



ALM INTELLIGENCE
**PACESETTER
RESEARCH**

PWC Excerpts -
Summary Report

Workforce Management Services

2021-2022





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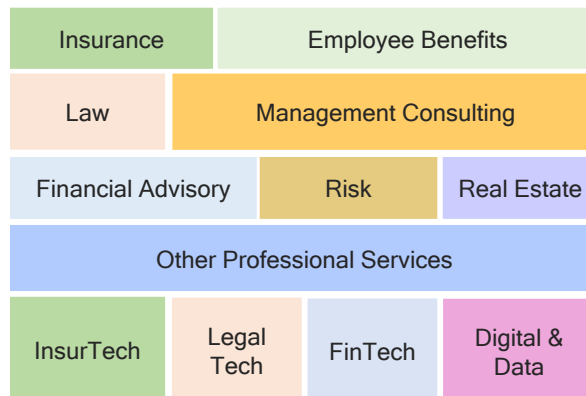


ALM Intelligence Pacesetter Research (APR) is a market research initiative of ALM Intelligence with an inclusive perspective of the professional services landscape. Rather than narrowly focusing on one segment of the market, APR covers a broader range that includes law, consulting, insurance, financial advisory and other actors operating in the market defined by the research topic. The purpose of ALM Pacesetter Research is twofold:

- *Deliver practical insights into the buying and selling of professional services in an increasingly converging marketplace*
- *Help buyers evaluate their sourcing options with objective assessments of providers' services and capabilities*

Pacesetter Advisory Council (PAC)

Market Leaders are selected by a panel of experts comprised of ALM editors, journalists, market intelligence analysts, and external professionals and academics who have experience working with professional services providers.



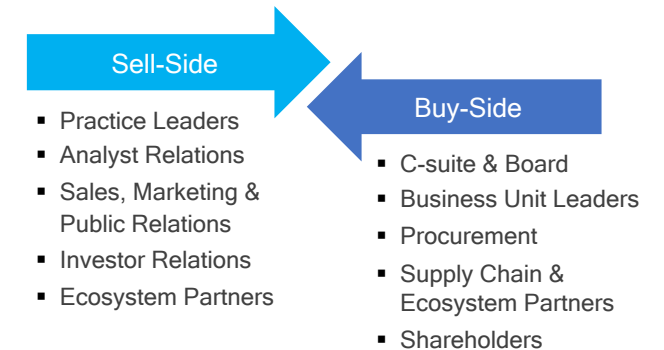
Research Methodology

APR analysts combine qualitative and quantitative research methods to profile Market Leaders in a given market. These providers are evaluated and scored against five core criteria to determine Pacesetter status.

- 1 Business model
- 2 Value proposition
- 3 Service delivery
- 4 Client enablement
- 5 Brand eminence

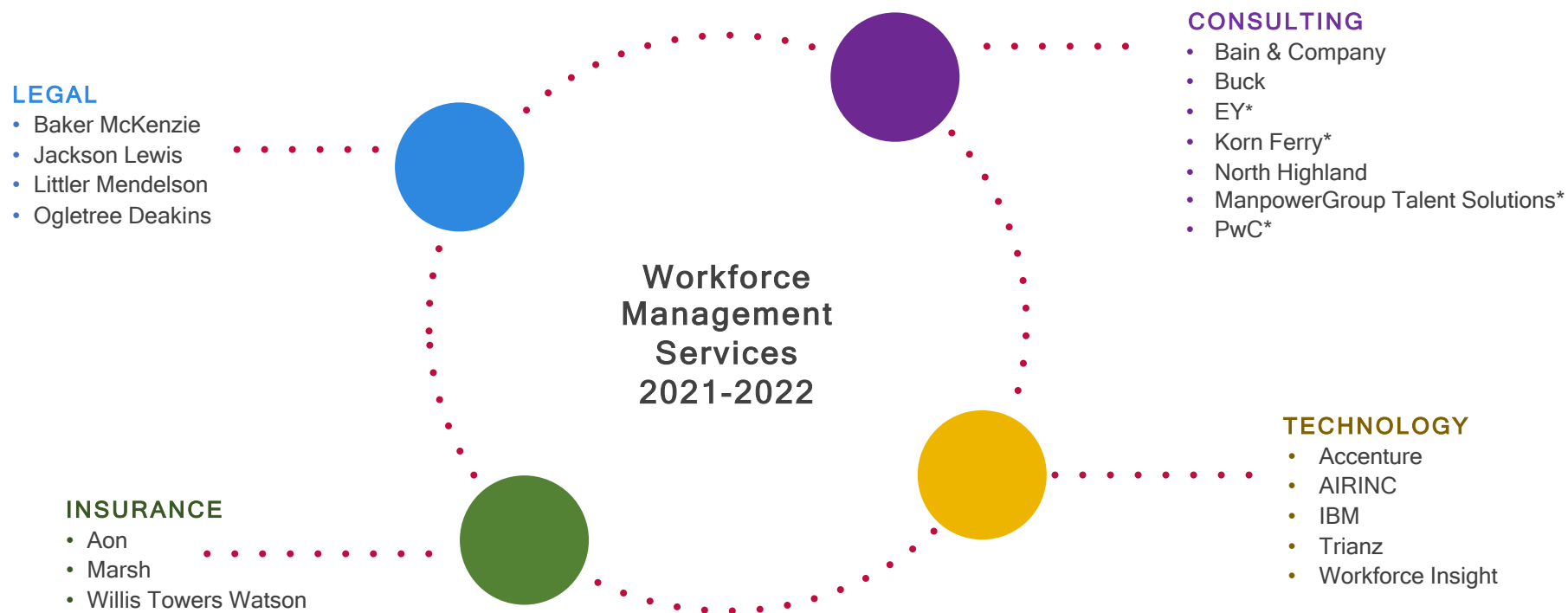
Audience

APR provides independent and objective analyses to providers and buyers of professional services coupled with practical insights that inform the decision-making process for strategic planning and procurement professionals.





*ALM analyzed and profiled 19 Market Leaders across 4 market segments for **ALM Intelligence Pacesetter Research: Workforce Management Services 2021-2022**. Four providers were identified as ALM Pacesetters (*): EY, Korn Ferry, ManpowerGroup Talent Solutions and PwC*





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Market Overview



February 18, 2021

The evolution of professional services in workforce management has tracked closely to the business world's journey towards digital transformation. Technology has been the main force driving advances in the science and practice of workforce management, and providers have spent the better part of the last ten years leveraging their innovation capabilities to develop solutions that digitize workforce processes and analytics capabilities that measure the effectiveness of transformed processes. At the same time, employee experience went from novel concept to mainstream imperative as the hallmarks of consumerism redefined life at work.

The business case for digital transformation embraced workforce management like never before. Providers developed business planning tools for shaping workforces to alternative business models. They developed new capabilities in organization design, learning platforms and leadership development programs. Nearly all issued white papers or perspectives that laid out frameworks for reimagining the workforce of the future. What they did not know was that everything they were doing was a dress rehearsal for the largest ever change in human behavior at scale.

The onset of COVID-19 in the winter of 2019-2020 shifted the context for workforce management services, placing new priorities on the immediate challenge of growing revenue in a locked down economy and sustaining productivity in a remote work environment. Many are concerned about the cost of reconstituting their workforce to be optimally productive under different conditions. There is an overall need to rethink the workplace and work itself as workers demand more control over the social contract.

For many workforce management providers and thought leaders, the pandemic has accelerated trends they have been talking about for over 10 years. Their clients know the future workplace will look very different from what it was pre-pandemic, and they see their job as helping clients build a stronger foundation for innovation and resilience in the face of continued uncertainty.

ALM Intelligence has been researching the workforce management services market since the late 1990s. Our recent conversations with professional services providers and their clients reveal that workforce management is now securely on the CEO's agenda. The future of work remains a prominent conversation with C-suite leaders, and workforce management is priority for business leaders across all corporate functions. All report that demand has never been so high among existing clients and that it is driving significant growth in new business as well.

This year's research focuses on 20 providers identified as Market Leaders in workforce management by ALM's Pacesetter Advisory Council. The cohort includes a mix of consulting, insurance, legal and technology services providers. It will come as little surprise that the providers identified as Pacesetters all come from the consulting peer group, as these firms are ahead of the game in terms of the breadth and depth of their capabilities, including more mature ecosystem relationships and technology partnerships. We hope you enjoy reading *ALM Intelligence Pacesetter Research: Workforce Management Services, 2021-2022*. Please drop us a line if you would like to share your thoughts.

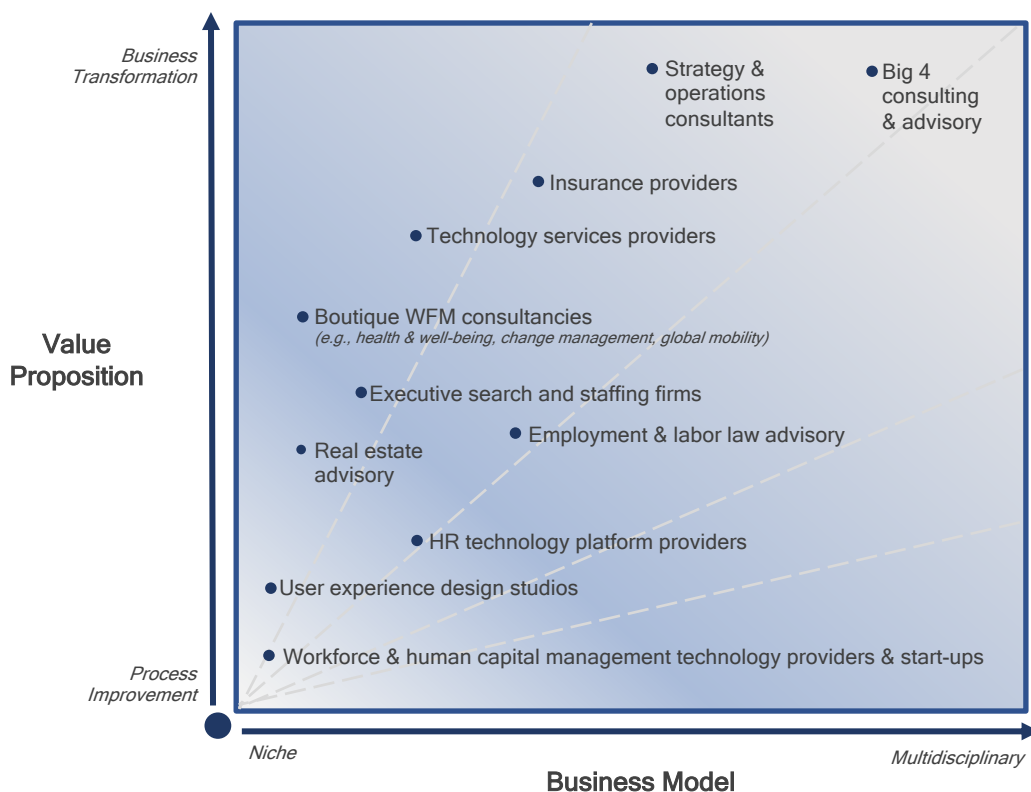


Liz DeVito
Lead Analyst
ALM Intelligence Pacesetter Research
Email: edevito@alm.com

Note: Jeanne Graham contributed to this research



The market for workforce management (WFM) services is diverse with a spectrum of providers across the professional services landscape catering to a broad array of client needs, and a variety of providers entering the market with new services and solutions for managing pandemic-related workforce challenges (e.g., contact tracing tools and employee well-being programs)



- Providers with strong management consulting expertise dominate the high-end business transformation market with strategy-led, multidisciplinary service offerings, implementation capabilities and an engagement style that prioritizes sustainability through client capability development
 - The consulting approach focuses on solving workforce management challenges with analytics-laden needs assessment and scenario planning processes that engage stakeholders from the C-suite to the front lines and back office
 - Governance, performance management and change management are integral to strategy and roadmap design
- Value propositions vary between insurance providers' consulting subsidiaries, although all share an HR- and employee-centric approach of particular value to employee experience consulting
 - Career management and total rewards consulting services and products are a competitive advantage that appeals to employers seeking to differentiate on the employee experience for talent attraction, development and retention
 - Insurance company parents are powerhouses of employee data and risk advisory services to inform analysis of employee matters related to COVID-19, e.g., leave of absence, workplace safety, health benefits and more
- Law firms are inching their way up the value proposition/transformation axis as they combine data analytics with technology to automate many employment matters, saving clients both time and money
- The technology market segment is highly fragmented yet most in demand as organizations adopt digital technologies that enhance the viability of remote and hybrid workplace models
 - Value propositions vary within the cohort with some, i.e., the Market Leaders, operating upstream to provide workforce management services that enable business transformation
 - Niche providers are largely vendors of workforce management software with deep vertical expertise in specific workforce processes or emerging technologies



COVID-19 has been a catalyst for reinventing the workplace and a defining moment for business leaders to address workforce management as a strategic, enterprise-wide challenge that involves the engagement of an expanding set of stakeholders

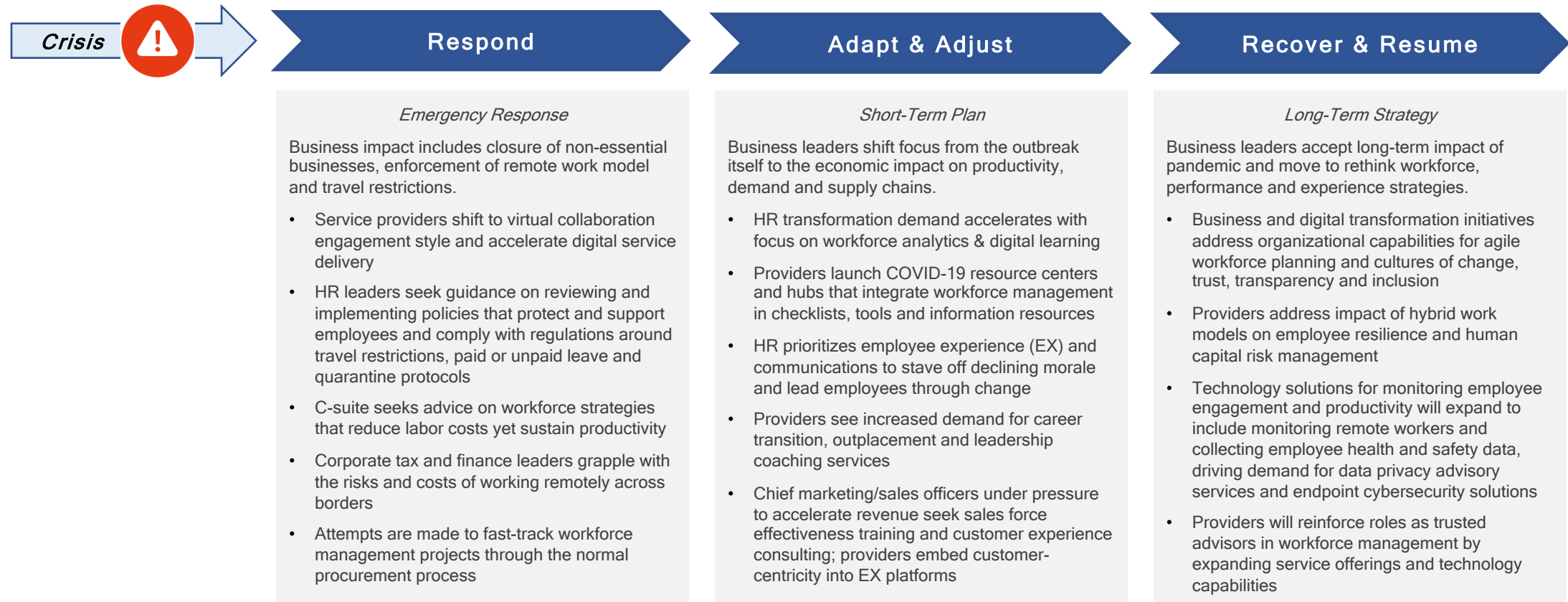
- Directly involved in scoping and purchasing services
- Key influencer; accountable/responsible for executing strategy
- Some influence on purchasing decision
- Not involved in purchasing decision

Stakeholders	Service Provider Segments				Stakeholder roles and interests
	Insurance	Law	Management Consulting	Technology Services	
CEO					For the CEO, workforce management is a strategic problem impacting growth strategy, business model design and brand relationships with all stakeholders
CFO					The scope and cost of workforce transformation services goes beyond the expense of employee rewards, positioning CFOs as the most influential stakeholders
COO					COOs are under increased scrutiny on the effectiveness of strategies for managing the human-machine workforce and will often partner with the CIO on such decisions
CHRO					CHROs are directly accountable for workforce management and, therefore, are key influencers in all decisions related to selecting and managing professional WFM services
CIO					CIOs have a narrower role in purchasing decisions, but are essential to ensuring the integrity and security of HR service delivery and employee experience systems
GC					GCs currently have limited influence beyond the legal and HR functions; however, this is changing as CEOs increasingly look to their legal counsel for strategic risk advice
CPO					CPOs' influence relates to the procurement function's operating model, for example, a CPO with category management responsibility for HR will have more influence than a generalist
Business & Function Leaders					As those responsible for executing and implementing WFM strategies, business and function leaders have an important voice that is increasingly factored into selection and buying decisions

Acronyms: CEO – chief executive officer; CFO – chief financial officer; COO – chief operating officer; CHRO – chief human resources officer; CIO – chief information officer; GC – general counsel; CPO – chief procurement officer



COVID-19 has secured workforce management a permanent place on the CEO agenda, driving demand for the full cycle of strategic, operational advisory and implementation services across large, middle and small markets



Note: The coronavirus surfaced in Wuhan, China in November 2019 and spread to 223 countries and territories throughout the world by January 28, 2021, according to the [World Health Organization](https://www.who.int/emergencies/diseases/novel-coronavirus-2019/situation-reports)

The ALM Intelligence Pacesetters



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WORKFORCE MANAGEMENT SERVICES
2021 – 2022



- **Business model:** The Pacesetters have built transformative workforce management businesses by optimizing the alternative business models adopted by their parent companies. They are adept at capturing the flow of ideas, talent and capital in their business ecosystems to provide comprehensive workforce management services and solutions that are dynamic and digitally enabled.
- **Value proposition:** The Pacesetters had a competitive advantage in that they had already invested in research-backed perspectives for shaping “future of work” strategies and developed frameworks for transitioning to a dynamic capability for workforce management that rapidly adapts to shifts in market conditions and business strategies. The pandemic heightened their value propositions among existing clients and in markets that were waiting to address workforce transformation after shifting to a digital business model.
- **Service delivery:** The ability to rapidly shift to virtual collaboration and accelerate digital service delivery is a hallmark of the Pacesetters, and the pandemic tested their capabilities in this regard. They also take care to support and protect their own employees by offering coaching and guidance on ways of working while maintaining social distancing and other COVID-19 protocols.
- **Client Enablement:** Market Leaders deploy a variety of approaches to ensure their clients establish an organizational capability for workforce management, from straightforward project management and implementation to staff augmentation and managed services. The Pacesetters are a bit more intentional in that they embed training, coaching, mentoring and upskilling throughout the engagement process.
- **Brand eminence:** One of the biggest challenges providers are facing in the pandemic is client demand for discounts, lower fees and alternative pricing models. The Pacesetters responded to the emotional content of this demand by offering free workforce management advisory services through webinars and establishing COVID-19 hubs to distribute related information, resources and tools, most at no charge. This approach not only reinforced their brands as trusted advisors, but also enabled them to help clients through the emergency phase of the crisis while keeping an eye on the long-term implications of the pandemic on workforce management.

Workforce Management Services Pacesetters 2021-2022

Market Segment	Provider
Consulting	EY
Consulting	Korn Ferry
Consulting	ManpowerGroup Talent Solutions
Consulting	PwC

Methodology Notes

The ALM Pacesetter Research methodology evaluates Market Leaders against five core criteria.

1. Business model
2. Value proposition
3. Service delivery
4. Client enablement
5. Brand eminence

Providers whose aggregate score is 85 and above qualify as an ALM Pacesetter.

See Appendix for detailed definitions of the five core criteria.



PwC		Primary Practice		People and Organization				
<p>PwC’s outside-in approach to workforce management helps clients navigate ambiguous operating environments with a disciplined, data-driven approach to developing people strategies and managing talent. In the context of COVID-19, PwC has refreshed its value proposition to focus on new perspectives and priorities that speak to the C-suite’s pandemic-driven agenda: maintaining productivity, reducing labor costs and risks, and redesigning employee experience and well-being. Where an organization sits within this context has implications for reconstituting workforce plans, which provides a starting point for PwC to determine the right mix of consulting competencies required to help clients address the challenges exposed by the pandemic.</p> <p>PwC mines insights from its CEO and CFO surveys to reorient and tailor service offerings in line with market sentiments. For example, the firm has developed a “return to work” offering focused on addressing employees’ concerns around safety at work and employers’ needs to sustain employee engagement and productivity. The solution combines consulting expertise on workforce strategy and organization design, change management and communications, learning and development, HR transformation and technology, and real estate with mobile- and digitally-enabled tools and accelerators, e.g., the Accelerated Workforce Modeler for scenario planning; Digital Accelerator Program for designing, scaling and accelerating new ways of working; and Virtual Reality Training to facilitate effective learning on topics ranging from leadership to soft skills.</p> <p>PwC People Analytics provides benchmarking services to help clients assess the competitiveness of their HR function and human capital strategies. The practice also provides customized analytics services for workforce planning and diagnosing the effectiveness of talent strategies, e.g., retention and attraction. The firm offers clients a Workforce of the Future Accelerator Workshop, where HR and business leaders immerse themselves with PwC experts to ideate, socialize concepts, and produce tangible outputs, e.g., data-driven workforce plans and talent strategy roadmaps. These workshops also provide a lab environment for co-designing solutions, such as prototype workforce modelling tools, that clients can use to build an internal workforce-of-the-future planning capability.</p> <p>PwC’s workforce management services also are supported by a portfolio of thought leadership and intellectual capital developed by the firm’s internal think tanks, centers of excellence and global leaders. PwC Strategy&’s Katzenbach Center, for example, regularly publishes papers and perspectives on topics related to organizational culture, leadership and teams. Leaders seeking a broader, long-term context for their people strategies may wish to read Ten Years to Midnight, a book penned by the PwC network’s global leader for strategy and leadership, Blair Sheppard.</p>								
Pacesetter Criteria					Pacesetter Impact Score			
Business Model	Value Proposition	Service Delivery	Client Enablement	Brand Eminence				

Impact Scale: ○ None ● Low ● Moderate ● Significant ● High ● Very High

Workforce Management Services

Strategic Workforce Planning	Talent & Leadership
Employment & Labor Law	Diversity, Equity & Inclusion
Employee Communications	Learning & Development
Organization Strategy	Organizational Culture
Change Management	Talent Mobility
Employee Engagement & Experience	
HR Technology Enablement	
HR Function Effectiveness	
People & Workforce Analytics	

■ Services offered
□ Services not offered



How PwC is moving the needle



Pacesetter Criteria	Qualitative Assessment
Business Model	PwC has designed a distinctive ecosystem of internal and external talent, solutions and research partners focused on workforce management. More importantly, the firm excels at mobilizing relationships within this ecosystem to pivot and shape service offerings that adapt to changes in the operating environment, as it has with COVID-19. One of the success factors behind this capability is PwC's equally strong commitment to acting as a living laboratory for workforce management innovations.
Value Proposition	The firm test-drives solutions and consulting approaches on itself before taking them to market. For example, employee adoption of the firm's Digital Fitness App is monitored to identify ways to enhance the user experience, and as the pandemic unfolded, client-facing consultants were involved in developing the "leading with empathy" approach to problem solving. Because of this practice, PwC's workforce management professionals can assure clients that their advice is proven, practical, actionable and human-centric.
Service Delivery	The pandemic prompted PwC to increase its focus on enabling remote productivity and services for client service delivery teams. The firm adapted delivery of its design thinking approach - Business eXperience Technology (BXT) - to remote services and tools and created playbooks for all employees to adopt new ways of working and teaming with each other and with clients.
Client Enablement	PwC has developed both business process-as-a-service (BPaaS) and technology-enabled managed services for workforce management, such as PwC Mobility Managed Services and Workday managed services. These solutions enable clients to achieve efficiencies, for example, by shifting operations to highly skilled PwC talent and maximize investments in on-demand, cloud-based human capital management platforms.
Brand Eminence	PwC is a strong believer in the power of market research and intellectual capital to enhance service delivery with external market insights that keep pace with changes in clients' operating environments and inform innovation initiatives. These investments range from working with global organizations (e.g., T20 and UNICEF) on workforce management policy development to developing free mobile apps to help clients understand where their company stands in its response to COVID-19 across organizational performance factors such as workforce management, strategy and brand.



ALM Intelligence Market Leaders



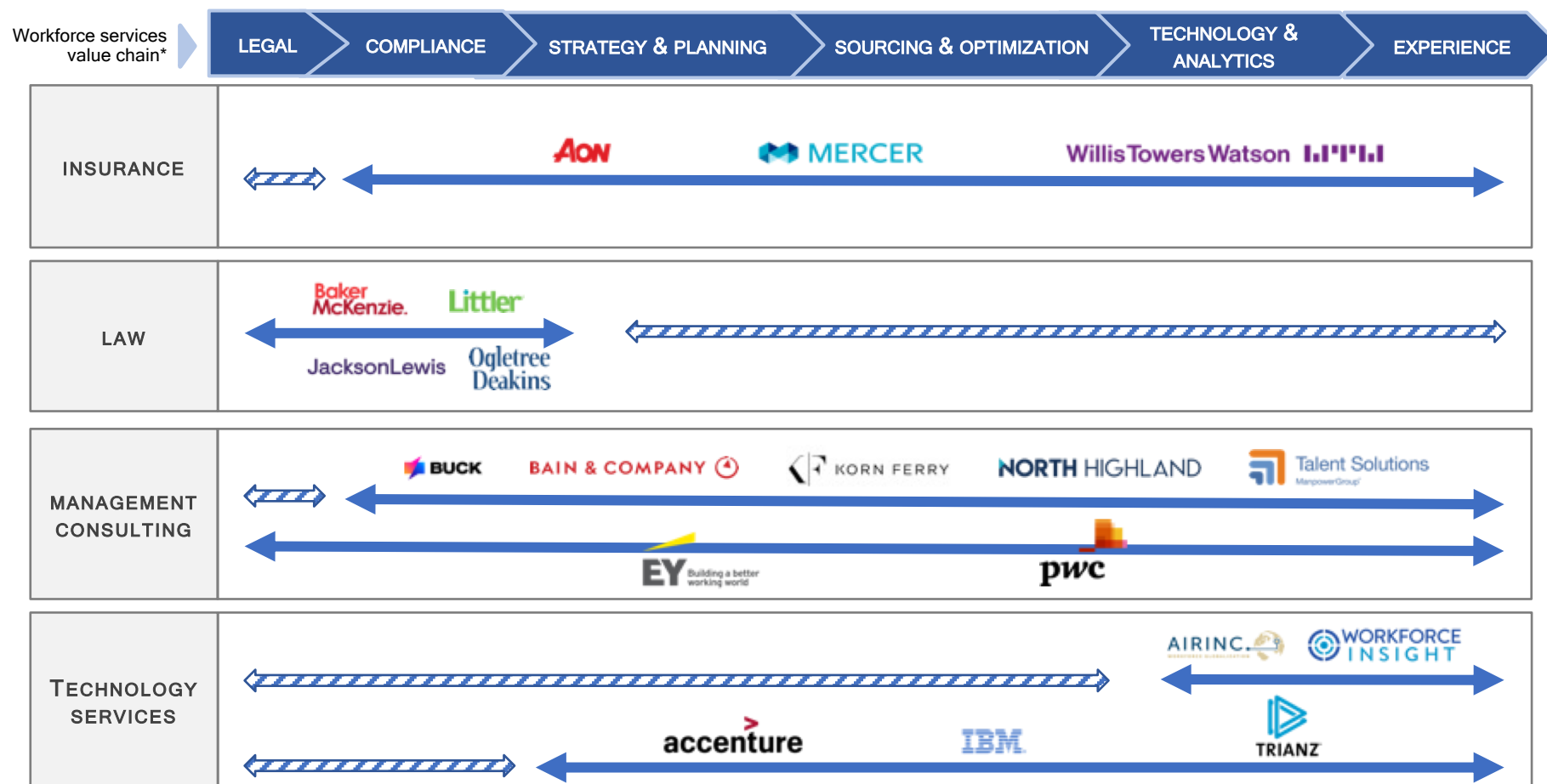
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WORKFORCE MANAGEMENT SERVICES
2021-2022





Workforce Management Services: Market Convergence

The Big Four consulting and advisory firms are one-stop shops for end-to-end workforce management services, followed closely by the management consultancies; market convergence concentrates around technology and analytics, signifying the importance of digital technology and transformation capabilities to the design and delivery of workforce management services



Key:

 Core services

 Services provided by ecosystem partners

 Services not provided



STRENGTHS

- Global service delivery bolstered by local resources worldwide
- Singular understanding of the HR function and deep commitment to elevating HR's role as a driver of strategic talent and workforce decisions that create value
- Workforce data powerhouses with risk analytics platforms that combine deterministic, stochastic and probabilistic modeling capabilities using proprietary data from clients HR information systems, insurance claims data, government data and ecosystem partners
- Deep technical knowledge of labor law, HR policies, contracts and regulations around employee safety

WEAKNESSES

- Overall weakness in management and strategy consulting with exceptions, e.g., Marsh & McLennan's Mercer and Oliver Wyman subsidiaries collaborate on "future of work" and COVID-19 thought leadership and intellectual capital, including perspectives, frameworks and methodologies
- Ingrained market perception as benefits brokers and HR consultants overshadows strategic human capital and workforce management capabilities that create impact for clients
- Must compete with insurance brokerage business for corporate development dollars to innovate workforce management solutions and strengthen niche capabilities through strategic acquisitions

OPPORTUNITIES

- Unparalleled insights into the material impact of risk, including systemic risk events, are rocket fuel for innovating approaches to workforce management that are both sustainable and cost-effective in the context of the pandemic economy
- Strong talent mobility capabilities enable consulting around new forms of mobility in the pandemic era, including shorter assignments and moving jobs to people rather than people to jobs
- Leverage knowledge of HR policies and COVID-19 legislation to innovate digitally-enabled, self-service tools that help employees manage risks to their personal information and data in the post-vaccine workplace

THREATS

- The outlook for this market segment is colored by years of insurance industry consolidation that has compromised human capital consulting brands, placed control of workforce management strategies and business development with insurance-centric corporate leaders, and led to a significant loss of strategic human capital and workforce management consulting talent
- Management consulting providers are key rivals who have the competitive advantage of multidisciplinary service offerings and global methodologies that embed workforce management in transformation frameworks

Insurance providers' competitive advantage is a deep knowledge of employees' decision-making behaviors based on decades of helping clients deliver workforce rewards and engagement services



STRENGTHS

- Law firms are flexing their innovation muscles by digitally enabling employment and labor law processes, knowledge management and decision support tools
- Law firms have huge amounts of data from client matters that can be aggregated to offer self-service technology to clients as subscription services
- Law firms are using digitally-enabled knowledge management capabilities to move outside traditional hourly billing fees and instead offer clients alternative or flat fee structures that give clients price predictability

WEAKNESSES

- Although knowledgeable about law firms' employment and labor law advisory services, the market lacks awareness of law firms' strategic consultative services in workforce restructuring, agile workforce planning and other aspects of workforce management
- Law firms deal with GCs or HR professionals rather than the C-suite
 - Labor and employment, due to commodity characteristics, is one of the less profitable practices for law firms, making technology investment less attractive to general practice firms versus employment-only firms. This makes technology investments to stay competitive less likely in general practice firms and limits their ability to change delivery of legal services when clients increase their focus on efficiency

OPPORTUNITIES

- While COVID-19 will continue to dominate the legislative and policy landscape for the immediate future in the US, the new administration and Congress are expected to give significant attention to labor and employment matters, creating opportunities for law firms to market their ability to help clients navigate workplace law trends, legislation, regulation and litigation
- Corporate legal departments continue to face pressure to justify their costs. This will lead to a greater appreciation for workforce data analytics services from law firms that enable strategic choices around job design for corporate legal teams, diversity and inclusion initiatives, and human capital risk management, compliance and ethics advisory services

THREATS

- Caught unprepared for the pandemic-driven shift to remote work and digital service delivery, corporate legal departments have diverted spending from outside counsel services to internal investments in legal operations talent and technology
- Law firms are experiencing pricing pressures due to increased demand for discounted services by key buyers - GCs and Chief Legal Officers - who are grappling with budget cuts, staff layoffs and increased workloads due to continued depressed corporate revenues and cash flow in the pandemic economy

Law firms have a unique position in the WFM services market in that they are the only providers with the maturity, depth and breadth of knowledge and experience in employment and labor law



STRENGTHS

- Multidisciplinary approach delivers depth and breadth of WFM expertise and capabilities across the value chain of services (strategy-execution-scaling)
- Outside-in approach provides macroeconomic context for designing workforce plans that encompass the continuum from the business of today to that of the future, pulling workforce strategy upstream into customer experience and downstream into business model innovation
- Long-standing ecosystem relationships with HR technology giants (e.g., Oracle, ServiceNow, Workday), SaaS application providers and HR tech start-ups provide buyers with expert sourcing of point and platform solutions for transforming HR service delivery and the employee experience

WEAKNESSES

- Breadth of capabilities vary between providers in this market segment; for some providers, specific capabilities, (e.g., employment law and regulation advisory services) are provided by a small team of legal experts rather than a global practice as with EY and PwC. Buyers need to carefully scope providers' offerings to determine whether they seek comprehensive, bundled services or prefer to manage a portfolio of service providers to achieve comparable integrated service delivery
- Large-scale investments in technology assets increase overhead costs, which are often embedded in structured pricing models; as such, consulting providers are less open to performance-based or flexible approaches to pricing their work

OPPORTUNITIES

- For clients with advanced analytics capabilities and mature technology infrastructure, there is an opportunity for consultants to draw data from corporate systems outside of HR to inform workforce management program outcomes; for example, integrating behavioral data captured from AI-enabled cybersecurity endpoint systems to assess adoption and compliance by full-time and contingent workers
- The pandemic has accelerated middle-market companies' investments in digital transformation, presenting downstream market opportunities for consulting providers able to achieve ROI with smaller scale WFM projects
- Consulting providers are well positioned to help clients navigate and understand the financial and tax implications of government sponsored COVID relief and economic stimulus programs both within and across borders

THREATS

- Government mandates specific to COVID-19 restrictions have created a caste system of essential and nonessential workers which fuels distrust and dampens engagement across the labor force that is outside of clients' control. This creates a consulting challenge around the design of employer value propositions and employee experience journeys that ring true and resonate with demoralized workers weighed down by an uncertain environment and an uncertain outlook
- With the most developed ecosystems across the professional services market, consulting providers must be vigilant and meticulous in how they manage the data privacy and cybersecurity risk of ecosystem partners involved in the capture and distribution of workforce management data

Consulting providers' competitive advantage is a transformational approach to workforce management, agile service delivery, and scalable solutions



STRENGTHS

- Solutions-led approach aligns technology investments with workforce management priorities, enabling clients to use consistent tools, taxonomies, data and processes across the business
- Ability to identify and articulate the impact of HR and workforce management technology strategies on people and organizational structure, including assessing current skills, identifying gaps and new roles and responsibilities, and guiding clients in building a team with both the technical skills and mindsets needed to redefine workforce management for the pandemic era
- Ecosystem relationships enable service delivery outside of core competencies to enhance the overall value proposition; for example, relationships with Thrive Global and the Josh Bersin Academy enable Accenture to integrate employee well-being into EX design

OPPORTUNITIES

- Shift go-to-market strategies and messaging to pandemic's focus on the human experience with use cases and marketing communications that highlight how workforce management systems unleash human potential
- Leverage artificial intelligence embedded in cybersecurity systems to understand changing patterns of employee behaviors and related risks of remote work environments
- Continue to innovate desktop as-a-service apps and tools for the post-vaccine workplace; for example, contact tracing, skills ontologies, employee productivity monitoring, learning experience platforms, workforce planning and modeling, and internal talent marketplace exchanges

Technology service providers' competitive advantage is an ability to contextualize digital transformation to clients' goals for the employee experience

WEAKNESSES

- Providers' capabilities vary within this segment with some offering deep vertical expertise, such as AIRINC's focus on talent mobility analytics, and others offering services that are competitive to multidisciplinary consulting providers; for the latter cohort, the challenge is to be able to differentiate across market segments with a consulting-led approach to workforce management
- Consulting talent is typically focused on developing strategies and solutions on provider's proprietary workforce management platforms

THREATS

- Strong competition from Big Four firms with deep technology consulting and systems implementation capabilities, robust ecosystems of workforce management technology and data analytic start-ups, and strategic workforce consulting expertise
- Intense competition for alliances with HR tech start-ups from all segments of the workforce management services market raises the cost of corporate development and innovation
- The ever-shortening life cycle of emerging technologies makes it difficult for providers to adjust for mistakes in customization on a timely basis, which can threaten implementation and go-live schedules



Appendix



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The goal of ALM Pacesetter Research is to help buyers of professional services navigate an increasingly complex landscape with confidence. We use a multidisciplinary perspective to identify best-in-class providers of legal, consulting, financial, insurance, employee benefits, and other professional services, and analyze how they are evolving as an ecosystem of interdisciplinary service providers. Our research is grounded in over 50 years of accumulated market insights and qualitative research models that combine knowledge of management science with case studies and other sources of knowledge to understand patterns of market supply, demand, behavior and ways of doing business.

IDENTIFY

- The ALM Pacesetter Advisory Council (PAC) convenes in advance of the research project kick off; members include ALM journalists and editors, and external experts such as consultants, general counsel and industry thought leaders
- The PAC selects the set of Market Leaders that will be covered in the research topic from a larger group of providers that members have identified in the normal course of their work
- PAC members also provide expert knowledge and insights to the ALM Pacesetter team throughout the research and analysis process

RESEARCH

- The ALM Pacesetter Team within ALM Intelligence conducts primary and secondary research
- Primary research includes in-depth interviews with practice leaders at the provider firms covered in the research; satisfaction interviews with clients referred by those providers; and in-depth interviews with thought leaders, recruiting professionals and other sources
- Secondary research includes data gathered from annual reports and earnings calls, management presentations, public filings, case studies, press releases, journals and publications, online information databases and other publicly available resources

ANALYZE

- ALM Pacesetter analysts evaluate and score the Market Leaders against five core criteria
 1. Business model
 2. Value proposition
 3. Service delivery
 4. Client impact
 5. Brand eminence*See criteria definitions on next page*
- Market Leaders that achieve a Pacesetter Impact Score equal to or over 85 are designated as ALM Pacesetters
- Pacesetter analysts map markets and stakeholders and write market trends
- Market segment overviews are peer reviewed by the appropriate PAC member



ALM defines workforce management (WFM) as professional services designed to improve clients' ability to source, develop, engage and retain the human resources required to deliver the enterprise strategy.





Core Criteria	Definition
Business Model	Provider's ability to reposition core competencies around new products, services, and business models to adapt to shifting patterns of market supply, demand, behavior and ways of doing business
	Detailed Criteria: Scope of services, Supply chain, Ecosystem, Corporate Development, Innovation Capability
Value Proposition	Provider's ability to deliver on its value proposition, i.e., the positioning statement that communicates the benefits and economic value a prospect will receive by purchasing the provider's products and services over a competitor's
	Detailed Criteria: Differentiated services, Risk management, Measurable outcomes, Evidence-based solutions, pricing options
Service Delivery	Provider's ability to mobilize resources and configure assets to serve clients
	Detailed Criteria: Solutions design, Engagement model, Talent and culture, Project management, Enabling tools
Client Enablement	Provider's ability to help clients affect continuous, sustainable change, improve performance and achieve growth
	Detailed Criteria: Client relationship management, Business case development, Stakeholder conversations, Change management and capability development, Living laboratory
Brand Eminence	Provider's ability to leverage brand and marketing strategies to differentiate in its marketplace as an expert practitioner and thought leader
	Detailed Criteria: Thought leadership, Intellectual property (IP), External research partnerships, Sales and marketing, Case studies



Workforce Management Services Definitions	
Legal	Labor and employment law services, including affirmative action, alternative dispute resolution, broad-based and executive compensation, business and human rights, discrimination and harassment, employee benefits, employment taxes, ERISA and benefit plan litigation, global mobility and immigration, international employment law, labor management relations, workplace privacy and data security, workplace safety and health, and more as offered by individual law firms
Compliance	Risk management services related to employment and labor law practices listed above; includes compliance training, writing and reviewing HR policies and codes of conduct, and more, as offered by individual law firms
Strategy & Planning	Services related to the systematic, disciplined process for identifying and addressing gaps between current and projected workforce requirements; includes workforce scenario planning and workforce impact modeling
Sourcing & Optimization	Services related to identifying, attracting, developing, deploying and retaining talent; includes employee mobility, staffing and career transition services, and real estate advisory
Technology & Analytics	Services related to HR and human capital management technology strategy, HR service delivery operating model design, HR process redesign, HR technology and analytics strategy and implementation, cloud/digital readiness assessment, risk analysis and mitigation, change management and project management
Experience	Employee engagement and employee experience consulting and technology services, including employee communications (digital, personalized, campaigns); survey and focus group design, execution and analysis; design thinking and user experience design services; and custom website and portal design, buildout, maintenance and hosting



Patrick Fuller
Vice President
ALM Intelligence



pfuller@alm.com
+1.405. 285. 5358



Liz DeVito
Lead Analyst
ALM Pacesetter
Research



edevito@alm.com
+1.212.457.9170



Jim Doyle
Strategic Account Executive
ALM Pacesetter
Research



jdoyle@alm.com
+1.212.457.9171



Jeanne Graham
Research Lead
ALM Pacesetter
Research



jgraham@alm.com
+1.512.784.6473



Tomek Jankowski
Lead Analyst
ALM Pacesetter
Research



tjankowski@alm.com
+1.212.457.9175



Eliza Sawyer
Marketing Manager
ALM Intelligence



esawyer@alm.com
+1.513.482.1492



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