it uses data, how it uses its app store to test ideas, and in its business accelerators. Its challenges include inconsistency in the application of these capabilities and its lack of visibility and credibility in business transformations — in part due to its short history in this space. Business transformation customers are very conservative in choosing a partner, and this lack of a multidecade history is difficult to overcome. However, Cognizant is gaining traction as an increasingly strong technology-based transformation partner.

Strong Performers Have Limitations In Narrow Areas

- › **Capgemini.** Capgemini excels in its ability to execute transformations across multiple countries and cultures. It is complete in its services and particular strong in change management, a digital-oriented methodology, and its reuse of internal knowledge assets. While it boasts great thought leadership and technology capabilities, particularly for the European marketplace, the challenge for Capgemini is to apply these capabilities consistently. Implementation of software, reuse of assets, and even change management (where it shows remarkable sophistication) received mixed feedback in our evaluation.
- › **EY.** EY was solid in nearly all aspects of a business transformation, with a few areas that could be considered weak but also a few that were at the same level as the Leaders in this evaluation. EY received some of the strongest praise for its industry and customer knowledge and provided excellent support through related services of tax, regulatory, and risk. It suffered in the competition for some opportunities because of the widespread perception of the company as an auditor — it has only moderate visibility in the business transformation space. Its challenges, besides visibility, are

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inconsistent execution of software platforms, application of reusable assets, and change management. Finally, its research in “purpose-led transformations” is insightful and highly marketable. The application of it to business transformations is still to be proven, but it’s promising.

- › **KPMG.** With acquisitions including EquaTerra and Cynergy and its extensive tax, audit, and other services, KPMG provides complete business transformation support. KPMG’s visibility is still largely in the strategy and accounting-related practices, though with its acquisitions, strong growth, and significant media investment, this is changing. It is positioned well for the future with its agency capabilities, a well-designed knowledge management portal, and sophisticated knowledge of organizational change management. Its acquisition of Cynergy, for example, vaulted KPMG to a very strong position in digital design, but this is only one part of building out comprehensive end-to-end business transformation capacities. KPMG is solid all around, but clients noted inconsistencies in technical areas of implementation, the application of services including change management, and the visibility of its thought leadership.
- › **TCS.** TCS provides complete services with an orientation toward operational excellence. For example, it is highly innovative, but its history as a technology outsourcing partner means its focus is on innovating to reduce costs and improve operations, and its transformation work is strongly suited to the needs of CIOs. Though highly capable in analytics, mobility, and user experience design, TCS is simply not as cutting-edge as others in this evaluation. Its capabilities with software, especially enterprise software, are excellent. Its prices for business transformation services tend to be in the lower half of this group. As with several vendors that are not in the Leader category, it executes very well but with occasional mistakes in areas including change management and the integration of tax and regulatory resources into the project. With so much of its transformation business coming from its outsourcing customers, TCS already knows its clients and their systems well, and the firm uses this to reduce the risks and costs of these projects. TCS is an attractive option for companies seeking lower-cost technology resources to lead and support both business and IT transformation projects.
- › **Infosys.** Infosys has excellent industry knowledge and a complete set of services. In particular, its acquisition of Lodestone in 2012 filled significant gaps in its global management consulting. The firm’s growth plans are solid but not as clear or ambitious as the others in this group, and its visibility in business transformation is still very low. Its reusable assets including industry software solutions (manifest within its Impact Framework) are some of the best we reviewed, and they position the firm well to take advantage of the long-term trend toward asset-based consulting. As with some of the other Strong Performers, Infosys executes business transformations well but shows inconsistency in areas including change management, managing at the most senior levels of the client organization, and always having the right people available. Infosys is a strong option for companies seeking help with IT transformations, particularly those that require significant low-cost resources.

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Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

Ask a question related to our research; a Forrester analyst will help you put it into practice and take the next step. Schedule a 30-minute phone session with the analyst or opt for a response via email.

[Learn more about inquiry](#), including tips for getting the most out of your discussion.

Analyst Advisory

Put research into practice with in-depth analysis of your specific business and technology challenges. Engagements include custom advisory calls, strategy days, workshops, speeches, and webinars.

[Learn about interactive advisory sessions](#) and how we can support your initiatives.

Supplemental Material

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Survey Methodology

For Forrester's Business Technographics® Global Business And Technology Services Survey, 2014, Forrester conducted an mixed methodology phone and online survey fielded in July and August 2014 of 1,532 business and technology decision-makers located in Australia, Brazil, Canada, France, Germany, India, New Zealand, the UK, and the US from companies with 100 or more employees.

Each calendar year, Forrester's Business Technographics fields business-to-business technology studies in 10 countries spanning North America, Latin America, Europe, and Asia Pacific. For quality control, we carefully screen respondents according to job title and function. Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Additionally, we set quotas for company size (number of employees) and industry as a means

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of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- › **Vendor briefings.** Each vendor gave a presentation covering its capabilities in business transformations. Forrester reviewed supplementary written material in each case.
- › **Previous projects.** Forrester collected feedback from the clients of these consultancies. This information came to us from our own projects, interviews, and client inquiries.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with four of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

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Integrity Policy

All of Forrester's research, including Forrester Waves, is conducted according to our integrity policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Endnotes

¹ As companies face a growing, diverse mix of internal and external pressures, they're undertaking transformation initiatives that require deep technology and business process expertise. They're looking to external services providers to act as strategic partners capable of delivering end-to-end services. See the "[The Forrester Wave™: Business Technology Transformation, Q3 2012](#)" Forrester report.

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

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Forrester's research and insights are tailored to your role and critical business initiatives.

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