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Which Service Provider Is Right For Your Supply Chain Project?

by Patrick Connaughton
for Business Process & Applications Professionals



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by **Patrick Connaughton**
with Sharyn Leaver and Andrew Magarie

EXECUTIVE SUMMARY

Supply chain management (SCM) service providers play an important role in helping enterprises more efficiently plan and execute their supply chain strategies. Spending on SCM services will continue to grow due to increasingly complicated global networks, the mashing up of SCM operations with new mergers and acquisitions, and high profile sustainability issues that push SCM up to the C-level agenda. However, choosing a service provider can be a risky decision as many companies report missed expectations and failed projects. To avoid disappointment, buyers must select a consultancy that closely matches their needs by understanding the key characteristics of the four types of SCM service providers: 1) offshore/nearshore technology providers; 2) strategy consultants; 3) global, full-service systems integration firms; and 4) software vendor professional services.

TABLE OF CONTENTS

2 **Rapid Change And Globalization Drive Demand For SCM Consultants**

SCM Consultants Deliver Mixed Results

3 **Four Classes Of Providers Offer Varying Strengths And Weaknesses**

Offshore Technology Specialists: Deep IT Skills Galore, Limited Process Change Experience

Management Consultants: Strong On Vision, Short On Implementation Capabilities

Global Systems Integrators: Broad Range Of Services With Minimal Differentiation

Application Vendors: Services Move To Center Stage

RECOMMENDATIONS

12 **Accenture Is The Best Fit For Global Supply Chain Transformations**

13 **Supplemental Material**

NOTES & RESOURCES

Forrester interviewed 45 vendor and user companies including Accenture, Archstone Consulting, Bain, BearingPoint, Capgemini, Chainalytics, Cognizant Technology Solutions, Computer Sciences Corporation (CSC), Deloitte, Fujitsu, HCL Technologies, i2 Technologies, IBM, Infosys Technologies, Manhattan Associates, Northrop Grumman, Oracle, PRTM, Tata Consultancy Services (TCS), and Wipro.

Related Research Documents

["The Forrester Wave™: Risk Consulting Services, Q2 2007"](#)
June 25, 2007

["Ranking Supply Chain Management Tools And Services"](#)
December 12, 2006

["Topic Overview: Professional Services Provider Selection And Governance"](#)
December 12, 2006

RAPID CHANGE AND GLOBALIZATION DRIVE DEMAND FOR SCM CONSULTANTS

As companies look to source and sell products in emerging, global consumer markets, their supply chains are growing exponentially more complex. This complexity is rooted in multi-tiered sourcing and contract manufacturing in regions in which low costs and high margins can come at the expense of lower safety, quality, and service standards. The dynamics of higher customer expectations, greater demand variability, longer lead times, tighter environmental regulations, and unpredictable disruption risk all drive the need for SCM consultants to help manage scale and complexity.¹ These factors, combined with heightened C-level awareness that their supply chains can be a source of competitive differentiation, add up to increasing numbers of companies seeking assistance in better aligning their supply chains with their overall business objectives.

SCM Consultants Deliver Mixed Results

Supply chain consultants have proved invaluable in many ways including:

- **Promoting change in environments in which innovation has been stifled.** When companies reach out to external SCM consultants, the driving motivation is often to spark change and encourage innovation. Our interviews unearthed some excellent examples of consultants helping to move companies forward by breaking down barriers and redesigning old ways of doing business.
- **Providing deep expertise on infrequent, specialty tasks.** There are some events that companies experience so infrequently that it is impractical to have experts on staff. One example is an acquisition and the resulting need to integrate two or more supply chains across the new business units. Redesigning an acquired supply chain is critical to maintaining business continuity and reaping the consolidated operational gains. Many SCM service providers have offerings focused specifically on this task.
- **Helping condense mission critical timelines with IT staff augmentation.** For high profile, business critical SCM IT projects, the use of consultants to bolster IT staff has delivered proven results. Most commonly, we see companies using consultants for configuration and testing activities as well as support and maintenance.

Despite the benefits, some firms point to SCM consultancy shortfalls. When we asked companies why their supply chain service providers hadn't lived up to expectations, a few common responses rose to the top:

- **Contrary to their marketing, no one consulting company can really do it all.** There's often a significant gap between a consulting company's ability to provide strategic advice and guide a company through actionable transformation. Further into implementation, the same chasm exists between the process design phase and software configuration. Our interviews have shown

that many companies are hard pressed to find one service provider with capabilities that span strategy, operations design, and IT implementation.

- **An inordinate level of governance was required to get things right.** For some, especially those dealing with offshore service providers, the level of governance required every step of the way to get things done right left them thinking they would have been better off going down the path alone. Companies warned that the hidden costs and frustration of using a low cost, offshore service provider might outweigh the benefits.
- **Industry best practice knowledge was less than expected.** Many companies rationalized using a higher cost consultancy because of their ability to bring best practices to the table and help benchmark them against competitors and market innovators. Companies reported that expectations often fell short here, with the project team not taking the time to understand their business or leverage that knowledge to provide best practice guidance.

FOUR CLASSES OF PROVIDERS OFFER VARYING STRENGTHS AND WEAKNESSES

Given the possibility of missed expectations, choosing the right SCM service provider requires careful consideration of the unique challenges that face your organization and an understanding of which skills will have the greatest impact on the project's success. Although these general characteristics can help identify a shortlist of potential partners, enterprises must evaluate each firm individually to find the right one for their needs.

SCM service providers can be categorized into four groups: 1) offshore technology specialists; 2) management consultants; 3) global systems integrators; and 4) application vendors (see Figure 1). Each group's capabilities vary greatly with respect to depth of knowledge and processes supported.

Offshore Technology Specialists: Deep IT Skills Galore, Limited Process Change Experience

The common characteristics across these firms include low cost legacy system integration, custom development, testing, data migration, upgrade support, application outsourcing, and package implementation. These firms are less focused on process design and offering strategic SCM guidance. Across the board, customer references noted concerns around the high turnover on project teams based in India. Look for what differentiates these providers (see Figure 2):

- **Cognizant brings deep process manufacturing and SAP TMS experience.** Cognizant Technology Solutions has a deep relationship with SAP, assisting with transportation management development and testing, and being engaged early in implementation training activities. In addition to its SAP TM experience, Cognizant is differentiated by SCM application outsourcing practices specific to the process manufacturing industry. Cognizant's greatest weakness is its limited presence in regions outside the US. References were positive, reporting deep .Net expertise and a high level of enthusiasm, but cautioned that Cognizant is not always willing to drive process change when it's needed.

Figure 1 Types Of SCM Service Providers

Category	Description	Examples of firms
Offshore technology specialists	Primarily headquartered in Asia but delivering globally, these firms provide custom coding, testing, and IT outsourcing services.	Cognizant HCL Infosys Tata Consultancy Services Wipro
Management consultants	This group typically provides strategic planning advisory services as well as high level process design. Niche providers specialize in specific areas like performance measurement or network design.	Archstone Consulting A.T. Kearney Bain Chainalytics Deloitte PRTM
Global systems integrators	Large, multinational systems integrators provide services across process design, application configuration, project management, and testing.	Accenture BearingPoint Cappgemini CSC Fujitsu IBM Northrop Grumman
Application vendors	Application vendors naturally support their own product lines, but are increasingly also offering value added services like best practice consulting and benchmarking.	i2 Technologies Manhattan Associates Oracle

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Source: Forrester Research, Inc.

- **HCL leads with SAP and Oracle retail implementations.** More than 50% of HCL Technologies’ SCM revenues come from its retail practice and SAP implementations. Emerging areas include its life sciences and logistics practices. Historically, HCL provided application development and package implementation services. Its BPO group offers sourcing, procurement, sales order management, data cleaning, and global trade compliance services. HCL is differentiated by a strong focus on enabling supply chain visibility solutions and helping customers pull together their Oracle product suite to get the maximum ROI. Its SCM-specific practice is still ramping, with fewer than 100 total engagements, but it has good momentum, moving into next year with key strategic alliances, new IP collateral, and vertical specific capabilities being built out.
- **Infosys complements SCM consulting with outsourcing services.** Of all the offshore providers, Infosys Technologies provides the greatest breadth of operational outsourcing capabilities to complement its IT services. It has more experience with supply chain execution projects than with emerging practice areas like planning, sourcing/procurement, and EAM. From a packaged software perspective, Infosys has the greatest number of implementations with Oracle products, specifically, the Retail (Retek) and Sterling Commerce (Yantra) solutions. References report

Infosys' strengths being in legacy system integration, with a limited role in defining business strategy. Customers also reported that compared to other consultancies, Infosys had a much higher value to cost ratio.

- **Tata Consultancy Services (TCS) offers deep i2 product expertise.** TCS is relatively new to SCM-specific consulting with a five-plus-year-old practice, but is increasing its visibility through investments and strategic partnerships with application vendors like i2 and SAP. Most notably, TCS provides development and testing services for i2's R&D group, and is beginning to leverage that knowledgebase in its consulting group. Deep implementation skills with the i2 products are scarce, so this is a welcome addition to the market. References were positive for custom development work, noting attention to detail and TCS' to bring projects in on schedule. Most reported initially making the decision to go with TCS because of its competitive cost model. Customers reported that using TCS to staff on a one-off, specific skill basis can be challenging relative to larger development or testing projects.

Figure 2 Offshore Technology Specialists: Offerings

 A spreadsheet with additional data is available online.

Vendor	Services	Differentiators
Cognizant	IT effectiveness assessments, custom coding, application outsourcing, procurement operations outsourcing.	Process manufacturing, SAP TM experience, integration expertise for emerging SCM products.
HCL	Application development for Oracle and SAP retail solutions, middleware integration.	Retail focus, global trade compliance, BPO services.
Infosys	Operational outsourcing, supply chain assessments, package evaluation/selection, implementation/roll-out, version upgrades.	Retail focus, broad range of operational outsourcing services.
Tata Consultancy Services	Full range of standard services like package implementation, maintenance, custom coding, and testing. Emerging areas are IT outsourcing, process design, and strategy practices.	Deep SAP and i2 specific capabilities. Application configuration and maintenance make up the bulk of projects.
Wipro	Custom development, upgrades, and support.	i2 specific capabilities across DM on .Net, SCV, and retail specific solutions. SAP expertise includes EWM and xSOP.

- **Wipro has supply chain planning and project management skills.** Wipro complements its technical expertise with solid project management skills, which is a differentiator in this group. It has expertise with the i2 and SAP EWM products, and has the greatest bench depth in supply chain planning (network design, factory planning) followed by execution. Wipro's sweet spot is in the implementation of demand, inventory, scheduling, and transportation planning software. Wipro's greatest weakness is the limited number of SCM packaged software implementations it has completed to date.

Management Consultants: Strong On Vision, Short On Implementation Capabilities


Management consultants typically have expertise in project management, functional design, and strategic planning. Ideally, each firm also brings to the table total objectivity when it comes to selecting SCM software or outsourcing services (see Figure 3). Traditional management consulting companies like Bain & Company, The Boston Consulting Group, and McKinsey & Company all have small to mid-size dedicated supply chain practices and focus primarily on strategy projects. Other management consulting companies like Archstone Consulting, A.T. Kearney, Bristlecone, Chainalytics, and PRTM dedicate the majority of their resources to supply chain processes, focusing on specific areas of expertise and working with companies ranging from start-ups to the Fortune 50. Process design and project management are among the common characteristics of these companies, which pursue differentiation in various ways.²

- **Archstone Consulting excels in strategic sourcing and procurement consulting services.** Founded in 2003, Archstone has more than 150 clients, and continues to grow and compete with the larger management consulting firms on SCM projects. It has limited presence outside the US and Europe, however, and so would not be a good fit for global transformation projects. Archstone's CFO advisory services and competitive assessments differentiate it from other management consultants. Archstone has also developed its own process methodologies that combine different aspects of Lean and Six Sigma.

References reported Archstone to be "highly responsive" and distinguished by "having their own ideas but also being open to those from their clients as well." References also credited Archstone with being a clearly unbiased advisor and holding to timelines, but felt the company could have pushed harder to bring forward innovation and change within their organizations.

- **A.T. Kearney is a dedicated SCM management consulting company.** A.T. Kearney dedicates more than half its staff to SCM expertise and differentiates itself in strategic sourcing consulting and C-level advisory services. In 2006, A.T. Kearney split from EDS (by which it had been acquired in 1995) and formed an independent management consulting company again. A.T. Kearney has a solid reputation for strategy consulting.

Figure 3 Strategy Consultants: Offerings

 A spreadsheet with additional data is available online.

Vendor	Services	Differentiators
Archstone Consulting	SCM competitive assessments, CFO advisory, S&OP and collaboration consulting, network design.	Continuous improvement programs, strategic procurement, and supplier relationship management services.
A.T. Kearney	Strategic integration of acquired supply chains, demand management.	Sustainability services, strategic sourcing and procurement expertise, research and analytics based consulting, C-level advisory programs.
Bain	Lean Six Sigma, SCM organizational design, outsourcing decisions.	Results driven approach, SCM benchmarking.
Chainalytics	S&OP, strategic network design, benchmarking.	Transportation master planning, logistics modeling, analytics based performance management.
Deloitte	M&A, SCM design and optimization, strategic sourcing, supply chain organizational design.	Breadth of services across management consulting and system implementations.
PRTM	SCM strategy, lean operations, risk assessments, software selections, acquisition integration, network design.	SCOR methodology, owner operated, 1:4 ratio of partners to staff.

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Source: Forrester Research, Inc.

- **Bain brings a “results driven approach” to SCM consulting.** One of Bain’s core competencies is the ability to closely measure and benchmark SCM project success metrics for customers. From an IT perspective, Bain is focused on process enablement, and will sometimes manage, but not perform, implementations. Bain also offers services specifically oriented to helping clients make the right SCM outsourcing decisions and set up sourcing arrangements, areas of increasing demand.
- **Chainalytics differentiates with deep, analytics-based consulting.** Chainalytics focuses on supply chain strategy including S&OP, network design, inventory planning, and transportation optimization services. Its consulting services are firmly grounded in analytics and strategic simulation across the end-to-end supply chain, with a specialization in logistics. Its unique

outsourcing service, called Analytical Outsourcing, provides assessments on an ongoing rather than a project-by-project basis. References reported that Chainalytics brings, especially to transportation management, much deeper expertise and methodology than the other management and boutique consulting firms.


- **Deloitte uniquely complements its SCM services with a breadth of strategic offerings.** Deloitte's SCM offerings are complemented by strengths in areas like audits and risk management. This is paying dividends as the number of SCM engagements in which it is involved continues to increase. It achieves differentiation in strategic sourcing and the unique area of "tax advantaged supply chains." Emerging areas include offerings in SCM security and environmental sustainability consulting. With more than half its SCM projects strategic in nature, Deloitte competes more often with Bain and A.T. Kearney than with Accenture and IBM.
- **PRTM is a recognized leader in SCM performance assessment.** PRTM, which provides SCM strategy services, is best known for developing the SCOR reference model, one of the most widely adopted SCM performance assessment tools on the market today. It further differentiates itself from other management consultant firms by going a level deeper than process design into application design. It does not, however, perform application development, integration, or testing. PRTM's references reported easy access to the most experienced staff members and a low partner to staff ratio, which translates into a higher value proposition than some of its competitors can claim.

Global Systems Integrators: Broad Range Of Services With Minimal Differentiation

Each of the large systems integrators offers a full range of SCM services from process design and program management to application configuration and testing (see Figure 4). Others reach into the management consulting arena with well established SCM strategy practices, but are differentiated from that category by their ability to provide a fuller range of services that extend to implementation. Across the board, references of these companies reported that because of their size, identifying resources with the right expertise was not always easy. Customers suggest that to ensure project success, you interview and contractually lock in the most experienced consultants once you identify them. Because each of these companies offers such a wide variety of services, the major players can begin to look the same. However, there are some differences we discovered that buyers should know:

- **Accenture complements implementation services with strategy.** Accenture differentiates itself with its thought leadership, truly global ability to execute, and experience with large SCM transformation projects. References universally acknowledged Accenture's strong leadership and ability to act as a catalyst for innovation in their projects, emphasizing that its consultants were able to push them to work outside their comfort zones, bring industry best practices to the table, and stimulate change in an otherwise slow moving, inflexible SCM environment. Customer references also cited Accenture's experience with large-scale SCM transformations and its ability to deliver strategic guidance as well as implementation services as key reasons for choosing it.

Figure 4 Systems Integrators: Offerings

 A spreadsheet with additional data is available online.

Vendor	Differentiators	SCM specific software expertise
Accenture	Global ability to execute on large scale supply chain transformation projects.	Long standing relationships with Oracle and SAP. Also working and/or partnered with Ariba, Aspen Tech, Emptoris, i2, JDA Manugistics, LogicTools, Microsoft, PTC, Retek, Sterling (Yantra), and UGS.
BearingPoint	Global trade and risk services. Combination of traditional lean management/Six Sigma tools and methodologies with performance management and strategic change framework.	Oracle and SAP primarily. Some Microsoft experience.
Cappgemini	Supply chain event management and visibility services. Price revenue optimization, digital supply chain consulting.	G-LOG, Emptoris, JDA Manugistics, Oracle iProcurement and Ariba Buyer, Quintiq, SAP APO, SAP LES, SAP-SRM, Vertical Net, and Zycus.
CSC	Potential to leverage application outsourcing services, performance assessments, application vendor selections, business case development.	Manhattan Associates, Oracle, SAP, and UGS Teamcenter.
Fujitsu	Software selections, full life-cycle package implementation, offshore development.	SCM specific Oracle and SAP expertise.
IBM	Global reach, wide ranging industry specific capabilities, and the ability to integrate SCM service offerings with outsourcing, application services, software, hardware, and global financing.	SAP partner with certifications across global services, technology and hosting. Oracle certified global advantage partner. In addition to Oracle and SAP, IBM has experience with Ariba, Dassault, i2, and Manhattan Associates.
Northrop Grumman	Federal government project expertise.	Aldata G.O.L.D., CODS, Enovia, LSP, OpenTrack, Oracle, RAMS, SAP, Teamcenter, VMetric, and WEBCAV.

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Source: Forrester Research, Inc.

- BearingPoint achieves differentiation with global trade management and compliance.**
 BearingPoint, like the other SCM systems integrators, is able to support large transformation projects, but achieves differentiation through a focus on trade compliance, risk management, and its approach to Six Sigma. BearingPoint’s methodology combines Six Sigma and Lean principles with performance management and analytics to create a quantifiable transformation approach as opposed to non-measurable strategic rhetoric.


- **Capgemini offers supply chain visibility and control services.** Like the other consultants in this area, Capgemini provides strategic sourcing, process design, and project management services. It achieves differentiation in supply chain visibility and control, a distinct and growing pain point for companies today. Also unique to Capgemini is its “digital supply chain” services, which specialize in applying the principles and best practices of the physical supply chain to the distribution of digital content. References reported that Capgemini team members meshed well with their own staff, are extremely good at facilitating requirements gathering sessions, and have a deep bench when it comes to logistics and sourcing design.
- **CSC’s SCM offerings are much broader than outsourcing.** Computer Sciences Corporation (CSC), one of the world’s largest providers of IT infrastructure and applications outsourcing to the public and commercial sectors, reports that the majority of its SCM projects are, in fact, with clients with which it has had no previous outsourcing relationship. With SCM, its focus is less on operations outsourcing than on process design and implementation. Customer reference calls were mixed, the positive ones noting the company’s depth of resources and organization, the negative ones that it did not take time to learn their business before making recommendations.
- **Fujitsu specializes in SAP ERP and Oracle EBS implementations.** Fujitsu typically serves midtier companies or large divisions of global companies. Its differentiator is a low cost service model made possible by its offshore development and support facilities. Fujitsu’s experience and greatest depth of SCM resources is in sourcing and procurement, followed by MRP, APS, and order management. Emerging areas of expertise include demand planning (Oracle Demantra, specifically), TMS, and SRM. References reported its greatest strengths being the ability to accurately scope and develop custom modifications to SAP and Oracle ERP products.
- **IBM has the whole package, grounded in deep system integration experience.** IBM clearly has deep system integration experience, but with its size comes a hit or miss experience across supply chain projects. On larger transformation projects, IBM differentiates itself by sticking to its rigid project management methodology, which can create a substantial cost overhead when not scaled back for smaller projects.
- **Northrop Grumman leads with DoD expertise.** Northrop Grumman offers the full range of services from requirements analysis to implementation, training, and maintenance as well as IT outsourcing. It is differentiated by being one of the largest IT service providers to the federal government, specifically, to the Department of Defense.

Application Vendors: Services Move To Center Stage

Software vendors can provide deep product expertise and a direct line to R&D for fixes and support, but we see them providing other services as well (see Figure 5). The key SCM vendors making waves with their consulting practices include:³

- **i2 Technologies might actually be the leading SCM consulting company . . . one day.** i2 continues to evolve, its focus of late being on new product development including the creation of shared services libraries, templates, and utilities to speed implementations. To that end, it is aggressively rebuilding its once decimated consulting practice through hiring and strategic partnerships. Customers, no longer interested in goliath implementations, are demanding “pay by the slice” functionality, a model that lends itself much more to consulting revenue than licenses and maintenance. Customers still report a dearth of skilled application experts, but with i2’s renewed focus on ramping up services we expect this to change over the next few years. If i2 plays its cards right, it can leverage its extensive SCM IP to develop a winning services organization.
- **Manhattan Associates’ services extend beyond supporting its software.** Customers report strong leadership, process design, and best practice consulting on the WMS front, complementing Manhattan Associates’ software services. References also reported solid guidance on hardware infrastructure decisions, and guidance to leverage the base product and not pursue customizations. Experiences with consultants varied across product lines, being generally positive with the WMS consultants and mixed with those in other areas.

Figure 5 Application Vendors: Offerings

 A spreadsheet with additional data is available online.

Vendor	Services	Differentiators
Manhattan Associates	Principle experience lies in designing SCM solutions utilizing its own applications. The vendor provides support across solution design, process design, system configuration, testing, training, and long term support.	WMS leadership and best practices consulting. Manhattan Associates averages 300 system go-lives each calendar year, including major system upgrades.
i2 Technologies	Supply chain assessment, inventory policy assessment, supply chain process design, supply chain KPI and metrics assessment and design, technology solution design and development.	Lean manufacturing and Six Sigma related services including lean program development and vision alignment, pull system design, lean program management, lean training, structured Kaizen management, and technology enablement are some of the emerging service offerings.
Oracle	High level process design, low level process design, application design, application integration, application configuration, custom coding, project management, application testing, application maintenance, IT outsourcing services.	Strategic vision planning offering, outsourcing services for the full array of Oracle’s E-Business Suite. Oracle On Demand outsourcing services also offer additional capabilities such as help desk, advanced testing services and high availability disaster recovery options.

- **Oracle's SCM professional services are still playing catch up after the acquisition frenzy.** Oracle has doubled the size of its transportation management consulting group after the G-Log acquisition, leading to a solid core staff, but customers report problems finding experienced staff in other areas like demand planning (Demantra). It does offer other services beyond system implementation like its strategic vision planning service, the Oracle Insight Program, which helps companies prioritize and build a roadmap for software adoption at a feature function level. The real advantage of using Oracle consultants is that there is a better chance of influencing the product roadmap, but references were definitely mixed, some expressing strong reservations and noting that Oracle is "a technology company, not a services one."

RECOMMENDATIONS

ACCENTURE IS THE BEST FIT FOR GLOBAL SUPPLY CHAIN TRANSFORMATIONS

The SCM consulting market is diverse, and sourcing decisions can be complicated. Each company has different requirements and will hone in on a unique shortlist. To get started, supply chain leaders can whittle down the list of contenders by considering:

- **Accenture AND IBM for large supply chain transformation initiatives.** Of all the vendors we interviewed, Accenture's SCM consulting group was the best aligned to support long-term, global supply chain transformations across a broad range of services. A few companies have employed both Accenture and IBM, in a sort of checks and balances approach, on larger initiatives with impressive results. Consider marrying these two firms for multi-year SCM transformation projects to leverage the best aspects of each.
- **Offshore providers for software expertise.** Look beyond the software vendor's consulting staff to find offshore providers that might be able to support your project as well or better at a lower cost. Many of these firms like Cognizant and TCS are already doing R&D for the major software vendors (i2 and SAP, respectively), so they have the in-house expertise.
- **PRTM for performance management and metrics.** In the area of SCM assessment and measuring performance, PRTM is filling a much-needed gap with its services. Based on its market presence and reputation, for SCM projects looking for deep analytics based performance tracking, PRTM is an excellent option.

Forrester maintains a detailed matrix of each provider and its capabilities across services like design and testing for each functional area like transportation management and network design. To determine which service provider is right for your company, work with a Forrester supply chain analyst.

SUPPLEMENTAL MATERIAL

Methodology

Forrester's research team first prepared and sent out surveys to consulting companies to gather data. We then consolidated the responses and conducted follow-up interviews and briefings with the vendors. Customer reference calls were also done to validate vendor strengths and weaknesses.

ENDNOTES

- ¹ Although events like hurricanes and terrorist attacks are not always predictable, leading companies are making supply chain investments to ensure that the flow of goods continues through a major disruption. Consistently, our interviews revealed that the key to success is putting day-to-day processes in place that can scale in times of crisis. The specific best practices we identified with the highest return included: designing networks for maximum resiliency, extending situational awareness to supplier and carrier networks, and boosting prevention efforts through the integration of better security measures. See the August 3, 2007, "[Best Practices: Successfully Managing Security And Risk In A Global Supply Chain](#)" report.
- ² Booz Allen Hamilton, The Boston Consulting Group, Bristlecone, and McKinsey are also recognized as having supply chain management consulting expertise, but did not participate in our study.
- ³ SAP clearly has a large professional services practice, but declined to participate in our study.

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