

Professional Services and Solutions



2008 Brand Tracking Study

Knowing buyer priorities allows technology-based professional services providers to set realistic goals and differentiate on achieving best-in-class performance. In essence, the mantra promoting differentiation is background music to the main act: delivering on promises. It's never been more important for services providers to foster a strong and positive brand reputation.

REPORT HIGHLIGHTS

OVERVIEW

IT professional services providers face the ongoing challenge of promotion and differentiation of intangibles—technology and business competence, reliability, a collaborative culture, just to name a few. A strong brand, based on succinct messaging and proof points, plays an indisputable role in moving clients through the buying cycle that begins with awareness and continues as relationships are forged and formalized.

ITSMA's *IT Professional Services: 2008 Brand Tracking Study* helps services providers understand buyer attitudes and beliefs, their brand equity, current and/or aspired market positions, and perceptions of performance.

The 2008 edition of this survey represents the tenth annual installment of ITSMA's flagship multiclient brand tracking research focused on the IT professional services market.

STUDY SCOPE

ITSMA's *2008 Professional Services and Solutions Brand Tracking Study* focuses on providers of IT professional services and solutions. This study delivers the data study sponsors need to validate internal assumptions, improve marketing strategies and tactics, and hone their brand communication. Included are new data and analyses on key market indicators and topics, such as:

- **Market knowledge.** Who are the leaders and followers? Are providers recognized for their services capabilities? Are they making credible claims?
- **Provider preference.** To which firms do clients turn first? Are they familiar with others?
- **Services decision influences.** When there are a number of qualified providers, what breaks the deadlock?

(Continued)

- **Competitive differentiation.** How do buyers perceive the key players? What are the sources of differentiation? Where is the “white space?”
- **Report card.** Are professional services firms meeting expectations? Which ones are hitting home runs?

STUDY HIGHLIGHTS

This examination of the IT professional services and solutions market yields many interesting findings related to the firm selection process, brand equity of services providers, effective marketing, and purchasing preferences.

- Buyers will choose the company that can get the job done with the least amount of risk. There is comfort in predictability, so above all else, they look for services providers who are dependable, straight talking, and trustworthy.
- Market positions are built upon clear business, brand, and communication strategies. Clients have long memories, often classifying services providers based on where they have come from, rather than where they are today. However, this does not mean that they do not recognize services providers’ expertise in multiple services lines and horizontal and vertical markets.
- There is plenty of opportunity in this fragmented market, with the help of sound marketing - There are a few market leaders, and a bigger pack of followers that jockey for position, the results of which depend on market trends and buyer wants and needs. Yet, the market leading firms do not control the market share.
- Know what is most important to your buyers - Service providers are performing best in the areas that are most important to buyers. While they are doing a good job, they can always do better and benchmark themselves.

COMPANIES COVERED

The report examined the following 17 professional services and solutions firms: Accenture, Bain, BearingPoint, British Telecom, Capgemini, Cognizant, CSC, Deloitte, EDS, Hewlett-Packard, IBM, Infosys, KPMG, McKinsey, Satyam, TCS, and Wipro.



STUDY METHODOLOGY

ITSMA recruited sponsors for its 2008 Professional Services and Solutions Brand Tracking Study in late 2007 and early 2008. Sponsors of the study included Capgemini, Cognizant, and British Telecom.

ITSMA conducted 400 telephone interviews with U.S.-based senior IT and business decision makers (CXOs, vice presidents, and directors). The sample includes two types of professional services buyer (information technology executives/CIOs and business executives) and spans eight industry segments, including:

- Communications
- Energy/utilities
- Financial services
- Healthcare
- Life sciences
- Manufacturing
- Public sector
- Retail trade and hospitality

Organizations eligible to participate in the study reported annual revenue or operating budget of \$300 million or greater. Participants qualified for inclusion based on their decision-making authority. ITSMA donated money to charity in return for participants’ contribution to the study.

RESPONDENT DEMOGRAPHICS

Respondent Titles

Director	64%
Vice President	18%
President/CXO	18%

Organization Size

\$300-999M	20%
\$1-4.9B	30%
\$5-19.9B	20%
\$20B or more	30%

Industry

Communications	13%
Energy/utilities	12%
Financial services	13%
Healthcare	13%
Life sciences	11%
Manufacturing	13%
Public sector	13%
Retail trade and hospitality	12%

MORE INFORMATION

To learn more about the report, contact Julie Schwartz, Senior Vice President, Thought Leadership and Research at jschwartz@itsma.com or +1-781-862-8500, Ext. 112.

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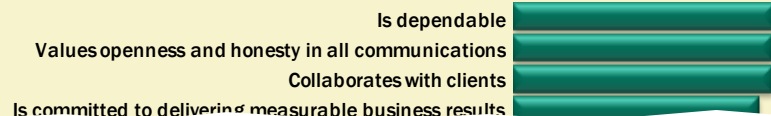
Figure 1.4 Unaided Awareness of IT Professional Services or Solutions Firms

What one firm would you most likely call if you needed IT professional services?
Which other firms come to mind that provide IT professional services?
% of Respondents (N=400)



Figure 3.1 Mean Importance Ratings of IT Professional Services Firm Attributes

When you and your company are selecting an IT professional services provider, how important is it that this vendor ___?
Mean Rating (N~395)





RESEARCH ORDER FORM

	ITSMA Member Price	Nonmember Price
IT Professional Services and Solutions, 2008 Brand Tracking Study	\$35,000	\$40,000
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