

IDC MarketScape: Worldwide Employee Experience Consulting Services 2022-2023 Vendor Assessment

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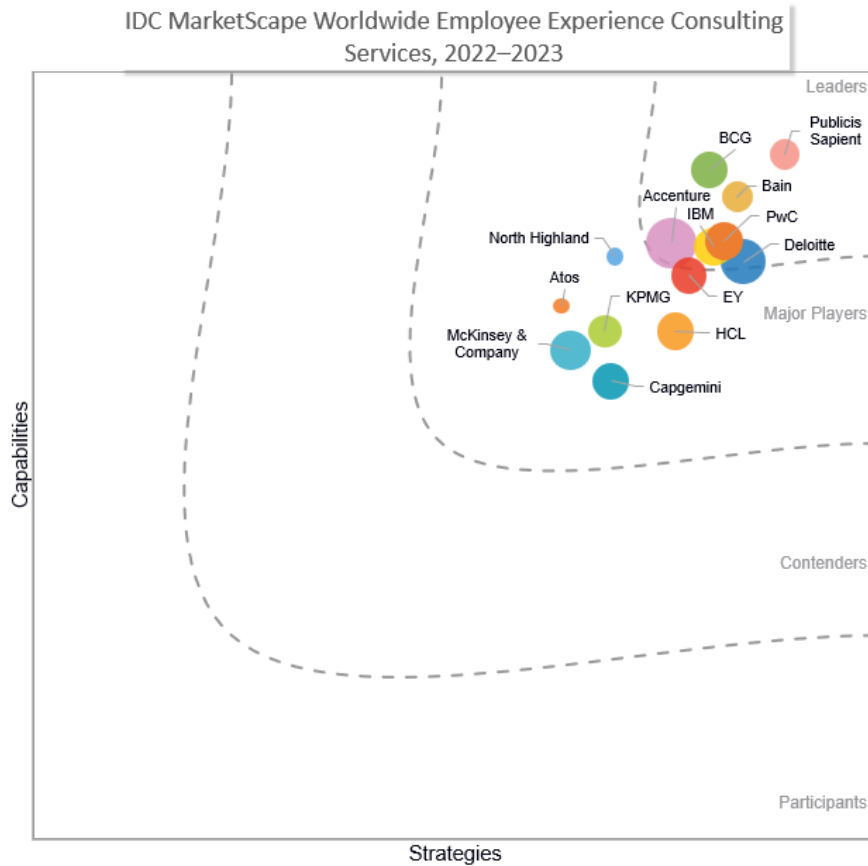
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THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Employee Experience Consulting Services Vendor Assessment



Source: IDC, 2022

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Employee Experience Consulting Services 2022-2023 Vendor Assessment (Doc # US49854822). 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

IDC conducted a thorough analysis and client case review of how each consultancy participating in the following IDC MarketScape designed, engineered, and executed on employee experience (EX) transformation. IDC's methodology for evaluation combined the efforts of its practices for employee experience and business consulting for people and organization (P&O) change to conduct interviews of both service providers and their reference clients. Each practice is then divided into separate camps for evaluation and reporting through individual frameworks for EX and P&O.

The EX market continues to grow in size and scale of related and integrated services and competencies. EX transformation is driving historically strategy-oriented consultancies to move more into the data space to meet clients more efficiently and effectively as they move through stages of organization change. Each of the consultancies evaluated for this IDC MarketScape supports clients across industries including public sector, manufacturing, technology and software, retail and hospitality, logistics, and supply chain. The combined field of participating consultancies sets the bar for entry into this IDC MarketScape for EX high while collectively narrowing the field for differentiation between them.

EX as a field is not completely mature or defined as each organization's strategy for change and requirements therein are highly diverse. EX drives up demand for consultative services particularly as the average organization executes through two phases of maturity toward incorporating employee feedback as data to guide and influence processes for embracing and implementing business change. Consulting for EX transformation places even the most experienced consultants in highly variable environments that can break the mold on even the most standard and proven methods and strategic guidelines. Consequently, when evaluating service providers in the EX market, position may be equally or less important to a provider's strength of offering than the scale of opportunity for how they will navigate change in the future (the size of their dot) or their differentiation (the space between their dot and the others nearest to it).

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

In leveraging the IDC MarketScape model, IDC studied 14 organizations that offer people, organization, change, and employee experience-related services. Participating service providers were required to meet the following criteria to be included in the IDC MarketScape assessment:

- Present a defined consulting offering that includes defined coverage and methodologies for change management, organization structure, leadership development, HR practice, talent organization, culture change, and employee experience.

- Be capable of serving clients up to or at a global level, with operations in at least two geographic regions (AMER [North America, South America, and the Caribbean], EMEA, APAC/APJ/ANZ).
- Represent a combined annual revenue of at least \$100 million across both people and organization and employee experience practices.
- Hold mature practices of at least five years of service in people and organization and employee experience.
- Employ a minimum of 500 consultants across both people and organization and employee experience practices.

ADVICE FOR TECHNOLOGY BUYERS

The EX consultancies represented are very strong performers with unique service and advisory offerings. Examine each provider's profile carefully for how each one is positioned with respect to their point of entry to EX; their competencies across data, technology, and strategy; and their depth of involvement with their clients' strategies. Each provider has unique and strong advantages that may defy the intuitive interpretation of their position within the visual analysis – a seemingly lagging dot may not always mean a weaker consultancy. Further:

- Identify and define your needs prior to determining your short list for consulting partners.
- Consider the services and advisory that you require from your EX consulting partner, and seek out those whose offerings are best aligned to your level of EX transformation maturity.
- Solicit references from each provider in your short list, and be sure to contact them to be certain that your short list matches your needs including equitable contingency planning for cost and scope of services.
- As you progress through your partnership with your chosen provider, maintain contact with your references to solicit best practices from both your provider and outside contacts through each stage of your projects.
- Maintain open and transparent lines of communication with your project leads to ensure that the scope of work reflects your needs, especially when those needs change to reflect new and emerging information or business challenges.

VENDOR SUMMARY PROFILES

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 a summary of each vendor's strengths and challenges.

Accenture

Based on close evaluation of the company's strategies and capabilities and on client and partner feedback, IDC has positioned Accenture in the Leaders category in the 2022-2023 IDC MarketScape for worldwide employee experience consulting services.

Accenture has over 35,000 people within a total firm head count of 721,000 people helping clients navigate employee experience challenges. Accenture has a dynamic presence in employee experience based on its scale, service offerings, reference history, expertise, and products left with the customer upon completion of Accenture's engagements. Accenture has invested heavily in deepening

its ability to understand and connect into client workforce and organization behavior to provide "360-degree value" for clients. The 360-degree value approach considers six dimensions – talent, inclusion and diversity, experience, sustainability, custom, and financial – as Accenture moves to facilitate organizational change by leaning into employee listening within and beyond the HR practice. Accenture develops its products and services as "client zero" to optimize all aspects of strategy, consulting, technology, and managed services for itself before rolling out offerings to clients. Across all its engagement, Accenture develops deep project partnerships with business stakeholders that equalize leadership roles between consultants as guides to best practices and stakeholders as practitioners of change. All of Accenture's services and solutions are offered globally.

Accenture places a large emphasis on early partnership with client stakeholders. As a professional services company, Accenture works to establish strong identification and discovery of client challenges in the client's operational environment before applying methodologies for change and transformation. Overall, Accenture's clients reported being happy with their outcomes despite some feeling rushed or as if Accenture took an outsized lead, leaning heavily in the company's self-proven playbook of strategies for success. Despite taking charge in execution, Accenture enables and aligns leaders at all levels of change to become capable of championing process, people, and culture transformation after the initial partnership concludes.

Strengths

Accenture builds exceptional knowledge partnerships with its clients. Accenture's clients were very satisfied with the company's early ability to study and identify their specific project needs. Accenture proved beyond capable to understand the finer points of EX transformation and organizational culture change within the HR practice and extend it across the broader enterprise. Accenture demonstrated great aptitude for navigating complex operational structures while conveying knowledge to customers clearly and in a way that ensured continued client ability once Accenture's engagement was complete. Clients rated Accenture strong for competencies in change management, organization change, leadership development, HR organization strategy, resource management, EX transformation, culture change, and scale across the extended enterprise. Accenture produced resources and references on request, curating them for client relevance before project success.

Challenges

Accenture's places for improvement were in workforce management and planning practices as well as continued client relations past early discovery. Accenture's average client tenure in EX transformation was reportedly shorter than comparably sized consultancies. While shorter engagement timing can be a sign of early project accomplishment, clients noted that Accenture was prone to accelerating change and assuming an imbalanced project partnership to meet or exceed project timelines. Clients also noted that Accenture's resources and references were somewhat limited in their scope and comparison but that may owe more to Accenture's efforts to curate for relevance over highlighting only its branded successes. Clients also informed that while Accenture provides exceptional strategic guidance, they would have liked to see stronger guidance for HR technology design and digital transformation.

Consider Accenture When

You are seeking an EX transformation partner that understands the finer details of how change in one part of the organization establishes a chain of consequences and alterations elsewhere. Accenture sees organizations as a series of dynamic and moving parts and expertly dives into the complex behavioral machinery to intricately rewire for cultural and process transformation. Accenture's

approach works well for clients that recognize what changes they need to make but need expert guidance on how to craft and execute those and future changes. Expect Accenture to take the lead on current EX transformation initiatives while training internal leaders and stakeholders to champion continued change along the Accenture methodology. Accenture is also a good choice for large-scale or global transformation efforts that may involve reconciling disparate compliance and culture paradigms within the same organization or through mergers and acquisitions.

APPENDIX

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

Employee experience consulting consists of both strategy-led and digital-first business consulting firms. Strategy-led firms serve clients from the perspective of guiding their organizations through managerial transformation that informs digital resource selection, organization change, and business reorientation. Digital-first firms serve clients from the perspective of making more insightful use of digital insights, closing data and resource gaps, and bridging digital competencies to inform organizational and managerial transformation. In both cases, clients benefit from organizational transformation around principles of employee experience that better connect the voice of the employee into how organizational change happens while improving transparency across change for the impacted workforce.

LEARN MORE

Related Research

- *The Rising Role of CIOs in Delivering Superior Employee Experience* (IDC #US49687222, September 2022)
- *Market Analysis Perspective: Worldwide Employee Experience Management Strategies, 2022* (IDC #US49665022, September 2022)
- *Worldwide and U.S. Employee Experience Software and Services Forecast, 2022-2026* (IDC #US49359622, September 2022)
- *Employee Experience: Maximizing Employee Experience Opportunity Requires a New Strategy, Not Just New Tools* (IDC #US48518322, June 2022)

Synopsis

This IDC study provides an assessment of providers participating in the worldwide employee experience consulting services market for 2022-2023. This study is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to a market benchmark for change force ranked based on reference client interviews focused on those factors expected to be most impactful toward success in each market during both the short term and the long term.

"Employee experience consulting opens a new frontier for organizations seeking to reestablish links between the individual employee needs and goals and how organizational leadership decides on and manages through change," noted Zachary Chertok, research manager, Worldwide Employee Experience at IDC. "Digital technology, infrastructure, innovation, and other transformational resources collect and enable the use of data toward building these links. Consulting partnerships, whether provided in a data-first context or a strategy-led context, enable business change stakeholders to leverage best practices and build unique strategies to use feedback as data to improve on human outcomes in the context of business objectives. At its current apex of success, employee experience strategy and change reinfuse people into how business gets done with technology and data as enablers of individual and collective achievement. As represented by the field of consulting partners in this IDC MarketScape, leading consultative partnerships for employee experience transformation focus on organizational guidance founded on improved individual and human outcomes across the workforce designed to aggregate into the achievement of strategic business objectives including agile adaptability in the face of change. I expect that the market for employee experience consulting will continue to grow, reflected in how this field of partners continues to deepen its guidance for true transformation and reconnection between employees and how business processes and objectives are executed and achieved."

About IDC

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