

Deloitte.

Kennedy consulting research
and advisory
Strategy Consulting
Marketplace 2009-2012

Graphics and quotes for Deloitte

Deloitte.

Deloitte noted for having full breadth of services, “executable strategy” and for being the largest strategy practice.

Deloitte’s strategy is built around global market offerings in which the firm pulls in skills from a variety of practices and geographies.

Deloitte is looking to grow by acquisition in key areas, banking being among them.

Making key investments in China, India, Central Europe and Russia, France, Germany, and Latin America.

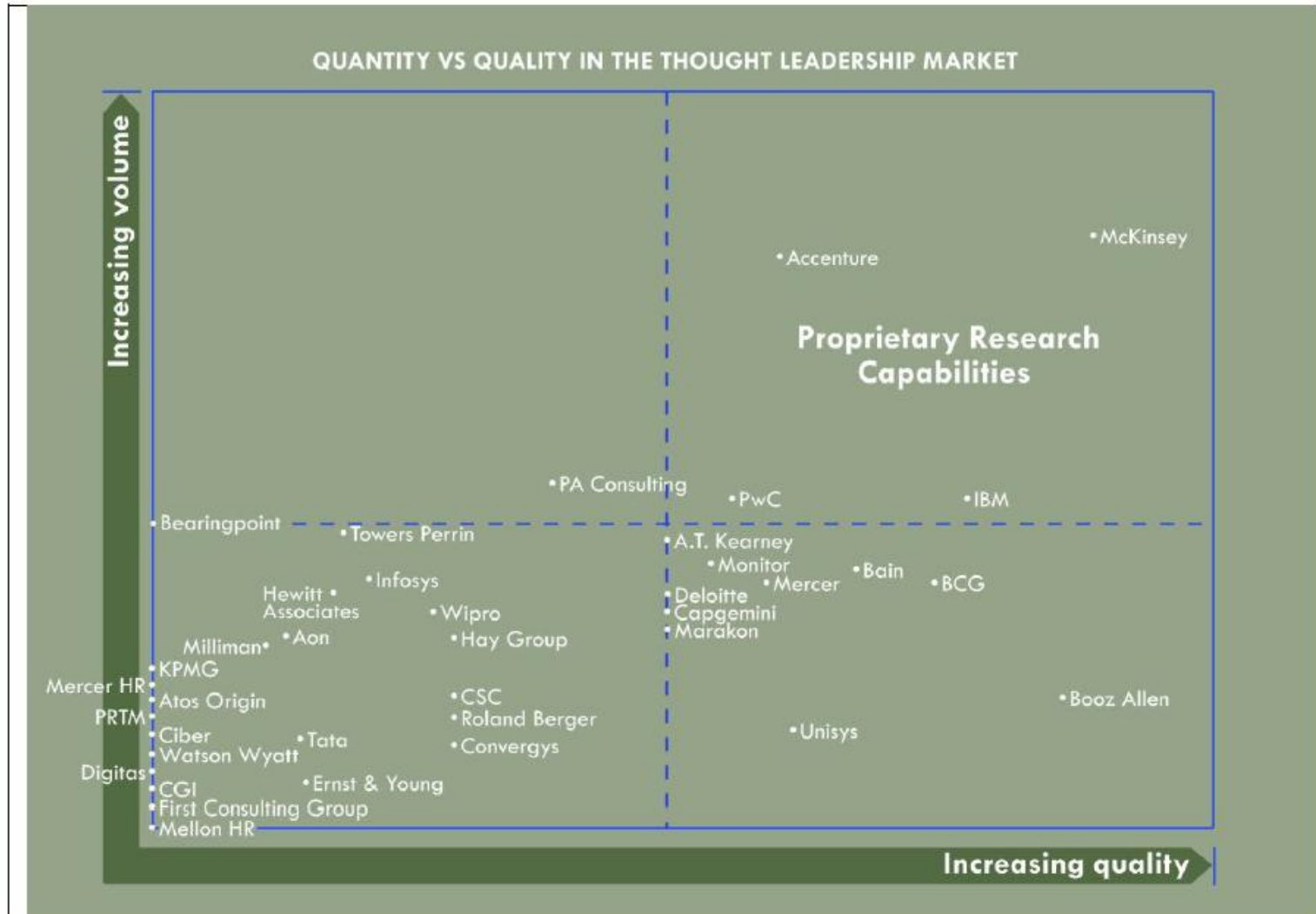
BearingPoint acquisition should vault Deloitte to the front in the government consulting space.

Deloitte ranks second by revenue in Global Strategy Consulting

Rank	Firm		
		2008 Revenue	Growth Rate
1.	McKinsey & Company	\$2,716	2.5%
2.	Deloitte	\$2,497	17.7%
3.	The Boston Consulting Group	\$1,776	4.3%
4.	Bain & Company	\$1,403	3.2%
5.	Accenture	\$1,164	9.0%
6.	IBM Global Business Services	\$1,036	9.0%
7.	KPMG	\$951	9.3%
8.	Oliver Wyman Group	\$685	0.4%
9.	Booz & Company	\$662	7.5%
10.	PricewaterhouseCoopers	\$650	6.6%

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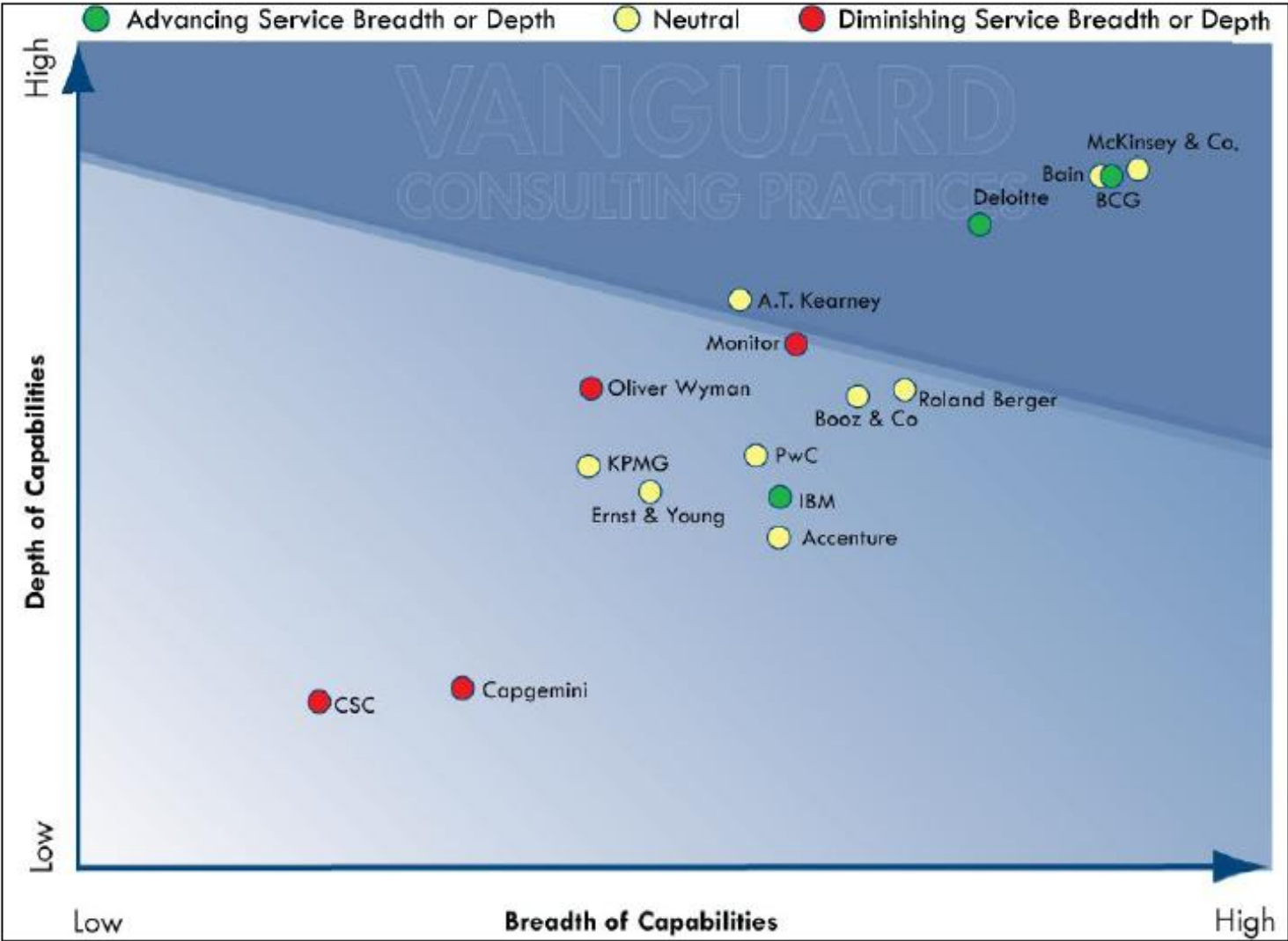
Published thought leadership by quantity and quality, 2006



Source: *Whitespace Report 2007*, Arkimeda; adapted with Kennedy Consulting Research & Advisory analysis

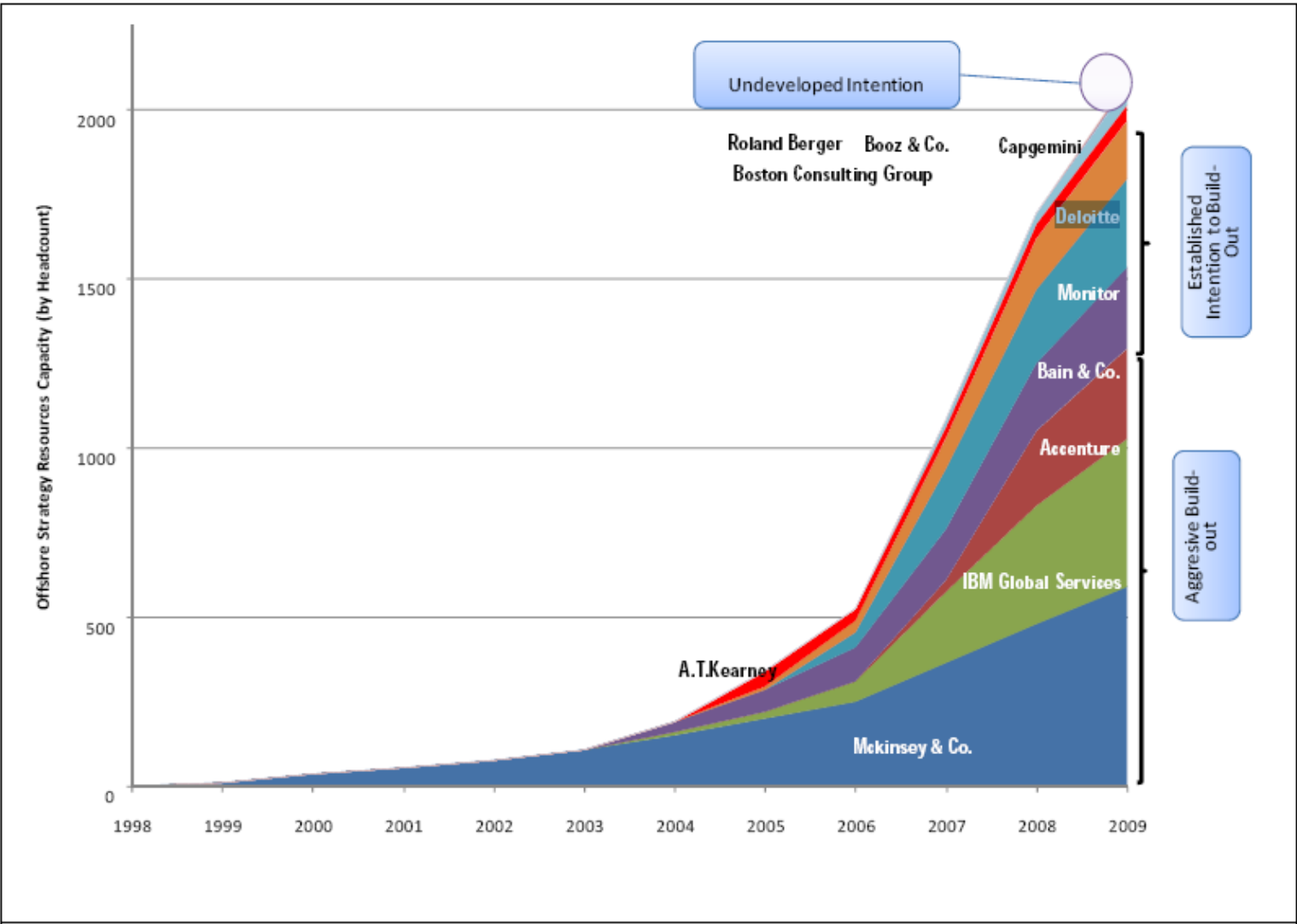
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Deloitte is among the leaders in breadth & depth in “Kennedy’s Vanguard of strategy consulting firms and practices, 2009”



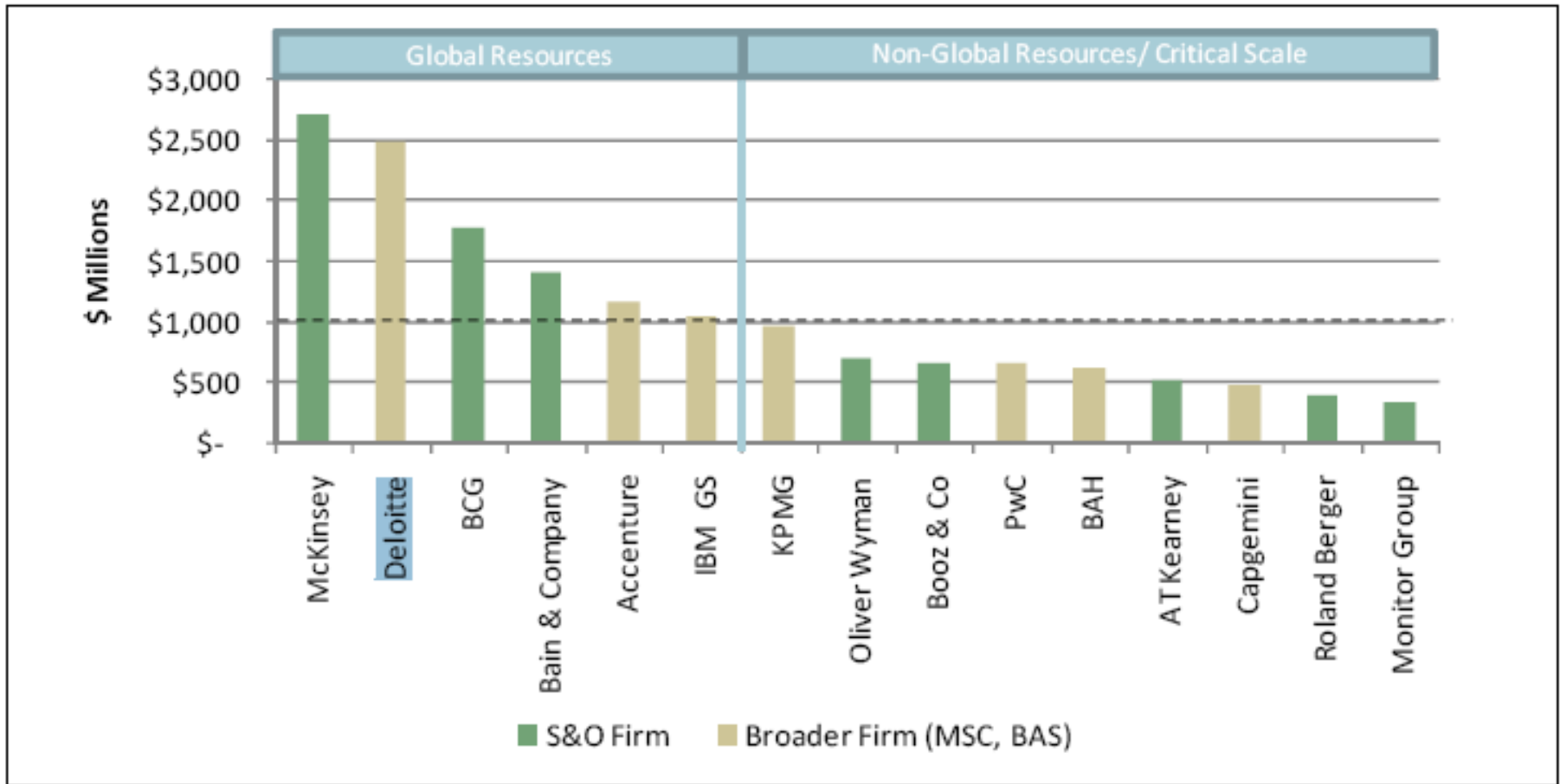
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Strategy related offshore captive center capacity of major strategy practices, 1998-2009



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Strategy practices with global resources/critical scale, 2008



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Kennedy's assessment of Deloitte's functional capability for strategy consulting

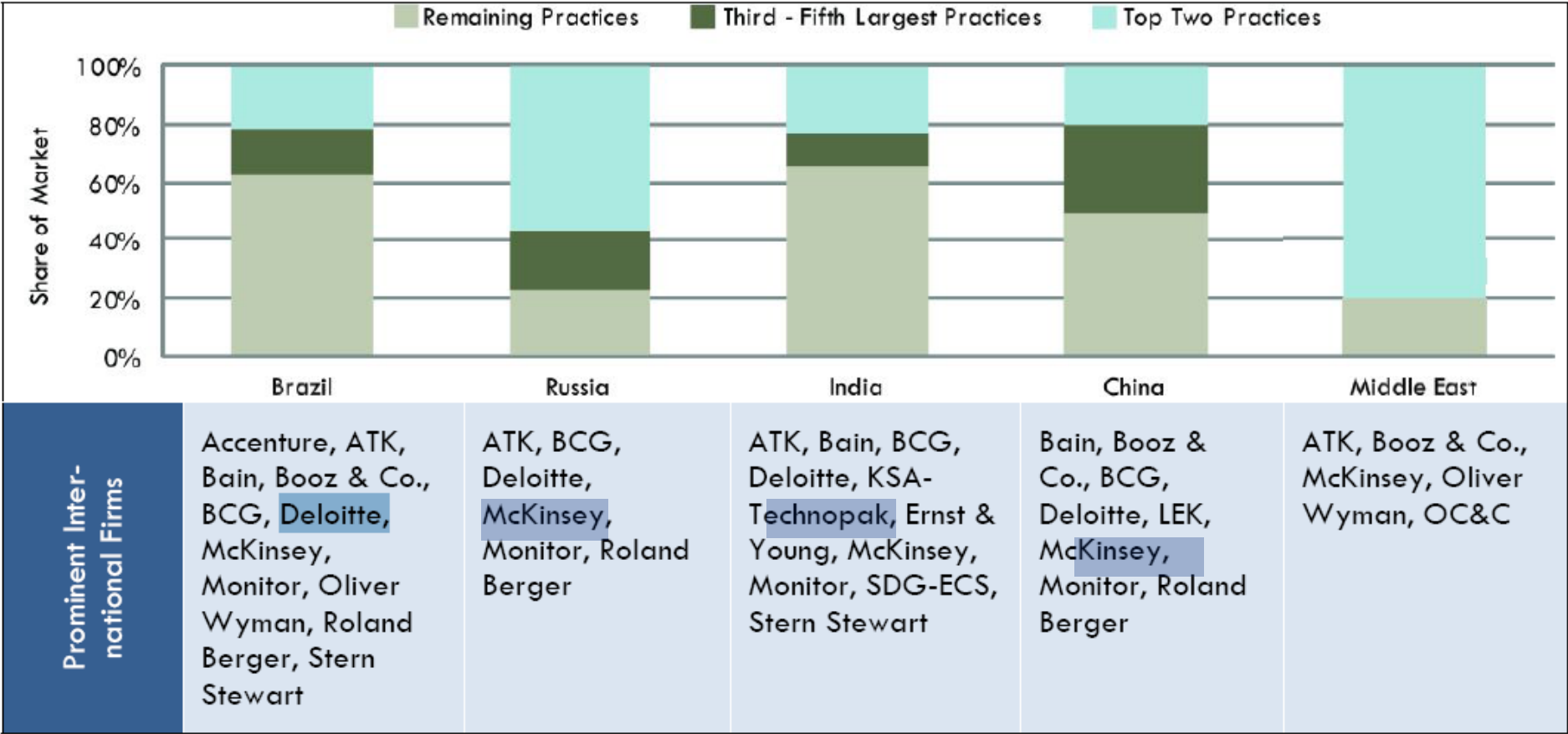
Functional Capabilities

Strategic Planning	Financial Strategy	Organizational Strategy
IT Strategy		Marketing & Branding Strategy

Key:	Strong	Moderate	Limited	None
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Source: Kennedy; Strategy Consulting Marketplace 2009-2012; © BNA Subsidiaries, LLC. Reproduced under license.

Varied activity of global strategy practices across BRICME markets, 2006



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Current talent cluster centralization models

	Stand-Alone Global Delivery Unit	Integrated Global Delivery/Domestic Unit	Stand-Alone GD Unit Supporting Domestic Market
Mandate	Offshore support for global consulting engagements	Offshore support for global consulting engagements Support domestic market consulting engagements	Offshore support for global consulting engagements Support domestic market consulting engagements
Advantages	Focus on GD allows for clear structure/ service decisions to support global support	Reduces risk for market entry into domestic market with traditional consulting activity Smooths capacity utilization through larger scale of demand to contend with (global, domestic)	Smooth capacity utilization of domestic activity Benefit of allowing for scaling up of global delivery (not inhibited by domestic) Higher risk exposure to domestic market
Disadvantages		Goals/ priorities may become confused (domestic vs. global projects) Inhibits ability to optimize structure for Global delivery and increase efficiency	Minimum of conflict for domestic market (since follows GD approach) Requires higher quality talent (more flexible) and more costly
Examples	A.T. Kearney, Bain capability center, McKinsey KC	Accenture, Capgemini	Deloitte Advisory Center, IBM S&C GD

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Approved quotes

- “Deloitte warrants special consideration because it has a financial strategy practice that exceeds that of the largest strategy firms. The firm’s sheer scale and broad footprint provide particular leverage in the financial strategy area, an advantage that surpasses the other BAS firms since Deloitte’s consulting business remained fully integrated while the other accounting firms split and then rebuilt their advisory capabilities. Deloitte’s strong finance dimension is combined with a much greater emphasis on traditional strategy work in pre- and post-merger strategy work.” *Source: Kennedy; Strategy Consulting Marketplace 2009-2012; © BNA Subsidiaries, LLC. Reproduced under license.*
- “Kennedy typically describes Deloitte as a multi-service consulting firm. Deloitte’s core management consulting services are considerably deeper and broader than those of its BAS peers. Additionally, Deloitte’s strategy practice has more breadth and depth generally than some of its MSC peers, such as Accenture and IBM. For this reason, Deloitte’s strategy practice has a very different profile compared to other MSCs and competes well with blended strategy firms.” *Source: Kennedy; Strategy Consulting Marketplace 2009-2012; © BNA Subsidiaries, LLC. Reproduced under license.*
- “Strategic planning is dominated by the players with whom it historically has become synonymous (McKinsey, BCG, and Bain). Deloitte has emerged as a formidable competitor, both in terms of scale and its emphasis on strategic execution.” *Source: Kennedy; Strategy Consulting Marketplace 2009-2012; © BNA Subsidiaries, LLC. Reproduced under license.*
- “Deloitte: This practice warrants special mention. Deloitte goes to market with a full breadth of services that support large transformation-type projects involving multiple elements (strategy, OM, IT, HR, and even BAS). Of the MSC firms, Deloitte has the largest strategy practice and rivals the traditional strategy practices in overall size and scale. In the APAC region, Deloitte is the largest strategy practice based on revenues. Fundamentally different from other MSC firms (e.g., IBM GBS, Accenture, Capgemini), Deloitte does not have sizable outsourcing activities. For this reason alone, Deloitte’s strategy practice possesses a very different profile to the aforementioned MSCs and competes quite differently in the marketplace.” *Source: Kennedy; Strategy Consulting Marketplace 2009-2012; © BNA Subsidiaries, LLC. Reproduced under license.*

Approved quotes

- “Deloitte delivers a combination of services that put it in competition with other strategy and operations practices and multi-service consultancies. Services span Human Capital, Enterprise Applications, Financial Management, Risk Management, Technology, Enterprise Applications, Strategy & Operations, and Outsourcing advisory services areas.” *Source: Kennedy; Strategy Consulting Marketplace 2009-2012; © BNA Subsidiaries, LLC. Reproduced under license.*
- “Deloitte has applied its own expertise in Human Capital to increase the firm’s position as a preferred destination for topflight strategists. Unlike the more traditional strategy firms and their insulated, homegrown cultures, Deloitte attracts transplants from other organizations.” *Source: Kennedy; Strategy Consulting Marketplace 2009-2012; © BNA Subsidiaries, LLC. Reproduced under license.*

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