DIGITAL TRANSFORMATION
IN THE **CONSULTING INDUSTRY**

DIGITAL TRANSFORMATION IN CONSULTING

9LENSES CONSULTING INDUSTRY ANALYSIS

The second annual installment of "Digital Transformation in the Consulting Industry" is being conducted by 9Lenses to provide consultants with the data to assess their performance and benchmark against peers. The analysis is broken down into four components:

1| Digital Overview

2| People

3| Process

4| Data Management

This analysis was conducted using the 9Lenses digital diagnostic platform, and the accompanying report was produced using our platform analytics. To learn more about how 9Lenses can transform your consulting diagnostics, please visit our website at *www.9lenses.com* or request a demo from our team.

We hope you will find a wealth of new ideas, validate existing thinking and build for the future of your practice.

The 9Lenses Team

THE OCCASION FOR THE RESEARCH: DIGITAL TRANSFORMATION

"DIGITALLY TRANSFORMED ORGANIZATIONS PERFORMED MUCH BETTER THAN ORGANIZATIONS THAT LAGGED BEHIND, EFFECTIVELY CREATING A "DIGITAL DIVIDE" ACROSS COMPANIES"
-Harvard Business Review

Last year, we discussed the prevalence of digital transformation buzz in the market. The term itself was a top performer on Google Trends in 2016 and now into 2017. Consultancies were quick to move on the opportunities the buzz created. *Source Global Research estimates* the digital transformation consulting market at over $23B. This is nearly 20% of all consulting services offered. In addition, our diagnostic found 78% of respondents are offering digital transformation services, up from 74% in 2016. Is this a short-term revenue trend or a substantive shift in the way consultants do business?

This year we're determined to learn if consulting firms are adopting the digital approach they espouse to clients.

Being digital matters. With a few years of digital transformation experiences under our collective belts, we've been able to assess the impact these changes have made. *HBR found that digital leaders outperform laggards significantly*. What separated leaders was their ability to use data in customer experience, product design, service delivery and employee performance. If we were to assess the consulting industry's performance on the criteria that HBR outlined for digital leaders, would it pass? Do consulting firms use digital platforms for customer experience, product design, service delivery and employee performance?

We've set out to answer these questions in our analysis.

DIGITAL LEADERS OUTPERFORM LAGGARDS ON THREE FINANCIAL MEASURES

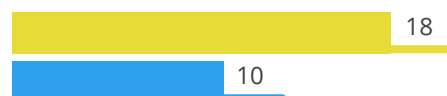Based on 2012-2014 data from 344 enterprises listed on U.S. exchanges.

■ Digital Leaders (top 25% of companies)   ■ Digital Laggards (bottom 25% of companies)
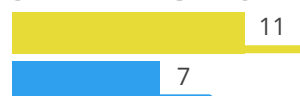
3-YEAR AVERAGE GROSS MARGIN
- 55%
- 37%

3-YEAR AVERAGE OPERATING MARGIN
- 18
- 10

3-YEAR AVERAGE PROFIT MARGIN
- 11
- 7

SOURCE: S&P CAPITAL IQ, KEYSTONE STRATEGY ANALYSIS

THE OCCASION FOR THE RESEARCH: DIGITAL TRANSFORMATION

During our analysis, it was clear that the specter of the new digital economy created a number of new questions that should be taken seriously.

- Are we making the appropriate changes to our operations and culture?

- Should we begin to rethink the billable hour business model?

- If our strongest assets are our people and our IP, are we scaling them?

- Are we testing new models to deliver value to clients?

- Are we beginning to invest in digital tools for a future in which our clients will be entirely digital?

We can't answer all of these questions yet. But we do know from working with our customers on the 9Lenses platform that leading firms are already testing ALL of these ideas.

Our sincere hope is that the analysis in the following pages will help inform forward-thinking consulting leaders. It will be by testing new ideas and evolving business models that leaders can get ahead of a digital future dominated by data.

DIAGNOSTIC ANALYTICS

96 *Participants*

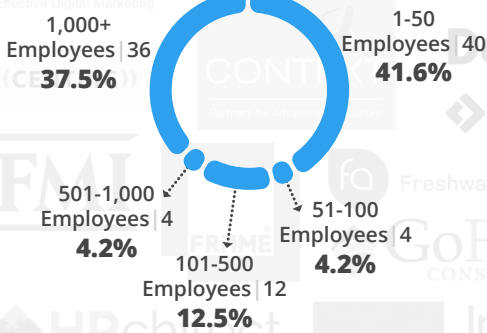**3,216** *Data Points*

14:26 *Average Time to Complete*

56.25% *User Comment Rate*

82.29% *User Comment Ratio*

216 *Comments*

DEMOGRAPHICS

Company Size

1,000+ Employees | 36
37.5%

1-50 Employees | 40
41.6%

501-1,000 Employees | 4
4.2%

51-100 Employees | 4
4.2%

101-500 Employees | 12
12.5%

Role

Partner | 56
58.3%

Engagement Manager | 21
21.9%

Associate | 3
3.1%

Analyst | 4
4.2%

Associate Partner | 12
12.5%

Practice Area

Digital Transformation | 24
25%

Strategy | 35
36.5%

Human Resources | 12
12.5%

Finance | 1
1%

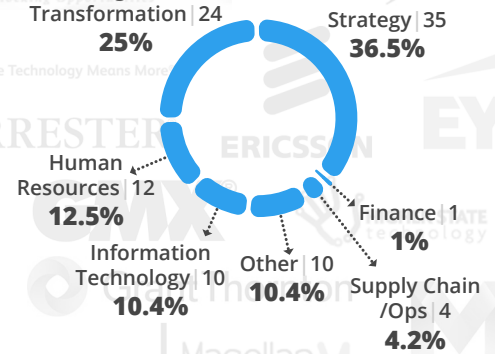Information Technology | 10
10.4%

Other | 10
10.4%

Supply Chain /Ops | 4
4.2%
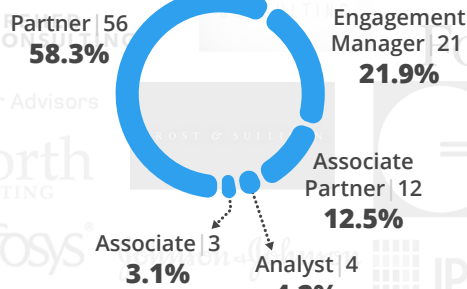
RESPONDENT FEEDBACK

We've summarized respondent feedback so that we can continue to refine the quality of our questions. At the end of the diagnostic we asked users to rank the quality of the experience on 5 point scale and our average ranking was a 3.67 out 5. Certainly some work to be done!
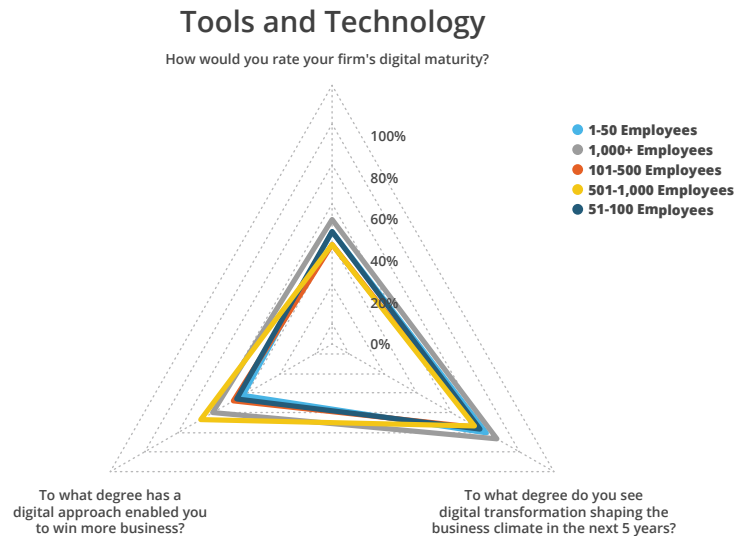
One of our goals this year was to increase the insight and data points from our diagnostic to improve the quality of our output without substantially impacting response rates or completion rate. This year we had 96 full participants vs. 93 last year but were able to improve the number of data points collected from 2,112 to 3,216, a 52% increase! We increased the number of comments from 126 to 216, a 71% increase, while our comment rate improved from 45.16% to 56.25%. One note we're making for next year is that the average completion time increased from 9:48 to 14:26 minutes. We'll have to weigh whether the increased ask from our respondents was worth the insight we collected, or perhaps we can trim time in future iterations. One idea is to eliminate the definition of digital transformation and ask respondents to force rank which category they believe provides the most benefit to clients. Incidentally, our software rated a 4.33 out of 5. We use this feedback to continue to refine our product and identify potential trouble spots.

Each 9Lenses diagnostic includes an opportunity for respondents to provide feedback into the questions themselves. Our clients use this data and our diagnostic analytics to tweak or eliminate questions, find the appropriate segments and gather feedback that might not otherwise be provided. The net result is that the platform aids consultants in the quality and science of their questions over time.

EXECUTIVE SUMMARY

DIGITAL TRANSFORMATION WILL SHAPE THE BUSINESS WORLD,
BUT THE DIGITAL MATURITY OF CONSULTANTS REMAINS LOW

Tools and Technology

How would you rate your firm's digital maturity?

- 1-50 Employees
- 1,000+ Employees
- 101-500 Employees
- 501-1,000 Employees
- 51-100 Employees

To what degree has a
digital approach enabled you
to win more business?

To what degree do you see
digital transformation shaping the
business climate in the next 5 years?

It's not *if* digital transformation will impact your business, but *when*. Ninety-four percent of respondents indicated that digital transformation will have an extreme or near extreme impact to the business world in the next five years. This year, senior managers of consulting firms are championing the transformation of their firms. 62% of respondents felt senior management is promoting a digital approach to an extreme or nearly extreme degree. This is a large change from last year, when senior management was a significant hurdle to a digital approach. Consulting leaders are recognizing the need for a more digital approach both so that they are credible service providers and so they can realize the benefits they are providing to clients.

Transformation presents opportunity. Firms that view transformation as an opportunity will have more business available and be better positioned for growth in the future. In the short term, the digital transformation consulting market is, *according to Source Global Research*, already valued at $23B, nearly 20% of the total market. According to our research, 78% of respondents are offering those services to clients, an increase over last year. Longer term, the most forward-thinking firms are already *testing new models for delivering value to clients* and identifying new adjacent revenue streams.

Consulting firms have a long way to go in their own transformation. The changes that firms are making in response to digital opportunity are still largely surface level. Changes to value proposition and the consulting portfolio were the most selected changes. In addition, respondents self-rated their firm's digital maturity with modest scores and further indicated that digital capabilities are only somewhat ingrained in company culture. If firms are to truly digitally transform their business, it will be through transforming culture that they do it.

Digital transformation will impact every practice area. The results make clear that the impacts of digital transformation will not be confined to a single practice or functional area. Respondents, when defining digital transformation, believe the impact to day-to-day activities is real and has impacts across the business for innovation, customer experience, how data is connected and how decisions are made.
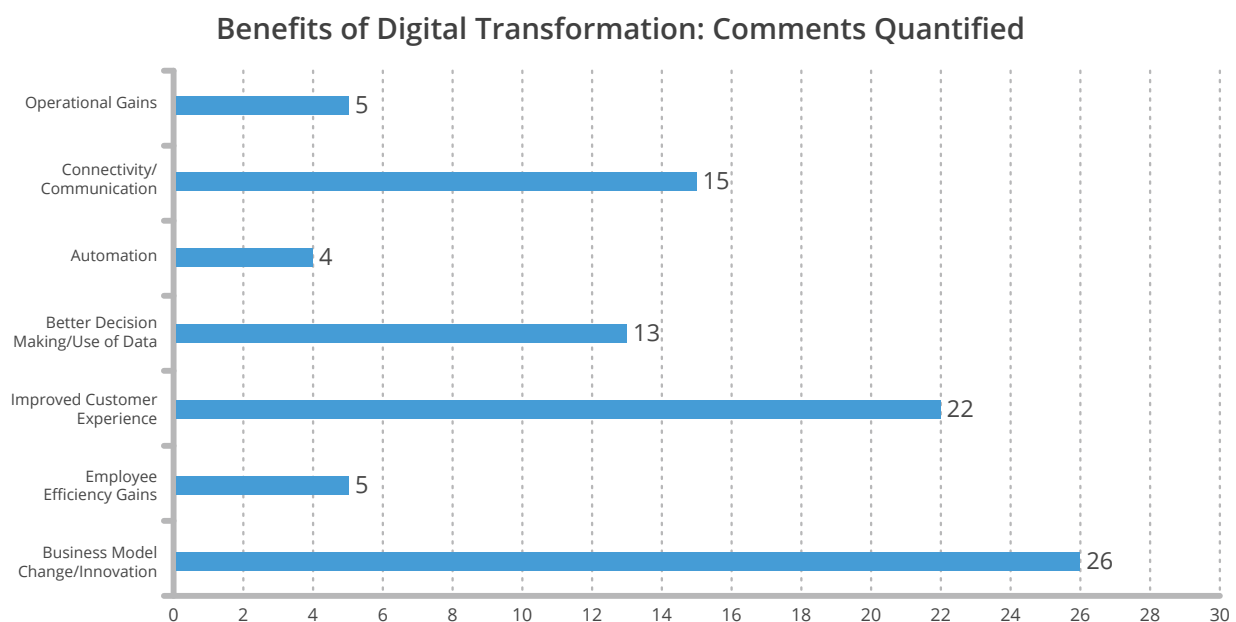
DIGITAL TRANSFORMATION IN YOUR OWN WORDS

We offered an open-ended question asking respondents to define digital transformation in their own words. The responses varied in depth, description and direction. To help make sense of the data, we used our comment sorting technology to quantify the definitions according to the benefit provided. We also selected a few of the definitions that we felt were powerful and articulate.

Two areas stood out in the analysis of how digital transformation was defined.

1. It's clear digital transformation is not limited to a single practice or functional area. The definitions and their benefits span across industries, business models, customers, employees and decision making.

2. Our definitions still have a long way to go for clear, benefit-focused articulation. Many firms and practices would benefit from a few small working sessions to collect knowledge on the subject and have each consultant practice articulating the benefits as they would with a client.

To learn more about how top firms are defining digital transformation, 9Lenses researched publicly available information and compiled *those definitions in one place*.

Benefits of Digital Transformation: Comments Quantified

Category	Value
Operational Gains	5
Connectivity/Communication	15
Automation	4
Better Decision Making/Use of Data	13
Improved Customer Experience	22
Employee Efficiency Gains	5
Business Model Change/Innovation	26

DIGITAL TRANSFORMATION IN YOUR OWN WORDS

" DIGITAL TRANSFORMATION IS TRANSFORMING CURRENT BUSINESS MODELS INTO MULTIFACETED GROWTH ENGINES USING MOBILITY, BIG DATA, SOCIAL MEDIA, CLOUD COMPUTING, AND ROBOTICS SO THAT IT STAYS CONTINUOUSLY RELEVANT TO USER'S OR CUSTOMERS IN A ERA OF EXPONENTIAL CHANGE.

" THE USE OF DIGITAL TECHNOLOGIES AND DATA TO CREATE NEW VALUE PROPOSITIONS AND OPERATING MODELS. THESE ARE ENABLED BY DIGITAL INNOVATION AND CREATIVITY TO ADDRESS NEW DIGITAL USAGES, BEHAVIORS AND NEEDS, RATHER THAN ENHANCING AND SUPPORTING TRADITIONAL METHODS.

" THE USE OF TECHNOLOGY TO RADICALLY IMPROVE THE PERFORMANCE OR GROWTH OF ENTERPRISES.

" DIGITAL TRANSFORMATION IS BEST DEFINED AS INVESTMENTS MADE BY ORGANIZATIONS IN, TECHNOLOGY, BUSINESS MODELS, AND PROCESSES THAT DRIVE NEW VALUE FOR CUSTOMERS AND EMPLOYEES ALLOWING THEM TO MORE EFFECTIVELY COMPETE IN AN EVER-CHANGING DIGITAL ECONOMY.

" DIGITAL TRANSFORMATION IS ABOUT HELPING ORGANIZATIONS CHANGE TO ADOPT AND THRIVE WITH THE WAY WORK IS CHANGING: WITH MORE RELIANCE AND INTEGRATION WITH TECHNOLOGY, MORE AUTOMATION, MORE EMPOWERED AND FLEXIBLE HUMAN RESOURCES AND HIGHER EXPECTATIONS FROM CUSTOMERS AND TEAM MEMBERS.

" LEVERAGING DIGITAL TECHNOLOGY IN AN ORGANIZATION TO OPERATE MORE EFFECTIVELY AND EFFICIENTLY - BOTH INTERNALLY AS WELL AS IN PROVIDING PRODUCTS AND SERVICES TO CLIENTS AND CUSTOMERS.

" DIGITAL TRANSFORMATION IS BEST DEFINED AS INVESTMENTS MADE BY ORGANIZATIONS IN, TECHNOLOGY, BUSINESS MODELS, AND PROCESSES THAT DRIVE NEW VALUE FOR CUSTOMERS AND EMPLOYEES ALLOWING THEM TO MORE EFFECTIVELY COMPETE IN AN EVER-CHANGING DIGITAL ECONOMY.
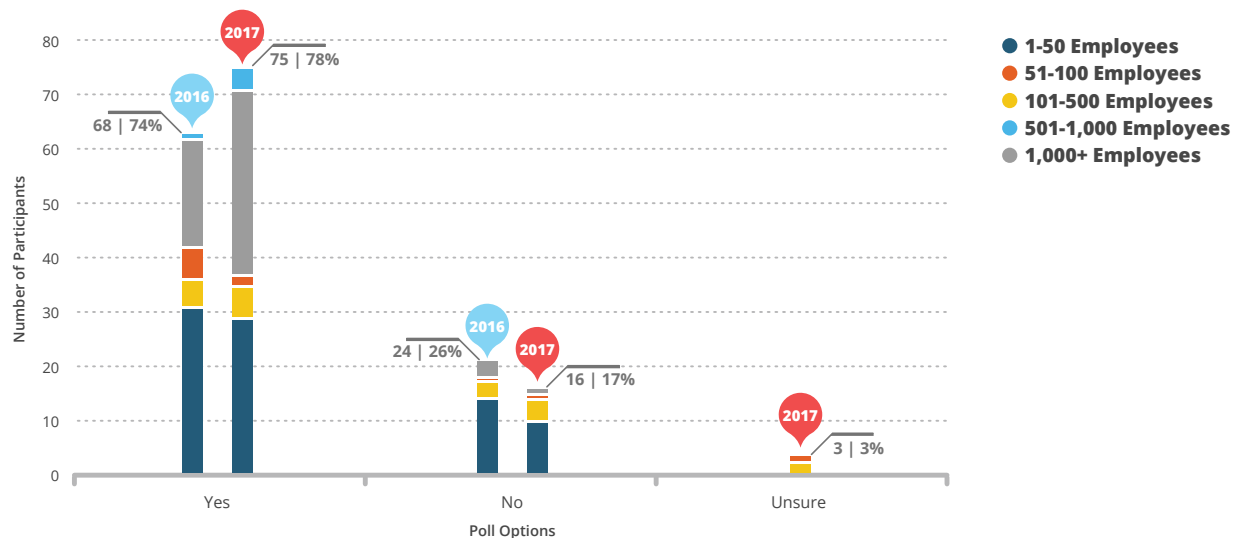
DIGITAL OVERVIEW

ASSESS THE DEGREE TO WHICH YOU FEEL THE MARKET IS TRANSFORMING DIGITALLY AND HOW YOUR FIRM IS RESPONDING

To what degree do you see digital transformation shaping the business climate in the next 5 years?
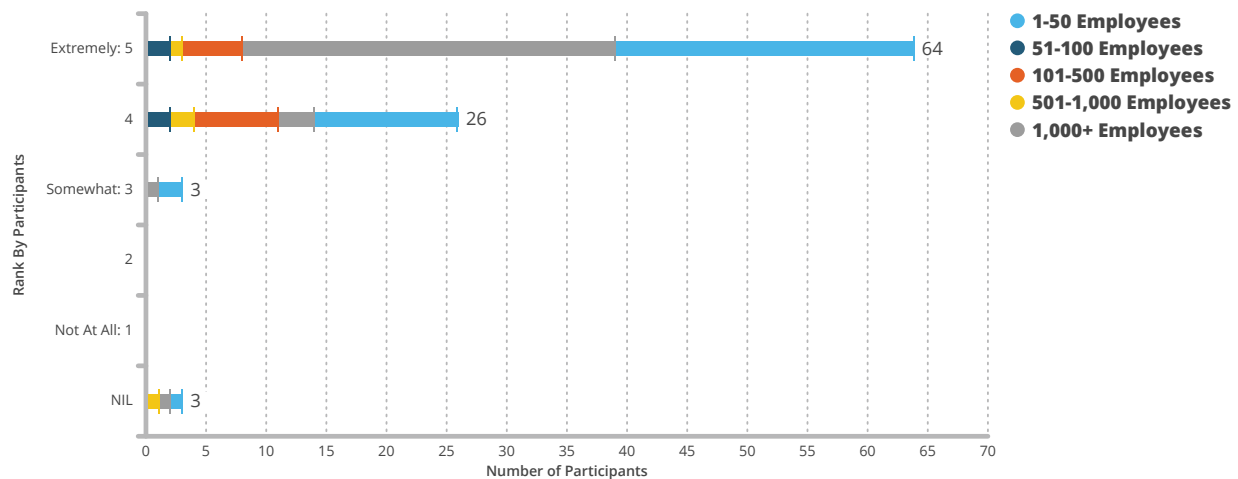
94% of respondents indicated digital transformation will have an extreme or nearly extreme impact on the business climate in the next 5 years, an increase of 10% from last year.
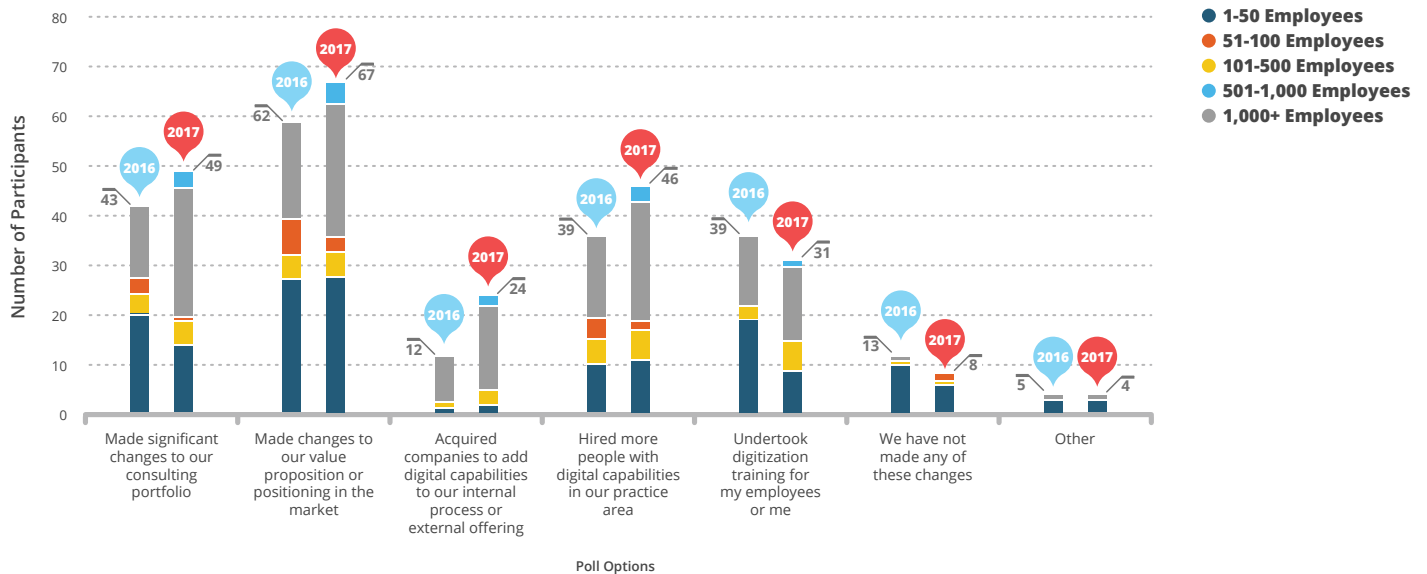
Does your firm offer consulting services to assist clients' digital transformation?

The majority of respondents, 78%, are offering digital transformation services to their clients, an increase from last year's 74%.

DIGITAL OVERVIEW

Which of these changes has your firm made in the last 3 years in response to digital trends?

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

Much like last year, the most frequently cited change to digital trends has been in the form of value proposition and positioning in the market, followed by changes to consulting portfolio. More substantive changes to acquire capabilities, skills or people have lagged. However, 2017 saw an increase in acquisitions and an increase in those firms hiring more people with digital capabilities.

Please rank the most important objectives for your practice or business

Legend:
- Priority 1
- Priority 2
- Priority 3
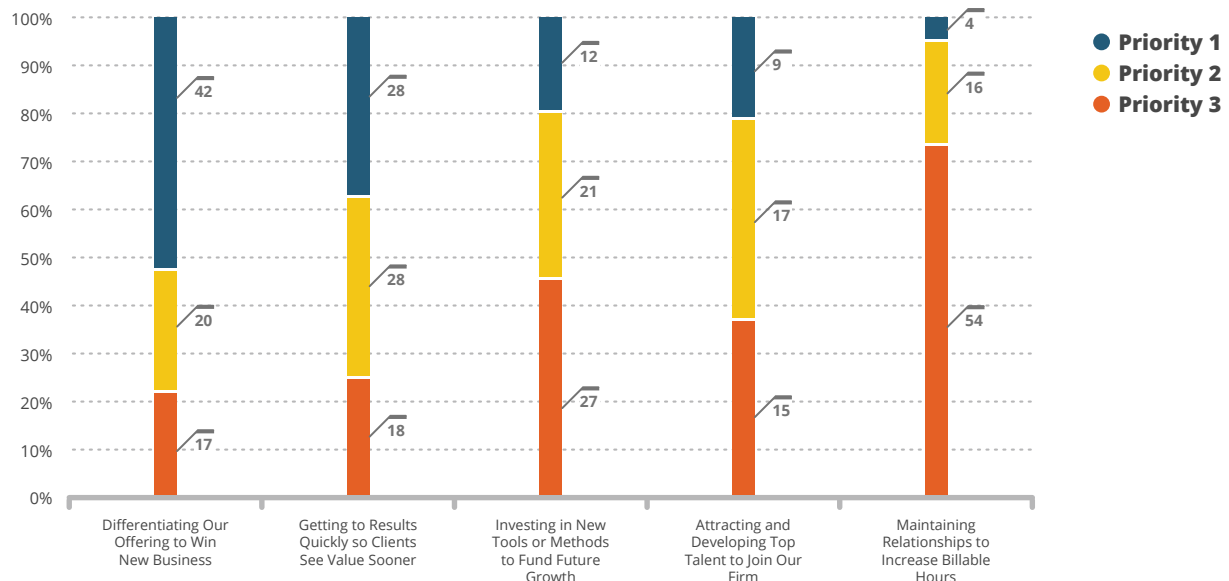
Differentiating business offerings and winning new business was the highest rated priority. Getting to results quickly ranked second, while investing in tools for future growth came in third. Consultants are prioritizing making money, quickly. Perhaps a warning that longer-term investments in tools and people is not an area of focus. Incidentally, our customers tell us the best way to "stay sticky" with clients is to ground that relationship in data.

DIGITAL OVERVIEW

How would you rate your firm's digital maturity?

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

Rank By Participants:
- Extremely Digital : 5 — 9
- 4 — 30
- Somewhat Digital : 3 — 36
- 2 — 17
- Not At All Digital : 1 — 2
- NIL — 2
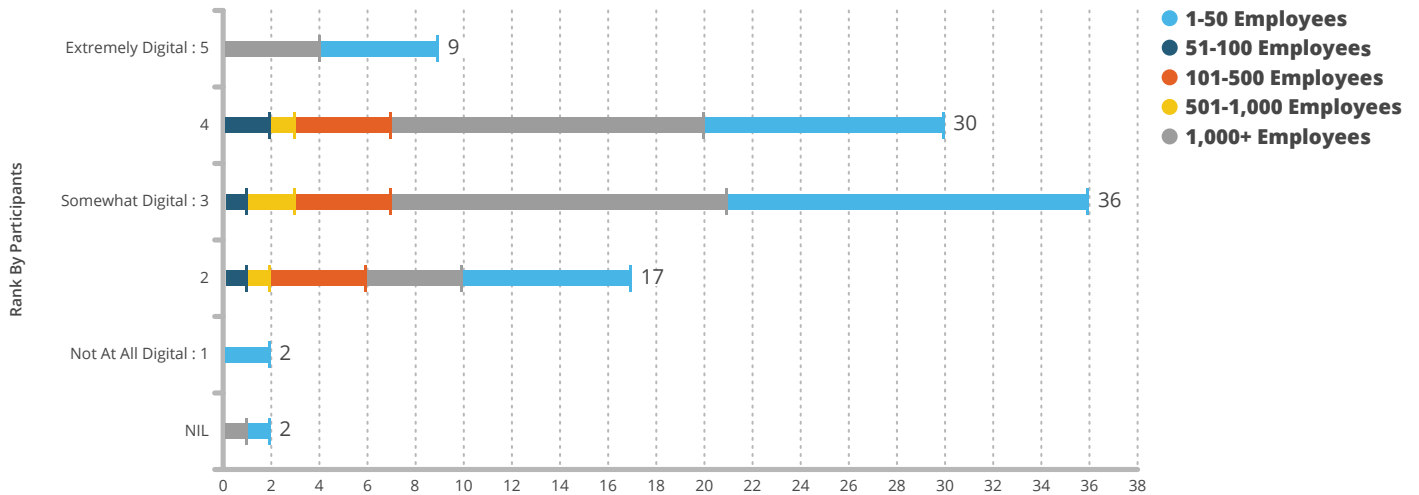
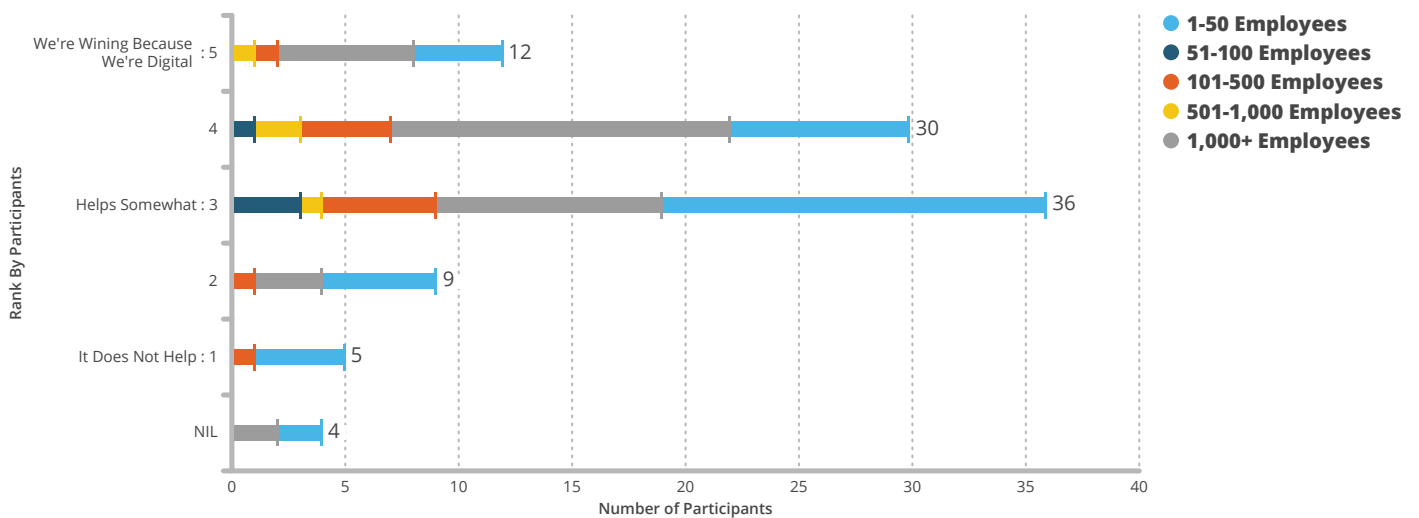52% of respondents indicated that they're only somewhat digital to not at all.

To what degree has a digital approach enabled you to win more business?

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

Rank By Participants:
- We're Wining Because We're Digital : 5 — 12
- 4 — 30
- Helps Somewhat : 3 — 36
- 2 — 9
- It Does Not Help : 1 — 5
- NIL — 4

Number of Participants

Similarly, the majority of respondents, 57%, indicated that a digital approach has only somewhat or not at all enabled them to win more business.

Consultants are telling us how important digital transformation is to the business environment, but as an industry consultants are lagging behind in their maturity and ability to monetize that approach.

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PEOPLE

ASSESS THE DEGREE TO WHICH CULTURE AND PEOPLE ARE IMPACTED
BY DIGITAL TRANSFORMATION AT YOUR FIRM OR PRACTICE

To what degree is the senior management of your firm promoting a digital approach?
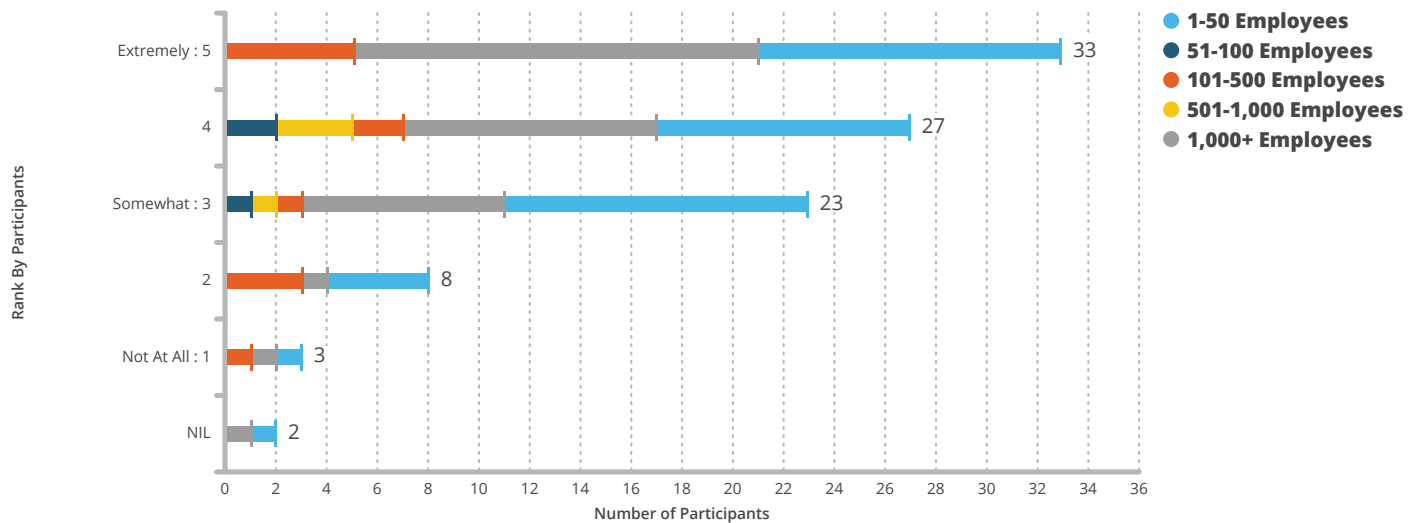
As we noted in the executive summary, senior management buy-in to a digital approach is no longer a challenge.
In fact, we found that 62% of respondents felt senior management is promoting a digital approach to an extreme
or nearly extreme degree.

To what extent are digital capabilities ingrained in your company culture?
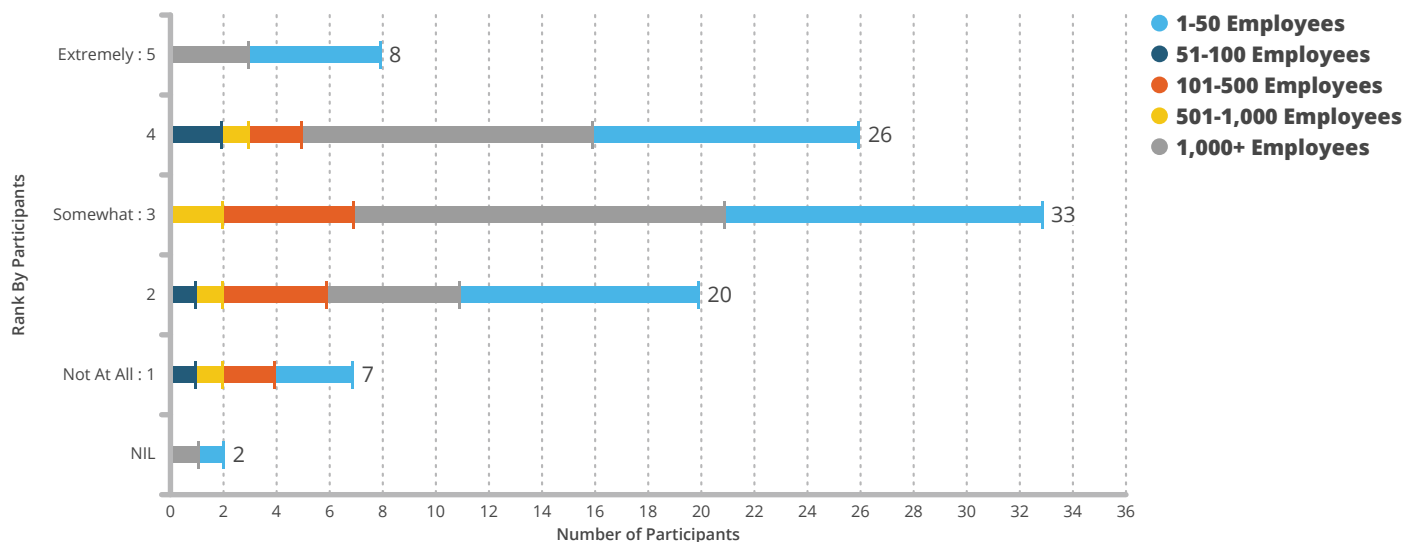
Although senior management is on board, digital capabilities are yet to be ingrained in company culture. 65% of
respondents believe it's only somewhat or not at all ingrained in the culture.

PEOPLE

To what degree does your firm or practice offer the following digital transformation resources for EMPLOYEES?

Category	Score
Training	3.61
Invest in Digital	3.53
Cultural Changes	3.41
Collaboration	3.65
Business Development Support	3.84

Score axis: 0, 1 : Not At All, 2, 3 : Somewhat, 4, 5 : Extremely
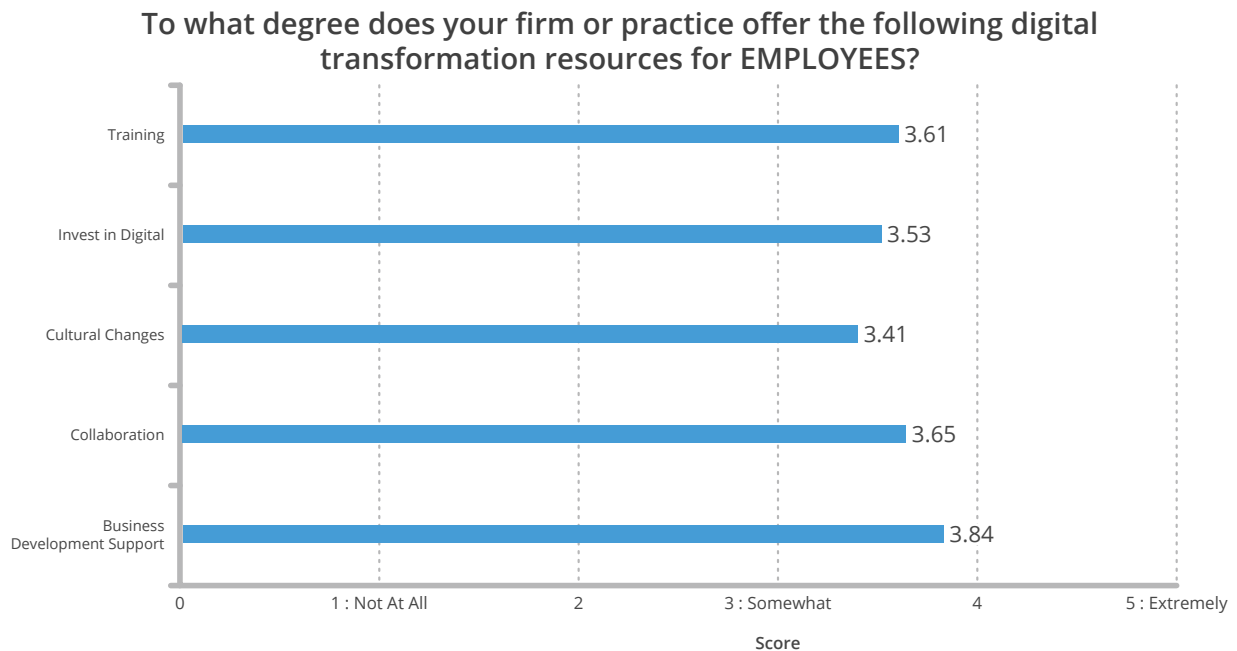
When asked about what resources firms were supplying to employees, thought leadership and business development resources, both used to secure new business, came out ahead.

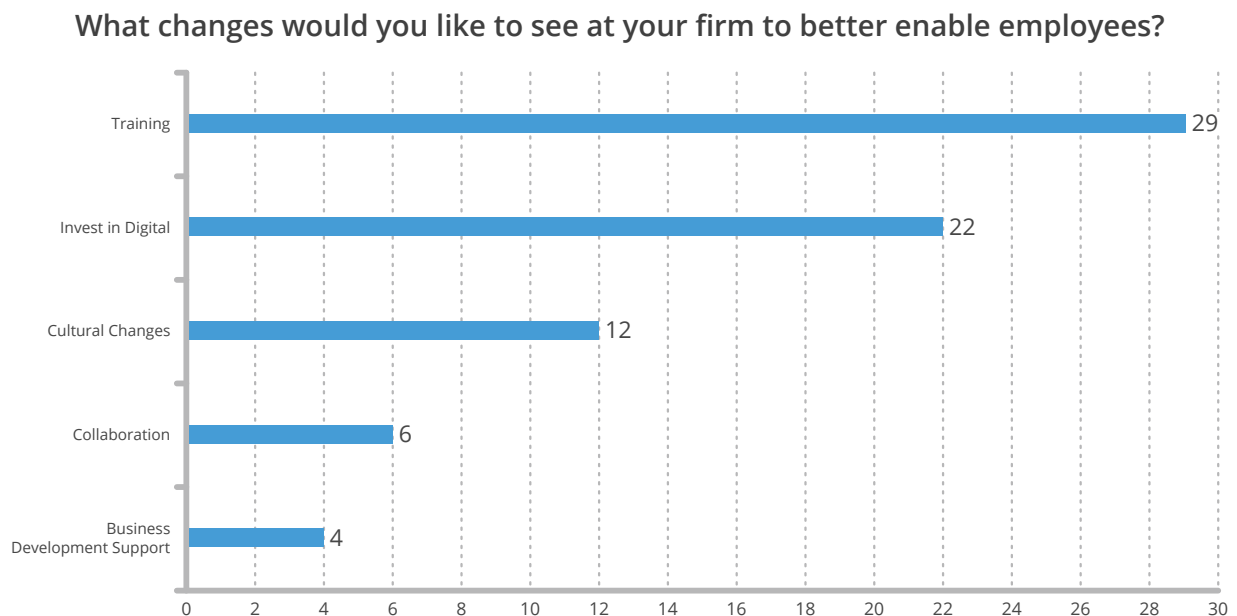## What changes would you like to see at your firm to better enable employees?

Category	Value
Training	29
Invest in Digital	22
Cultural Changes	12
Collaboration	6
Business Development Support	4

We asked respondents to comment on what changes they would like to see from their firms to better enable employees, and the results were quite clear across the board. Using our comment sorting technology, we quantified the responses into five different categories. Training and digital capability investment were the top areas. Training in particular seemed to be the root issues in cultural changes and business development support.

PEOPLE

What skills and competencies do you value most in hiring and promoting employees?

Legend:
- Priority 1 (blue)
- Priority 2 (yellow)
- Priority 3 (orange)

Chart values by category:

- **Problem Solving/Analytical Skills**: Priority 1 = 41, Priority 2 = 20, Priority 3 = 13
- **Collaboration/Working in Teams**: Priority 1 = 15, Priority 2 = 24, Priority 3 = 19
- **Adaptability**: Priority 1 = 9, Priority 2 = 12, Priority 3 = 20
- **Emotional Intelligence**: Priority 1 = 14, Priority 2 = 16, Priority 3 = 9
- **Comfort with Ambiguity**: Priority 1 = 9, Priority 2 = 15, Priority 3 = 14
- **Digital/Technical Expertise**: Priority 1 = 6, Priority 2 = 14, Priority 3 = 18
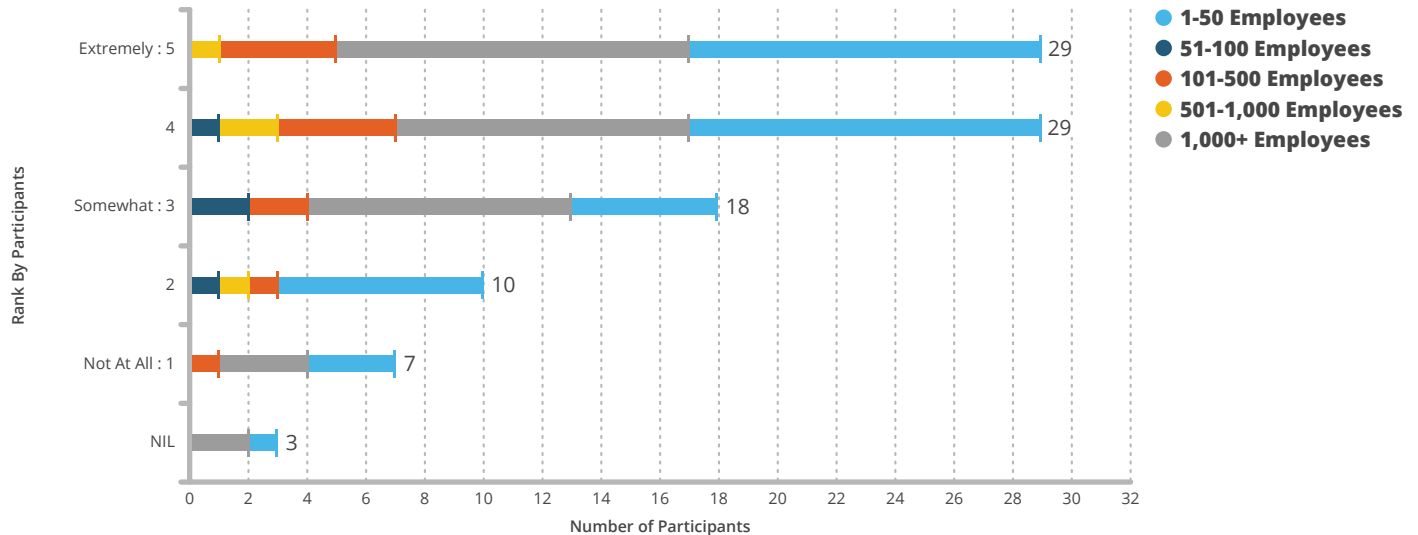
We were curious if consultants changed their perceptions of desired skills for employees in response to digital trends. But the results were clear that analytical and problem-solving skills are valued above all else, while teamwork and adaptability were rated second and third. Consultants continue to seek those able to help solve challenging problems while working well in teams.

It's clear from our "people" section that managers are for digital transformation, the resources are there and firms are hiring the right skills. However, no one seems to be taking ownership for leading the digital charge for investments and training.
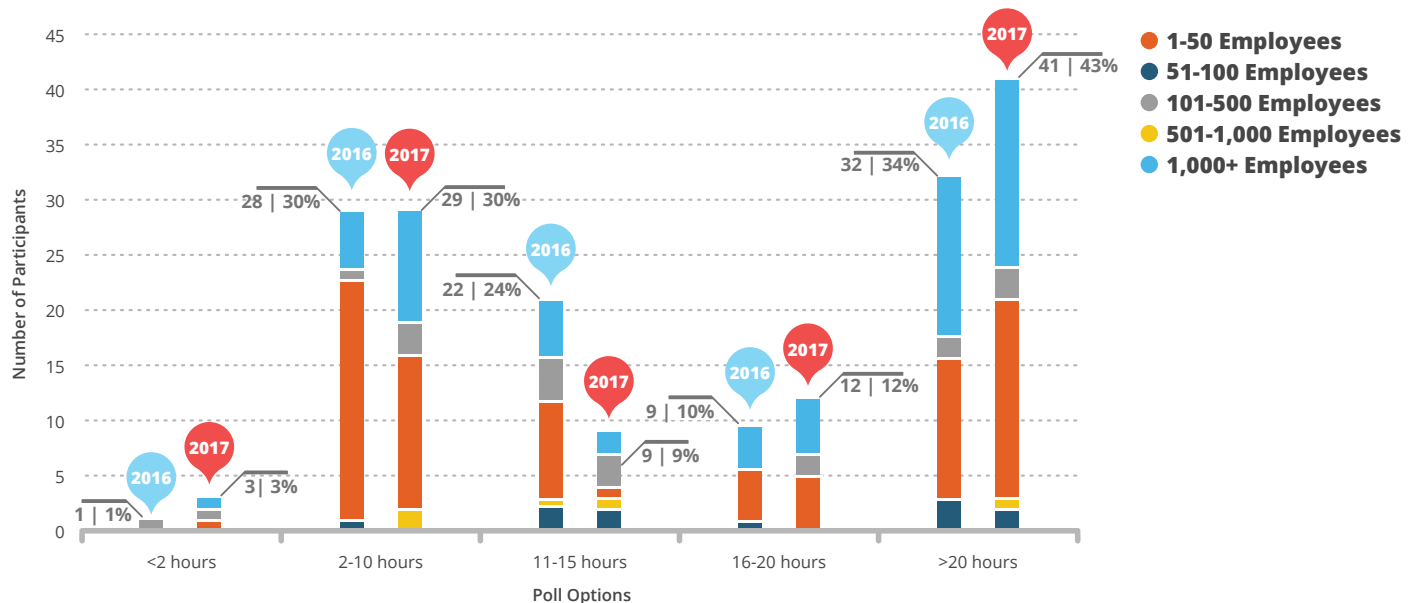
PROCESS

To what degree is moving to a digital consulting process a priority for your practice/company (e.g. Not using spreadsheets, surveys)?

Rank By Participants

- Extremely : 5 — 29
- 4 — 29
- Somewhat : 3 — 18
- 2 — 10
- Not At All : 1 — 7
- NIL — 3

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

Number of Participants

60% of respondents indicated that a digital consulting process is an extreme or nearly extreme priority for their firm or practice.
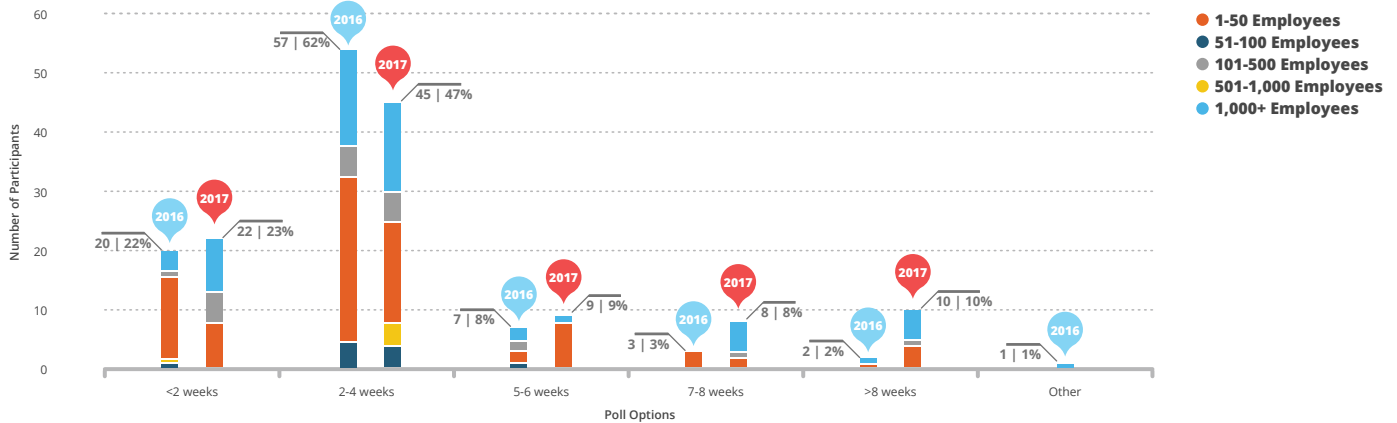
How much time do you spend collecting and organizing client data for presentation in a single engagement?

Number of Participants

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

Data labels:
- <2 hours: 2016 — 1 | 1%; 2017 — 3 | 3%
- 2-10 hours: 2016 — 28 | 30%; 2017 — 29 | 30%
- 11-15 hours: 2016 — 22 | 24%; 2017 — 9 | 10%, 9 | 9%
- 16-20 hours: 2016 — 12 | 12%
- >20 hours: 2016 — 32 | 34%; 2017 — 41 | 43%

Poll Options

64% of respondents are spending 11+ hours collecting and organizing client data for a presentation in a single engagement. That's a significant amount of non-value-adding activity that could be automated with the right platform.
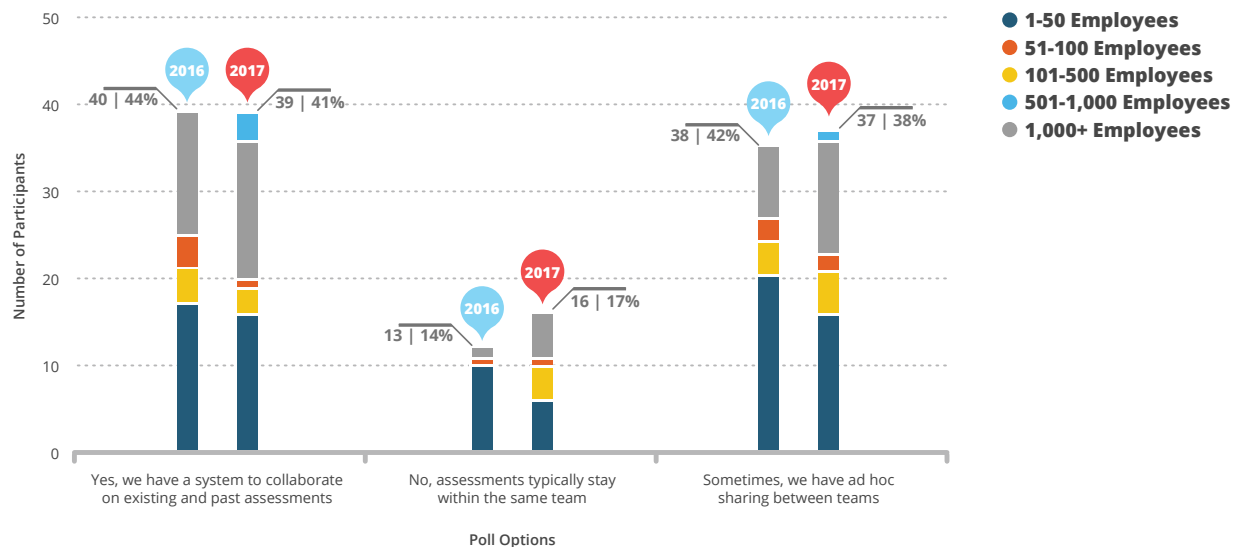
PROCESS

How long does your discovery process typically take?

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

70% of respondents spend less than 4 weeks in discovery time. A commendable improvement as clients seek value faster and less time identifying business issues.
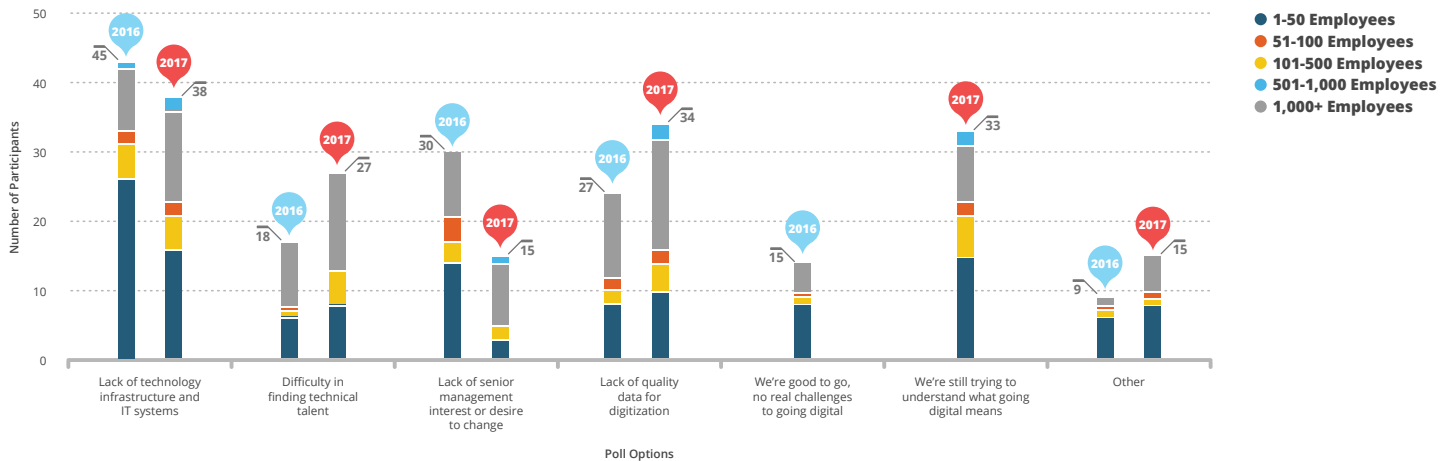
Are individuals or practices able to leverage consulting frameworks or data from other teams?

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

41% of respondents indicated they are able to leverage the frameworks and data from other teams. A worrying 54% are not able to leverage data from their peers or are only able to on an ad hoc basis. We've found that siloed frameworks and data create redundancies and prevent firms from building on their knowledge of the issues they solve and their clients.

PROCESS

Which of the following are challenges you face in taking your consulting process digital?

Legend:
- ● 1-50 Employees
- ● 51-100 Employees
- ● 101-500 Employees
- ● 501-1,000 Employees
- ● 1,000+ Employees

Y-axis: Number of Participants

X-axis (Poll Options): Lack of technology infrastructure and IT systems; Difficulty in finding technical talent; Lack of senior management interest or desire to change; Lack of quality data for digitization; We're good to go, no real challenges to going digital; We're still trying to understand what going digital means; Other

Data labels: 2016: 45, 2017: 38; 2016: 18, 2017: 27; 2016: 30, 2017: 15; 2016: 27, 2017: 34; 2016: 15; 2017: 33; 2016: 9, 2017: 15

Respondents indicated that the biggest challenges to taking their consulting process digital are lack of IT systems and lack of quality data. 33% of respondents are still trying to understand what going digital means for their firms. This is a trend we continue to see in the market as digital transformation takes on many facets. Also noteworthy is the fact that lack of senior management interest or desire to change is decreasing year over year.
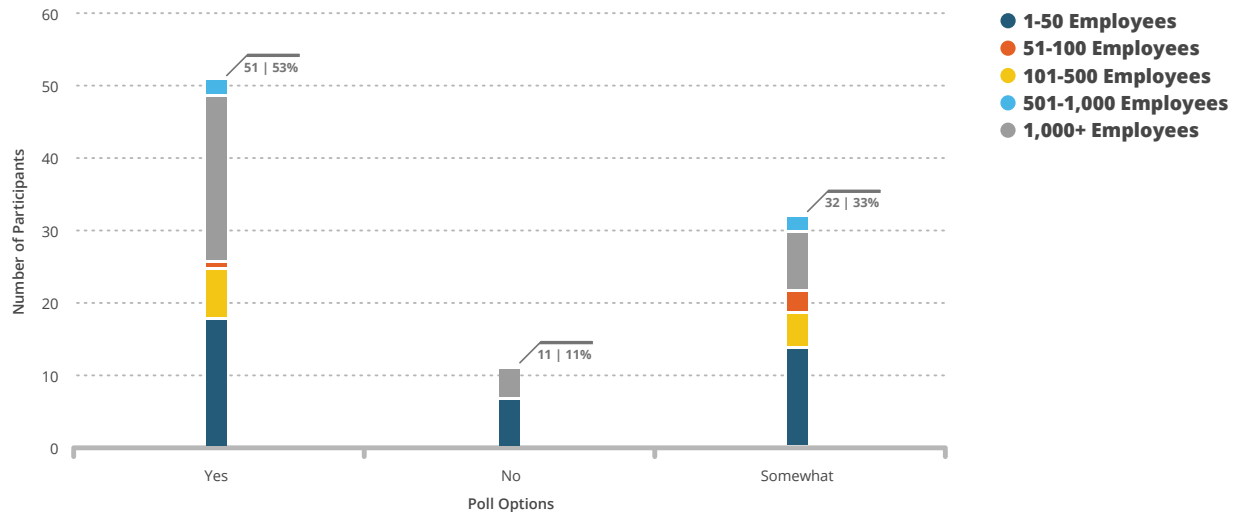
In our process section, consultants have indicated that a digital approach is a priority but are still spending too much time identifying issues, collecting data and even recreating the wheel. While different firms have different challenges, a disconnect still exists between desired and current state, perhaps pointing back to an ownership issue.
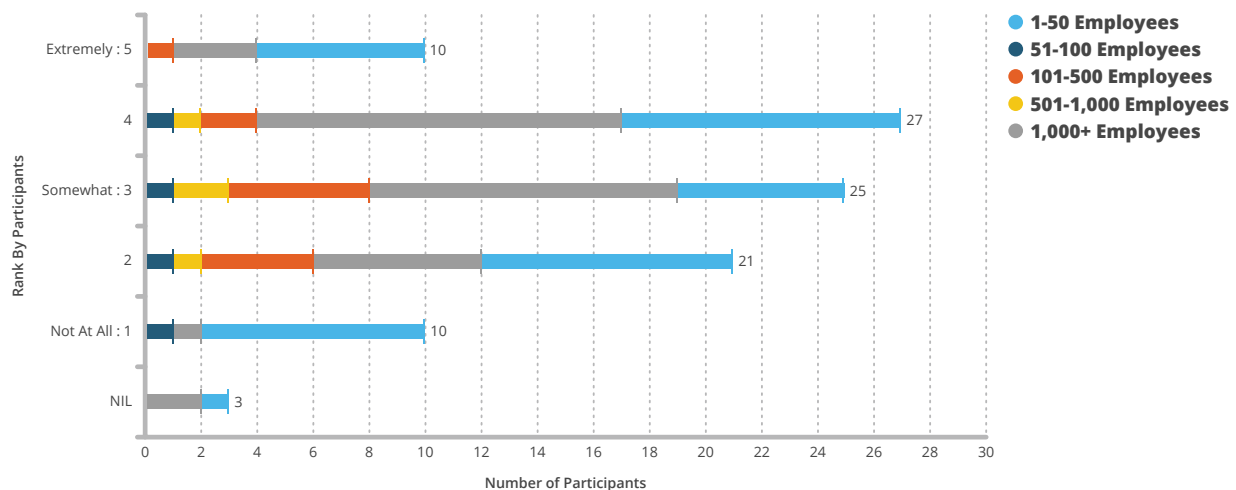
DATA MANAGEMENT

ASSESS THE DIGITAL DATA MANAGEMENT CAPABILITIES OF YOUR FIRM OR PRACTICE

Does your firm have clearly defined IP (i.e., frameworks, methodology, assessments)?

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

How effective is your firm at generating revenue from your IP?

Legend:
- 1-50 Employees
- 51-100 Employees
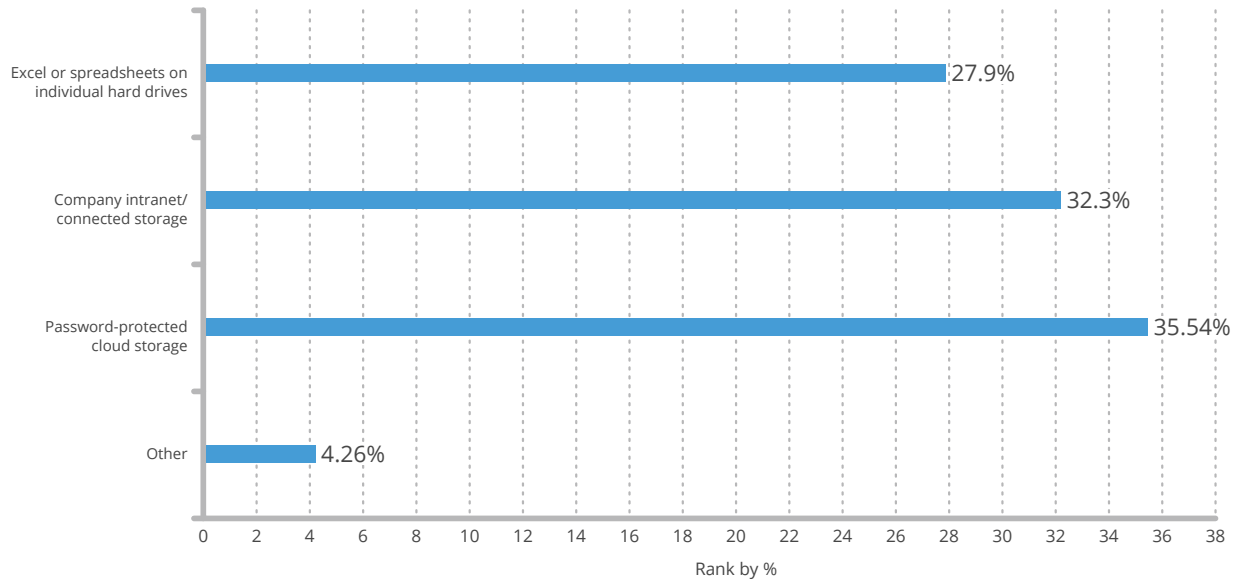- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

In our data management section, we included questions about intellectual property, or IP, as many consultants have told us that this knowledge lives with individual consultants and is at risk when employees leave the firm. Further, we found many consultants told us that much of their firm's knowledge is underutilized and not effectively monetized.

The results supported our anecdotal evidence. 52% of respondents indicated their firm has defined IP. When asked how effective their firm is at generating revenue from IP, we found most responses, 76%, were somewhat able to in the 2-4 range. Clearly there is a disconnect between consultant knowledge and the ability to win business with that knowledge. What is preventing firms from making money from their IP?
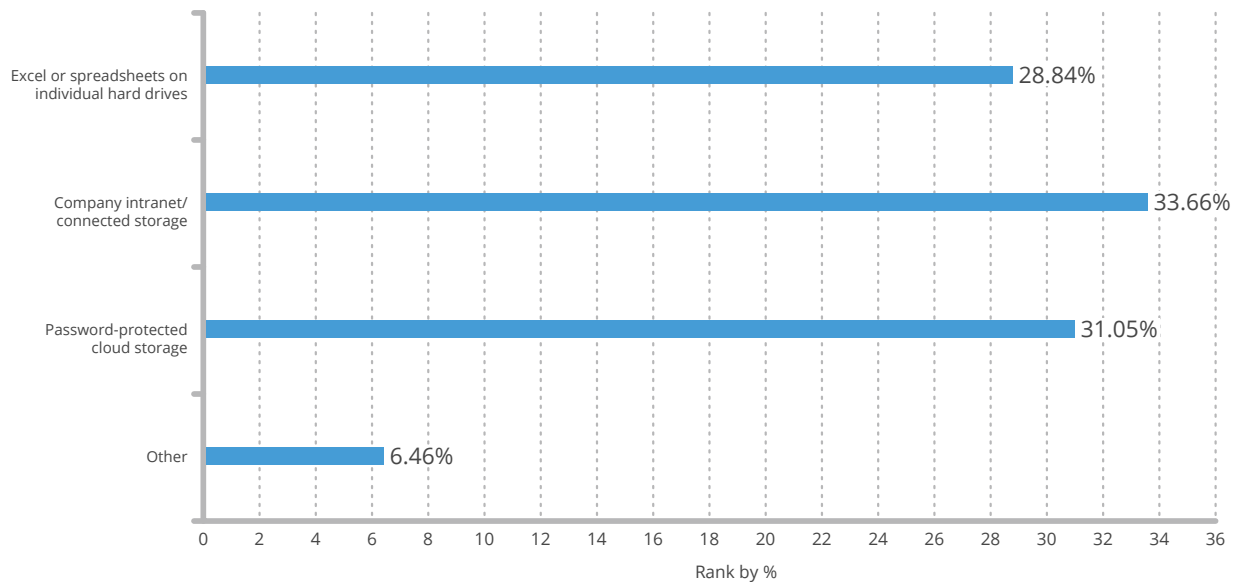
DATA MANAGEMENT

How much of your firm's assessments, frameworks and IP are currently stored in the following ways?

Excel or spreadsheets on individual hard drives — 27.9%

Company intranet/ connected storage — 32.3%

Password-protected cloud storage — 35.54%

Other — 4.26%

Rank by %

27% of that data is stored in ways that cannot be effectively leveraged across practice areas or the employee base.

Where is your firm's client data typically stored?

Excel or spreadsheets on individual hard drives — 28.84%

Company intranet/ connected storage — 33.66%

Password-protected cloud storage — 31.05%

Other — 6.46%

Rank by %

Client data is more likely to be stored on company intranet sites (34%), but a worrying 29% of client data is still stored in non-secure spreadsheets. We've yet to find the consulting firm that can present a client company with a cross-functional view of that company's performance in one location.

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DATA MANAGEMENT

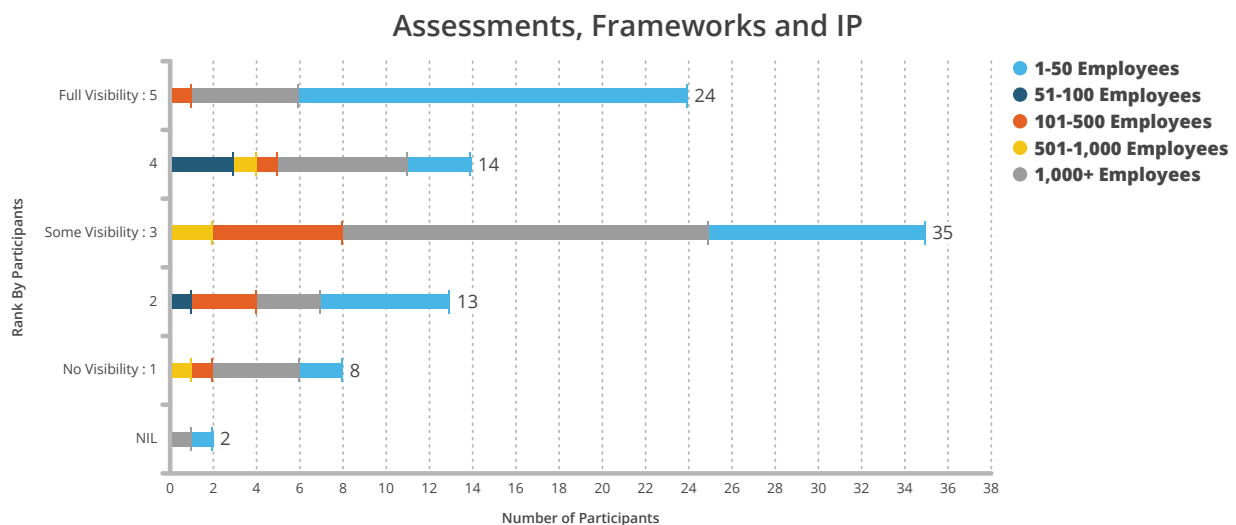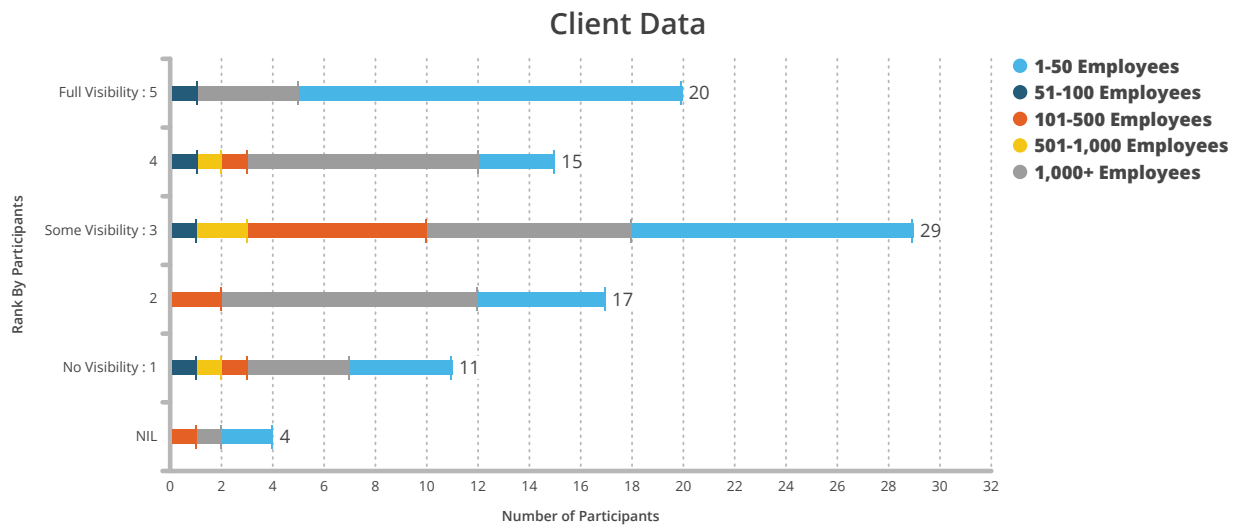## How many systems do you use to store data (i.e., Excel, Dropbox, Hard Drive, etc.)?
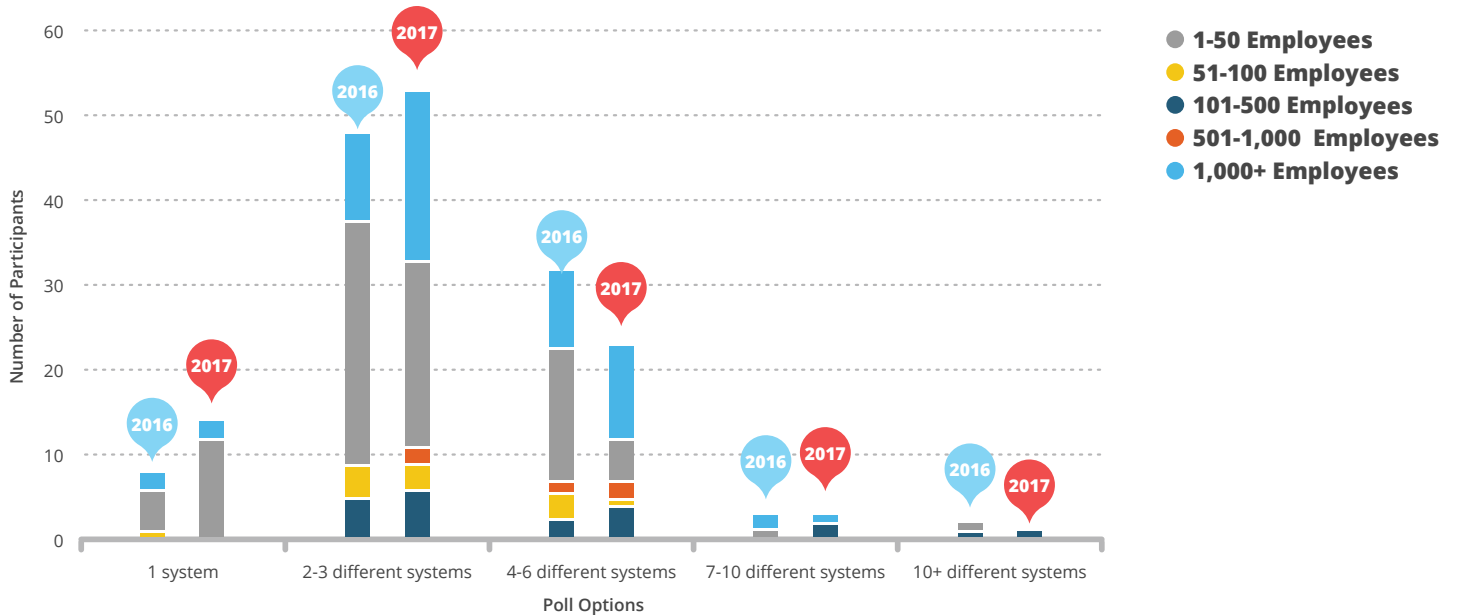
Roughly half of respondents are using 2-3 different systems to store their data, while 40% are using 4 or more systems. The most commonly cited tools in the comments were SharePoint, Google Drive and Dropbox. The comments section under data management made it clear that while firms have a few different areas for storing and managing data, there is no consistent approach to its application nor is the stored data leveraged in meaningful ways. The stored data typically stays in the system of record and is not leveraged across the firm.

DATA MANAGEMENT

HOW MUCH VISIBILITY DO YOU HAVE INTO WHO EDITS OR ACCESSES CLIENT DATA AND YOUR INTELLECTUAL PROPERTY?

Client Data

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

Rank By Participants (y-axis):
- Full Visibility : 5 — 20
- 4 — 15
- Some Visibility : 3 — 29
- 2 — 17
- No Visibility : 1 — 11
- NIL — 4

Number of Participants (x-axis): 0 2 4 6 8 10 12 14 16 18 20 22 24 26 28 30 32

Assessments, Frameworks and IP

Legend:
- 1-50 Employees
- 51-100 Employees
- 101-500 Employees
- 501-1,000 Employees
- 1,000+ Employees

Rank By Participants (y-axis):
- Full Visibility : 5 — 24
- 4 — 14
- Some Visibility : 3 — 35
- 2 — 13
- No Visibility : 1 — 8
- NIL — 2

Number of Participants (x-axis): 0 2 4 6 8 10 12 14 16 18 20 22 24 26 28 30 32 34 36 38

Respondents were varied in their assessment into the visibility of how their client data and IP were accessed, but generally ratings were high to mid scores. Perhaps unsurprisingly, the largest firms rated visibility much lower than other firms.

The "data management" section makes clear that while firms are largely clear on what they know, they are not able to effectively monetize that knowledge. The subsequent findings point to a multitude of systems and storage methods and lack of visibility and knowledge sharing as prime culprits.

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About 9Lenses
The Digital Diagnostic Platform

9Lenses is a digital diagnostic platform that allows consultants to thrive in a data-driven market.

Businesses expect better data. Survey platforms, spreadsheets and other manual business diagnostics no longer meet today's digital expectations. To compete in a data-driven environment, consultants must deliver secure propriety digital solutions. 9Lenses is the only diagnostic platform that digitally automates the development, collection, organization, connection and analytics of the consulting process.

By transforming business diagnostics to the 9Lenses digital platform, consultants deliver more value for clients and win more business.

See how it works for yourself.

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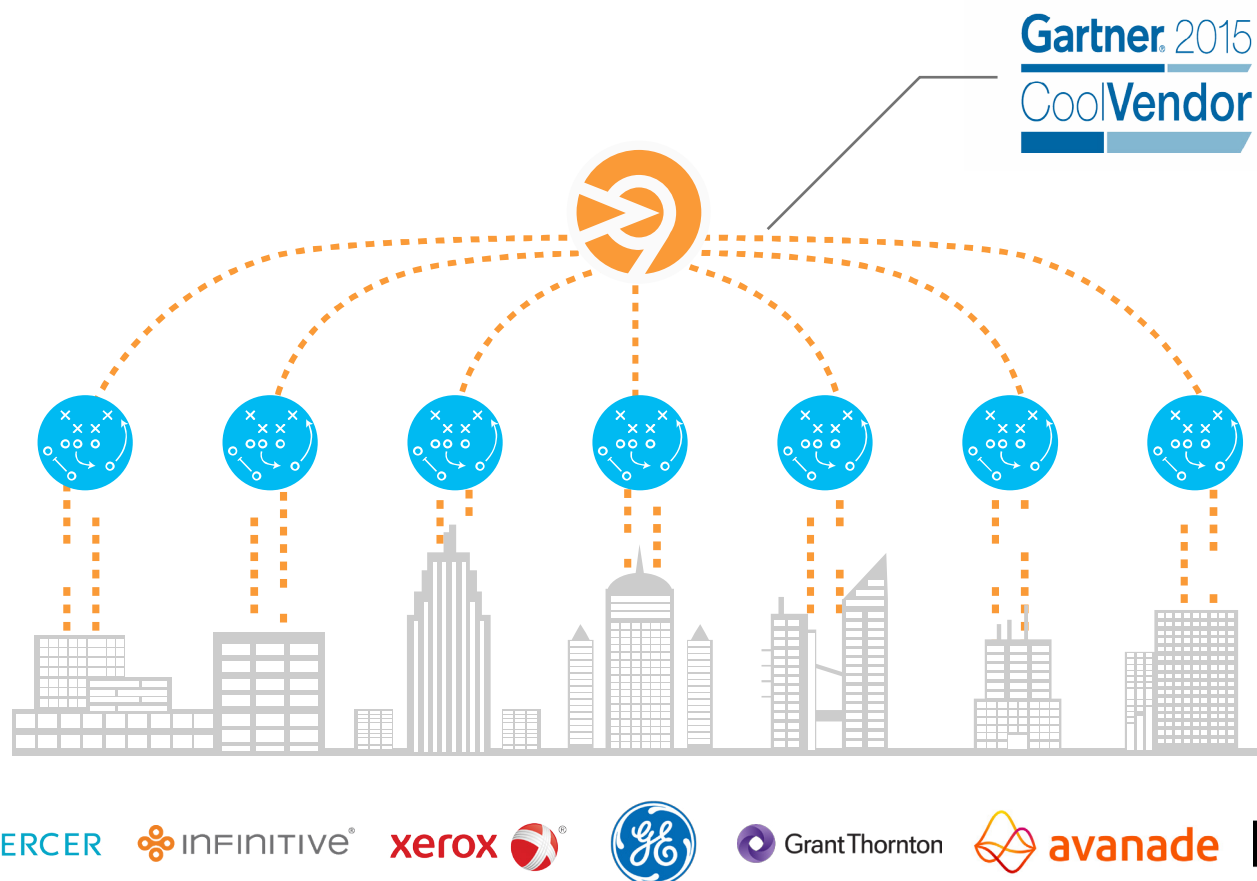
9Lenses Digital Consulting Platform
A Data-Driven Approach To Consulting

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