



September 14, 2011

Market Overview: Global Business Continuity Consultancies, Q3 2011

by Stephanie Balaouras
for Security & Risk Professionals



September 14, 2011

Market Overview: Global Business Continuity Consultancies, Q3 2011

A Growing Number Of Consultancies Provide Mature BCM Services Worldwide

by **Stephanie Balaouras**
with Chris McClean and Lindsey Coit

EXECUTIVE SUMMARY

When anxious executives demand that you improve business continuity (BC) preparedness across the enterprise, it's likely that you'll need help. Most BC management (BCM) teams consist of just a few dedicated corporate resources and one representative within each region or business unit. Chances are good that you're understaffed to begin with, so allocating sufficient time to refresh business impact analyses and risk assessments globally may not be possible. What's more, the skills and expertise required to stay on top of key trends, industry best practices, and the latest technologies are difficult to come by. To address these challenges, many Forrester clients turn to consultancies to help them revitalize their BCM programs. This market overview examines a mature landscape of management consultancies, traditional IT outsourcers, technology providers, and IT service providers, all of which compete to provide BCM consulting services on a global scale for large, complex enterprises.

TABLE OF CONTENTS

- 2 **Urgency And Complexity Drive Adoption Of BC Consulting Services**
- 3 **Ten Key Criteria Make Up The Global BC Consultancy Landscape**
- 7 **Vendors Focus On Either Enterprise Risk Or Technology**

RECOMMENDATIONS

- 14 **Prioritize Existing Relationships, Then Choose Between Risk And IT Expertise**
- 15 **Supplemental Material**

NOTES & RESOURCES

Forrester interviewed 26 vendor and user companies, including Accenture, CSC, Deloitte Development, EMC, Ernst & Young, Forsythe Technology, HP, IBM BCRS, KPMG, PricewaterhouseCoopers (PwC), SunGard, Verizon Business, and Wipro IT Business.

Related Research Documents

["Market Overview: Business Continuity Management Software, Q2 2011"](#)
May 26, 2011

["Business Continuity And Disaster Recovery Are Top IT Priorities For 2010 And 2011"](#)
September 2, 2010

["Forrester's Business Impact Analysis Template"](#)
July 23, 2010

URGENCY AND COMPLEXITY DRIVE ADOPTION OF BC CONSULTING SERVICES

According to Forrester's Forrsights Budgets And Priorities Tracker Survey, Q4 2010, 27% of enterprises say that significantly upgrading disaster recovery and business continuity capabilities is a critical priority, while another 41% say it's a high priority.¹ There are a number of factors driving this prioritization, including executives' diminishing tolerance for downtime, an increasing number of government and industry regulations that directly or indirectly call for BC preparedness, and rising demands for proof of preparedness from partners and customers.² And on top of all these trends, a string of devastating natural disasters such as the March 2011 earthquake and tsunami in Japan put a spotlight on some of our biggest concerns and our desire to prevent against both economic and personal loss.

With this broad sense of urgency for better BC/DR and emergency preparedness, the number of clients seeking consultancies to assist in these areas is on the rise. Additionally, there are changes in the business landscape that help make the case for enterprises seeking external guidance. Some of these changes are:

- **Partners within growing third-party ecosystems rarely participate in planning and testing.** Large enterprises have hundreds of third-party relationships, from outsourcers to hosting service providers to cloud providers. In fact, cloud providers will exacerbate this situation as many business leaders bypass IT altogether. Many clients tell us that they have not validated the resiliency of partners or included them in BC planning and testing.
- **Business processes span locations, yet BC plans address only headquarters and data centers.** There is an increasing distribution of critical IT applications, data, and services across geographies (e.g., North America, South America, EMEA, Asia Pacific) as well as enterprise locations (e.g., headquarters, data centers, remote sites, laptops). In many cases, IT doesn't back up critical data at remote sites or on endpoints such as laptops, and the broader BC team doesn't take these sites and systems into account during planning.
- **BC plans that address only critical applications may fail to address hundreds of others.** Today's complex business processes rely on multiple interdependent applications, sometimes hundreds or even thousands of them. Business owners can no longer identify the critical applications that support their process. Even IT doesn't understand all the application interdependencies. As a result, BC/DR managers focus BC plans on recovering a subset of all applications, not the end-to-end business process.

Consultancies can provide the scale, expertise, and methodologies to address these complexities and help you roll out a consistent, formal BC/DR program.

TEN KEY CRITERIA MAKE UP THE GLOBAL BC CONSULTANCY LANDSCAPE

In every region of the world, you will find dozens of BC consultancies. The *Disaster Recovery Journal* lists more than 831 vendors in its Disaster Recovery/Business Continuity Planning & Consulting catalog.³ Some consultancies focus on one particular phase of the BCM planning life cycle or on a particular industry. Some can consist of hundreds of professionals; others just a handful. There are good reasons to select small or niche firms, including cost, customer service, and industry focus. However, if you're responsible for BC/DR in a large enterprise, you most likely want a consultancy that can support the entire BCM life cycle on a global scale.

Five Fundamental Capabilities Are Common Across All BC Consultancies . . .

You don't always need to hire a consultant to help you with every phase of the BCM life cycle, but it's best to hire one that has the capabilities to support you from start to finish if necessary — it demonstrates a breadth of understanding for how each piece of the puzzle fits with the others, so there's more focus on consistent, practical processes. When evaluating comprehensive BC consultancies, Forrester defines five fundamental capabilities they all should possess (see Figure 1):

- **Business impact analyses, to catalog your critical assets and processes.** BIAs sound straightforward — you identify your critical business processes, map all the dependencies, quantify the impact of a disruption, and define your recovery objectives. However, they're far from simple. You have to make tough decisions like whether to measure business impact by process horizontally across your enterprise or more vertically by geographic region — or more likely a combination of both. In addition, you have to decide the best way to address an ecosystem of possibly hundreds of third-party relationships and thousands of applications. Consulting firms that draw from a large global pool of specialists can help guide these decisions.
- **Risk assessments, to identify and measure potential disruptions.** To perform an effective risk assessment, it helps to have a defined risk taxonomy so that you don't overlook a potential risk to the business in your planning. Identifying the risks is challenging by itself, but then accurately determining its probability and impact to the business is even more challenging.⁴ Consultancies have well-defined risk taxonomies that they continue to refine project after project. Their prior projects often help them build knowledge of certain risks by industry as well as by geography. Finally, you should also expect your consultants to augment their knowledge with field interviews — interviewing local first responders and local government officials to understand the history of disruptions in the area.
- **Strategy and plan development, to align efforts with objectives.** In addition to covering how you will address identified risk scenarios, your overall BCM strategy should include how you plan to institute and manage the BCM program itself. To which department will it report, for example; how many staff will you need; will you manage it centrally or regionally? Consultancies can do more than help you with these straightforward strategies for business,

workforce, and IT continuity — they can also help you think outside the box. This means that strategies they develop with you could leverage the latest in cloud services, alternative staffing models, or other innovations.

- **Testing, to provide assurance your plan will function.** If you're not testing, your efforts are worthless. Without testing, you have no way of knowing whether your plans are effective and whether your actual recovery objectives match expected objectives. In addition, testing is one of the most important means of training and awareness. Companies that have invoked their BC plans report that lack of training and awareness is one of the most important lessons they learned.⁵ Consultancies can help you design a test strategy by defining the types of tests you should run and how frequently you should run them. They can also define the test objectives, manage the tests, and debrief the results for each test.
- **Maintenance and ongoing support, to account for changes in the business and risk profile.** Business continuity is not a one-time planning event, it's an ongoing program. Your BIAs and risk assessment need to be updated every one to two years, or more frequently if there are significant changes in your business or the business' risk profile. Ideally, you should keep your plans up-to-date continuously as the business and IT environment changes. You should conduct tabletop exercises quarterly and more extensive tests once or twice each year. It can be helpful to have a consultant on staff as a "resident" — someone to increase your staff but also to provide knowledge transfer and best practices.

... So BC Managers Can Focus On Five Differentiating Capabilities

Beyond its ability to support the core BCM life cycle, you may want a consultant who can help you implement a specific tool or technology, develop dashboards and metrics that actually matter to the business, or prepare for a particular BCM certification. In addition, depending on the scale and the geographic distribution of your enterprise, you'll want a consultancy with not only broad global experience but also expertise in the specific geographies where you operate. When evaluating comprehensive BC consultancies, Forrester defines five differentiating capabilities they all should possess (see Figure 2):

- **Technology partnerships, which mean implementation capabilities.** So your consultancy has helped you perform BIAs and risk assessments across the enterprise, and they've even outlined key strategies that you should employ for business, workforce, and IT continuity. Now what? Many of these firms are just management consultancies and don't actually implement any of the technology solutions or services that you need to support your program. They will kindly (for a fee, or course) *project manage* the implementation. To successfully do this, they should have a good understanding of the vendors' technology and they should have strategic relationships in place with these vendors.

- **Reporting and metrics expertise, which help communicate BC/DR to the business.** It's easy to define operational metrics such as the number of business processes covered by plans, the number of risks mitigated by plans, and the number of plans updated. It's more difficult to define the business- and executive-level metrics that convey the overall risk posture of the enterprise and the effectiveness of the program. Some of the more mature consultancies have built strong reporting frameworks that can help you translate complicated BC/DR data into metrics the business cares about.
- **Certification, audit, and assessment services, which provide program assurance.** There's a slowly growing interest in BC-related certifications such as BS 25999. Although consultancies don't actually award the certification, they can prepare you for a certification assessment. They can also prepare you in advance of internal or external audits and benchmark your program relative to your industry peers.
- **Staffing levels and expertise, which reflect the depth of services.** This is obviously one of the driving factors for hiring a consultancy — you want their expertise. You want a consultancy with dedicated BC consultants with at least eight to 10 years of experience in the field. Individual certifications from groups such as the DRI International (DRII) and the Business Continuity Institute (BCI) indicate strong knowledge of the fundamentals, but they should not be a substitute for on-the-job experience.
- **Global capabilities and reach, which reflect the breadth of services.** Business processes and services span geographies. Whether you're looking at research and development functions, your order-to-cash processes, or customer support services, to perform local BIAs and risk assessments, it's critical to have local input from all your locations. Consultants may be able to help by doing work remotely or reallocating staff from other geographies, but ideally, they will be able to provide local BC-related knowledge (particularly an understanding of local risks) and cultural knowledge required to put information in its proper context.

Figure 1 Fundamental Consulting Capabilities

Criteria/ technology	Business or IT problem solved
Business impact analysis (BIA)	The consultancy can help you complete a BIA across a globally distributed enterprise using their proven methodologies, tools, and workshops. After the BIA, you should understand your business processes, dependencies, and recovery/resiliency requirements. These services are particularly helpful not only for global enterprises but complex enterprises — those with a large number of divisions or business units or complex processes.
Risk assessment (RA)	The consultancy can help you identify, analyze, and evaluate the risks to your business in a structured manner using an established risk framework and risk taxonomy. Ideally, the consultancy will help you quantify the probability and the impact of the risk so you can prioritize which risks to mitigate and which you will accept.
Strategy & plan development	Once you understand your business requirements, dependencies, and most probable, high-impact risks through the BIA and RA, you have to develop mitigating strategies and actionable plans should the risks transpire. The consultancy can help you develop strategies and document plans that encompass people, processes, <i>and</i> technology solutions. Strategy also encompasses how you will organize and govern your BC management program across the enterprise on an ongoing basis.
Testing	If you don't test, all your plans are useless. Testing helps you validate your capabilities and ensure that everyone is comfortable with their roles and responsibilities. The consultancy can help you create your overall test strategy, develop test methodologies, define test objectives and scenarios, schedule tests, manage the execution of tests, and debrief after the test. This includes tests such as walkthroughs, tabletop exercises, simulations, and actual failovers.
Maintenance & support	BC planning is not a one-time event, it's an ongoing program. You will need to regularly update BIAs and risk assessments, continuously update plans, and test several times a year. A consultancy will provide knowledge and tool transfer during the engagement and offer continuing support services in the form of co-sourcing or full outsourcing.

59372

Source: Forrester Research, Inc.

Figure 2 Differentiating Consulting Capabilities

Criteria/ technology	Business or IT problem solved
Technology/ SI partnerships	Many enterprises want not only a consultancy that can provide services as it relates to program management, strategy, processes etc., but a consultancy that can actually oversee the deployment and integration of technology as it relates to automated communication and technology recovery services.
Reporting & metrics	Once you've established your BC management program, you need to manage its effectiveness, report on the overall preparedness of the organization to steering committee members and executives, and easily respond to auditors and third parties when asked for proof of preparedness. A consultancy can help you build the appropriate metrics at every layer — operational, managerial, and executive.
Certification, audit & assessment services	With global recognition of industry standards such as BS 25999 or NFPA 1600 in the United States, a growing number of enterprises want to understand how their programs stack up against these standards. Consultancies can help you prepare for certification to these standards. They can also help you respond to audit requests from internal and external auditors and other third parties.
Staffing levels & expertise	BC requires significant expertise in both program management, key processes like business impact analysis, risk analysis, strategy and plan development, as well as testing. Consultancies can provide that expertise as well as the scale to do this for a large enterprise. Certifications such as CBCP/MBCP/CBCI or CBCA/CBCLA, etc. are a good indicator of essential skills but also demonstrate the consultancy's commitment to developing its resources and BC practice.
Global capabilities and reach	If you have global operations and want to establish consistency across those operations, you'll need a consultancy with staff in North America, EMEA, APAC, etc. Having local staff and local "centers of excellence" in particular regions demonstrates not only a commitment to the region but a knowledge of its unique risks as well as cultural considerations.

59372

Source: Forrester Research, Inc.

VENDORS FOCUS ON EITHER ENTERPRISE RISK OR TECHNOLOGY

There are four broad categories of vendors: 1) management consultancies; 2) traditional IT outsourcers; 3) technology providers; and 4) IT service providers. Most often, the choice is between vendors that provide broad enterprise risk management expertise and are technology-neutral and those that can provide targeted BC consulting services as well as IT implementation services. More specifically:

- **Management consultancies provide holistic risk analysis.** Traditional management consulting firms, such as Deloitte, Ernst & Young, KPMG, and PwC, have strong skills in enterprise risk management (ERM) and BCM. In most cases in fact, their BCM practice is a subset or subgroup within their broader ERM practice. These firms do a much better job of considering all the risks to your business, not just IT risks and not just the obvious natural or human-made risks. However, with one or two exceptions, they don't provide implementation or configuration of any IT products. Instead, they work with your technology vendors to provide guidance and project management for these implementations (e.g., for backup, replication, data center failover, etc.).

- **Integrators and outsourcing firms build upon their in-depth client knowledge and expertise.** Vendors such as Accenture, CSC and Wipro translate their expertise in managing clients' IT operations and physical data centers to offering their own in-depth guidance in both BC management and IT continuity. For clients that already rely on these vendors for other services, the vendors' existing knowledge of their environment, coupled with their technical expertise and overall BC know-how, makes them ideal for clients that need to rapidly improve their BCM program.
- **Technology and service providers complement technical depth with targeted BC consulting.** Operating as distinct units within massive IT system vendors, IBM Business Continuity & Resiliency Services and HP Services are leading DR providers. They know your platforms, they run your tests, and in many cases, they're the ones standing beside you when you actually have to invoke one of your plans. Likewise, EMC's storage and replication technology has been central to many DR solutions for years. EMC has been integrating this technology for years as well, and EMC is building on this foundation with a growing consulting group. IT infrastructure integrator Forsythe has arrangements with every major IT vendor, and with this broad technology knowledge has established a sizable and experienced BC consultancy. These consultants can take you from planning to actual technology selection and implementation.
- **Hosting and service providers offer a broad range of consulting and IT related services.** Vendors such as Verizon Business and SunGard Availability Services host, and in most cases, manage, your critical IT systems, and they are rapidly developing a range of cloud services as well. Like the traditional outsourcers, firms that manage and have in-depth knowledge of clients' IT environments find it logical to also offer consulting services to aid in the availability and continuity of that IT environment. Both of these vendors have a strong history in providing BC and DR-related services. In the future, you can expect other telecommunication vendors, hosting providers, and cloud providers to also invest in their BC consulting offerings.

Vendor Overview

While there are countless vendors offering BC consulting services, we've included a selection of vendors with global capabilities and mature services that are worth noting (see Figure 3):

- **Accenture.** Accenture offers full-service BIA capabilities using product vendor solutions and custom-developed solutions, including questionnaires, surveys, interviews, and workshops. The company has an assessment framework to evaluate risk in a structured manner, and it leverages insight from its Global Delivery Network for geographic best practices based on local threats and historical events. For strategy development, Accenture can also draw upon specialists within the company for supply chain, order management, revenue generation, and human resource management. For implementation, the company has relationships with all the major service system vendors and has a standard approach to implementation called Accenture

Delivery Methods (ADM) for all system integration deployments. Accenture can also assist with ongoing maintenance and support, testing, dashboard creation, and preparation for certification. The company has several hundred dedicated BC professionals located primarily in North America, Europe, and Asia Pacific.

- **CSC.** CSC uses LDRPS BCM software to deliver a standardized approach to BIA and risk assessment processes. CSC consultants draw on their experience to customize their BIA offering for certain industries (financial services; health services; technology and consumer; chemical, energy, and natural resources; aerospace and defense; US government) and to update the risk taxonomy based on previous engagements. They provide basic BC strategy and planning services today and are expanding their crisis management services. CSC is closely aligned and involved in major US government preparedness initiatives such as the National Level Exercise and the National Incident Management System. As a technology outsourcer and integrator, the firm has strategic alliances with all the major system vendors and manages approximately 350 DR tests annually, using an ISO 9001 testing methodology. Standardizing on LDRPS gives CSC the ability to develop additional service offerings based on the tool's broad capabilities, particularly in areas beyond IT such as vendor management. The firm has more than 100 dedicated BC consultants spanning North America, EMEA, Asia, Australia, and India.
- **Deloitte.** For both the BIA and the risk assessment processes, Deloitte has a highly standardized approach that it calls its "Enterprise Resilience Methodology." Consultants use this methodology to evaluate credible risks, critical business processes, internal and external dependencies, and supporting technologies to determine the requirements for resilience. When complete, they use their BETH3 (Buildings, Equipment, Technology, Human Resources and 3rd Parties) Total Asset Protection (TAP) resilience framework and methodology to design and build mitigation, redundancy, and response strategies. For ongoing maintenance and support, Deloitte offers its Total Program Management (TPM) service. The TPM service is a complete outsourcing or strategic co-sourcing of some or all of an organization's BCM activities from exercising and testing to BIA and strategy refreshes. Deloitte is not a certifying body; however, it has representation on many of the standards-setting and certification organizations and can help clients align with BS 25999, NFPA 16000, ISO standards, NIST, and industry-specific requirements. Deloitte is strong on innovation; it recently launched its Bamboo application so that clients can centrally manage incidents via mobile devices. Deloitte has the largest number of dedicated BC professionals of any vendor in this study as well as the broadest geographic reach and presence.
- **EMC.** EMC offers both BIA and risk assessment services with an information-centric approach. For strategy and plan development, EMC has a 10-step BC methodology encompassing business resilience planning, crisis/emergency communication, workforce continuity, manual workarounds and process recovery, as well as evaluation of technology alternatives. With EMC's

acquisition of Archer Technologies, the company now has the ability to integrate a GRC tool set with these services. Generally, EMC excels and focuses on “IT enabled business processes” as opposed to addressing processes and risks outside of its core strength as a technology vendor. However, as an IT technology vendor, EMC provides comprehensive IT services for business continuity, disaster recovery, and related disciplines, including security and compliance. The company also offers ongoing maintenance and support for annual health checks or residencies. As part of a “Managed Availability Services” offering, which provides long-term BC program management services, EMC offers comprehensive BC program metrics and reporting. Of the more than 14,000 professionals in EMC Global Services, more than 1,500 are business continuity practitioners.

- **Ernst & Young (E&Y).** The E&Y BIA offering involves interactive discussions with executives to properly scope the effort and confirm business-critical functions. The firm’s consultants conduct BIAs using an approach that involves facilitated workshop sessions to supplement survey questionnaires. For the risk assessment, they use an in-house tool to identify exposures that can adversely affect the business in numerous domains including geographic location, infrastructure, utilities, and data centers. Based on the gaps identified in the BIA and the findings from the risk assessments, they help clients develop strategies and plans that address people, process, and technology. They also assist with the plan maintenance through testing (planning, execution, debrief, etc.) and through reviews of BC program documentation. E&Y offers several support services, including education, staff augmentation, post-disaster assessment, annual maturity model assessment, and program refresh for areas such as BIA and BCP. In most of their support services, they provide periodic executive management reporting including scorecards and dashboards. E&Y has pools of dedicated BCM professionals in all regions (they are all required to maintain certifications). Approximately 40% of staff is located in the Americas, and 20% reside in each of the other three regions. Forty percent of BCM projects are global.
- **Forsythe Technology.** Forsythe offers services for US-based clients with global reach. The company uses a variety of proprietary tools and methodologies, as well as commercial tools available for the BIA, risk assessment, and plan development. Forsythe engagements primarily focus on managing risk within the business context of IT, which is the company’s core strength. Forsythe offers a wide range of advisory services, from IT strategy and service management to data center engineering, and the company has spent more than a decade developing strong partnerships with all the major IT vendors. Forsythe’s consultants support every test type (walkthrough, tabletop exercises, actual failovers, etc.), and their methodology covers details such as establishing alternative sites, addressing server and network compatibility, ensuring post-disaster security controls on email, data backup and recovery, and data loss prevention. Once they help clients build plans, they will go back on a quarterly, semi-annual, and annual basis to update BIAs, plans, and tests. Forsythe does not disclose the number of dedicated BC consultants.

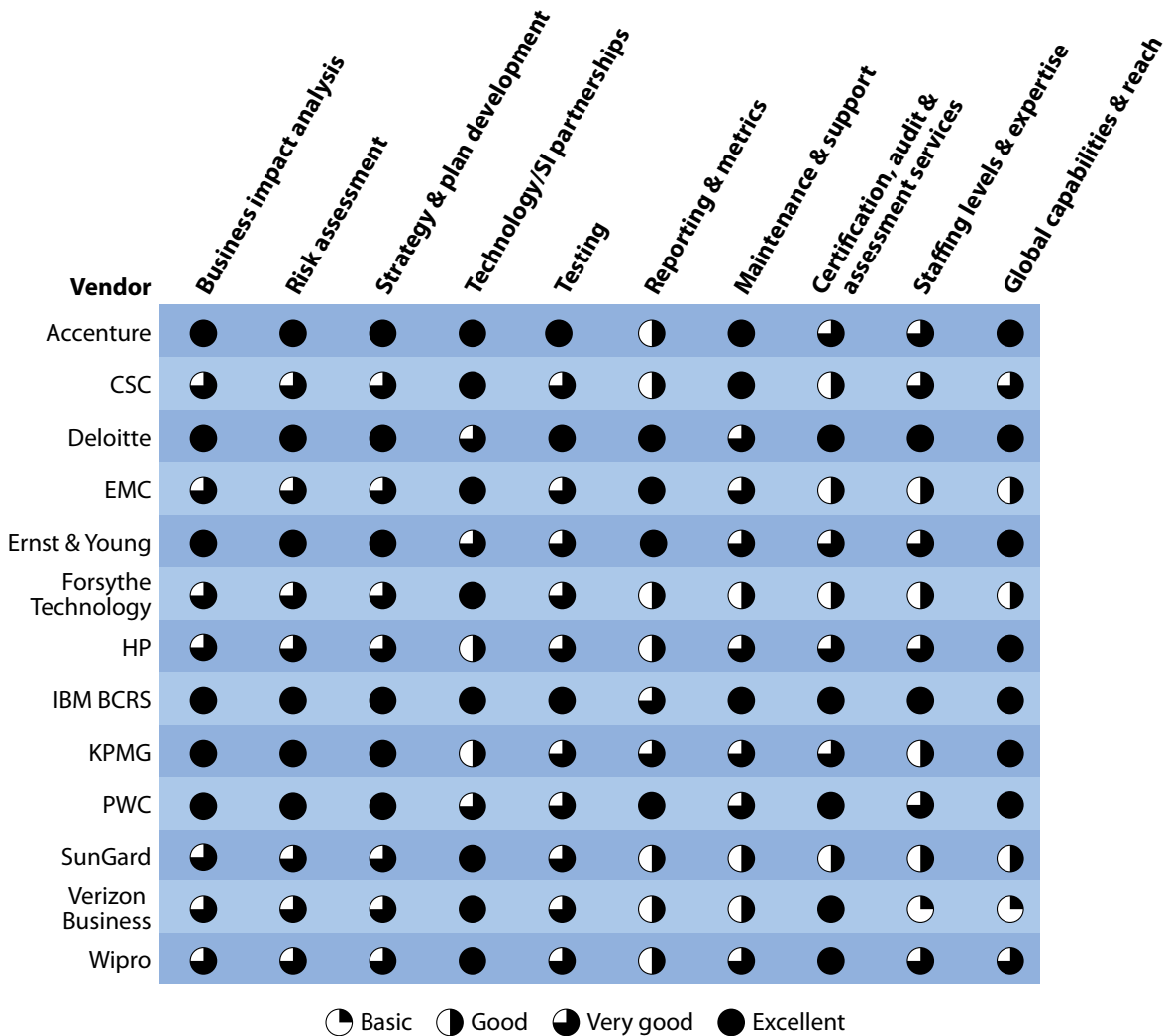
- **HP Services.** HP provides tailored BIA services worldwide for local and global customers, using proprietary tools. For risk assessments, HP's consultants have extensive experience with data center risk assessments but are also capable of assisting with business risks associated with natural disaster, metropolitan incidents, denial of access to business premises, pandemic, and personnel risk. They develop strategies and plans according to best practices such as BS 25999 and ISO 27031. Because the company is one of the major DR services providers, testing is a large area for them. They support all variations of business and IT continuity exercises, ranging from small proof of concept exercises to full-scale data center or site disaster exercises. And like other major consultancies, HP provides services to help companies establish BC or IT continuity programs that clients can manage or that HP can help them manage. The company also provides assessment services for BS 25999, providing a baseline for clients and then reassessing them and reporting on progress each year. HP has several hundred practitioners worldwide that provide continuity consulting services.
- **IBM BCRC.** As a leader in the BC marketplace with 20 years of consulting experience, IBM has mature processes supporting the entire BCM life cycle and excels with large, complex organizations. IBM's BIA offering is built to identify critical service offerings, support business processes and assets, and then assess the business risks and impact through a unique "vertical" and "horizontal" analysis. IBM consultants have a comprehensive threat taxonomy, and their risk method, which they call the "IBM Resilience Framework," looks at six layers of a business from strategy to facilities. For strategy and plan development, they use their "Resilience Strategy Design" and "Resilient Architecture Design" frameworks to create a standards-based architecture that blends continuity, availability, and recovery techniques with security. As employees of the world's largest supplier of technology and software products and services, these consultants have deep implementation skills, and they offer a wide range of support services — they can run your program or provide staff augmentation. Testing is also a major strength; they have several thousand companies that come in twice per year to test with them. They assess clients against their Resilience Maturity Model (RMM) and also help them prepare for certification. IBM boasts several hundred dedicated BC consultants and is a truly global business, with as much consulting business outside the US as inside the US..
- **KPMG.** In its BIA service, KPMG identifies the business processes and recovery objectives, along with dependent applications; it also identifies financial, operational, and regulatory impacts, as well as the dependencies between processes. For the risk assessment, KPMG consultants use a proprietary risk taxonomy, and they've developed a comprehensive risk questionnaire. Their strategies and plans cover both business (crisis management, emergency response) and IT (cold sites, warm sites, hot sites, internal recovery, and external recovery). Testing services include observation, assistance with coordination, and facilitation of the various types of tests (i.e., tabletops, walkthroughs, networks). They will assess clients against their

internally developed maturity model and help develop dashboard reporting for executive-level and in-depth operational reports for steering committees. They can also provide co-sourcing. KPMG has several hundred BC professionals across North America, Europe, and Asia; however, only a small number have industry certifications.

- **PwC.** When performing BIAs, PwC uses its proprietary “Global Best Practices” database to help uncover critical elements of business processes that should be considered for inclusion in the BC program. For risk assessment, the company’s consultants use risk taxonomies built from existing external models, and augmented with their enterprise risk management experience, that are aligned with the client’s industry sector and regulatory environment. For strategy and planning, they use facilitated workshops with client functional teams to discuss strategies for selected scenarios. The strategies typically address remote work ability, manual workarounds, use of alternate service providers, and work transfer to alternate client locations as options to respond to the predetermined planning scenarios. They offer extensive testing, from tabletop scenario tests to multiday, global integrated tests and failovers. They provide assessment services against their maturity model, Organizational Preparedness Assessment (OPA), and ongoing support services as necessary. PwC does not disclose the number of dedicated BC consultants it has on staff, but Forrester estimates that it is a sizable group capable of delivering global engagements.
- **SunGard Availability Services.** For BIA engagements, SunGard offers two approaches: one that focuses on the risks to critical business processes and one that takes more of a risk profile approach. As for risk assessments, SunGard primarily focuses on natural, accidental, and intentional threats. SunGard’s directional strategy development helps clients define their business needs as they relate to organizational readiness, mobilization, communications, and the recovery of the workforce and technologies. For reporting and metrics, SunGard has a comprehensive BCM program that identifies long-term metrics and aids with ongoing measurement and progress. The company does not offer any certification or audit services, although it will provide assessment services aligned to key industry standards to help clients self-identify their strengths and weaknesses against standards and regulations. SunGard has a sizable group of full-time consultants (between 50 and 100) dedicated to business continuity, the majority of whom have industry certifications. The vast majority of the company’s BC consulting clients are in North American (approximately 75%), with the remainder in Europe.
- **Verizon Business.** Verizon offers customized BIA services, which leverage the framework established by BS 25999. For the risk assessments, Verizon consultants use ISO 27001 to identify risks and associated likelihoods, primarily focusing on IT risk. For strategy and plan development for clients, Verizon mainly focuses on facilities planning, crisis management, and supply chain management risk. In terms of partnerships, Verizon relies on its relationships with both hardware and software vendors to meet customers’ needs. These vendors include SunGard, for mainframe and subscription-based recovery, and Varolii, for emergency notification. The company has a relatively small number of full-time consultants globally; however, it has access to subject matter experts from other parts of the organization when necessary.

- Wipro.** For BIA services, Wipro has developed a Business Continuity and Availability Management framework and a Business Impact Analysis framework aligned to ITIL and ISO 27001. Wipro consultants have a proprietary risk assessment methodology based on BS 25999 and ISO 27001 that they customize to their clients' environments. For ongoing maintenance and support, Wipro offers program governance, reporting, compliance management, training and awareness, audits, staff augmentation, periodic testing, and general plan maintenance. Wipro does offer certification services and has helped more than 20 clients with their BS 25999 certifications. Wipro has relationships with technology vendors such as ISF, SunGard (LDRPS), and Archer as well as all the major system vendors. The company has 175 consultants spread across the world — approximately 24% of which reside in North America, with 24% in EMEA, 41% in APAC, and 10% throughout the rest of the world.

Figure 3 Today's BCM Software And Service Market Offers A Wide Variety Of Solutions



RECOMMENDATIONS

PRIORITIZE EXISTING RELATIONSHIPS, THEN CHOOSE BETWEEN RISK AND IT EXPERTISE

In our study of 13 global BC consultancies, we found that all of them had mature services across the BCM life cycle. The main points of differentiation came in the focus (business, technology, or both), technology implementation, industry expertise, and global scale. When evaluating consultancies, you should consider these differentiators in more depth. More specifically, we recommend that you select a consultancy based on:

- **The operational scope of your BC program.** Companies handle BC differently. Some companies have a broad scope and address supply chain management risks, vendor management risks, and human resource risks. Other companies focus BC efforts on location risks and technology risks, with some consideration for human resource risks. Maybe you need a consultancy that can leverage in-depth expertise in enterprise risk management or it's sufficient if a consultancy primarily focuses on technology risk. Select one of the management consultancies when a business perspective and risk expertise are most important. Select from the traditional outsourcers, technology providers, or service providers when managing availability across complex IT environments is your biggest challenge.
- **The geographic scope of your BC program.** This particular study focused on consultancies with a global scale. Most of the consultancies had most of their resources concentrated in North America and Europe with a much smaller percentage in Latin America and Asia. In addition to the number of staff in each of your operating locations, you should know the number of global projects that the consultancy delivers annually, the locations of "centers of excellence," and the percentage of a typical project that they complete remotely.
- **The standards and requirements of your industry.** In heavily regulated industries such as healthcare or energy, it's important that the consultancy have demonstrated knowledge, staff expertise, and reference customers. Increasingly, clients want consultancies to assess their current state not only against industry-accepted best practices but also against comparable peers. They also want to be sure that the consultancy understands and can advise them on the pertinent government and industry regulations that mandate or affect BC strategy and plans.
- **Your implementation requirements.** In today's world, there are few business processes that IT does not enable or support in some way, and with a multitude of new options for improving the resiliency of IT such as next-generation backup and replication technologies, active-active data center site strategies, and cloud services, many clients ultimately require technology implementation after a BC assessment. It's important to understand the role that you want your consultancy to play; many can only project-manage the implementation of technology solutions, they don't actually do it.

SUPPLEMENTAL MATERIAL

Companies Interviewed For This Document

Accenture	IBM
CSC	KPMG
Deloitte	PricewaterhouseCoopers
EMC	SunGard
Ernst & Young	Verizon Business
Forsythe Technology	Wipro
HP	

ENDNOTES

- ¹ Source: Forrsights Budgets And Priorities Tracker Survey, Q4 2010.
- ² Ideally, we should make investment decisions based on rational, objective risk assessments, but unfortunately, all security and risk pros know that's not always how it works. Headline-grabbing catastrophes, pandemics, and security breaches get the attention of senior executives. Impending regulation or the knowledge that they significantly lag behind their industry peers in spending or best practices also gets their attention. See the September 2, 2010, "[Business Continuity And Disaster Recovery Are Top IT Priorities For 2010 And 2011](#)" report.
- ³ Source: *Disaster Recovery Journal* (<http://www.drj.com/vendor-directory.html>).
- ⁴ Enterprise risk management (ERM) programs are helping to break down organizational silos so that executives can gain insight on the risks that may affect all aspects of their business. Unfortunately, this trend is taking a toll on risk managers. It's becoming impossible for them to wield subject matter expertise across a growing number of risk domains, so instead they must be masters of procedural guidance. In the second core step of the risk management process, which the ISO 31000 standard labels "identify the risks," this means developing a comprehensive risk taxonomy, establishing a recurring set of risk assessment techniques, and guiding the documentation of risks in a way that will direct future decisions during the risk analysis and risk evaluation steps. See the January 12, 2011, "[The Risk Manager's Handbook: How To Identify And Describe Risks](#)" report.
- ⁵ Because of the importance of reliable, automated communication, more companies are moving away from manual procedures to automated services. See the June 21, 2009, "[Business Continuity Management People And Communications Trends](#)" report.

FORRESTER®

Making Leaders Successful Every Day

Headquarters

Forrester Research, Inc.
60 Acorn Park Drive
Cambridge, MA 02140 USA
Tel: +1 617.613.6000
Fax: +1 617.613.5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

Research and Sales Offices

Forrester has research centers and sales offices in more than 27 cities internationally, including Amsterdam, Netherlands; Beijing, China; Cambridge, Mass.; Dallas, Texas; Dubai, United Arab Emirates; Frankfurt, Germany; London, UK; New Delhi, India; San Francisco, Calif.; Sydney, Australia; Tel Aviv, Israel; and Toronto, Canada.

For the location of the Forrester office nearest you, please visit: www.forrester.com/locations.

For information on hard-copy or electronic reprints, please contact Client Support at +1 866.367.7378, +1 617.613.5730, or clientsupport@forrester.com.

We offer quantity discounts and special pricing for academic and nonprofit institutions.

Forrester Research, Inc. (Nasdaq: FORR) is an independent research company that provides pragmatic and forward-thinking advice to global leaders in business and technology. Forrester works with professionals in 19 key roles at major companies providing proprietary research, customer insight, consulting, events, and peer-to-peer executive programs. For more than 28 years, Forrester has been making IT, marketing, and technology industry leaders successful every day. For more information, visit www.forrester.com.