Market Research

Consulting Industry – USA & Canada

4/3/2014

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1. Introduction & Purpose

Fluentbrain.com helps consulting companies working on projects across countries, languages and culture barriers by facilitating the workflow of information, thus improving communication, decision-making and productivity.

The company defines its core customers as Business Builders who can be business consultants, coaches, mentors, incubators and accelerators. Business Builders are the ones who help their clients make more money. Fluentbrain helps Business Builders communicate clearly and work online effectively, with their clients abroad. They overcome linguistic, cultural and technological barriers. The two lines of solution that Fluentbrain provides are:

- **Pre-Sales:** Visual notes, diagrams, proposal,
- **Project Delivery:** capture, organize and communication your information, Live mind mapping, Dynamic web applications

The purpose of this market research is to perform a quantitative and qualitative assessment of the following in the context of Fluentbrain's business:

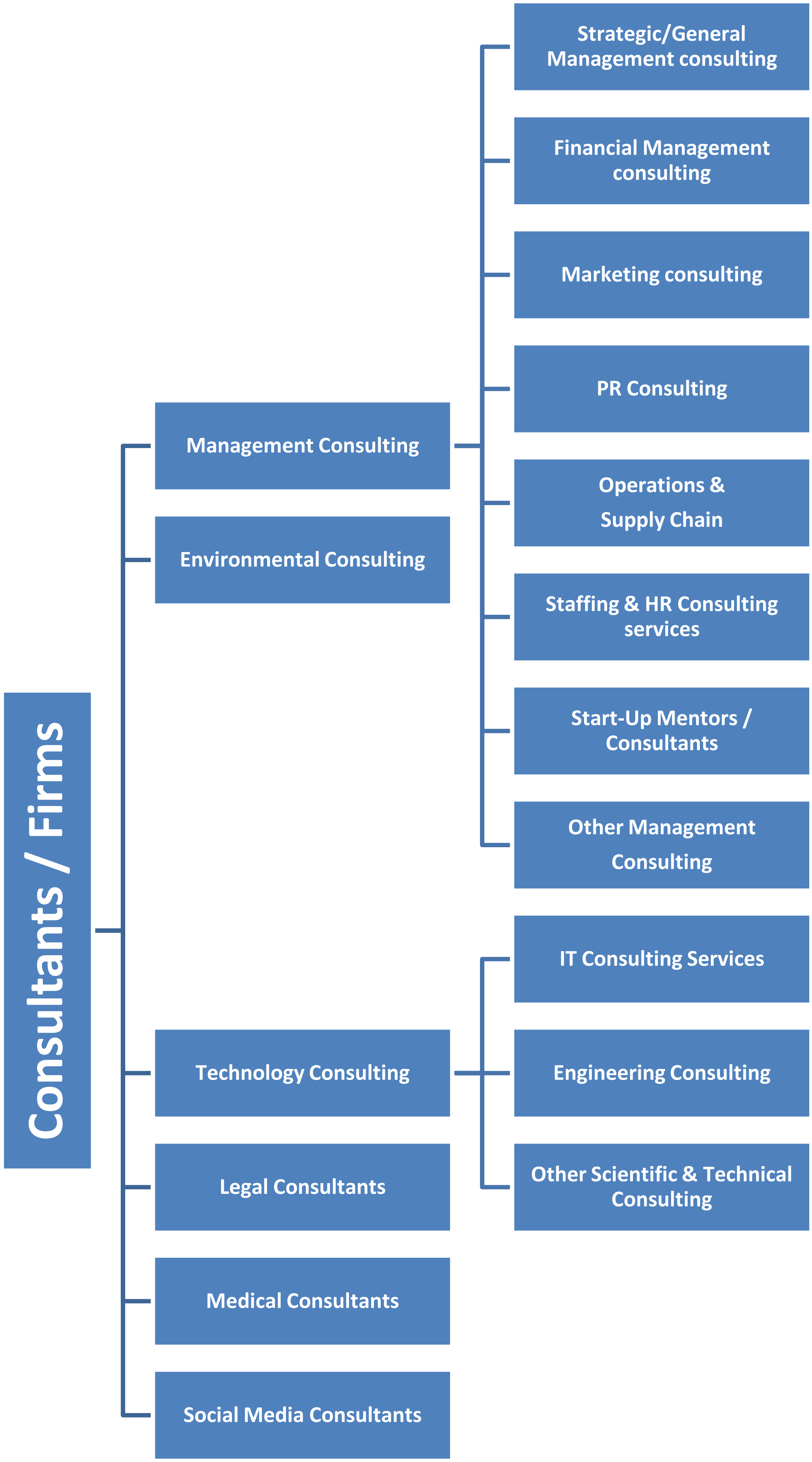
- Market Size & Trends
- Customer Analysis
- Competitors
- Macro-Environment Analysis

The scope of this study is limited to the target market of USA and Canada. Further the research has been conducted using secondary sources.

2. Market Size and Trends

2.1 Market Definition

The Market for Fluentbrain is defined by the Individual Consultants or Organizations that are interested in the products and solutions offered by Fluentbrain and that have resources to purchase the product. Expanding further on the concept of Business Builders, the market includes Individual Consultants & Firms in the following areas:


Consultants / Firms
Management Consulting
Strategic/General Management consulting
Financial Management consulting
Marketing consulting
PR Consulting
Operations & Supply Chain
Staffing & HR Consulting services
Start-Up Mentors / Consultants
Other Management Consulting
Environmental Consulting
Technology Consulting
IT Consulting Services
Engineering Consulting
Other Scientific & Technical Consulting
Legal Consultants
Medical Consultants
Social Media Consultants

2.2 Potential Market Size & Growth Rate - Canada

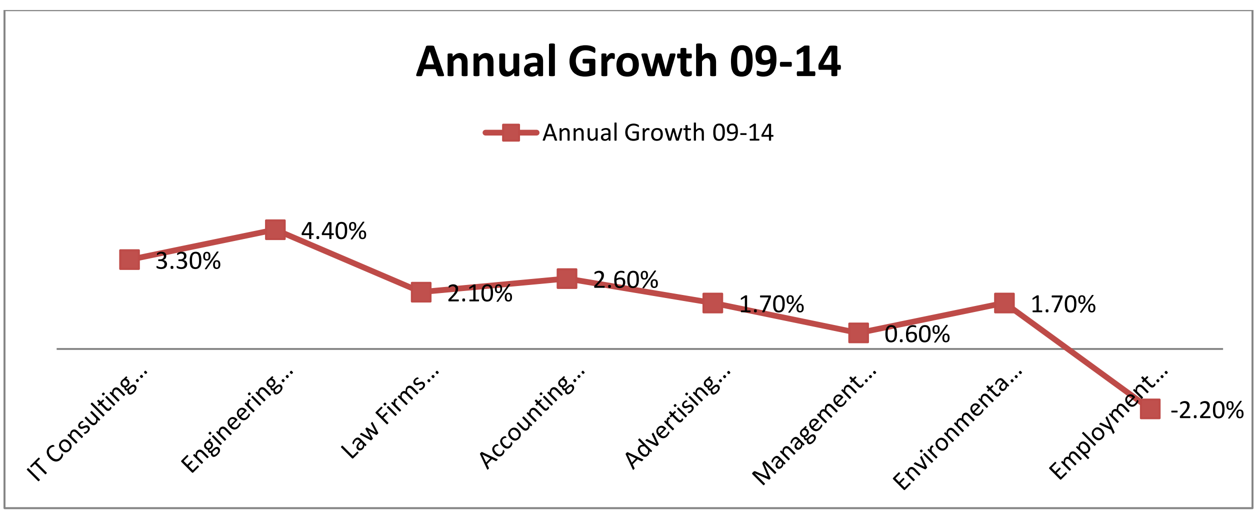
NACIS Classification for Professional, Scientific and Technical Services (NAICS54), which includes the following:

- 5411 - Legal Services
- 5412 - Accounting, Tax Preparation, Bookkeeping and Payroll Services
- 5413 - Architectural, Engineering and Related Services
- 5414 - Specialized Design Services
- 5415 - Computer Systems Design and Related Services
- 5416 - Management, Scientific and Technical Consulting Services
- 5417 - Scientific Research and Development Services
- 5418 - Advertising and Related Services
- 5419 - Other Professional, Scientific and Technical Services

The Market Size, measured in terms of number of establishments is shown below:

(Statistcs Canada) Number of employer establishments by employment size category and region: December 2012				
Professional, Scientific and Technical Services (NAICS54)				
Province or Territory	Employment Size Category (Number of employees)			
	Micro	Small	Medium	Large
	1 - 4	5 - 99	100 - 499	500+
TOTAL in CANADA	**96,381**	**29,793**	**996**	**104**
Percent Distribution	75.70%	23.40%	0.80%	0.10%

Source: Statistics Canada, Canadian Business Patterns Database, December 2012

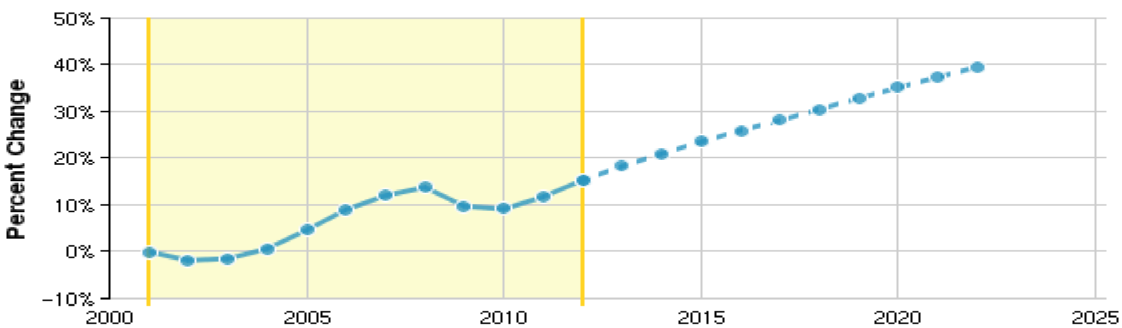


Source: IBIS Report

2.3 Potential Market Size & Growth - USA

Although the professional, scientific, and technical industry sector makes up only 6% of the U.S. workforce, it was responsible for 10% of national job growth from 2010 to 2012. In addition, the broad industry (NAICS 54) grew by 6% in the past two years, which illustrates our nation's march toward a more technical, STEM type workforce. There are over 9.2 million jobs in this industry, which is driven by sub-sectors like computer system design services and management, scientific, and technical consulting services.

Computer systems design and custom computer programming services are the clear leaders and have added a ton of jobs — 89,000 and 71,000 jobs respectively, representing 12% and 10% increases. The second fastest growing sector is translation and interpretation services. In two years it has gained over 4,000 new jobs (17% growth). The biggest sector on this list is offices of lawyers. It employs 1.26 million, but has had zero job growth since 2010.



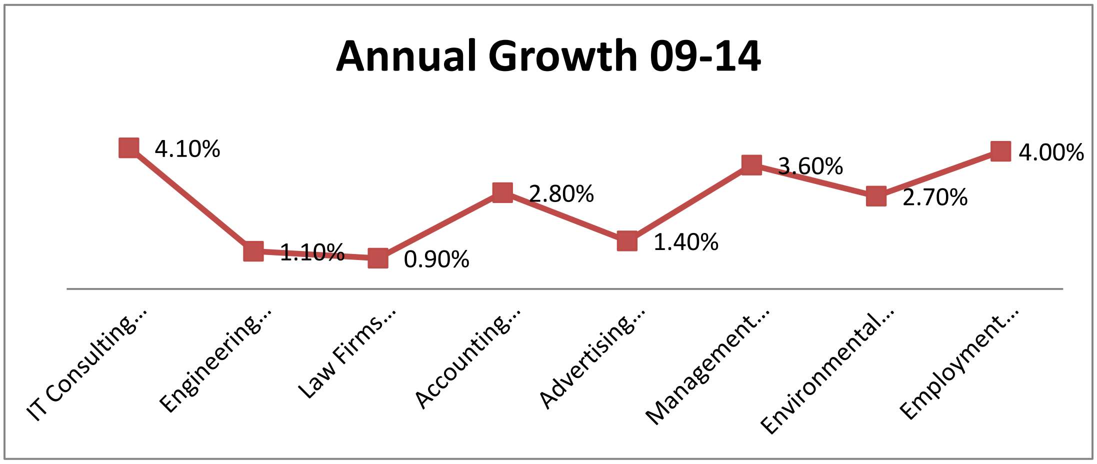
Source: http://www.newgeography.com/content/003228-the-emerging-professional-scientific-and-technical-sector

Overall Market Size

The overall market size in terms of millions of dollar of revenue is shown below.

NAICS	NAICS Description	Item	Tax Status	Employer Status	2012 Revenue	2011 Revenue	2010 Revenue	2009 Revenue
54	Professional, Scientific, and Technical Services[3,6]	Revenue	All Establishments	Employer and Nonemployer Firms	1,565,862	1,499,984	1,429,172	1,375,217
54	Professional, Scientific, and Technical Services[3,6]	Revenue	All Establishments	Employer Firms	1,419,174	1,363,303	1,298,579	1,251,798

Source: http://www2.census.gov/services/sas/data/table1.xls



Source: IBIS Report

2.4 Key Trends

- ***IT Consulting***
  - There is huge traction in four areas of growth, popularly called SMAC. It includes Social Media, Cloud Computing Analytics & Big Data and Mobile Devices. (Source: Cognizant Interview)
  - Right now, System Design, Integration and Development Services represent the bulk of IT Services Revenue accounting for 36% in USA. (Source: IBIS Report)
- ***Engineering Services***
  - After a period of subdued growth due to declining demand, the Engineering Services business is set to bounce back once again. Design Services for Industrial Processes, Equipment and Products is the largest segment with market share of 21%. (Source: IBIS Report)
  - Computer Aided Design Systems and other automation tools are likely to bring down the costs. Source: IBIS Report)
  - Profitability depends largely on the ability to accurately predict the costs. (Source: Hoovers)
- ***Law Firms***
  - Recent amendments to the Federal Rules of Civil Procedure make electronically stored information such as e-mails, instant messages, voicemails, e-calendars,

graphics and data on handheld devices discoverable in litigation. The explosive growth of ESI has increased the cost and complexity of the e-discovery process and forever changed the face of large-scale, complex litigation. New roles in litigation support, e-discovery and trial technology have emerged to address the electronic realities of a digital age. (Source: Top Trends)

  - Legal outsourcing, both onshore and offshore, is transforming law practice as law firms and corporate legal departments seek to minimize costs, increase flexibility and expand their in-house capabilities. (Source: Top Trends)

- ***Accounting Services***
  - High demand is expected from Canadian Mining and Natural Resources Companies in near future.
  - Revenue has mainly been bolstered by increase in the number of accounting firms.
  - As technology expands and the automation of data collection rises, the focus of accounting will shift from computation to consulting as clients increasingly rely on their accounting professionals to analyze business information, support decisions and provide strategic advice. (Source: Intuit)
- ***Advertising Services***
  - In the coming years, the internet will continue to pose a problem for firms because companies can place advertising on the internet without the help of an agency. Furthermore, the shift to online content will make clients more likely to seek contracts that favor performance-based compensation. (Source: IBIS Report)
- ***Management Consulting Services***
  - Source client research has identified three major opportunities for growth for consulting firms in 2013: new services, new roles, and new delivery models. Of those, new delivery models – which concerns consulting firms moving away from the old pyramid consulting model in favour of something more flexible – appears to hold the greatest potential. (Source: Source Consulting.com)
  - Specialist smaller consulting firms emerge and grow

- Consolidation of the consulting market place by the "Big Four" and the growth of "business intelligence" consulting services. (Source: Consultant News)

- ***Staffing Services***
  - The US industry is divided into three major segments: temporary help services (about 50 percent of industry revenue), professional employer organizations (about 45 percent), and placement agencies (about 5 percent). (Source: Hoover)
  - Social Recruiting is picking up, 98% of the firms are now using Social Media for Recruiting in the US. (Source: Bullihorn Report)

- **Common Trends**
  - Powerful mobile devices, software-as-a service, and secure, web-based technology allow professionals to work from virtually anywhere. As a result, more legal professionals are working remotely from home or a virtual office.

3. Customer Analysis

3.1 Customer Demographics - Canada

3.1.1 Customer Demographics – Firms by Geography & Size

The table below very aptly captures the number of businesses by size (employee headcount) and the region in Canada:

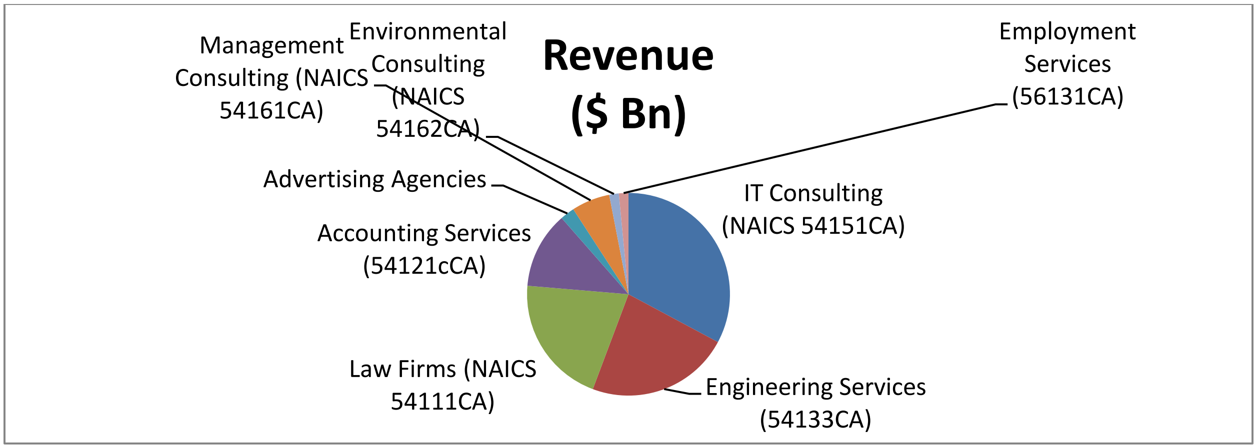
(Statistcs Canada) Number of employer establishments by employment size category and region: December 2012				
Professional, Scientific and Technical Services (NAICS54)				
Province or Territory	Employment Size Category (Number of employees)			
	Micro	Small	Medium	Large
	1 - 4	5 - 99	100 - 499	500+
Alberta	19,524	4,085	139	18
British Columbia	15,145	4,615	121	14
Manitoba	1,776	777	21	1
New Brunswick	1,216	440	13	1
Newfoundland and Labrador	820	358	11	0
Northwest Territories	64	50	2	0
Nova Scotia	1,440	605	21	0
Nunavut	20	13	0	0
Ontario	38,830	11,471	429	45
Prince Edward Island	217	125	2	0
Quebec	15,428	6,526	220	25
Saskatchewan	1,803	685	16	0

Yukon Territory	98	43	1	0
TOTAL in CANADA	**96,381**	**29,793**	**996**	**104**
Percent Distribution	75.70%	23.40%	0.80%	0.10%

Source: Statistics Canada, Canadian Business Patterns Database, December 2012

3.1.2 Revenue Share by Type of Consulting Firm

The charts below show the share of key segments in the Consulting Industry, their share and growth rates:



3.1.2 Revenue, Growth, Employment & Number of Businesses by Type

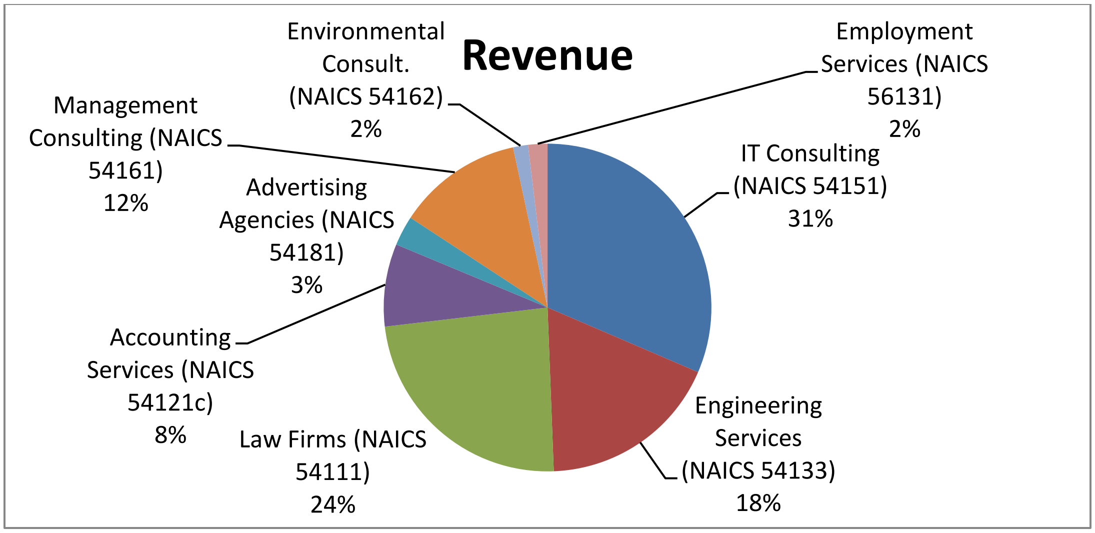
Industry	Revenue	Annual Growth 09-14	Employment	Businesses
IT Consulting (NAICS 54151CA)	$43bn	3.30%	224,791	57,131
Engineering Services (54133CA)	$ 30 bn	4.40%	210,466	25,549
Law Firms (NAICS 54111CA)	$27bn	2.10%	82,385	27,215
Accounting Services (54121cCA)	$16 bn	2.60%	100,259	34,287
Advertising Agencies	$ 3 bn	1.70%	24,000	4,898
Management Consulting (NAICS 54161CA)	$8bn	0.60%	63,678	42,940
Environmental Consult. (NAICS 54162CA)	$2bn	1.70%	6,788	4,011
Employment Services (56131CA)	$2 bn	-2.20%	39, 725	1,116

Source: IBIS Report

3.2 Customer Demographics - USA

3.2.1 Revenue Share by Type of Consulting Firm Sub-Sector

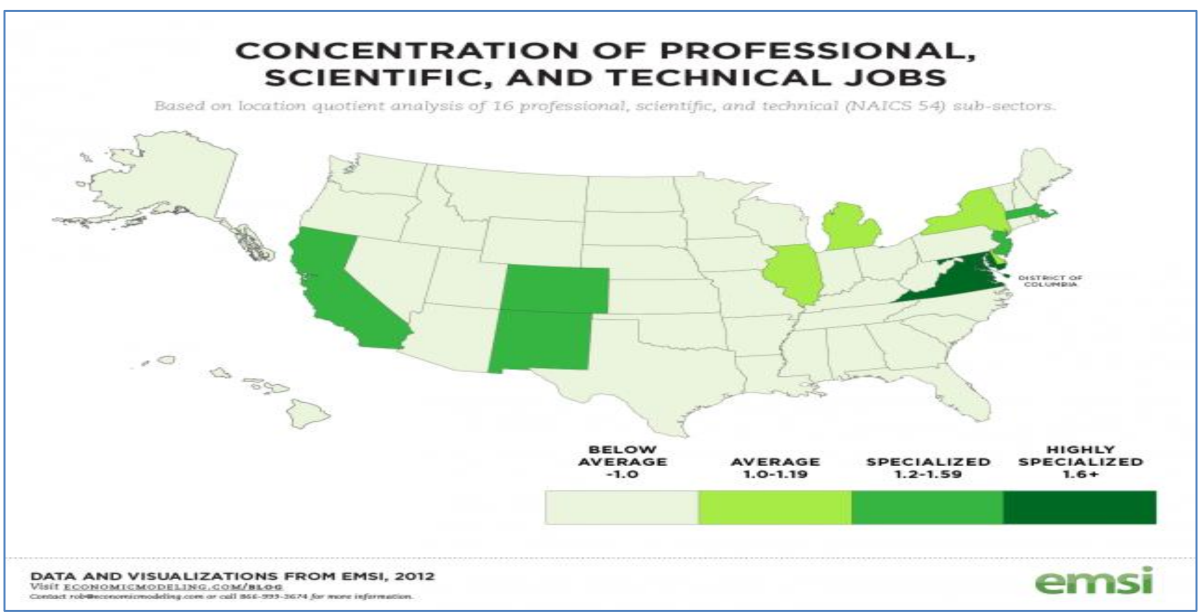
Within professional, scientific, and technical industry the IT Consulting, Engineering Services and Law Firms are largest while IT Consulting, Employment Services and Management Consulting are the fastest growing.



3.2.2 Revenue, Growth, Employment & Number of Businesses by Type

Industry	Revenue	Annual Growth 09-14	Employment	Businesses
IT Consulting (NAICS 54151)	$363 bn	4.1%	1,851,028	442,549
Engineering Services (NAICS 54133)	$207 bn	1.1%	1,120,707	146,665
Law Firms (NAICS 54111)	$274 bn	0.9%	1,336,031	409,923
Accounting Services (NAICS 54121c)	$94 bn	2.8%	517,765	109,262
Advertising Agencies (NAICS 54181)	$34 bn	1.4%	171,125	13,536
Management Consulting (NAICS 54161)	$143 bn	3.6%	788,038	118,143
Environmental Consult. (NAICS 54162)	$17 bn	2.7%	123,665	64,249
Employment Services (NAICS 56131)	$22 bn	4.0%	252,93	13,987

3.2.3 Number of Employees by Geography



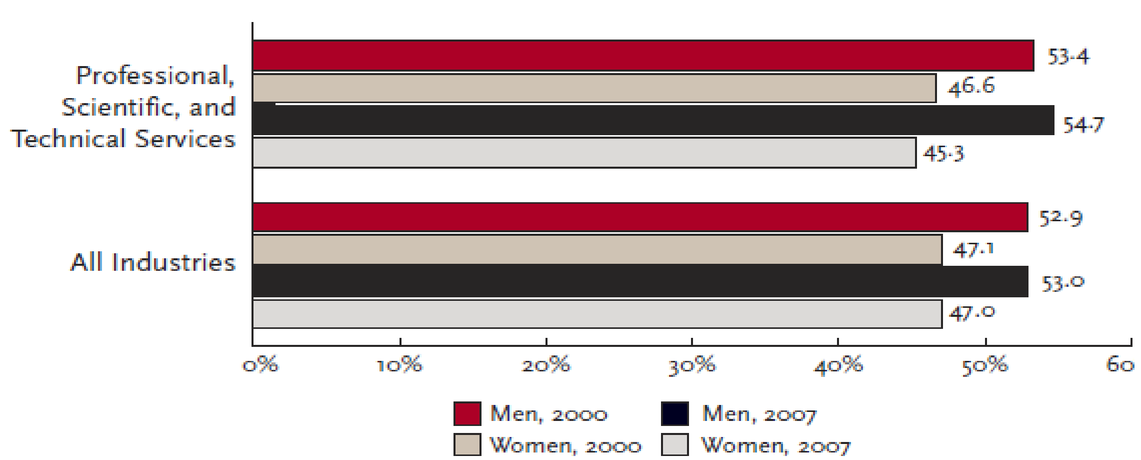
3.2.4 Employment by Salary Range / Hourly Rate

Occupation	Total Employment, 2012	2010-2012 Growth	Avg Hourly Wage	Avg Ed Level
Lawyers	768,596	0%	$51	97% Professional Degree
Software Developers and Computer Systems Analysts	996,902	8.00%	$44	50% Bachelor's
Computer Systems Analysts	527,350	5.00%	$38	45% Bachelor's
Mechanical Engineers	253,033	6.50%	$38	52% Bachelor's
Civil Engineers	269,908	1.40%	$37	57% Bachelor's
Medical Scientists	104,396	7.00%	$37	64% Doctoral
Management Analysts	727,348	5.00%	$36	41% Bachelor's
Architects	110,512	0%	$33	52% Bachelor's
Accountants	1,273,877	3.70%	$30	56% Bachelor's
Busuiness Operations Specialists	1,004,963	1.20%	$30	33% Bachelor's
Public Relations Specialists	233,604	3.50%	$26	56% Bachelor's
Services Sales Reps	710,385	2.50%	$25	38% Bachelors
Paralegals and Legal Assistants	269,061	2.70%	$23	34% Bachelor's
Interpreters and Translators	68,895	8.20%	$22	30% Bachelor's
Advertising Sales Agents	186,417	1.40%	$22	47% Bachelor's
Surveying and Mapping Technicians	51,896	0%	$20	37% Some College (no degree)
Biological Technicians	75,167	1.60%	$19	37% Bachelor's
Bookkeeping, Accounting and Auditing Clerks	1,859,752	2.50%	$17	39% Some College (no degree)
Interviewers	228,666	2.80%	$15	35% Some College (no degree)

Source: http://www.newgeography.com/content/003228-the-emerging-professional-scientific-and-technical-sector

3.2.4 Consultants by Gender (Globally)

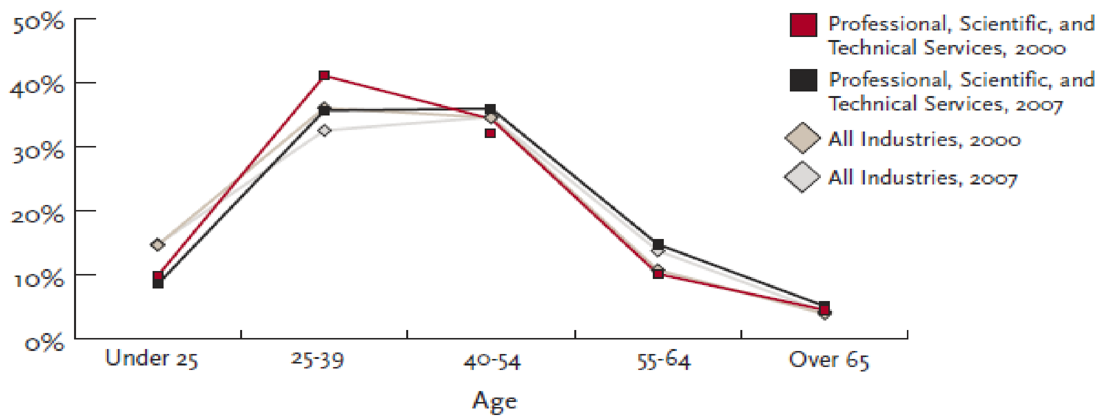
Figure 1.1 Gender Distribution of the Labor Force



Source: https://www.bc.edu/content/dam/.../TMISR06_ProfScientificTech.pdf

3.2.4 Consultants by Age

Figure 1.2 Age Distribution of the Labor Force

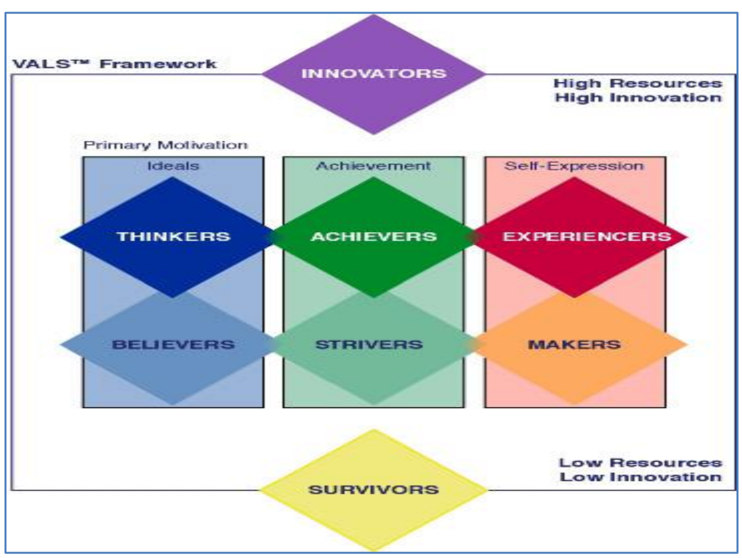


Source: The Integrated Public Use Microdata Series (IPUMS-USA)

Source: https://www.bc.edu/content/dam/.../TMISR06_ProfScientificTech.pdf

3.3 Customer Psychographics

Getting Customer Psychographic profile is complex, hence we rely on the expertise of proven market research firm “VALS” for same. VALS™ segments US adults into eight distinct types—or mind-sets—using a specific set of psychological traits and key demographics that drive consumer behaviour.



Source: http://www.strategicbusinessinsights.com/vals/ustypes.shtml

The detailed characteristic of each type is shown below:

- **Innovators -** Innovators are successful, sophisticated, take-charge people with high self-esteem. Because they have such abundant resources, they exhibit all three primary motivations in varying degrees. They are change leaders and are the most receptive to new ideas and technologies. Innovators are very active consumers, and their purchases reflect cultivated tastes for upscale, niche products and services.
- **Thinkers -** Thinkers are motivated by ideals. They are mature, satisfied, comfortable, and reflective people who value order, knowledge, and responsibility. They tend to be well educated and actively seek out information in the decision-making process. They are well-informed about world and national events and are alert to opportunities to broaden their knowledge.
- **Believers -** Like Thinkers, Believers are motivated by ideals. They are conservative, conventional people with concrete beliefs based on traditional, established codes: family, religion, community, and the nation. Many Believers express moral codes that have deep roots and literal interpretation. They follow established routines, organized in large part around home, family, community, and social or religious organizations to which they belong.
- **Achievers -** Motivated by the desire for achievement, Achievers have goal-oriented lifestyles and a deep commitment to career and family. Their social lives reflect this focus and are structured around family, their place of worship, and work. Achievers live conventional lives, are politically conservative, and respect authority and the status quo. They value consensus, predictability, and stability over risk, intimacy, and self-discovery.
- **Strivers -** Strivers are trendy and fun loving. Because they are motivated by achievement, Strivers are concerned about the opinions and approval of others. Money defines success for Strivers, who don't have enough of it to meet their desires. They favor stylish products that emulate the purchases of people with greater material wealth. Many Strivers see themselves as having a job rather than a career, and a lack of skills and focus often prevents them from moving ahead.
- **Experiencers -** Experiencers are motivated by self-expression. Young, enthusiastic, and impulsive consumers, Experiencers quickly become enthusiastic about new possibilities

but are equally quick to cool. They seek variety and excitement, savoring the new, the offbeat, and the risky. Their energy finds an outlet in exercise, sports, outdoor recreation, and social activities.

- **Makers -** Like Experiencers, Makers are motivated by self-expression. They express themselves and experience the world by working on it—building a house, raising children, fixing a car, or canning vegetables—and have enough skill and energy to carry out their projects successfully. Makers are practical people who have constructive skills and value self-sufficiency. They live within a traditional context of family, practical work, and physical recreation and have little interest in what lies outside that context.
- **Survivors -** Survivors live narrowly focused lives. Because they have few resources with which to cope, they often believe that the world is changing too quickly. They are comfortable with the familiar and are primarily concerned with safety and security. Because they must focus on meeting needs rather than fulfilling desires, Survivors do not show a strong primary motivation.

Demographic and Behavior Snapshots Highlight the Vibrancy of Using VALS™

Primary Motivation		Ideals		Achievement		Self-Expression		
	Innovators	Thinkers	Believers	Achievers	Strivers	Experiencers	Makers	Survivors
Psychological Descriptors	Sophisticated In Charge Curious	Informed Reflective Content	Literal Loyal Moralistic	Goal Oriented Brand Conscious Conventional	Contemporary Imitative Style Conscious	Trend Seeking Impulsive Variety Seeking	Responsible Practical Self-Sufficient	Nostalgic Constrained Cautious
	Percent of Innovators	Percent of Thinkers	Percent of Believers	Percent of Achievers	Percent of Strivers	Percent of Experiencers	Percent of Makers	Percent of Survivors
Total US	10	11.3	16.5	14	11.5	12.7	11.8	12
Median age	47	58	53	41	30	24	48	69
Married	62	73	62	70	32	20	64	45
Work full time	67	52	40	65	45	42	56	13
Own a tablet or e-reader	36	25	9	19	6	14	7	4
Contributed to environmental organization in past year	20	11	2	4	2	3	4	1
Own a dog	39	40	43	52	44	41	57	38
Bought new or different auto-insurance policy in past year	17	16	16	18	15	16	22	14
Buy food labeled natural or organic	24	15	8	10	4	9	8	4
Used hair color at home to cover gray	7	11	15	9	2	1	9	11
Media trusted the most:								
TV	11	25	43	26	38	24	33	54
Radio	15	11	7	7	7	6	12	11
Internet	42	30	21	35	32	48	26	4
Magazines	10	9	7	7	4	3	7	5
Newspapers	23	25	23	24	18	19	22	24

Source: VALS™/GfK MRI Spring 2012

Source: http://www.strategicbusinessinsights.com/vals/demobehav.shtml

3.4 Customer Needs

The fundamental needs that our solution is going to address are:

- **More efficient and effective communication –** With the world becoming flatter, communication challenges are growing. Consultants need to communicate effectively with all stakeholders within and outside the organization. They need to get maximum output from the time available to them during the meetings. They need to structure the thoughts and ideas discussed in a way that everyone can contribute.
- **Improved decision-making –** This is at the core of any business. Most of top management professional need to take decision based on incomplete information. There is a need to have maximum information that is presented in a way that decision making becomes easier.
- **Better productivity –** Consultants are on constant lookout for ways and means to improve their and their client's productivity. Consultants typically cost themselves and charge themselves on a dollar per hour basis. With very less fixed cost, the productivity improvement directly translates into profit margin.

3.5 Customer Pain Points

Let us look at some of the pertinent pain points that customers are facing currently:

- **Pre-Sales**
  - **Collaboration across business functions & partners -** Preparing a proposal requires the Proposal Manager to seek inputs from different teams like Technology, SME, Finance, Legal, Business Partners, Network, Sales etc. Most of the times such information flow is through Emails using word documents which becomes challenging.
  - **Collaboration across geographies –** The information flow problem is further aggravated if the teams are located across geographies and in diametrically opposite time zones.
  - **Shooting off RFP Responses without thinking -** "shotgun method" of simply shooting off responses to requests for proposals like thoughtless bullets. Sure, you think if you cast your net wide enough, you're bound to catch some new customers, but you're more likely shooting yourself in the foot, with the average

win rate lower than normal. It is essential to discuss with stakeholders to first "qualify" the lead and understand the value proposition before responding to RFP.

- **Brainstorming to bring all Stakeholders on Same Page with respect to Win Strategy –** Win strategy preparation requires inputs, real time discussion, sharing of facts, files, links, videos etc from multiple stakeholders. This helps everybody come on same page with respect to the inputs available and for preparing the "Win Strategy".
- **Visually Appealing proposals –** Customers hate to read highly verbose proposals. Proposals with powerful diagrams that scream the value proposition and how you can solve the problem for client will help you score brownie points.
- **Pressure due to Tough Deadlines -** They call them deadlines for a reason — if you don't adhere to them; you are dead out of the running. A lack of support from the proposal manager or starting late or lack of incentives or not enough resources – the reasons can be many.

- **Project Delivery**
  - **Collaboration across diverse team members –** Diversity within a project team can be cultural, geographical, organizational, functional, age related, level of education and so on. Project management communication within such diverse groups is a challenge at the best of times.
  - **Managing Costs -** Employee costs typically represent two-thirds of the cost base of your average consulting firm. Universal pay rises therefore have major implications for the cost base of a consultancy. It is therefore essential to optimally utilize the resources and to improve productivity**.**
  - **Brainstorming to Resolve Issues –** Project Teams need to often come together on a platform to resolve the issues. It requires huge amount of information sharing and real time collaboration.
  - **Pressure due to Tough Deadlines -** They call them deadlines for a reason — if you don't adhere to them; you are dead out of the running. A lack of support from the proposal manager or starting late or lack of incentives or not enough resources – the reasons can be many.
  - **Other generic Challenges**
    - Unclear goals and objectives
    - Lack of alignment to project goals across stakeholders

- Non-participative sponsors and stakeholders, or users
- Poor communication of objectives and targets across the team
- Unofficial scope creep
- Poor/ lack of measures or information on project performance
- Unclear responsibilities (can be catastrophic on its own)
- Lack of / poor quality planning / resource planning
- Poor supplier integration / management
- Lack of commitment or team-working
- Lack of ownership (relates to many areas)

(Source: http://www.pmis.co.uk/what-goes-wrong-with-projects.htm)

4. Competitor Analysis

- **Groove Consulting (http://www.grove.com/site/ourwk_srvc.html), USA**
  - The Grove's consulting and design services deliver visual solutions for meetings, teams, and organizations seeking alignment and change. They focus on Meeting Facilitation, Team Development and Organizational Change.
  - They offer different workshops on Visual Thinking related Tools in San Francisco Area. It costs approx. $800 for a day.
  - They also have a suite of software tools for visual thinking and collaboration.
- **Lance Change Consulting (http://www.lanechangeconsulting.com/category/visual-thinking/)**
  - They work on Graphic Recording, Team Development and Visual Facilitation of Meetings.
  - Based out of San Francisco, USA
  - They have a long client list including Google and SKF
  - One key weakness seems to be lack of Software Tool usage and mostly such sessions are on-premise as opposed to remote sessions.
- **Visual Consulting Group (http://visualconsultinggroup.com/)**
  - Visual consulting group employs a visual thinking methodology to help you with any communication challenge, internal and external. We help you to simplify your message. We then select the right type of media together with you and help create crystal clear, crisp and easy to understand communication tools for deployment. These tools can be maps, video's, micro sites, iPDF's, etc.
  - Based out of Netherland
- **Visual Thinking Magic (http://www.visualthinkingmagic.com/about)**
  - Founded in August 2011, Visual Thinking Magic is designed to help you revolutionize the way you think and solve life's most difficult problems using unique visual thinking tools, techniques and strategies that are built upon a solid visual thinking framework.

    - It is founded by Adam, a life coach. The site has lot of informative content, but the revenue model is not clear.
    - It seems to rely more on frameworks and not on software tools.
- **Delsys (https://www.delsys.ca/)**
    - Based out of Ontario, Canada.
    - The Delsys Visual Thinking approach focuses on gathering information, facilitating lively discussions and the communication of complex business and product-related concepts via high-impact visual and interactive media.
    - The "Delsys Experience", enabled by their Visual Thinking techniques, is often referred to as one of the most important take-aways from the modelling sessions **facilitated at their offices**.
    - Led by Eric Milliga, the Chairman. The key executives include DEO, Team Lead and Manager Operations.
- **Visualmapper.org** (http://Visualmapper.org)
    - Based out of Ontario, Canada. Wallace Tait is the Founder and lead consultant at Visualmapper.
    - Facilitating whole brain thinking, using the mindset of Visual Mapping.
    - Teaching, coaching and facilitating change process, for a more whole brained approach to information management.
    - Appears to be a small player. The website is re-directing to his blog.