The Forrester Wave™: CX Consulting Practices: Experience Strategy And Business Transformation, Q2 2019

The Nine Providers That Matter Most And How They Stack Up

by TJ Keitt
May 28, 2019

Why Read This Report

In our 30-criterion evaluation of experience strategy and business transformation providers, we identified the nine most significant ones — Accenture, Bain & Company, EY, KPMG, McKinsey & Company, North Highland, Publicis Sapient, PwC, and Strativity Group — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer experience (CX) professionals select the right one for their needs.

Key Takeaways

McKinsey & Company, Bain & Company, And Accenture Lead The Pack

Forrester's research uncovered a market in which McKinsey & Company, Bain & Company, and Accenture are Leaders; Strativity Group, PwC, KPMG, and North Highland are Strong Performers; and Publicis Sapient and EY are Contenders.

CX Strategy, Business Strategy, And CX Metrics Development Are Key Differentiators

As businesses struggle with CX transformation, superior integration of CX strategy with business strategy and analytical frameworks will dictate which consultancies lead the pack. Practices that can align customer journeys with business strategy, enable an organization to support different journeys, and drive improvement through analytics position themselves to successfully deliver true experience strategy and business transformation to their customers.

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CX Leadership Requires Firms To Link CX To Business Strategy

Inspired by customer-centric business leaders like Jeff Bezos and concerned about disruptive market entrants like Netflix and Ocado, top executives focus on improving customer experience. However, few organizations have the business discipline to effectively deliver their intended customer experience.[1] To make up for this capability gap, consultancies with expertise in CX strategy and business transformation have stepped forward to help CX leaders change their organizations in order to effectively serve customers.

As a result of these trends, customers should look for experience strategy and business transformation practices that:

› **Align business strategy with customer journeys.** It can be difficult to convince executives that CX is the best way to boost business success. Standout consulting practices are able to show business leaders how improving customer interactions will benefit the organization in areas like increased revenue per customer and reduced cost to serve. This helps focus the transformation effort, ensuring executives understand the scope of the task and can explain it to employees, investors, and their boards of directors.

› **Revamp the organization to support different journeys.** Each customer journey is supported by an ecosystem of employees, partners, suppliers, technologies, and business processes that will affect the quality of the experience.[2] The complexity of this ecosystem makes it difficult for CX pros to know where to begin when fixing problems. Smart consulting practices build road maps that show which combinations of people, process, and technology support each critical customer journey. This helps CX pros pinpoint the departments that need to be brought together to improve the interactions that will boost business performance.

› **Provide the analytical frameworks that justify continual CX improvement.** To ensure the transformation lasts, CX pros must demonstrate positive business results on an ongoing basis. Savvy consulting practices help CX leaders develop metrics and use data science to show the relationships between how customers interacted with a brand, how they perceived the interaction, and what they did as a result — like bought more or made a recommendation.[3] These analyses reassure executives that their investment in a CX transformation was wise and help make the case for further investments in the overarching CX program.

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Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our Now Tech on customer experience consulting practices.[4]

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: CX Consulting Practices: Experience Strategy And Business Transformation, Q2 2019

THE FORRESTER WAVE™

CX Consulting Practices: Experience Strategy And Business Transformation

Q2 2019

FIGURE 2 Forrester Wave™: CX Consulting Practices: Experience Strategy/Business Transformation Scorecard, Q2 2019

	Forrester's weighting	Accenture	Bain & Company	EY	KPMG	McKinsey & Company	North Highland	Publicis Sapient	PwC	Strativity Group
Current offering	50%	3.43	3.29	2.56	2.88	3.60	2.44	2.55	2.94	3.01
Business strategy consulting	20%	3.60	3.40	2.20	2.20	4.00	2.20	1.80	3.60	2.60
CX strategy development	25%	3.00	4.40	3.60	3.00	4.40	3.00	3.00	3.00	4.40
CX metrics development	10%	3.00	5.00	1.00	3.00	5.00	3.00	1.00	3.00	3.00
CX analytics	10%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Technology transformation	8%	5.00	1.00	3.00	3.00	1.00	3.00	5.00	3.00	1.00
Workforce consulting	8%	2.50	1.00	1.00	3.00	3.00	3.00	3.00	1.00	4.50
CX innovation consulting	15%	4.20	2.20	2.60	3.00	2.60	1.00	2.20	3.20	1.80
Standardized CX tools	5%	3.40	4.60	2.60	3.80	4.20	1.00	2.20	1.80	2.20
Strategy	50%	3.80	4.20	2.50	3.30	4.10	3.20	2.60	3.50	4.20
Vision and road map	25%	3.00	5.00	1.00	3.00	5.00	3.00	3.00	5.00	3.00
Client engagement strategy	25%	5.00	3.00	3.00	3.00	3.00	5.00	1.00	3.00	5.00
Partner strategy	15%	5.00	3.00	3.00	5.00	5.00	1.00	3.00	3.00	3.00
CX capabilities integration	15%	3.00	5.00	3.00	3.00	5.00	3.00	1.00	3.00	5.00
Delivery consistency approach	20%	3.00	5.00	3.00	3.00	3.00	3.00	5.00	3.00	5.00
Market presence	0%	4.50	4.00	4.00	3.50	4.00	1.50	2.50	3.50	1.50
Client penetration by region	25%	5.00	5.00	5.00	5.00	3.00	1.00	3.00	5.00	1.00
Office footprint by region	25%	5.00	3.00	5.00	3.00	5.00	1.00	3.00	5.00	1.00
Average deal size	25%	5.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Thought leadership	25%	3.00	5.00	3.00	3.00	5.00	1.00	1.00	1.00	1.00

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

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Vendor Offerings

Forrester included nine vendors in this assessment: Accenture, Bain & Company, EY, KPMG, McKinsey & Company, North Highland, Publicis Sapient, PwC, and Strativity Group (see Figure 3). We invited Boston Consulting Group, Deloitte, and Prophet to participate in this Forrester Wave, but they chose not to participate, and we could not make enough estimates about their capabilities to include them in the assessment.

FIGURE 3 Evaluated Vendors

Vendor
Accenture
Bain & Company
EY
KPMG
McKinsey & Company
North Highland
Publicis Sapient
PwC
Strativity Group

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **McKinsey & Company tackles CX as a C-level strategy issue.** True to its historic focus on being an advisor to CEOs, McKinsey has invested in capabilities and partnerships to help top executives identify CX issues, build an action plan, and acquire the skills needed to execute the plan. Part of this investment goes toward bringing in nontraditional talent, such as data scientists and designers, to bolster its CX consulting and services. But McKinsey's standout investments are in its Journey Pulse survey, which pinpoints the customer journeys executives need to focus on; its CX Academy,

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which helps upskill employees on CX management; and its bench of senior advisors, who are former executives. On the partnership front, McKinsey has invested in a relationship with the Disney Institute to help executives think through culture transformations and experience design.

McKinsey excels in areas of CX strategy creation, road maps, organizational transformation, and training. These capabilities align with its consulting approach of helping executives create a strategy, transferring knowledge on how to get there, and then stepping aside. McKinsey's client references noted that the firm's effectiveness in building CX road maps came from its ability to leverage its proprietary research and its experience. The potential downside to McKinsey's approach is that the firm has limited capabilities in tech implementation, which preclude a holistic execution partnership after the road map is declared. McKinsey is an ideal choice for senior leaders looking to make strategic shifts around customer experience.

› **Bain & Company helps firms properly link its Net Promoter System to business value.** Bain's CX practice — dubbed Simple & Digital — built a CX transformation approach that heavily leverages the firm's widely adopted Net Promoter System.[5] The purpose is to help CEOs transform their businesses in a systematic way. To do this, Bain is investing in data partnerships and analytics talent to help deliver insights to top management. The most recent of these investments is NPS Prism, an analytics partnership with Qualtrics to help business leaders identify problematic customer journeys and quantify the business returns they will get from addressing the problems. Wrapped around this analytics core is an organizational transformation capability that can help improve employee experiences, revamp operating models, build new teams, and develop new channels.

Given Bain's consulting focus on CX-led business transformation, it follows that the firm is strong in strategy, organizational transformation, and road maps. The firm stands out in metrics development, where it's able to help clients apply its Net Promoter System to customers, employees, and partners as a way of tracking overall business health. Bain's client references note that the firm brings these elements together well in business transformation engagements, helping executives align planning processes and teams around customer journeys and then measuring the business results. The potential downside with Bain is similar to McKinsey in that the firm has limitations in its ability to help CEOs execute technology transformations. The Bain approach works best with business leaders interested in large transformation projects and the Net Promoter System.

› **Accenture focuses on holistic business change around customer experiences.** The consulting giant's size and breadth of capabilities allow it to contextualize CX transformation as part of a larger business transformation, which it refers to as a "Living Business." To deliver on this transformation, Accenture has invested heavily in building out robust frameworks and methodologies for the CX vision, road maps, and metrics to help its clients visualize the scope of the transformation needed, as well as identify the different Accenture resources required. Helping to inform its clients' CX strategies and technologies, Accenture has also invested heavily in over 400 innovation labs and a number of workshops.

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Because Accenture can tackle the people, process, and technology changes around CX, the firm is a solid player across all of the capabilities Forrester evaluated. Its client references backed this up, noting that Accenture is good at helping take an overarching CX vision and turn that into an execution strategy. Where Accenture excels is in innovation consulting, which is critical to determining how the customer experience will evolve, and in technology transformation. The latter capability is of particular note because Accenture is a leading partner for vendors like Salesforce and Microsoft, and it uses its technical prowess to help clients revamp business processes and client touchpoints. The potential downside with Accenture is that because the organization is so large, it may take time to find the right team. Accenture is a good fit for CX leaders looking for a transformation partner with a strong mix of business consulting, experience strategy, and tech implementation skills.

Strong Performers

› **Strativity Group links employee engagement to CX success.** The CX consultancy's CEO and president, Lior Arussy, describes his company's mission as getting everyone in the business — including employees who aren't customer-facing — bought in to a CX transformation. So, the firm has invested in tools and assets to help business leaders effect a cultural transformation as part of the overall CX strategy. For example, Strativity's IMCO (individual, manager, customer, organization) Employee Engagement Rating is a diagnostic tool that helps business leaders spot trouble areas — such as workers who are acting out their displeasure with their employer. To flesh out the rest of the CX strategy, Strativity focuses on organizational alignment, leading workshops with key stakeholders from across the business to ensure their perspectives are included in the experience design and implementation plans.

Strativity's "people-centered" approach explains why the firm has very strong capabilities around culture transformation, employee enablement, and customer research. The consultancy's client references say Strativity excels at laying out what customers need and linking that to what employees need to do. The potential downside of working with Strativity is that it doesn't have many of the perks of the bigger outfits in this evaluation — innovation labs, industry specialists in dozens of areas, or massive data repositories. Strativity is a good fit, though, for those firms that need a partner to lay out their CX strategy and provide the tools and training necessary to ensure employees are aligned to deliver on it.

› **PwC brings business expertise to CX strategy development and execution.** The firm's philosophy and delivery framework are summed up as BXT: business, experience, and technology. To make this a reality, PwC has engaged in a massive retraining of its entire workforce in an initiative called "Your Tomorrow," which is meant to upskill employees on digital experience abilities, as well as build out assets to allow them to deliver CX projects. Furthermore, PwC has brought together its various industry, functional, and technical specialties to create "Integrated Solutions,"

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which are repeatable offerings that take advantage of the firm's strategy and business consulting, experience design, and tech services capabilities. These efforts have yielded industry-specific offerings, such as a diagnostic tool called Biological that physicians can use to help treat patients.

PwC's industry consulting capabilities stand out in this evaluation, as do its innovation labs. The latter capability — powered by roughly 40 globally distributed labs — is a critical part of the firm's ability to go from strategy to execution, as these sites facilitate ideation and display emerging technology for clients to consider. The firm's client references second this observation, noting the firm's assistance in ideation and helping build new customer experiences. The potential downside of working with PwC is that for clients looking for a CX skills transfer, the firm offers little by way of training and certifications. PwC is a strong partner for businesses that seek a firm with enough industry specialization to make a CX strategy practical and enough implementation ability to help put it into action.

› **KPMG views CX through the lens of the front, middle, and back offices.** The key concept in the KPMG CX approach is the "connected enterprise," which describes how the different parts of the business have to change to meet customer demands. The linchpin in how it creates connected enterprises is the "CX Workbench," a collection of frameworks and accelerators KPMG built to walk clients through strategy development, vision setting, capabilities assessments, road map creation, and execution. To help companies transform in the way the CX Workbench outputs prescribe, KPMG has pulled together functional-area specialists, employee experience consultants, change management experts, data scientists, digital strategists, and innovation labs under the connected enterprise conceptual umbrella.

KPMG is a steady performer across all of the capabilities we evaluated for this report. Where the firm stood out was in its employment of frameworks, which it uses to align the disparate consultants it brings together on a CX transformation engagement. KPMG's steady hand and useful frameworks were reflected in its client reference feedback, which noted that the firm's consultants were able to employ those frameworks to set strategies and road maps that made sense for their businesses. The potential downside of working with KPMG is that for clients looking for a variety of innovation-related workshops, the firm only provides design workshops that are tied to their innovation centers. KPMG can be a solid choice for CX leaders who are looking for a good mix of functional-area and CX expertise, allowing the consultancy to provide considerable assistance on executing the strategy.

› **North Highland approaches CX transformation as a capabilities challenge.** The Atlanta-based consultancy's organizational structure signals its approach to CX consulting: The consultants are organized by capabilities — e.g., strategy and experience design — and are pulled together as needed. This is important because a big part of the firm's self-defined value proposition is building processes, systems, and skills in its clients that will persist beyond the project. One way that the firm achieves this is by building client coaching into its project plans to ensure that skills

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transfers happen throughout the engagement. The firm also creates "learning experience strategy" documents to show clients their capabilities gaps, allowing North Highland to set a plan to train employees to improve the customer experience.

North Highland is strong in CX strategy development, workforce consulting, technology transformation, and analytics. These findings are supported by North Highland's client references, all of whom reported the firm is an effective customer experience strategy partner, helping them create a solid plan together and put together the assets to deliver a better experience. These strengths also align with North Highland's emphasis on creating lasting capabilities within its clients. The potential downside of working with North Highland is that it has not made the investments in innovation consulting, functional-area expertise, and industry expertise that the larger firms in this evaluation have. North Highland is a good choice for CX leaders who want help sketching out a CX strategy and then building out skills as the consultancy helps execute on that strategy.

Contenders

› **Publicis Sapient ties CX strategy to experience design and execution.** Sapient's legacy in experience design, technology services, and innovation consulting has positioned the firm to be a strong partner in CX strategy execution. On the experience design and innovation front, Sapient can walk clients through design workshops and help its clients' internal teams adopt design thinking and Agile development processes. To support the technical backbone of these new experiences, Sapient has technology partnerships with vendors such as Adobe, IBM, Salesforce, and Sitecore. It's investing in areas to bolster these capabilities, including data intelligence to help clients make better experience design decisions and processes to help clients develop more customer-responsive product management teams.

Sapient stands out in this evaluation as a very strong technology transformation partner, which speaks to its track record as a top-flight digital transformation firm. The company's client references also point to strengths in customer research, innovation workshops, and experience design — all critical inputs into a CX strategy and road map. The potential downside to working with Sapient is that it isn't a strong partner for holistic organizational or cultural transformation. Sapient makes an outstanding CX transformation partner for CX leaders who are concerned about their business' ability to plan, design, and deliver digital customer experiences.

› **EY shows clients how to build out an experience infrastructure.** EY's entry into the CX consulting market has been marked by a spree of acquisitions meant to build out capabilities around experience design and CX infrastructure development. This approach has paid dividends with EY Seren, its respected market research arm, and Citizen, its design firm. EY has also made investments in "wavespaces," innovation centers that allow its clients to attend workshops or demonstrations of technologies that will change customer experiences. Wrapped around these experience design capabilities are significant investments in technology implementation partnerships with vendors like Microsoft and SAP, and a consulting framework — experience-led transformation — to align the disparate consulting resources necessary to deliver a CX transformation engagement.

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EY is strong in the areas of customer research, innovation centers, and technology transformation. The firm's client references also noted that it can transfer knowledge on topics like Net Promoter and customer journey mapping. All of these strengths align with EY's goal of helping clients build and then support new digital customer experiences. The potential downside of working with EY is that in orienting its CX go-to market so heavily around digital transformation, it may not be a great fit for executives trying to revamp their organizations and cultures around customer experience. EY is a sound partner for business leaders who are interested in blending together a total digital business transformation with a CX transformation.

Evaluation Overview

We evaluated vendors against 30 criteria, which we grouped into three high-level categories:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include CX strategy creation, CX road maps, customer research, cultural transformation, CX metrics development, and CX analytics.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated the vision and road map, client engagement strategy, and delivery consistency.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's client penetration by region, office footprint by region, average deal size, and thought leadership.

Vendor Inclusion Criteria

Forrester included nine vendors in the assessment: Accenture, Bain & Company, EY, KPMG, McKinsey & Company, North Highland, PwC, Publicis Sapient, and Strativity Group. Each of these vendors has:

› **CX transformation revenue of over $10 million annually.** Because CX leaders turn to a range of firms to help set their CX strategy and road map, we included both large and small consultancies in this evaluation.

› **Multinational operations.** Because of the global nature of business, we wanted to ensure that the firms we evaluated could deliver on an international scale. The practices in this evaluation have offices staffed by their own personnel in multiple countries.

› **Interest from Forrester clients.** The practices in this evaluation are the companies that Forrester's clients mention when they look for partners in setting their CX strategy and transforming their organizations to deliver their intended experiences.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by March 22, 2019 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] In Forrester's most recent evaluation of CX management (CXM) maturity, we found organizations still fail to perform CXM activities with discipline — and the situation is getting worse in terms of these companies' cadence and accountability around these management activities. That's a serious problem, because companies must execute CXM activities with discipline to provide great CX reliably. See the Forrester report "The State Of CX Management Maturity, 2018."

[2] We can break this ecosystem down into customer-facing and behind-the-scenes layers, as well as an operating environment in which these interactions happen. See the Forrester report "Improving CX Through Business Discipline Drives Growth."

[3] Interaction, perception, and outcome metrics are the hallmarks of an advanced measurement framework. To get started, CX pros must build hypotheses about which factors are meaningful within each customer interaction. See the Forrester report "Establish A CX Measurement Program In Seven Steps."

[4] See the Forrester report "Now Tech: Customer Experience Consulting Practices, Q2 2018."

[5] Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

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