

Appendix

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Appendix A

Internal interviews

Appendix A.1 : Internal interviews

To envision the future client-consultant relationship, first a thorough understanding is necessary of KPMG's current client-consultant relationship and the use of digital touchpoints within this relationship. This understanding is created via internal exploratory interviews.

These internal interviews were conducted with consultants from the Smart Tech Solutions team. The Smart Tech Solutions team is a horizontal department within KPMG, which means they apply their services across different business units within KPMG and therefore have an umbrella view on the digitization efforts within KPMG. The Smart Tech Solutions team consists out of business innovators and Product managers. The Business Innovators are responsible for helping different suites translate their innovation needs and client questions into new business opportunities or solutions. Product managers are responsible for the governance and strategic foresight of digital tools and products within KPMG.

Four internal interviews were conducted.

One interview with the head of the business innovators, two interviews with consultant business innovators and one with the head of project managers. These interviews were semi-structured, and all lasted around 30 minutes. The decision to conduct semi-structured interviews was taken, because this method allows open responses from participants (Adams, 2015) and allows the interviewee to dive deeper in unforeseen topics of interest.

The main research topic of these interviews was exploring the current-client relationship and the use of technology within this relationship.

Four subtopics were established.

1. Role and position at KPMG
2. Digitalization and Innovation within KPMG
3. Use of digital tooling
4. The future KPMG client relationship

The complete interview guide and transcripts can be found in on the next pages.

Participants:

I1: Senior Manager, Head of Product Managers, Smart Tech Solutions team, KPMG

I2: Senior Manager, Head of Business Innovators, Smart Tech Solutions team, KPMG

I3: Consultant, Business Innovator, Smart Tech Solutions team, KPMG

I4: Senior Consultant, Business Innovator, Smart Tech Solutions team, KPMG

Appendix A.2 Interview Guide

INTERVIEW GUIDE TEMPLATE

Research topic: The use of digital tooling within KPMG's client-consultant relationship

Main research question: What kind of tools is KPMG currently using and developing to support their client relationship?

Checklist for start

- Are you oke with me recording?

-
-
-
-

Introductory script (optional)

I am at the start of my research to envision the 'perfect' future client-consultant relationship. Therefore I first need to know more about the current state of events and use of digital tooling within KPMG. So that is why I wanted to talk to you, because you have a broader view on current use of digital tooling and activities regarding digitalization within KPMG.

With the client-consultant relationship I refer to the acquiring of clients, the process of project execution with a client and the retention of clients. So abstract said three phases of the client-relationship.

Subtopic 1:

Role and Position @KPMG

Opening question:

What do you currently do at KPMG?

Follow-ups/probes:

- With which suits do you work together?
- What kind of projects do you do?
- What is your role in these projects?
-
-
-

Subtopic 2:

Projects

Opening question:

How do these projects initiate?

Follow-ups/probes:

- What was the need of the client to initiate this project?
-
-
-
-
-

Appendix A.2.2 Transcripts

Subtopic 3:

Digital tooling

Opening question: What kind of digital tools are currently being used?

Follow-ups/probes:

- Which part of the relationship could benefit more of digital tooling?
 - What are objections against use of digital tools
 - What do clients want?
- Do you have some 'good' use cases of tools that have successfully been implemented in the client-relationship

Subtopic 4:

The future client relationship

Opening question: How do you see the 'perfect' client-relationship?

Follow-ups/probes:

- What are now the issues preventing this vision to become reality?
- What kind of role has technology within this vision?
-
-
-

Checklist for closure

- Do you know people you think I need to talk to? Digital savy people, or people who are really digital oriented
-
-

List of generic probes (optional)

-
-
-
-
-
-

The transcripts are confidential and available upon request.

Appendix A.3 Summary internal interviews

KPMG's client-consultant relationship



- Ad-hoc
- "Uurtje-factuurtje"
- Personal
- Labor intensive
- Trust is key

Features client-consultant relationship:

- Linear Process
- Personal and trustworthy connection: Trust is very important.
- Client on pedestal
- KPMG wants to bring their client new innovations only when they ask for it, but they most of the time don't ask it, but expect it.
- In advisory, consultants have short projects, most of the time, with a maximum of 6 months.
- Often same processes used in every project, but every project needs a slightly different kind of expertise
- The consulting mindset has stayed the same for over a 100 years: Client has a question, the consultant listens to that question, and delivers an answer.
- Within KPMG commercial success is of the greatest value.

KPMG's 3 types of innovation:

- Process digitalisation
- Adaptation of new digital tools
- Development of digital products to cater to client needs


Difficulties:

- No company vision on how consulting and their client relationship will change.
- Silo thinking
- Conservative mindset
- Brand value: KPMG gives security, innovation gives insecurities
- Blind leading the blind --> KPMG expects innovative push but needs to pull
- Month to Month targets: shortterm policy and strategy.
- KPMG NL is a small firm, so the question arises; "shouldn't KPMG NL wait for Global to propose innovations?"
- Technologies are being adapted after they are proven by competitors
- KPMG strategy of a people driven organisation

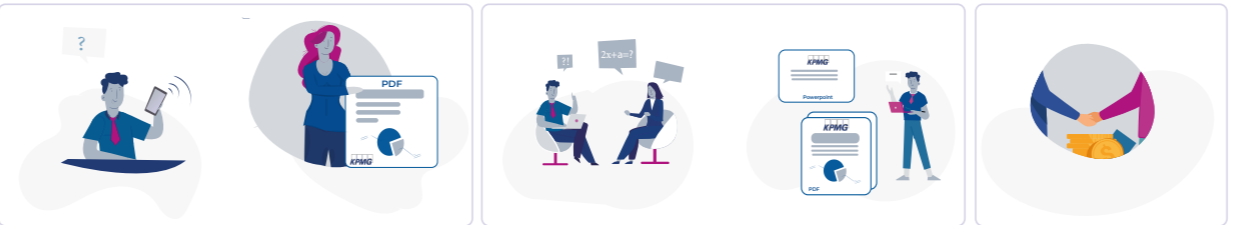
Innovation within KPMG Advisory:

"As the relationship with our clients and human insight is most important in this process, we do this with the business. A group innovators has dedicated their time to this and are exploring our future client challenges before they become everyday realities. All to offer our clients the best possible solutions."

Client-journey



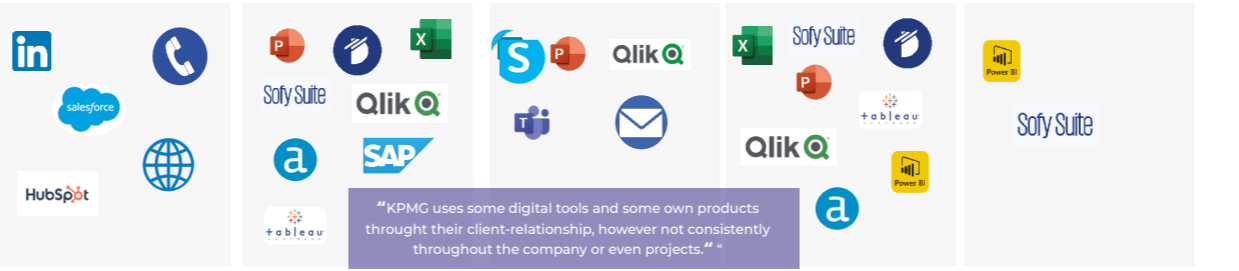
Acquisition **Execution** **Retention**



Touchpoints

Acquire	Excite	Engage	Deliver	Maintain
Obtaining new clients	Inspire and excite clients to work with KPMG.	Client touchpoints throughout the execution of a project.	Delivering results and answers to the client.	Maintaining a client-relationship after a project.
<ul style="list-style-type: none"> "the coffee Network" Referrals Thought Leaderships Proposals Partnerships Public tenders KPMG Global and member firms Landing pages 	<ul style="list-style-type: none"> Proposals Landingpage New innovations Events Thoughtleaderships 	<ul style="list-style-type: none"> Project Support Face-to-face Meetings Presentations News Updates Co-creation sessions Online meetings E-mails 	<ul style="list-style-type: none"> Presentations Reporting Solutions Products Software solutions 	<ul style="list-style-type: none"> Personal Relationships Knowledge storing digital solutions

Which "digital" tools are being used?



Use cases of certain innovations within KPMG.

- Senses, a new insight driven sales approach,** delivered via Dialogue
- Interactive online proposals,** with use of Dialogue, most of these proposals are pdfs turned into online presentations. They are mainly used to give the client a sneak peak of their digital capabilities and to excite the client about the project.
- Dilemma Application,** an interactive game that replaces hours of face-to-face trainings. Giving consultants more time to focus on other work and give the client direct insights into the thoughts of their employees.
- Facilitator view** Online interactive survey tool. Facilitates engagement, collaboration and real-time analysis.
- R&R used dialogue to create a subscription model for interactive dashboard** instead of sending a static excel list, with one-time payment. This solution also lead to new client engagements.
- Sofy solutions,** that stays at the client, and gathers data, so it can be used for process optimization in future projects.

Why does KPMG want to innovate?

- Stay competitive in the market
- Keep the talent
- Prevent from becoming obsolete
- Saving money
- Preparing for the future, changing the mindset

Food for thought:

"We now mainly deliver software solutions next to our standard consulting service, in the long term competitors will tackle us, and our margins will no longer be profitable."

"What the one sees as innovation, sees the other one as not more than standard procedure."

"We sell hours of work."

"Digitization of processes is not always as beneficial as people think"

We expect our clients to say "KPMG please become innovative", but actually the client is expecting you, as a smart consultancy, as advisor, to tell them 'you have to be more innovative!'

"Don't forget, consultancy is a business to business industry, as I have learned. Innovation at clients also goes very slow."

"How to make sure digitalization of your process gives you the scaffolds to stay competitive?"

"If you only stick to the traditional consulting in addition with some software solutions, at a certain point in time you can no longer provide the 'normal' consultancy service because you can't deliver competitive prices anymore because your process is too expensive now."

"We have to focus more on working with our clients. Instead of for our clients"

"Now you have big groups working on the same reports, in the future I believe this should be much smaller teams, focusing more on answering the client-question".

Opportunities:

- KPMG uses a lot of standardized processes, using the same processes, making it less personal. With technology the opportunity arises to make standardized processes more personal.
- The successes or benefits of digitalization are not showcased in the right way, or are not being listened to.
- Currently, the client-consultant relationship is Ad-Hoc. We get a question from a client, so we solve that question. But if we change this relationship into a continuous relationship, we could prevent this question from being asked in the first place.
- There is a lack of shared understanding of innovation and current digital innovation activities within kpmg.
- KPMG needs to change its way of consulting to stay competitive in the changing market. In the long run their 'uurtje-factuurtje' will result in their prices being too expensive to compete with their competitors who can offer more digitalized processes. This results in the need to alter their approach to their business and client-relationship.
- It is not only about changing the business mindset of KPMG, but also that of their client. How can KPMG take their clients with them on the 'journey of the future'.

KPMG's Current use of digital tooling

Data analytic & Visualization tools:



Tool to faster create large datasets.

Features:

Alteryx Analytics allows users to organize, clean, and analyze data in a repeatable workflow. Business analysts find this tool particularly useful for connecting to and cleansing data from data warehouses, cloud applications,



The Microsoft BI suite comprises a set of products that offer services ranging from data visualization to advanced data analysis[1].

Specialties: Cloud computing, analytics, Office integration



The solution allows organizations to combine all their data sources into a single view[2].

Specialties: Dashboards, reporting, visual analytics



SAP offers a broad range of BI and analytics tools in both enterprise and business-user driven editions[2].

Specialties: Predictive analytics, reporting, dashboards



Tool used to visualize large amounts of data. Tableau offers an expansive visual BI and analytics platform.

Specialties: Data visualization, data analytics, dashboards

Delivery tools:



A software package designed to create electronic presentations consisting of a series of separate pages or slides.

Specialties: reporting, visualizing



Excel is used to organize data and perform data analysis.

Specialties: data entry, data management, financial analysis



Bundles ready-to-use analytics solutions on a common platform to help clients accelerate their digital ambitions and leverage their data to tackle various business challenges[4].

Specialties: Data management, platform solution



Online tool that allows consultants to create interactive digital reports, platforms and proposals for their clients.

Specialties: Reporting, Interactive digital spaces, creating engaging content

CRM tools



Salesforce is a cloud-based customer relationship management (CRM) platform with applications for sales, service, marketing and more that help bring customers and companies together[3].

Specialties: Sales, CRM, Service, Marketing cloud, additional apps



HubSpot is a cloud-based customer relationship management (CRM) platform with Marketing Hub, Sales Hub, Service Hub, and CMS Hub software applications[3].

Specialties: CRM, Sales, Lead management

Project Management Tools



A cloud-based collaboration tool to collaborate, chat, call and share documents online.

Specialties: Video-conferencing, Online-collaboration, communication



Azure DevOps is a Software as a service (SaaS) platform from Microsoft that provides an end-to-end DevOps toolchain for developing and deploying software. (5)

Specialties: Project development, Agile planning, software development, visualisation

[1] <https://www.softwaretestinghelp.com/data-analysis-tools/>

[2] <https://solutionsreview.com/business-intelligence/the-20-best-data-analytics-software-tools-for-2019/>

[3] hubspot.com/products/sales/salesforce-vs-hubspot

[4] <https://www.kpmgsofy.com/about-us/>

Appendix A.4 Overview digital tooling within client-relationship

Use of digital tooling within the client-consultant relationship

Client journey

Client-faced Digital tools

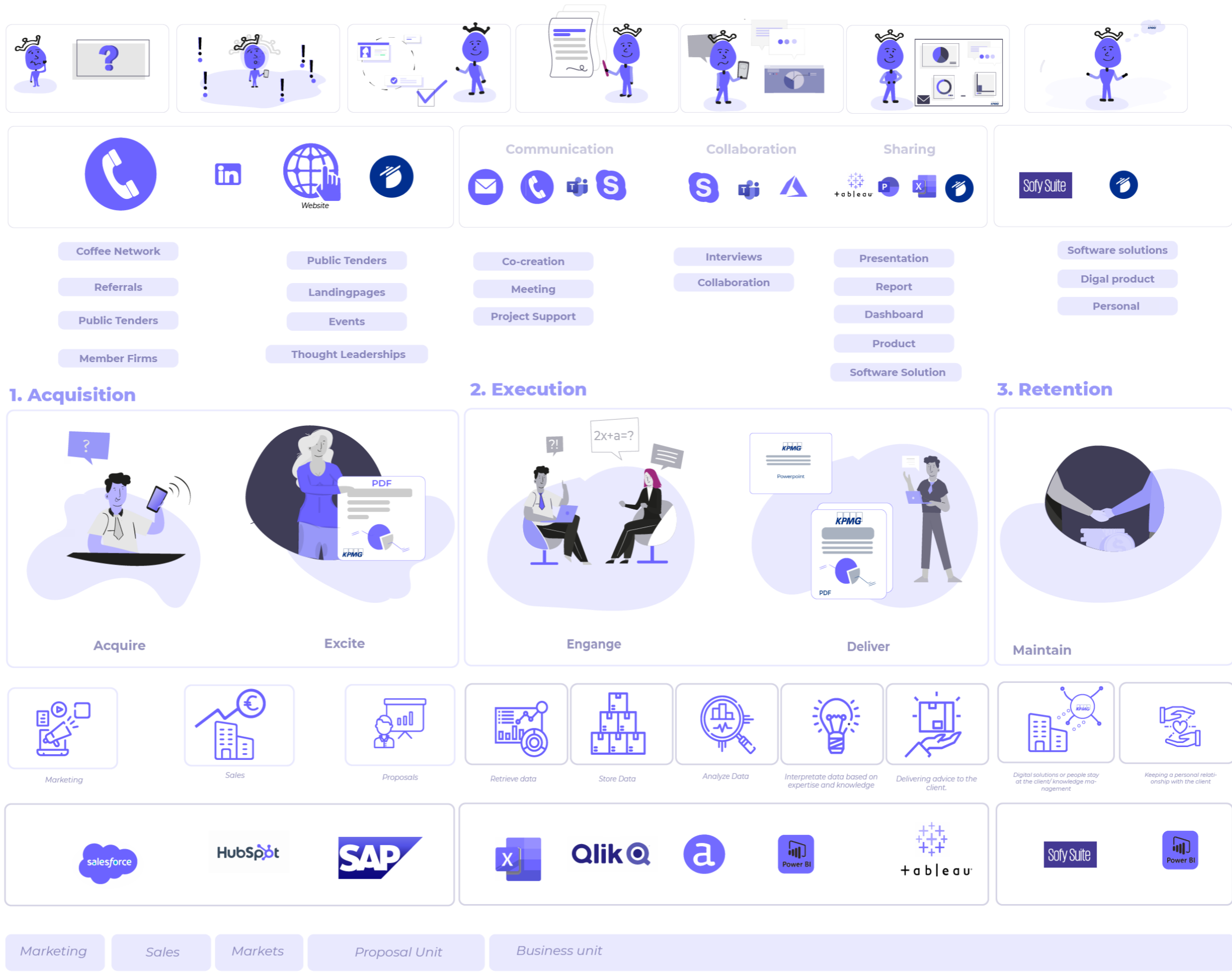
Client touchpoints

Client-faced consultant activities

Back-end Activities

Digital tool touchpoints back-end

Department



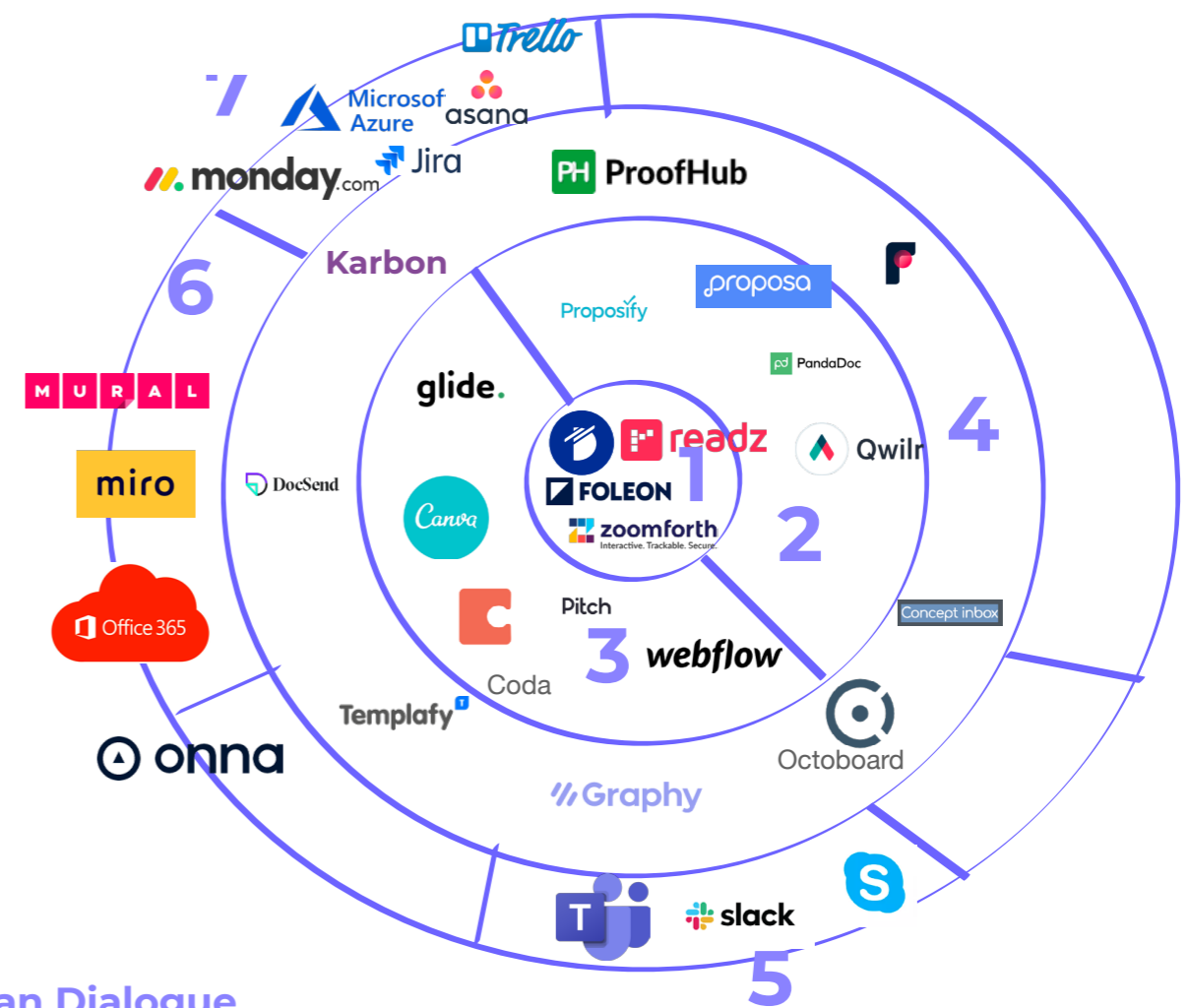
Appendix B

Market analysis complete overview

B1: Market analysis other jobs-to-be-done market overview

This appendix includes an additional competitor map and shows an overall map of the competing tools.

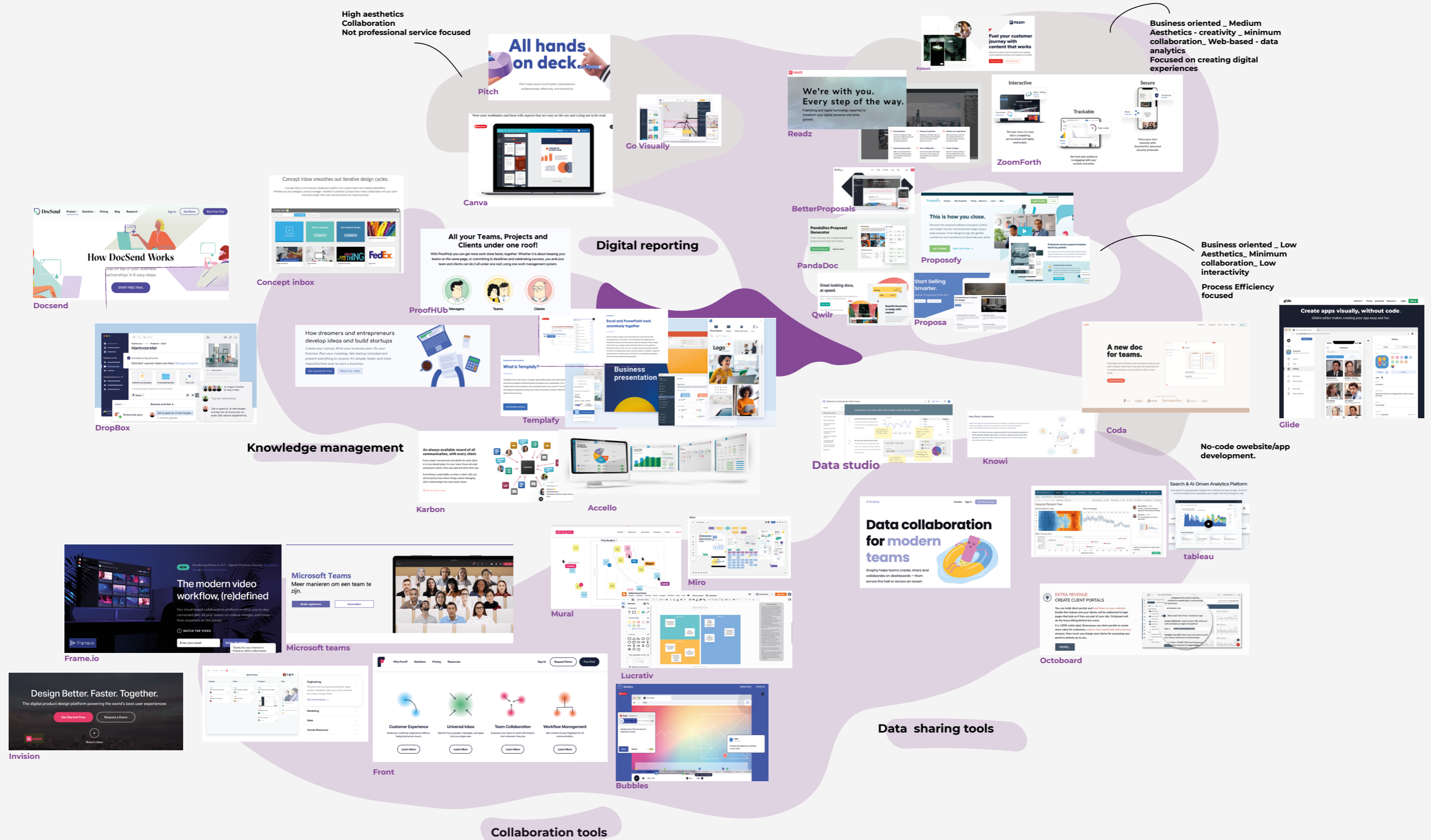
- 1 Creating professional digital experiences for clients
- 2 Creating proposals more efficient
- 3 Create interactive digital content
- 4 Safely sharing knowledge/ data with clients
- 5 Communicate with clients
- 6 Collaborate online
- 7 Manage project



scan Dialogue

Competitor scan 2 : Dialogue

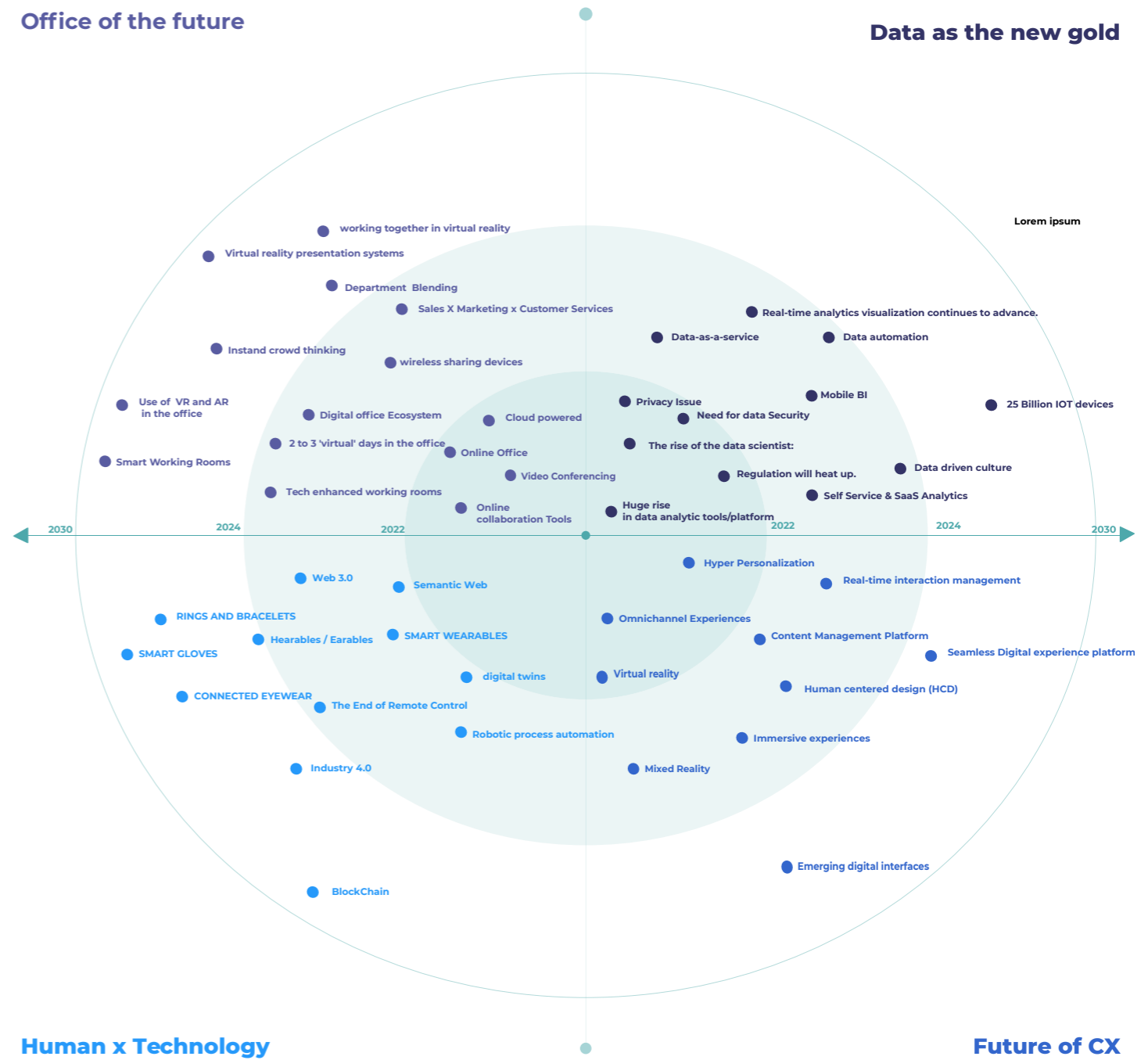
B2: Overall market scan on digital tooling



Appendix C

Trend Map

C1: Trend Map.



Appendix D

Participants design iterations/
involved stakeholders

D1: Participants design iterations

Design iteration 1.0

Stakeholder	Function	Field of interest	Why important to Dialogue:
S1.1	Business Innovator, KPMG	Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team	Horizontal view on innovation efforts across the firm
S1.2	Business Innovator, KPMG	Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team	Horizontal view on innovation efforts across the firm
S1.3	Head of <u>businesss</u> Innovators, KPMG	Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team	Horizontal view on innovation efforts across the firm

D2: Participants design iteration 2.0

Stakeholder	Function	Field of interest	Why important to Dialogue:
S.2.1	Director digital Assurance & Innovation, KPMG	The Audit & Assurance industry is being disrupted. Weaving new technologies and skillsets in the fabric of the industry is essential. At KPMG, together with inspiring colleagues, I have the opportunity to shape the future of audit & assurance. People driven progress!	Big stakeholder: interested in applying Dialogue within the Assurance unit
S.2.2	Partner : Asset Management & Pensions, Leadership Team Advisory, Risk & Regulatory Lead, Financial Risk Management Lead, KPMG		Partner of R&R, one of the business units that most frequently use Dialogue for their client engagements.
S.2.3	Director of Business Development and Sales, EMA Region, KPMG	Working with multinational teams to develop and effectively implement sales and business development strategy to enhance client relationships and drive revenue growth. Responsible for a multi-functional team and budget.	Connection to global: interested to get Dialogue on global scale COO markets team : focused on organizing market activities within the region ; connect people; coordinate higher initiatives; number of member firms ; responsible for taking on the monitoring of the team
S.2.4	Director of Sofy Solutions, KPMG	Expertise on Delivering Digital solutions to clients: KPMG Sofy Suite bundles ready-to-use analytics solutions on a common platform to help clients accelerate their digital ambitions and leverage their data to tackle various business challenges.	Cooperation partner
S.2.5	Head of Technology KPMG	Global ambassador Dialogue Contact with member firms and global technology perspective	Global ambassador Dialogue
S.2.6	Senior Manager Asset Management Risk & Regulatory, KPMG		Frequent Dialogue User Responsible for driving digital initiatives within the R&R Business Suit
S.2.7	Head of business Innovators, smart tech solutions, KPMG		Responsible for the Dialogue product within R&R

D3: Participants design iteration 3.0

Stakeholder	Function	Field of interest	Why important to Dialogue:
S3.1	Product Manager, Dialogue	Product Innovation and driving digitization across KPMG	Owner of Dialogue. Responsible for developing and operating Dialogue.
S3.2	Head of Technology KPMG	Global ambassador Dialogue Contact with member firms and global technology perspective	Global ambassador Dialogue
S3.3	Business Development specialist within the Branding Reputation & Marketing team and Markets department within KPMG	Supporting the lead development process of the Advisory, Assurance and Markets campaign teams with a multi-disciplinary (Audit/Advisory/Meijburg)	Advocate for Dialogue within KPMG

Appendix F

Documents Design Iteration 1.0

F.1 : Stakeholders involved in design iteration 1.0

Stakeholder	Function	Field of interest	Why important to Dialogue/future of consulting:
P1	Business Innovator, KPMG	Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team	Horizontal view on innovation efforts across the firm
P2	Business Innovator, KPMG	Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team	Horizontal view on innovation efforts across the firm
P3	Head of business Innovators, KPMG	Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team	Horizontal view on innovation efforts across the firm
P4	Process Manager, topsector logistiek	Use of data,	Experience of hiring big consulting firms for over 25 years.

F.2 : Design Probes/ Presentation material

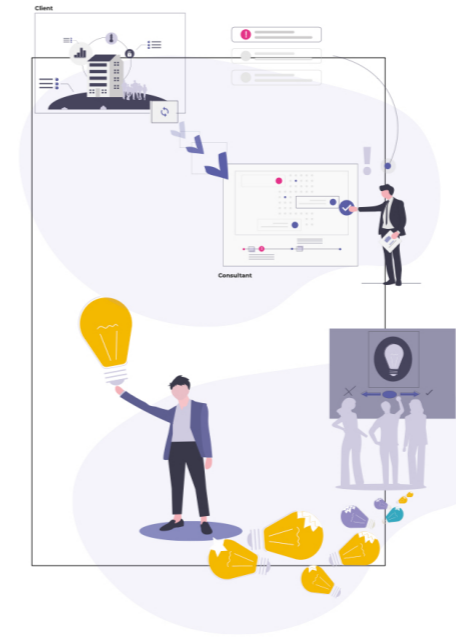
Slide 3

Slide 1

The future client-consultant relationship.

Validation 1.0

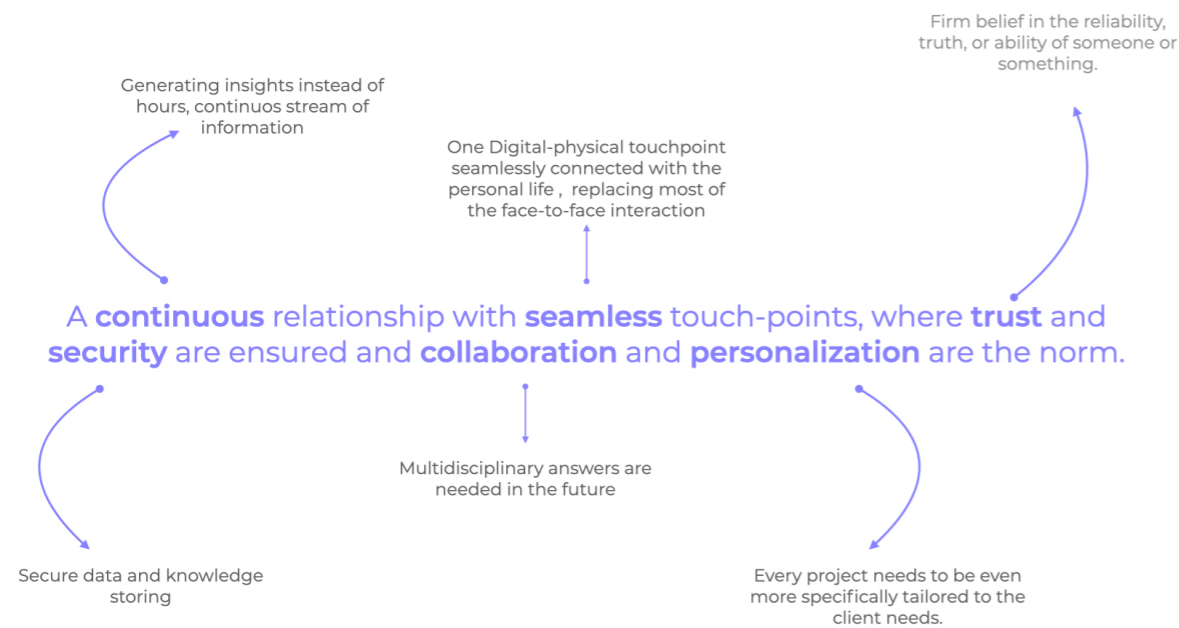
C Continuous



S Seamless



Slide 2

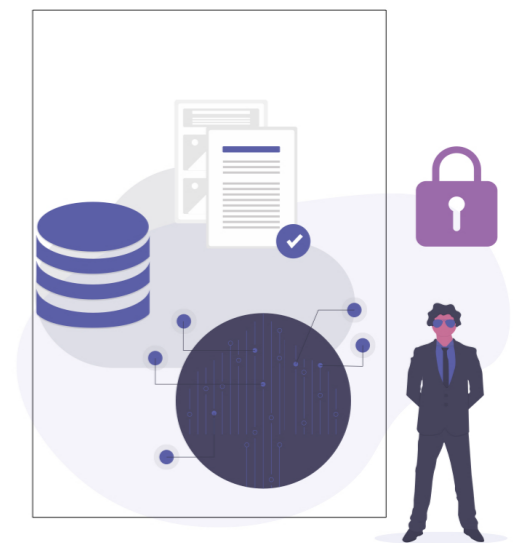


Slide 4

T Trust

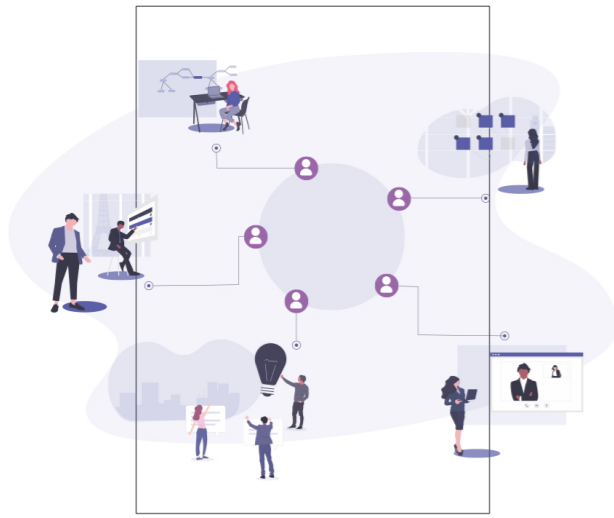


SE Security



Slide 5

C Collaboration (co-creation)



P Personalization



Slide 6

Scenarios: KPMG and digital client relationship scenarios

KPMG wows clients, and excite employees with the possibility to **quickly** create and test digital experiences and product solutions. To attract new clients, engage with existing clients, differentiate from the competition and spark innovation to test new exciting business propositions.

#standout

KPMG as a big professional service network itself, it can easily and efficiently facilitate big multidisciplinary projects with experts from any field, from beginning to end. With the use of their own platform they can provide their clients with a transparent digital platform that supports these kind of projects in every step of they way, from orchestrating to real-time insight into stakeholder views.

#Orchestrate #Track#Store#Act

KPMG can create spaces for clients to foster their client-relationship and give pro-active advice to their clients based on real-time data and insights. Creating a continuous relationship with their clients through a digital touchpoint, providing insights and knowledge when needed. Using the tacit-knowledge of the consultant and AI to quickly give answers to questions and developments.

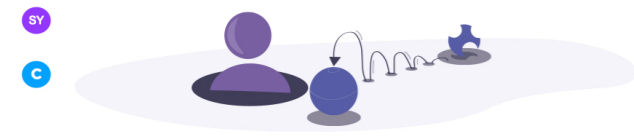
#thenewconsulting

KPMG offers their clients a digital project space where they together establish and create a personal and trustworthy relationship. KPMG offers their clients the possibility to choose and tailor their project from beginning to end, making sure they provide them with a modular consulting project.

#CreateRealDigitalRelationships

Slide 6

Scenarios: Future client-consultant relationship



The consultant as quick solution provider

- Digital project
- Client wants a product or software solutions
- Need for agile digital approaches
- Quick results, immediate impact



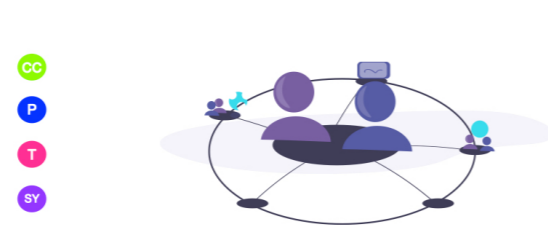
The consultant as orchestrator

- Big projects
- Difficult problems and cross-disciplinary solutions
- Multiple parties involved in project



The consultant as digital advisor

- Pro-active advise giving : Continuous Relationship
- One digital touchpoint with consultant
- On-going relationship : personal advisor
- Not project-based



The consultant and client as co-creators

- Project for client only one party involved
- Client demands project tailored every step of the way
- Modular consulting business

Slide 7

Dialogue directions

The digital maker lab

Dialogue, the platform for KPMG employees to engage with clients and quickly experiment on new business propositions and digital experiences.

New Products, Solutions, Business Propositions, Adds, Thoughtleadership library

#standout

Digital invites, event spaces.

#OrchestrateTheDialogue

The Digital Office

Dialogue as one-stop platform for tailored knowledge spaces, pro-active presenting real-time knowledge and data.

Individual Knowledge spaces.

#AlwaysAvailable#TheNewConsulting

The digital trust creator

The consultant can use Dialogue to closely interact with their client on a personal level supported with technology. Dialogue offers the consultant the possibility for the client to tailor the project in every step of the way.

Project process platform, Communication platform.

#PersonalInTheDigitalSpace

F3. Insights Co-reflection 1.0

Insights sessions P1 and P1

P2: Wat ik een beetje mis, ik denk dat zeker als de relatie digitaler wordt, zeker software een deel van de consultant overneemt: dat het dus verandert he. Omdat software verantwoordelijk wordt voor de interactie met de klant. En de vorm waarop je het presenteert, de inhoud van consulting steeds belangrijker wordt.

P2: Wat wij doen met Dialogue doen nu, is dat we het in een mooi digitaal plaatje presenteren naar de klant. Maar daardoor moet de inhoud ijzersterk zijn. Zeker als software de grootste touchpoints over gaat nemen is de consultant niet bezig met hoe laat ik het er mooi uit zien, nee die is alleen maar met die inhoud bezig! Die wordt eigenlijk een soort van thought leader: daar ligt de nadruk op. Op een gegeven moment heb je een heel pand met mensen die alleen maar bezig zijn met een bepaald onderwerp. En dan upload je dat vervolgens naar de klant, veel meer gefocust op de inhoud.

P1: Inhoud mist een beetje in alle vier scenarios. Je kan het als aspect noemen, hoe gaan ze met de inhoud om. Nu zie je vaak bij traditionele consultancy, dat advies alleen maar vanuit de consultant komen. Terwijl wat ik zie, is dat de klant juist samen dat advies wil creëren.

P2: Content is king. Zowel in de marketing, maar ook überhaupt in als je naar de klanten gaat. Ze gaan niet meer met je koffie drinken, alleen als je iets te bieden hebt, inhoudelijk te tonen hebt, Als ik kijk, dan zie ik eigenlijk meer dan wat Dialogue kan doen, eigenlijk vervangt wat een partner doet.

P1: Het is niet meer normaal met wat voor gedetailleerde inzichten je 'op de koffie' moet komen om van waarde te zijn. Daarom zie je ook wel, dat je gewoon het hele bedrijf moet kennen. Als je het goed doet bij een klant dan blijf je ook langer.

P2: Meer de iteratieve processen wordt een ding. Projecten nu duren soms maanden, maar nu met die agile methode, gaan ze ook veel meer kort opdrachten doen en dan steeds verder kijken. En meer kortere projecten.

P1: Wat ik zie, en dat zou je in de markt kunnen testen. Je hebt Trust en Safety als kenmerken genomen, en dat ademt echt KPMG. IK kan me best wel voorstellen, dat bij andere bedrijven zoals start-ups, ze echt niet praten over security en trust. Voor mij voelt het heel erg als KPMG.

P2: Als ik kijk met de bedrijven waar ik mee praat; scale-ups en start-ups: is trust en security echt

geen topprioriteit. Terwijl bij klanten zoals banken en pensioenfondsen staat dit boven aan de lijst.

P1: Als ik hier over praat met Boutique consultants, praten ze echt niet over security en trust, maar gewoon zo snel mogelijk geld verdienen.

P2: PMO-tooling voor grote projecten, zie ik niet iets nieuws. PMO: heel veel stakeholders intern en extern.

P1: Als je Dialogue zou kopen als SaaS product, dan gaat het wederom om kleuren en logo, maar dan blijft de hele regels en tools hetzelfde.

P1: Dialogue zou een platform kunnen zijn voor zoon interactieve klant omgeving.

P1: Ik ben nu ook bezig bij R&R met een overview van alle regelgeving, maar wat zij willen die regelgevingen verandert maandelijks. Zodat ze samen met de klant kunnen communiceren in dat platform. En daarin zie je heel erg dat KPMG en klanten opzoek zijn naar een platform waarbij ze samen kunnen praten over content. Real-time inzichtelijk voor iedereen.

P2: Mag ik vragen, heb je dit ook tegen de traditionele rollen van de consultant rollen aangehouden.

P1: je hebt gebruik gemaakt van de assen, maar wat bedoel je daar mee?

Insights P3

- Ik mis het begin en het eind van de klant-consultant journey
- Dialogue is wordt juist gezien als goede stap om contact te maken met klant.
- Quick solutions provider vooral rond deals
- Als zo'n project klaar is, is het klaar.
- Hoe ziet de reis eruit binnen zoon relatie?
- Interessant nog om te kijken hoe behoudt je zo een relatie? Een soort continue sales?

Insights session with P4

Advisor himself P4 also hired multiple big consultancy parties and is currently process manager for Topsector Logistiek

The four scenarios were presented to him, which he gave some interesting insights and feedback for the further design of the future client-consultant relationship.

tant relationship.

Insights from exploratory interview :
Data en information are changing the power-arrangement within client and consultant relationships. Do understand that innovation does not come from digital interactions, it is also key to understand when to go 'offline' to stimulate innovation.

Eventually consulting's projects are all about making the right agreements en setting up the project. Why should this always be in text, why not make more use of tangible insights? I think the power of the consultant in the future will be focused on how consultants can translate all sorts of knowledge and viewpoints into actionable insights.

I no longer care for a McKinsey consultant to deliver me a lot of data. No. I want to know what we are going to do with this data. And how I can be more data driven.

Insights over all:

- We need the full journey
 - All these scenarios are services
- KPMG offers
- How is this going to translate into KPMG specific?
 - More interaction within the relationship
 - Trust and Security very important within the client-relationship
 - All the scenarios are applicable for KPMG, how can we translate this in an overall client journey?

Appendix G

Documents Design Iteration 2.0

G.2 List of involved stakeholders during design iteration 3

Stakeholder	Function	Field of interest	Why important to Dialogue:
P1	Director digital Assurance & Innovation, KPMG	The Audit & Assurance industry is being disrupted. Weaving new technologies and skillsets in the fabric of the industry is essential. At KPMG, together with inspiring colleagues, I have the opportunity to shape the future of audit & assurance. People driven progress!	Big stakeholder: interested in applying Dialogue within the Assurance unit
P2	Partner : Asset Management & Pensions, Leadership Team Advisory, Risk & Regulatory Lead, Financial Risk Management Lead, KPMG		Partner of R&R, one of the business units that most frequently use Dialogue for their client engagements.
P3	Director of Business Development and Sales, EMA Region, KPMG	Working with multinational teams to develop and effectively implement sales and business development strategy to enhance client relationships and drive revenue growth. Responsible for a multi-functional team and budget.	Connection to global: interested to get Dialogue on global scale COO markets team : focused on organizing market activities within the region ; connect people; coordinate higher initiatives; number of member firms ; responsible for taking on the monitoring of the team
P4	Director of Sofy Solutions, KPMG	Expertise on Delivering Digital solutions to clients: KPMG Sofy Suite bundles ready-to-use analytics solutions on a common platform to help clients accelerate their digital ambitions and leverage their data to tackle various business challenges.	Cooperation partner
P5	Head of Technology KPMG	Global ambassador Dialogue Contact with member firms and global technology perspective	Global ambassador Dialogue
P6	Senior Manager Asset Management Risk & Regulatory, KPMG		Frequent Dialogue User Responsible for driving digital initiatives within the R&R Business Suit
P7	Head of business Innovators, smart tech solutions, KPMG		Responsible for the Dialogue product within R&R

G3. Script of reflective sessions

First I will present the current client-relationship, which is divided by three different activities:

1. Acquire
2. Execute
3. Maintain

This current relationship has 4 main characteristics : Ad Hoc, Diffused Touchpoints, Labor intensive and Personal approach

1. Reactive approach to client engagement : Personal relationships, coffee network,
2. Exciting the clients with the right proposals, currently mainly delivered via static solutions, Dialogue however is increasingly used to bring digital reporting
3. Engagement is done via multiple diffused touchpoint, microsoft teams, e-mail, data analytic software is increasingly used and so on.
4. Deliver static solutions or more and more digital solutions
5. Maintaining the relationship mainly via personal relationships, consultants on site or digital products that stay at the client
- 6.

But is it is a mostly linear relationship with a beginning and an end

With the research I have done, regarding the changing client needs for agile solutions, consultants focusing on tacit knowledge and orchestrating qualities instead of retrieving data, the rise of digital driven competitors, the transparency in the consulting market, and to stay relevant in the competitive market.

I have designed a future KPMG client-consultant relationship based on the core values of safety and trust: The humanly digital relationship where a KPMGs digital infrastructure enables Client and consultant to becoming equals in a process designed together.

Ensuring their people knowledge and expertise is elevated with use of the right technology and digital touchpoints.

4 main characteristics of this new relationship are:

1. Pro-activity
2. Centralization
3. Collaborative Ownership
4. Continuity

Three different phases: Attract: Interact: Sustain

1. Trigger: pro-active personalized digital client engagement
2. Inspire: Pre-made digital mini solutions, involvement from the clients already starts here (previously the proposal phase).
3. Personalize: Extra step in the relationship where the client completely chooses the project, the people, the digital tools, the amount of physical meetings vs. digital meetings, perhaps even bots to help the process
4. Engage: Project is centralized around one point of touch between the client and the consultant. Knowledge and communication is centralized, involving the client in every step of the way. Focus is on quick knowledge creating, clients expects KPMG consultants to focus on their tacit knowledge and orchestrating qualities instead of the retrieval of data.
5. Last phase of sustain is all about elevating this project space into a relationship space. The project space is turned into a lasting digital touchpoint between KPMG and their client making sure this relationship is continuous. KPMG can have direct insights in the client process and market and is able to actively trigger the client with modular solutions or possibilities. Starting the relationship again : circular relationship.

3 Concepts:

1. Creating hyper personalized digital experiences for clients with the knowledge of the people from KPMG. : Internal view on pre-made solutions such as digital libraries, landing pages and so on. Combined with internal knowledge concerning different clients.
2. Interactive hybrid client space: Digital touchpoint within project , where everything from the project is centralized. Even uploading deliverables. To provide the client with a more agile and interactive way of project-making.

3. Creating the continuous relationship by providing clients a tailor-made relationship space: for example the tailored knowledge library ; where Kpmg can actively engage with their previous client by pro-actively trigger them with relevant digital content and solutions.

Questions:

1. What is your view on the concept of pro-active digital client engagement?
2. What is your view on the centralized digital client interaction space?
3. What is your view on the continuous client-relationship?
4. Do you agree with this future vision?
5. What do you miss in terms of the digital future client-relationship?
6. Which concept directions do you think offer the most value for KPMG?

G4: Interview Guide

Interview Guide: Co-reflecting Sessions User Journey and concept directions

Research topic: Validating user journey and concept directions with stakeholders

Main research question: Which concept direction is most valuable for KPMG?

Checklist for start

- Are you oke with me recording this interview?

-

-

-

-

Introductory script (optional)

Subtopic 1:

Current role within KPMG

Opening question:

How are you currently involved in shaping the future client-consultant relationship?

Follow-ups/probes:

- In terms of digitization
- or in terms of business development etc.

-

-

-

Subtopic 2:

Opening question:

Follow-ups/probes:

- What is your view on the first concept of pro-active digital client engagement?

- What is your view on Centralized Client interaction

- What is your view on a continuous client-relationship?

-

-

Subtopic 3:

Future client journey

Opening question:

Do you agree with this overall future client-consultant journey?

Follow-ups/probes:

- No? What do you miss?

-

-

-

-

Subtopic 4:

What is the most valuable direction for KPMG to go for.

Opening question:

What do you think is the best direction to further develop Dialogue for?

Follow-ups/probes:

-

-

-

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Checklist for closure

-

-

-

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List of generic probes (optional)

-

-

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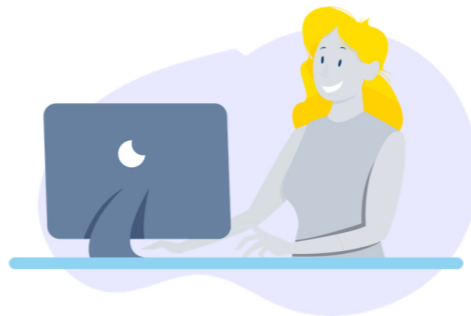
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G5. Presentation material/boundary object

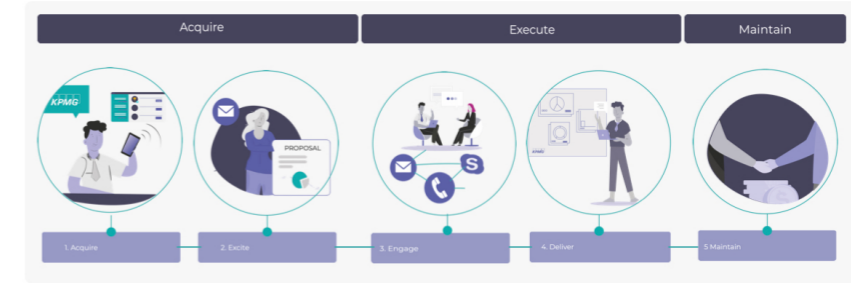
Envisioning the future client-consultant relationship

Validating a concept for KPMG's future client-consultant relationship



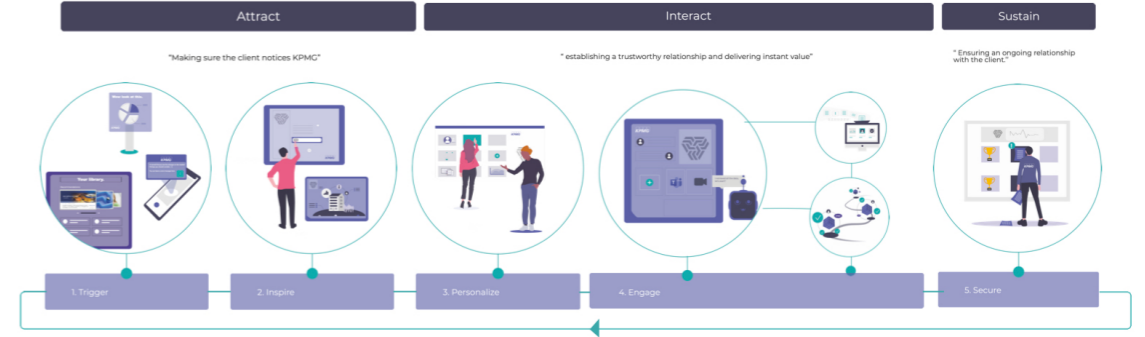
Changing relationship

- Ad Hoc
- Diffused touchpoints
- Labor Intensive
- Personal Approach



- Pro-Activity
- Centralization
- Continuous
- Co-Ownership

KPMG's Humanly Digital client relationship: Becoming equals in a process designed together.

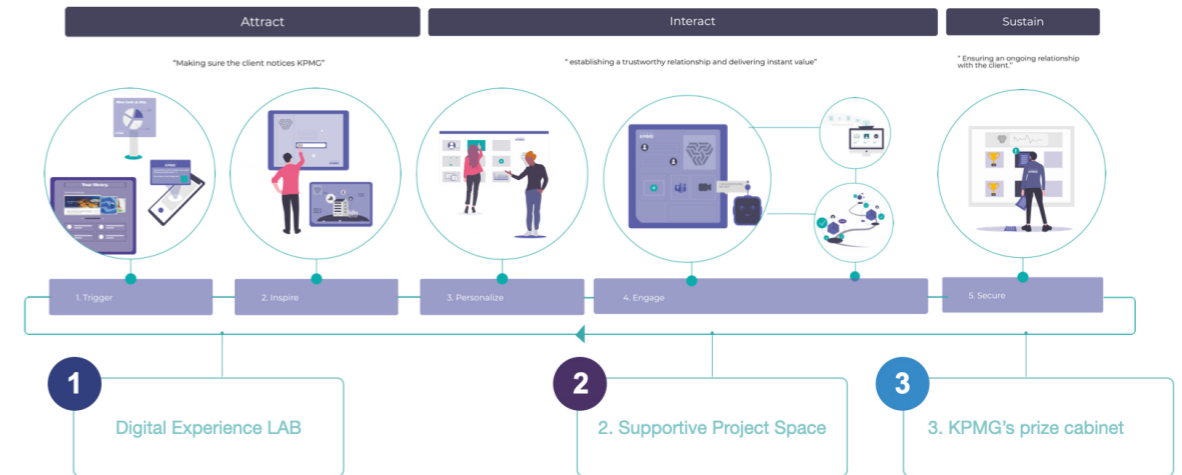


First question:

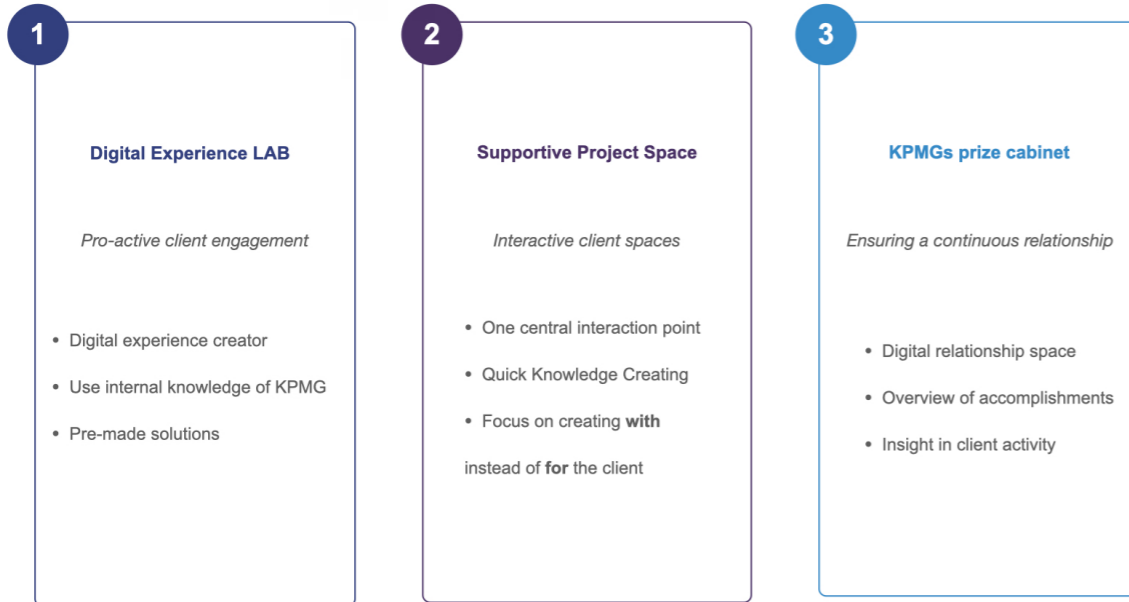
How are you currently involved in 'shaping' the future client-relationship?

3 Concept directions for Dialogue:

KPMG's Humanly Digital client relationship: Becoming equals in a process designed together.



3 Concept directions for Dialogue:



Second question:

Future client relationship:
The three directions
Do you recognize these?
Do you see them differently?
Pro-active digital client engagement
Interactive project space: focused on creating real interaction
Kpmg's prize cabinet : creating the continuous relationship

G6. Summary of the findings

Future Client-consultant relationship findings

Orchestrating our client interactions: whenever they interact with KPMG feels the same is our ultimate goal. But it's a challenging one, isn't it - P2"

"So the tools, tools are great, but it needs a strategy and also then alignment between marketing and the relationship owner. - P5"

And so we have a lot of different business units. So it needs also a coherent way to build this kind of experience. So that, again, if you if you have 10 different solution providers in advisory and they're all going to their customers independently and again, there will be quite annoyed about what is the strategy of KPMG driving this. P5

KPMG's brand perception: we have to make sure that our identity in using technology is also 100 percent fits our DNA. P5

"It should we should be still to be seen as the advisor of our customers to understanding the business processes better than any technology vendor" - P5

' You cannot make something digitally specific , only a person can do that' . - P4

"The root causes the relationship. And sometimes I feel that we're using technology or overestimating the capacities of technology. There are just a channel for me channel to connect with my customer. So building a client relationship is without technology, almost impossible anymore, especially in the new reality. But the question mark is now how we evolve technology in the way that it not becomes annoying for our clients, because we are shaping a new client relationship and that means that you know about his style" - P5

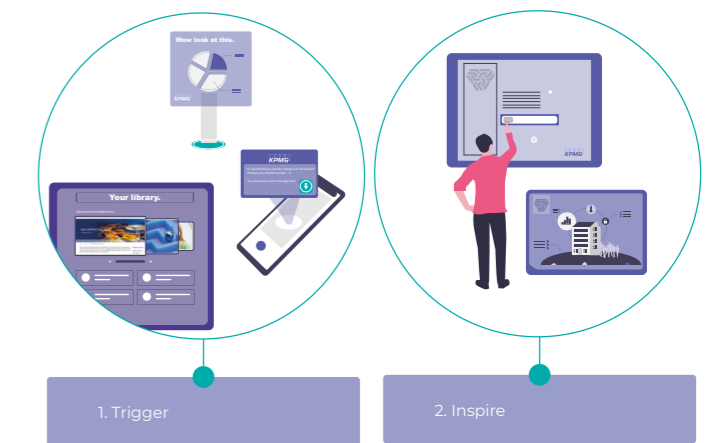
Information and attention overload
There's a central theme that also a McKinsey and they're all running into the same issue, how to build the client future relationship, and they all come with overwhelming stuff of marketing, checkbooks, etc. So you get it quite relatively quickly annoyed about it. Yes. So the physical work, you see this when you're a senior executive or a client is visiting a business or an exhibition. Oh, they take off the bench just to make sure that they don't be touched by anybody from the vendors because they're too many.- P5

cut through the noise with 'real' fitting client interactions
we also have to measure whether we not overload our clients with our outreach because that could

easily switch into an annoying factor. And and it's not the building customer relationship because there some of the customers maybe feel more spent. So quality in the outreach is important now, cultures or whatnot. And then, of course, also how we measure our frequency and interactivity.- P5

Company culture on digital tooling
And we know there are about marketing automation tools, of course, only as good as are using them and only as good as your partner and directors. Your professionals are using it and also to feed the system was quality data. And I think before we talk about tools, I think it's important to mention that, of course, we also need to work on the culture in enabling this type of new technology.- P5

Globalization and orchestrating
I think it's important that we have a global idea of what type of technologies we are bringing into the member from. So so also the profile getting stronger in the market about what technology you can expect from KPMG and also what we are going to be being famous for if we support everything P5 centralization is not maybe the right terminology in KPMG because we are so fragmented. So instead of centralization, I would say orchestration becomes the key discipline. P5



Findings per journey phase

Attract - making sure the client notices KPMG

Insights:

Introduction and explanation of what the insights where in regards to this client relationship.

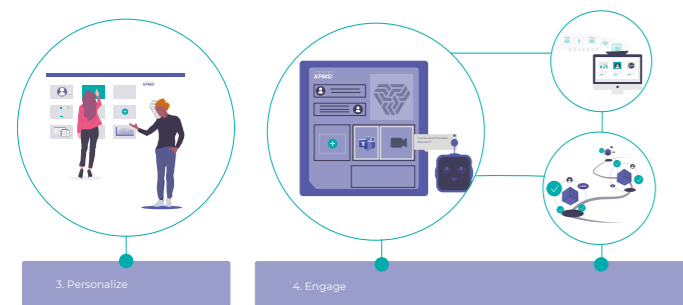
- Focus on trigger and winning in the new reality
- Make use of more immersive selling experiences
- Combining knowledge and design

- Combining Dialogue and CRM
- De KPMG catalogus : giving context to solutions

Examples with quotes:

And especially when we look at some of the clients that we have, you know, the multinationals that are operating in eighty or one hundred and fifty countries to try to build a platform which everybody is engaging with. And no matter where in the world they work for that organization, whenever they interact with KPMG feels the same is our ultimate goal. But it's a challenging one, isn't it? P3

So this proactive client engagement, I would say it's important that it's been strongly aligned with the markets. Yeah. Market leaders and getting also better intel. What are the sweet spot, sir, to to kick off such a digital experience." _P5



Interact - establishing a trustworthy relationship and deliver instant value

Insights:

- Complexity of projects is increasing
- Consultants are needed such as solutions architect, that know how to serve the client in te best way.
- Interaction is becoming more important within projects
- KPMGS wants to enforce the digital image throughout our relationship
- Don't replace teams
- Modular way of consulting
- More focus on co-creation and also the involvement of third parties , such as technology providers.
- A seamless Client Experience is needs, a client does not want to go to a yet another portal to login.

Examples with quotes:

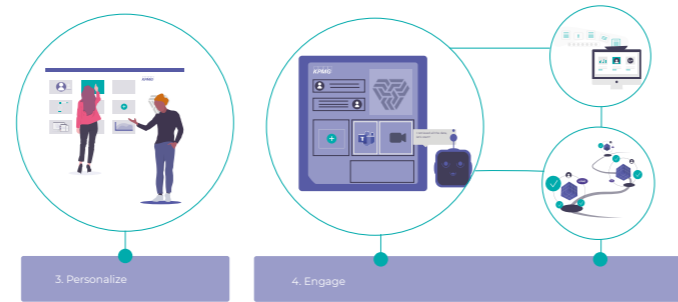
Dan kom je weer op, de zandweg terecht eigenlijk dan ga je weer terug naar de vorige eeuw, en moet je eigenlijk daar ook die digitale experience laten zien. - P6

I think it was in stage three being much more modular. I guess my view there is actually I see these kind of solutions becoming much more bespoke to clients already. And what I like about where

you're starting to head is this ability to co-create - P3

we have to make sure that our identity in using technology is also 100 percent fits our DNA. -P5

"Rather than one person talking to a client about their problem and trying to define a solution, I think there's a much greater need for solution architects and also more parts of our business to be able to create and design tailormade solutions."-P3



Sustain - Ensuring an ongoing relationship

- Focus on showing new things to clients
- Should be a pro-active interaction
- De KPMG catalogus : giving context to solutions
- Should have a global strategy on ensuring this relationship
- We have enough material to continuously surprise the client with new content, but it does need to be from an understanding point of view

Examples with quotes:

want je wil graag in continuïteit met klanten in contact zijn en dat zij voortdurend verrast worden door de dingen die KPMG helemaal heeft. - P2

Maar de gedachte daarbij is we moeten een visie hebben van wat we op dit gebied willen. En dan moeten we in eerste instantie kijken wat er vanuit de global en anders op de markt beschikbaar is - P4

" De menselijke connect , No-way dat dat vervangen wordt door een digitaal systeem" P4

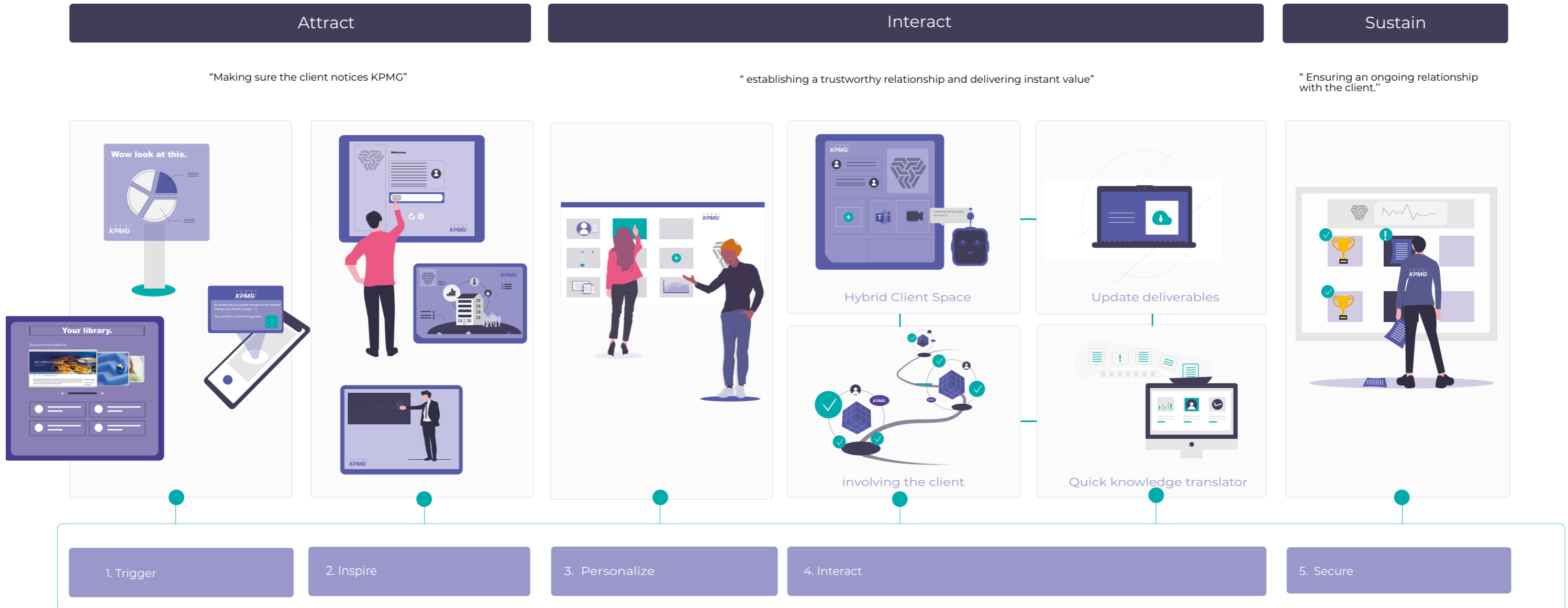
-"Dat vind ik echt een hele hele goeie [...]stel dat je er bij wijze van spreken echt een soort fysieke prijzen kabinet hebt of eigenlijk een verlenging van een supportive project space. Zegt dat je daar ook onze thoughtleadership, zoals we dat dan noemen, of risico's die we in één keer zien vanuit de actuele ontwikkelingen dat daar dam kunnen tentoonstellen om nog even in de terminologie te blijven." -P6

We moeten het wel heel snel dat vrijblijvende koppelen aan een bepaalde dienstverlening, dus het is niet voldoende om te zeggen van nou, ik stuur even een leuke folder of over nou ja, weet ik veel over klimaatverandering, nou hartstikke leuk, maar welke vraag beantwoord je dan? P6

Appendix G7: Transcripts

The transcripts are confidential and available upon request.

G8. Framework of the future client-consultant relationship



Appendix H

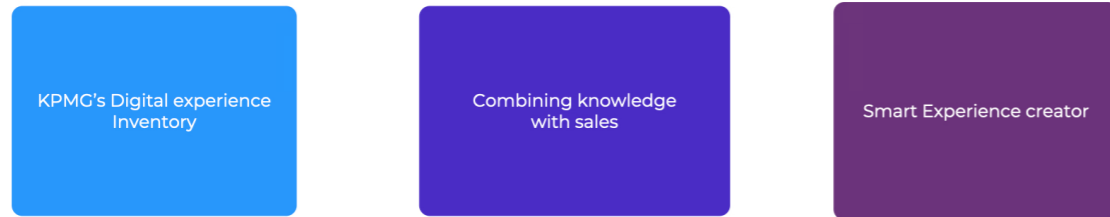
Documents Design Iteration 3.0

H1: List of involved stakeholders during design iteration 3.0

Stakeholder	Function	Field of interest	Why important to Dialogue:
S3.1	Product Manager, Dialogue	Product Innovation and driving digitization across KPMG	Owner of Dialogue. Responsible for developing and operating Dialogue.
S3.2	Head of Technology KPMG	Global ambassador Dialogue Contact with member firms and global technology perspective	Global ambassador Dialogue
S3.3	Business Development specialist within the Branding Reputation & Marketing team and Markets department within KPMG	Supporting the lead development process of the Advisory, Assurance and Markets campaign teams with a multi-disciplinary (Audit/Advisory/Meijburg)	Advocate for Dialogue within KPMG

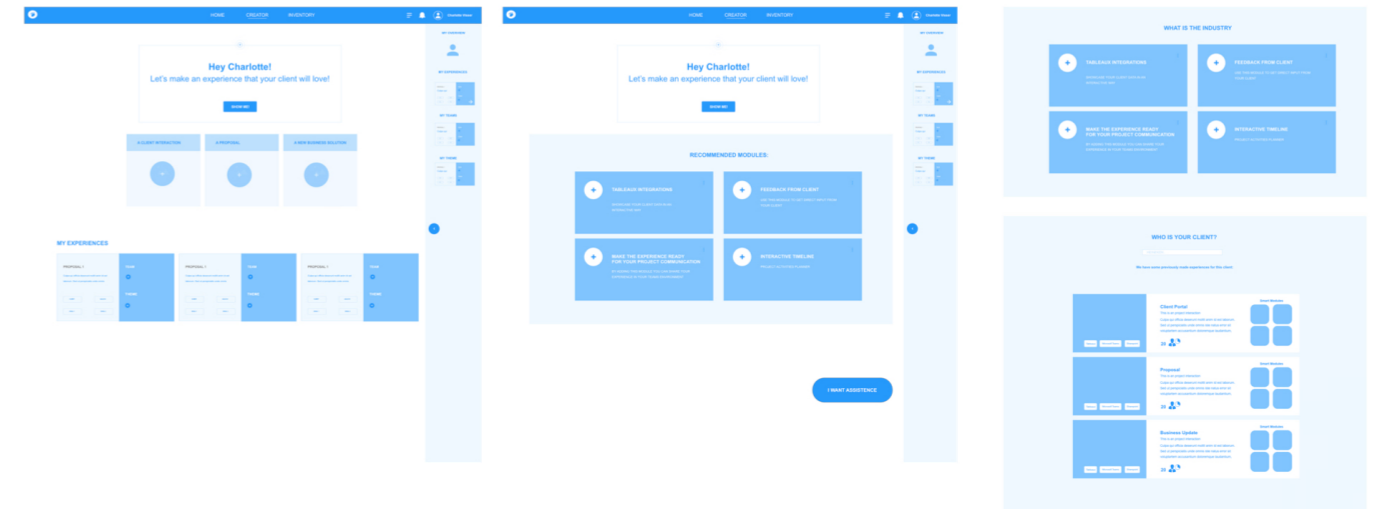
Future positioning : Dialogue as client experience expert.

The 3 pillars



User Scenario Smart experience creator

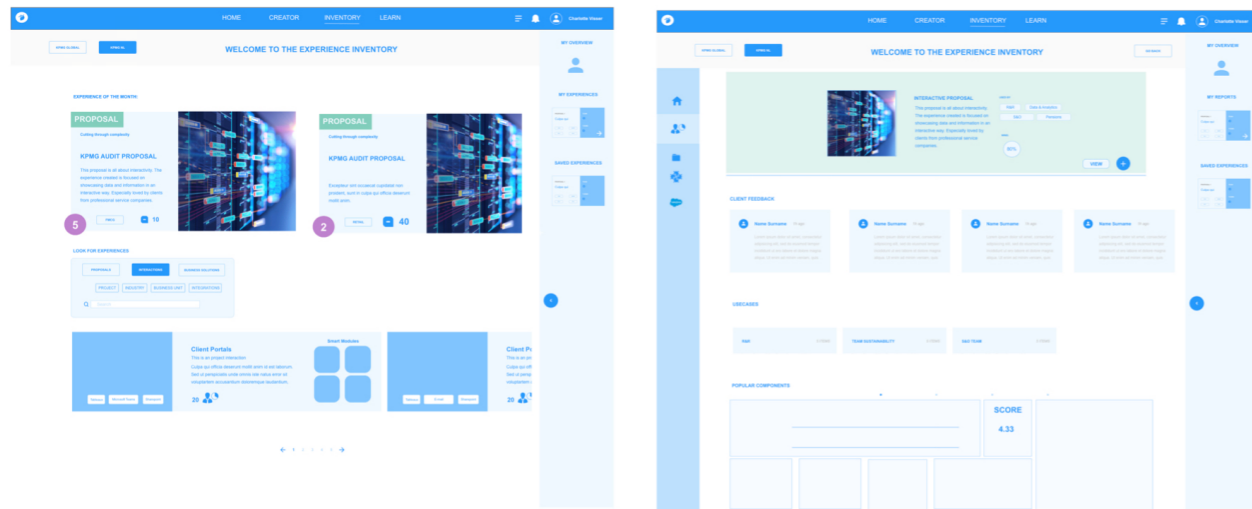
"Enabling consultants to quickly built fitting digital client experiences."



"DIALOGUE SHOULD BE THE FIRST OPTION OR THOUGHT WHEN CONSULTANTS WANT TO SHARE OR DELIVER INFORMATION TO THEIR CLIENTS"

User Scenario Digital Inventory

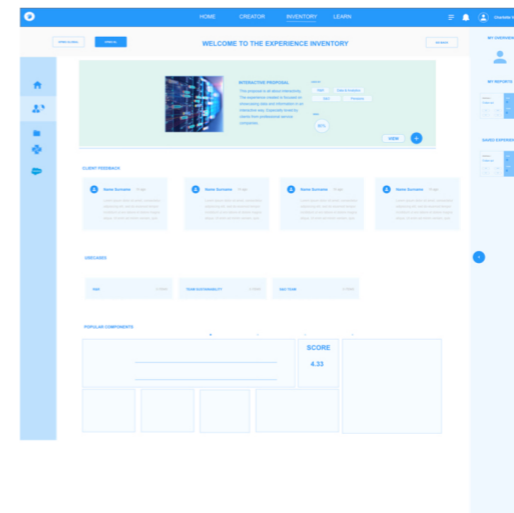
"Building the client relationship together with our clients."



LEARN BY DOING, UNDERSTANDING KPMG'S CLIENT EXPERIENCES

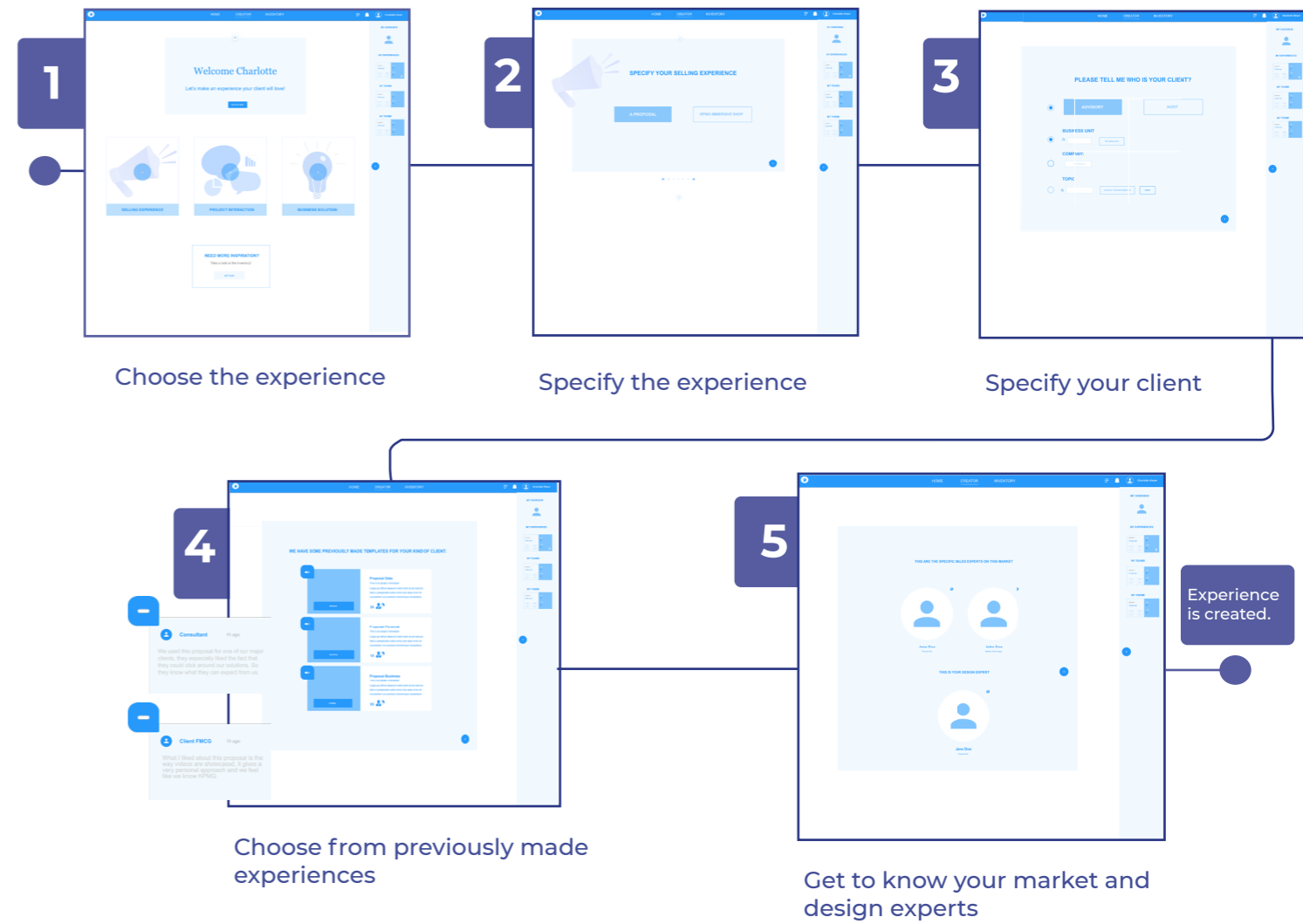
User Scenario Owning the client relationship

"Triggering clients in the new reality, combining the business with the sales"



FOR ONE SEAMLESS KPMG EXPERIENCE, SALES AND MARKETING SHOULD BE INVOLVED IN THE CREATION OF CLIENT EXPERIENCES.

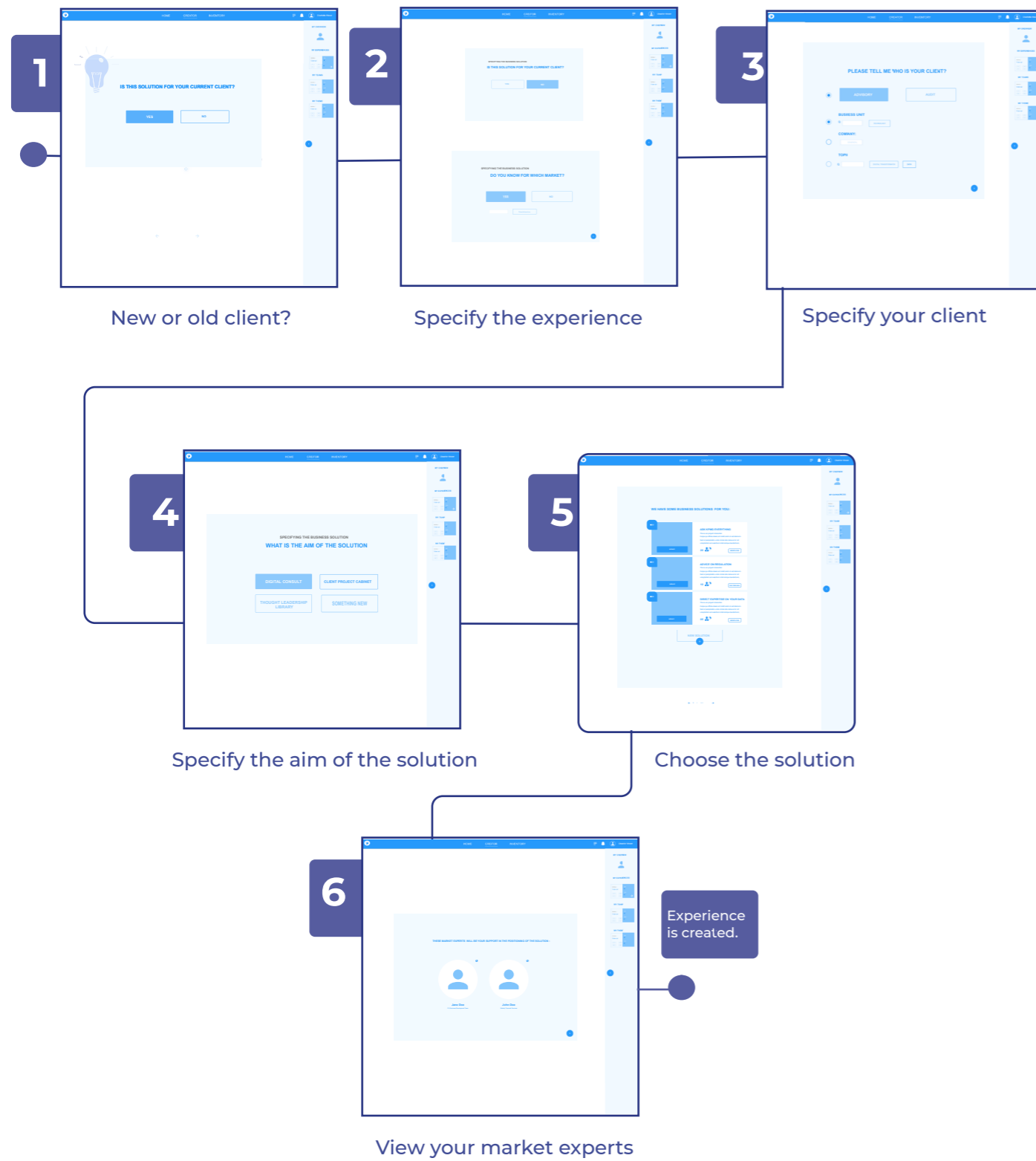
CREATING A SELLING EXPERIENCE



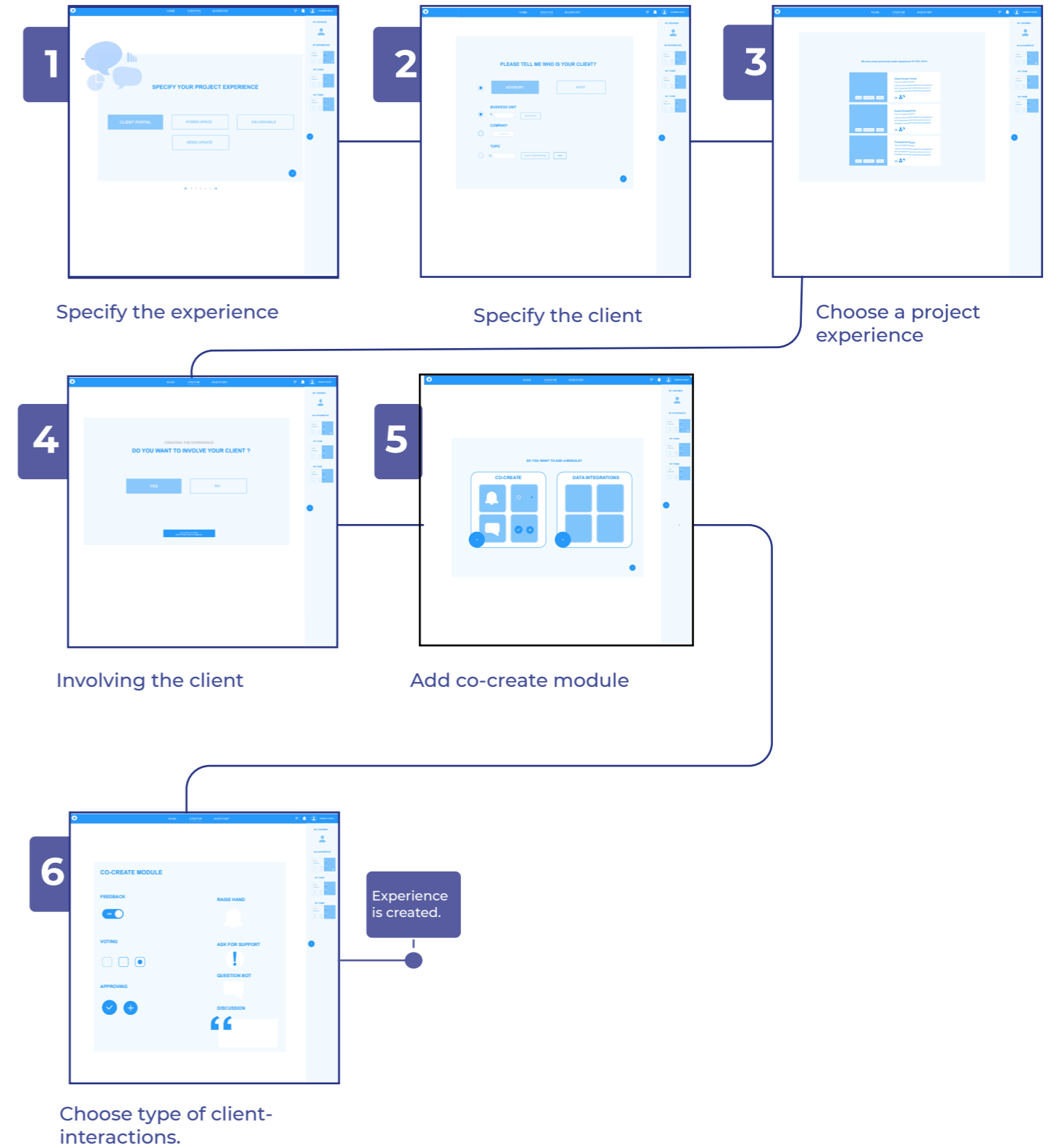
Appendix I

Additional documents final Design

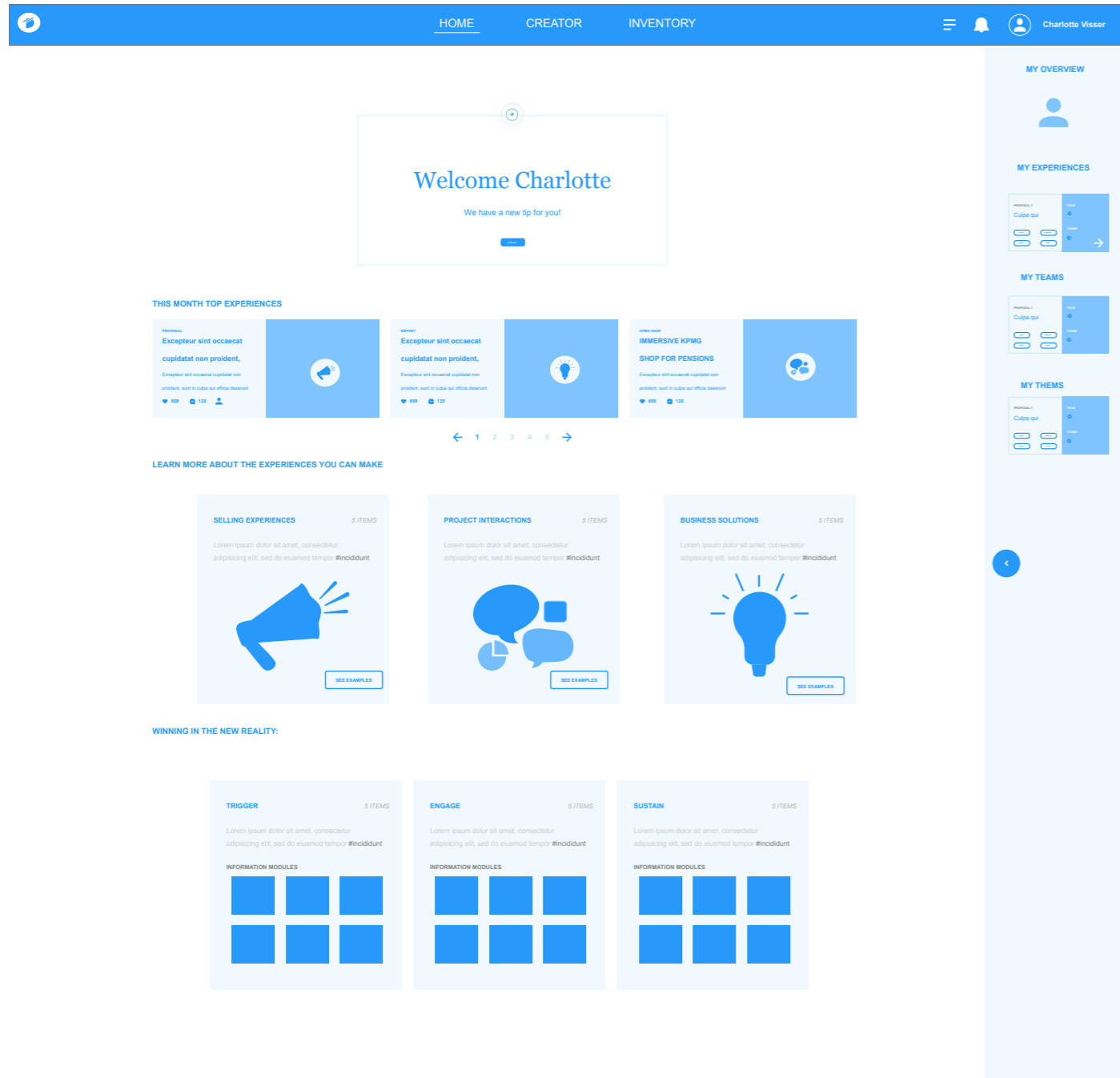
CREATING A BUSINESS SOLUTION



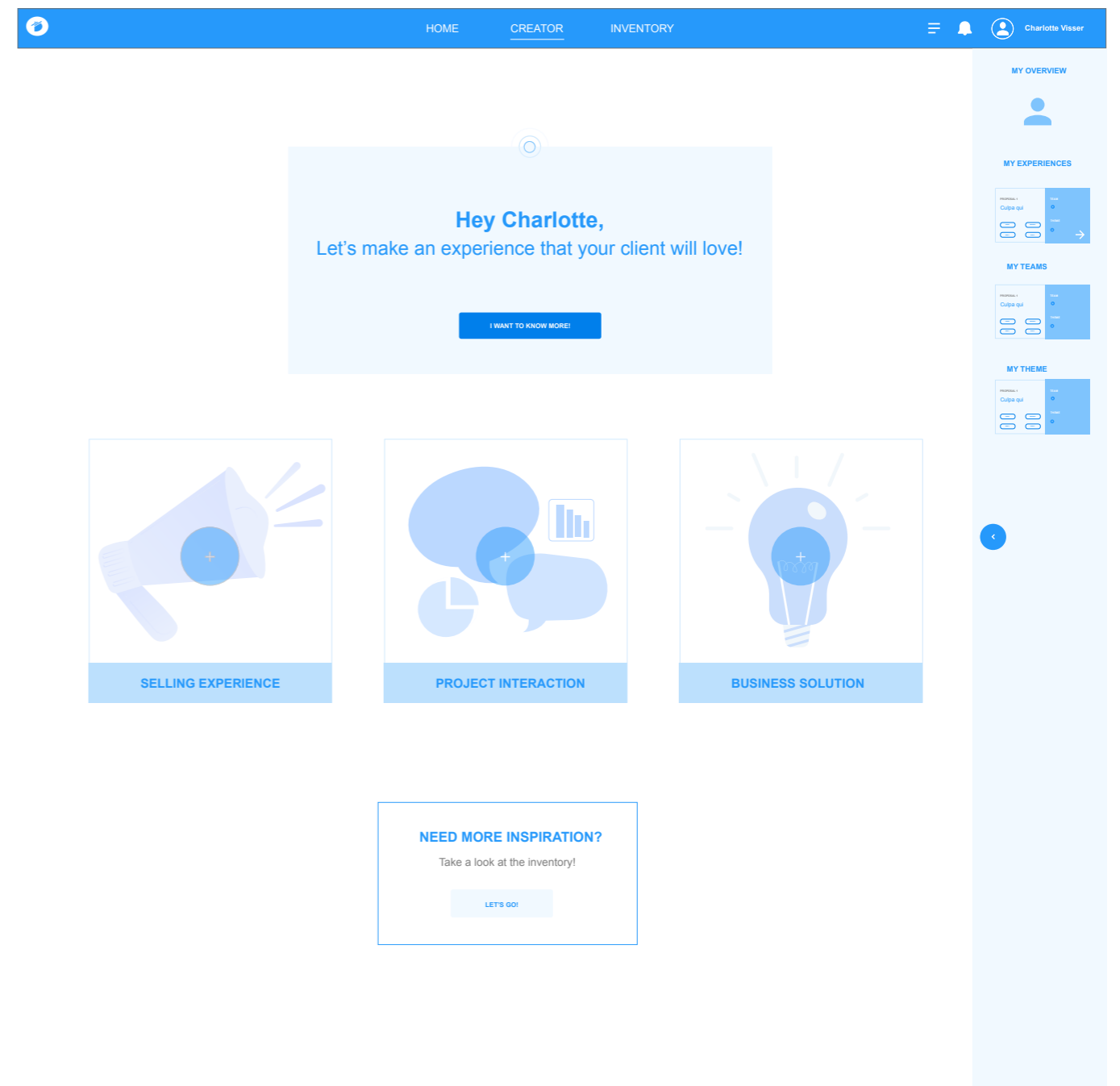
CREATING A PROJECT EXPERIENCE



HOME PAGE

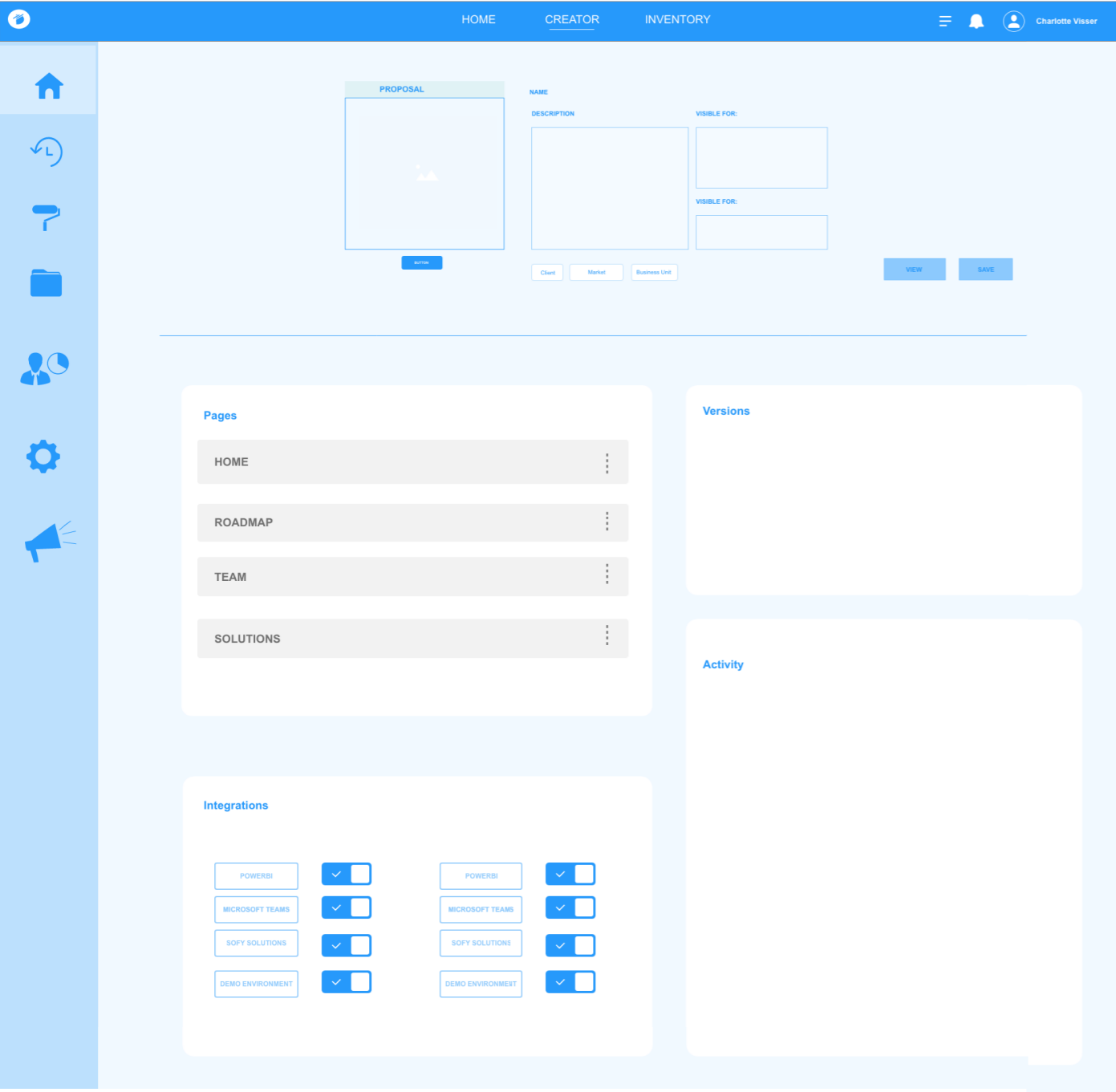


SMART CREATOR



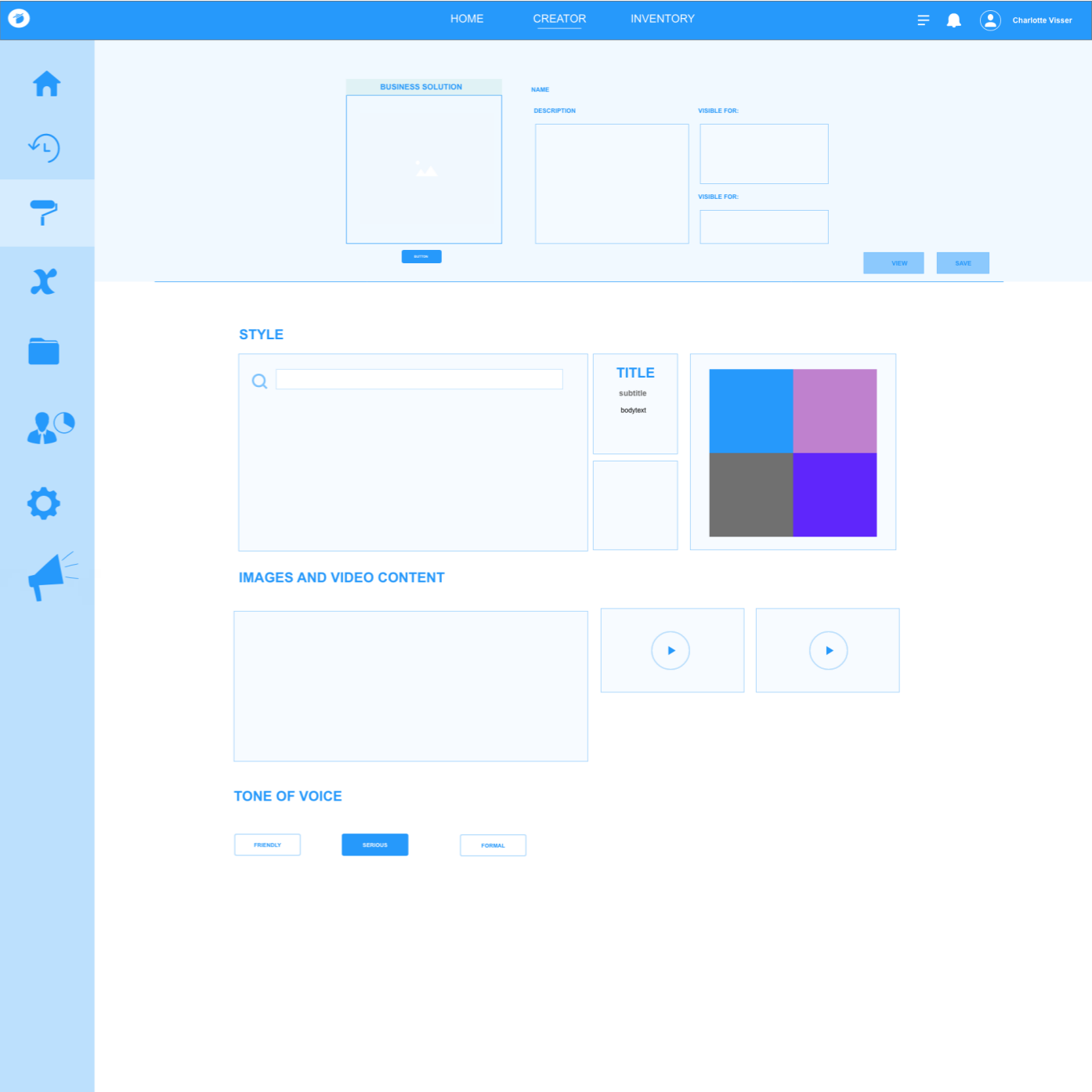
SMART CREATOR

integrate technologies



SMART CREATOR

Personalize the experience



SMART CREATOR

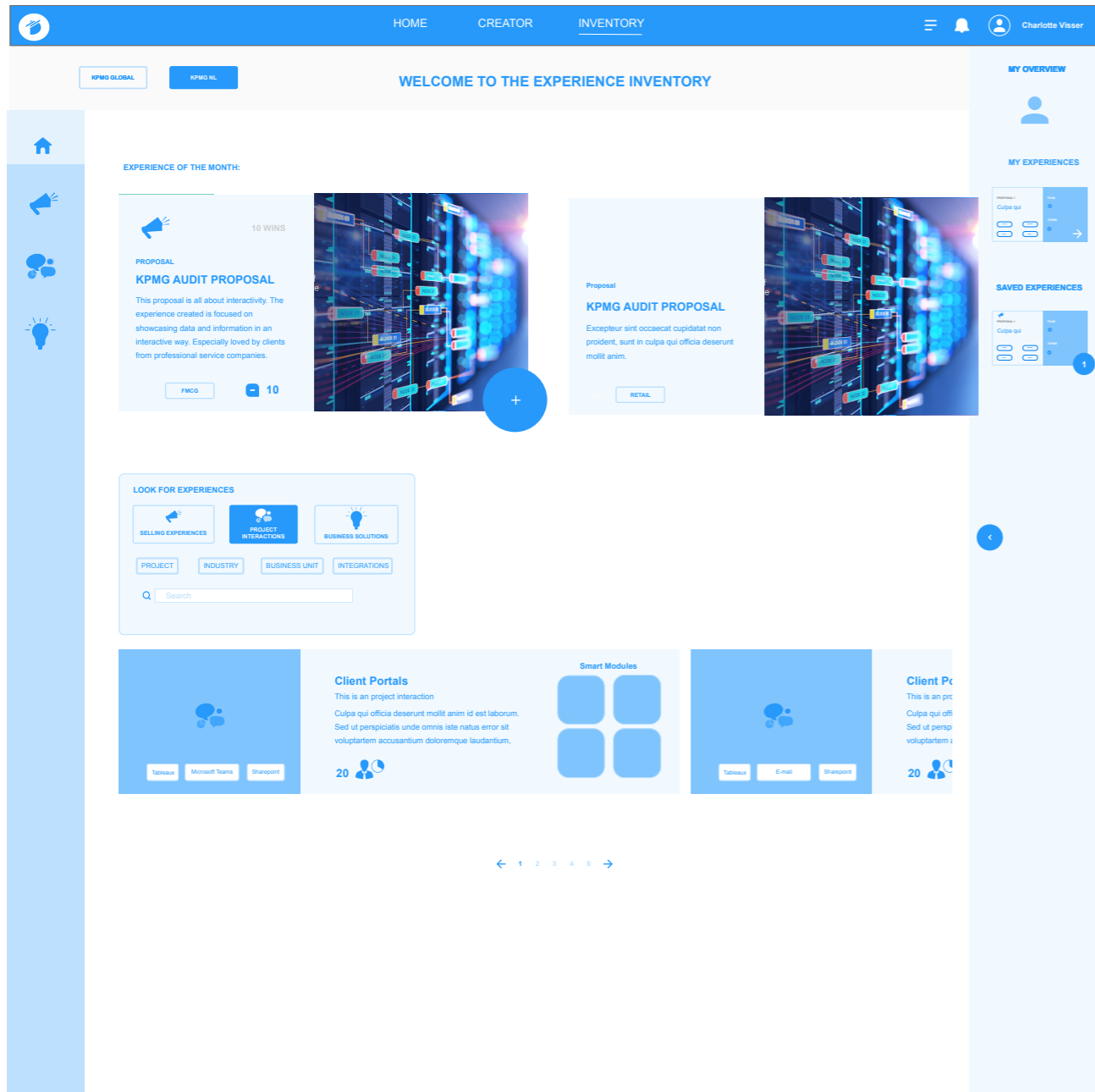
The interface for page 58 features a blue header with navigation tabs for HOME, CREATOR, and INVENTORY, and a user profile for Charlotte Visser. A vertical sidebar on the left contains icons for home, undo, redo, folder, and notification. The main content area includes a 'PROPOSAL' form with fields for NAME, DESCRIPTION, and VISIBLE FOR, and buttons for VIEW and SAVE. Below the form are three sections: 'CLIENT INTERACTION' with a score of 4.33 and a line graph; 'CLIENT FEEDBACK' with two entries for Heineken (John Repo and Rosa Haas) and a Salesforce logo; and 'WON/LOST' with a trophy icon and a feedback box.

SMART CREATOR

The interface for page 59 features a blue header with navigation tabs for HOME, CREATOR, and INVENTORY, and a user profile for Charlotte Visser. A vertical sidebar on the left contains icons for home, undo, redo, folder, and notification. The main content area includes a 'PROPOSAL' form with fields for NAME, DESCRIPTION, and VISIBLE FOR, and buttons for VIEW and SAVE. Below the form are two sections: 'ENGAGEMENT FINDINGS' with a search bar, a list of 'PROPOSAL AMERICA' items, a score of 4.33, and a line graph; and 'CONTACT MARKET EXPERTS' with two expert profiles: Philip Mansholt (Marketing Digital KPMG) and Claartje Vriends (Sales Expert).

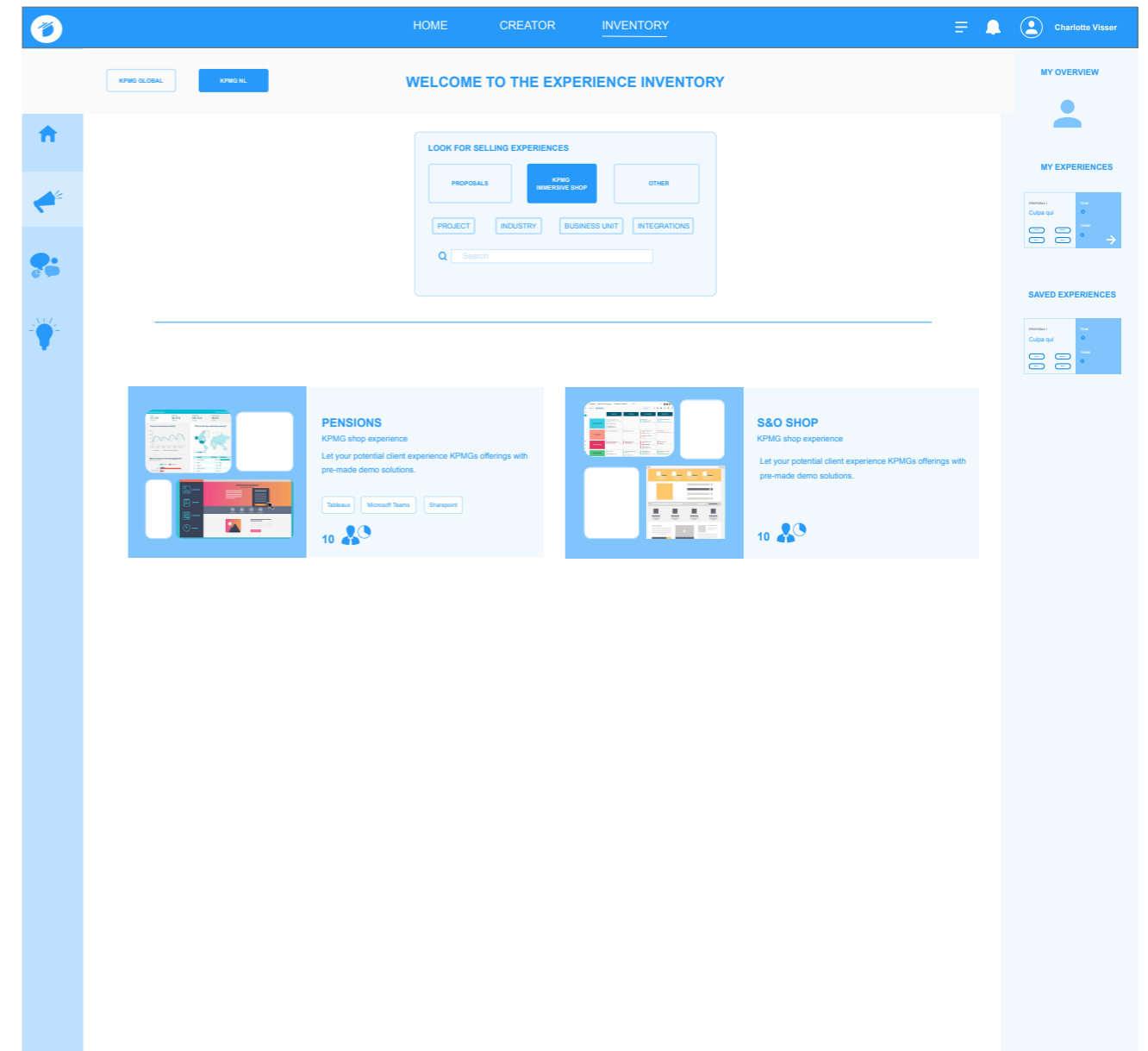
DIGITAL INVENTORY

Overview inventory



DIGITAL INVENTORY

Selling section

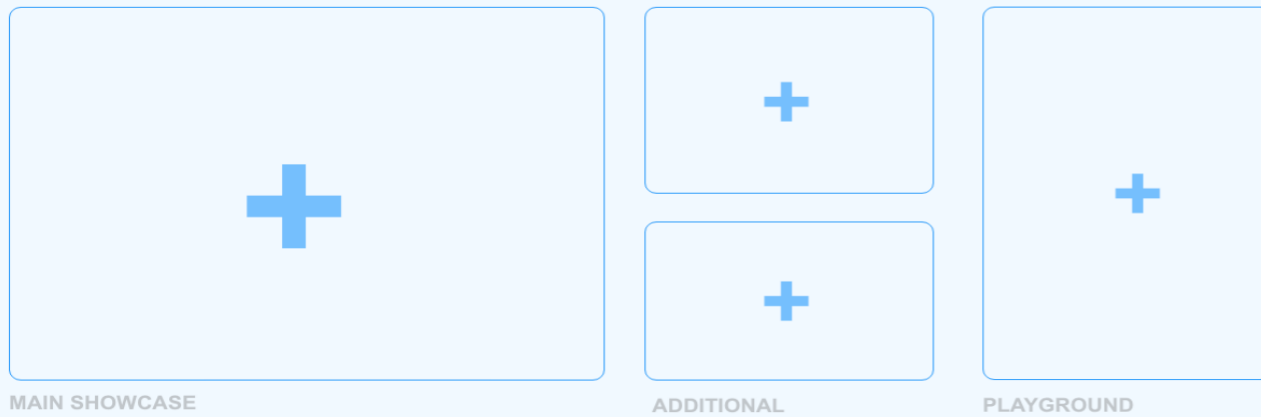


FUTURE IMMERSIVE EXPERIENCES

The KPMG shop

IMMERSIVE SELLING EXPERIENCE : KPMG'S SHOP

SOLUTIONS TO SHOWCASE:

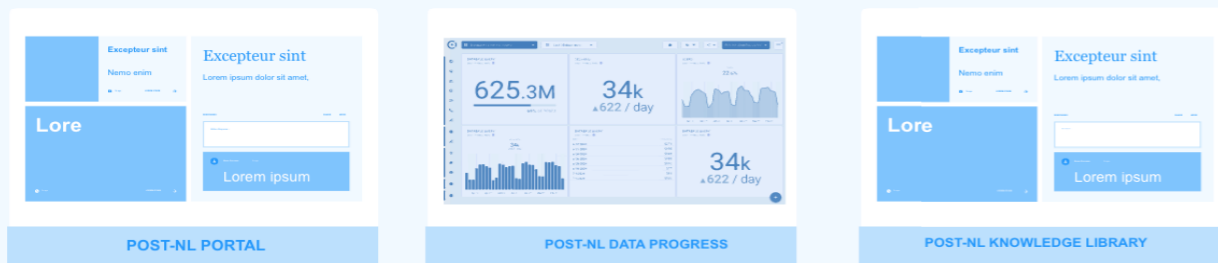


MAIN SHOWCASE

ADDITIONAL

PLAYGROUND

EXISTING SOLUTIONS



POST-NL PORTAL

POST-NL DATA PROGRESS

POST-NL KNOWLEDGE LIBRARY

← 1 2 3 4 5 →

ACTIVATE INTEGRATIONS

- POWERBI
- MICROSOFT TEAMS
- SOFY SOLUTIONS
- DEMO ENVIRONMENT

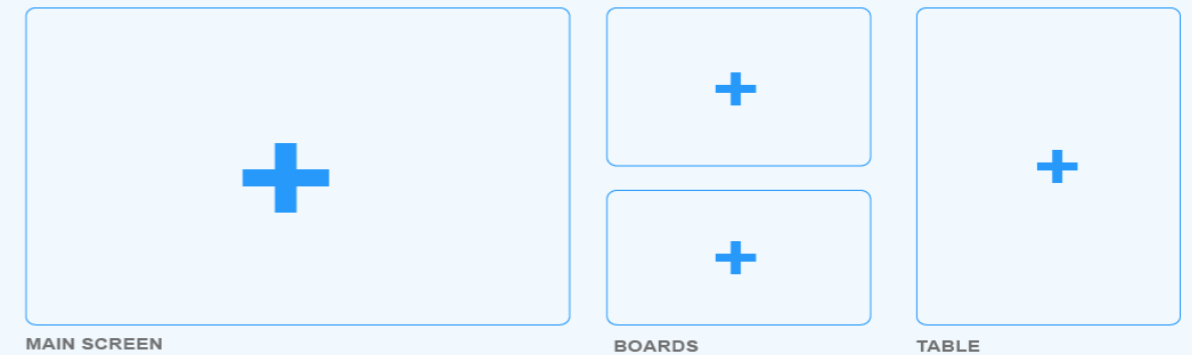


FUTURE IMMERSIVE EXPERIENCES

The KPMG shop

HYBRID EXPERIENCE

HYBRID PROJECT EXPERIENCE



MAIN SCREEN

BOARDS

TABLE

CONNECT CLIENT EXPERIENCES



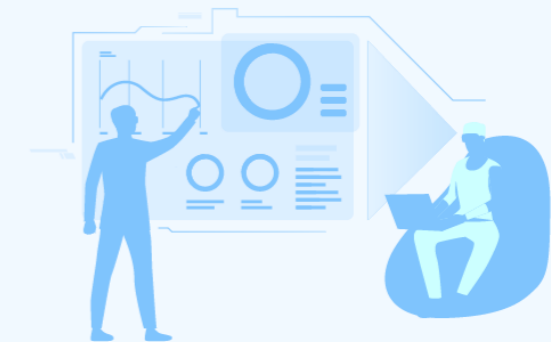
POST-NL PORTAL

POST-NL DATA PROGRESS

POST-NL KNOWLEDGE LIBRARY

ACTIVATE INTEGRATIONS

- POWERBI
- MICROSOFT TEAMS
- SOFY SOLUTIONS




← 1 2 3 4 5 →

THE FEEDBACK BUTTON

KPMG

HOME INTRODUCTION TEAM OFFER



Welcome <Client>,
proposal
15/02/2021

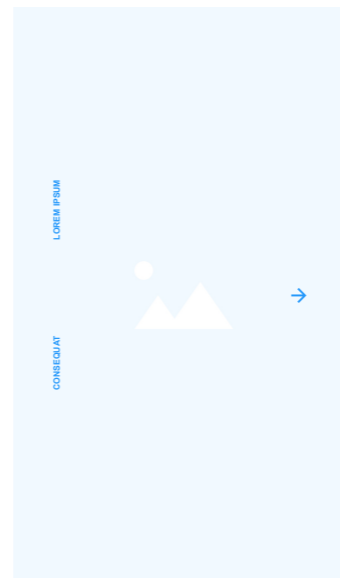
Excepteur sint occaeuiecat cupidatat.

Culpa qui officia deserunt mollit anim id est laborum. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi roepior architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eosque qui dolorem ipsum quia dolor srit amet, consectetur adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat iope voluptatem.

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"Excepteur sint occaeecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. Sed ut perspiciatis unde omnis iste natus error sit voluptatem."




KPMG


CONTACT

Name Surname Co-Founder & CTO

Name Surname Co-Founder & CTO

Feedback 

© KPMG 2021

Feedback 

Feedback

How would you rate your experience?

1 2 3 4 5

Do you have any additional comment?

Please enter here..

NEXT

Feedback

This experience supports me in finding information

1 2 3 4 5

Do you have any additional comment?

Please enter here..

NEXT

Feedback

I am inspired by this experience

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Feedback

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Thank you so much!

