

# IDC MarketScape: Worldwide People and Organizational Consulting Services 2022-2023 Vendor Assessment

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THIS IDC MARKETSCOPE EXCERPT FEATURES ACCENTURE

## IDC MARKETSCOPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide People and Organizational Consulting Services Vendor Assessment



Source: IDC, 2022

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide People and Organizational Consulting Services 2022-2023 Vendor Assessment (Doc # US47023821). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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This study is a follow-on of our 2019 IDC MarketScape for worldwide change consulting services. We updated the name of the survey to focus on the people and organizational elements of consulting support in which change management is a subset and the key goal of people and organizational activities. As part of this study, we paid particular attention to employee experience (EX) as a key element of the work being performed. A separate IDC MarketScape for worldwide employee experience was developed in tandem with this piece.

The people and organization (P&O) professional services market continues to grow in market size, number of players, and breadth of services offered. The professional services firms in this study support clients across industries, governments, and nonprofit organizations in their desire to support their clients to move from one way of operating to another. The reason for making these moves runs along a continuum from needs driven by desperation to aspirational goals and everything in between. The forms that the change required also varied in the level of digital, technical, and human effort required to produce the new, more competitive, strategic, and profitable organization that the clients desired.

P&O professional services consulting providers seek to create robust and competitive businesses by enabling their workforce to perform at their best. P&O encompasses a combination of organizational, employee, human resources (HR), and resource management practices. When done well, P&O can maximize performance by being a steward of change management, org structure guidance, leadership development, HR management, talent management, agile, and culture change. Done wrong, P&O consulting can limit the potential of the business and its workforce.

This study assesses the capabilities and business strategies of many prominent business consulting firms. This evaluation is based on a comprehensive framework and a set of parameters that are most indicative of providing successful people, organizational, and change consulting services for short-term and long-term needs. A significant component of this evaluation is the inclusion of business consulting buyers' perception of both the key characteristics and the capabilities of these P&O consulting providers, both directly from the vendors' clients and through a survey.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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Using the IDC MarketScape model, IDC studied 12 organizations that offer people, organization, change, and employee experience related services. Evaluated vendors had to meet the following criteria to qualify for this vendor assessment:

- Providers must have a defined consulting offering that covers change management, organization, leadership, HR, talent and culture, and employee experience.

- Providers' people and organization practices need to be capable of global support.
- Providers had a minimum of \$100+ million in annual people, organization, change, and employee experience consulting revenue in 2021.
- Providers have revenue in two or more geographic regions (Americas, European Union, Middle East and Africa, Asia/Pacific).
- Providers' people, organization, change practice has been active for 5+ years.
- Providers have a minimum of 500 people and organization consultants.

## ADVICE FOR TECHNOLOGY BUYERS

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The P&O providers in this study are all strong performers with their own areas of expertise. Read carefully about how they position their services against your needs. The provider may have a great many services and capabilities that you do not need and be weaker in areas that you do need. Further:

- Consider what you most need from your P&O provider. Are you looking for a firm that is packed with methodologies, pioneering thinkers, or helping hands.
- Define your need before you meet with the providers so that you are not swayed by compelling presentations and examples of client successes. Your context is the most vital element of your future success and needs to be clear before you are influenced by the providers. You can go back to your original thinking after you have heard from the providers to determine which one most clearly understands your needs and will provide you with the best path forward.
- Ask your provider for references to speak with prior to making a final decision and/or reach out to your own network to hear how the provider produces the results described in the proposal process.
- After you start the work with your provider, maintain your connection with the references or your contacts to ask for helpful hints on how best to work with your provider at each stage of the project work.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides an overall summary of each vendor's strengths and challenges.

### Accenture

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in this 2022-2023 IDC MarketScape for worldwide people and organizational consulting services.

Accenture has over 35,000 people helping clients with people and organization challenges. The company is a large player in the people, organization, and change space because of its scale, go-to-market solutions, service offerings, products, practitioner tools, and industry expertise. The firm has invested in a wide array of tools, behavioral scientists, and artificial intelligence (AI) capabilities to create "360° Value" for its clients. The 360° Value approach considers six dimensions – talent, inclusion and diversity, experience, sustainability, custom, and financial – to deliver people, organization, and change project solutions consistently for clients across the world. Accenture prides itself as being "client 0" – where it tests and optimizes all aspects of strategy and consulting, technology, and managed services solutions on its own global workforce.

Accenture takes an asset-led approach to its people, organization, and change consultative model. The company creates a base solution that is underpinned by data, AI, and technology and provides clients with insights they need to transform at speed. These proprietary assets include its Transformation GPS and Change Management Platform along with assets from a network of ecosystem partners.

Accenture's change framework is designed to enable and align leaders at all levels to develop into change catalysts to enable transformation based on shared ambition and outcomes. The company supports the client change by reimagining the structure, talent, skills, mindsets, and behaviors needed for the transformation. This approach is augmented by Accenture's Transformation GPS tool that establishes a baseline among organizations to track their change process and journey by benchmarking change journeys. P&O transformation projects can be made available on Accenture's cloud-based change management platform where its change management templates, tools, and activities are aggregated for each client enterprise.

### ***Strengths***

Based on client feedback and IDC analysts' evaluation, Accenture is seen to excel at transferring operational and process knowledge to client teams, ability to help clients implement recommended consulting approach and ensure adoption by the client, able to effectively convey its point of view (POV) and opinion related to top client issues and successfully creating business value. We heard from one client about what it appreciated about Accenture was that "they referenced other projects and benchmarks throughout the project." For another client, it "welcomed meeting with people from other companies about their journey," for a similar project.

### ***Challenges***

Conversely, Accenture can improve its perception among clients related to its ability to understand unique needs of the client's business. What we heard from one client was that "Accenture could have worked as a better partner from the beginning rather than pushing change quickly on the client." On a similar note, a client noted, "The managing director felt they knew the client, but there were key elements missing between knowledge of the business and knowledge of the client's people." Another case team stated, "Accenture is great at concepts but needs reality checks from the client on implementation and execution." Accenture's approach is so well established that it sometimes suffers from being institutionalized in that the consulting team rely on their transformation playbook to drive the work, which can miss contextual subtleties. Accenture's 'software implementation' mentality can override local team needs for the sake of the larger goal. The updates to Accenture's transformation model are designed to address this, but clients should be quick to share if, and when, such incidents occur."

### ***Consider Accenture When***

Consider Accenture if you are looking for a P&O provider and transformation solution underpinned by innovation, data, AI, and technology that helps leaders create transformation by enriching the relationship between people and technology. Accenture's approach works well for P&O project work that requires consistent, repeatable, and scalable solutions by providing clients with a digital core solution to optimize client operations and accelerate growth. Because of its size, 35,000 talent and organization staff, and reach, Accenture is a good consideration when seeking a people, organization, and change partner that can operate globally.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

### Market Definition

People, organizational, and change (PO&C) consulting services are used in concert to adapt organizations to a constantly changing economic, geopolitical, and market ecosystem. People and organizational consulting seeks to clarify working relationships when management alters the workforce to changing markets, managing costs, and sizing the workforce in respect to business demand, native business growth, contraction, or scale around M&A. Change management is a structured approach to transitioning individuals, teams, and organizations from a current state to a goal state, which includes both organizational change management processes and individual change management models that work in concert to respond to and enable the people side of change. PO&C consulting providers, when successful, partner with businesses to create robust and competitive organizations by enabling people to continually work at their best no matter the circumstance. PO&C consulting includes the following supporting activities:

- Leadership consulting
- Human resources and management consulting
- HR operations consulting
- Talent acquisition consulting

- Employee experience consulting
- Culture consulting
- Agile business consulting

Business consulting involves advisory and implementation services related to management issues. It often includes defining an organization's strategy and goals and designing and implementing the structures and processes that help the organization reach its goals. Business consulting includes three main areas: strategy consulting, operational improvement consulting, and change and organization consulting. The market is primarily served by four firm types:

- **Big Four:** IDC recognizes the well-known Big Four firms as the four largest international accountancy and professional services firms – Deloitte, EY, KPMG, and PwC.
- **Multidisciplinary:** IDC describes multidisciplinary firms as large, diversified consulting organizations that offer a range of business consulting services to clients across a myriad of sectors. To distinguish these from other specialty firms, consulting services must address more than two business functional areas in addition to providing strategy and operational implementations.
- **Technology led:** These are also large, multifaceted firms and are known for deep expertise in both technology and business consulting. IDC identifies these firms as those that expanded from information technology-centric businesses into more broad business consulting or vice versa.
- **Specialty:** Specialty firms have focused areas of consulting expertise in specific industries, functional areas, or technologies. Management and strategic consulting specialists that offer primarily strategy consulting and business intelligence (BI) models to specific sectors or industries including government fit into this category of firms.

## LEARN MORE

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### Related Research

- *Global Client Value Survey, 2022* (IDC #US48577722, September 2022)
- *Market Analysis Perspective: Worldwide and U.S. Business Consulting Services, 2022* (IDC #US48577922, September 2022)
- *Worldwide and U.S. Business Consulting Services Forecast, 2022-2026* (IDC #US48578122, May 2022)
- *IDC Market Glance: Business Consulting Services, 1Q22* (IDC #US45852220, March 2022)
- *Worldwide and U.S. Business Consulting Services Market Shares, 2020: Some Firms Still Found Growth in a Shrinking Market* (IDC #US47655721, February 2022)

### Synopsis

This IDC study uses the IDC MarketScope model to provide an assessment of providers participating in the worldwide people and organizational consulting services market. The IDC MarketScope is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to one another and to those factors expected to be most conducive to success in each market during both the short term and the long term.

"People and organizational consulting goes by as many names as providers and their methodologies. What matters to the organizations that seek their counsel and support is how well they can make the change they need to compete and operate in an ever-changing market," noted Bill Latshaw, research director, Worldwide Business Consulting Services at IDC. "While digital, technology, infrastructure, innovation, and other transformations often focus on data, these efforts are suboptimal if these transformations are not accepted and adopted by people in the organization. People, organization, change, and employee experience are melded together in ways that may reinforce, or limit, strategic objectives. For this reason, buyers continue to seek and demand people and organization support from their providers to enable the transformations vital to their growth and survival. I expect that people and organizational consulting in its many forms will maintain and strengthen in importance among buyers and providers that were included in this IDC MarketScape and those seeking to be."

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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