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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 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 where 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 on the next pages.

Appendix A.2 Interview Guide

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

<table>
<thead>
<tr>
<th>INTERVIEW GUIDE TEMPLATE</th>
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</thead>
<tbody>
<tr>
<td>Research topic:</td>
</tr>
<tr>
<td>Main research question:</td>
</tr>
<tr>
<td>Checklist for start</td>
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<tr>
<td>- Are you ok with me recording?</td>
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<td>-</td>
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<tr>
<td>Introductory script (optional):</td>
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</tbody>
</table>
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-up/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-up/probes:
- What was the need of the client to initiate this project?
- 
- 

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

The complete interview guide and transcripts can be found on the next pages.
Appendix A.2.2 Transcripts

The transcripts are confidential and available upon request.
**Appendix A.3 Summary internal interviews**

**KPMG’s client-consultant relationship**

- Ad-hoc
- ‘Uurtje-factuurje’
- Personal
- Labor intensive
- Trust is key

Features client-consultant relationship:
- Trust
- Personal and trustworthy connection
- Senses client
- Acquire (Obtaining new clients)
- Excite (Inspire and excite clients to work with KPMG)
- Engage (Client (re)engages through our execution of a project)
- Deliver (Delivering results and answers to the client)
- Maintain (Maintaining a client-relationship after a project)

KPMG’s 3 types of innovation:
- Process digitization
- Adaptation of new digital tools
- Development of digital products to cater to client needs

**Dichotomies**:
- It is not only about changing the business mindset of KPMG, but also that we educate our clients.
- The market will tackle us, and our margins will no longer be competitive.

**Opportunities**
- KPMG uses a lot of standardized processes, using the same processes, making it less personal.
- With technology, the opportunity exists to make your processes more personalized.
- The success or benefits of digitalization are not always as beneficial as people think.
- Currently, the client-consultant relationship is Ad-hoc. We get a question from a client, we solve that question. But if we change this relationship into a continuous relationship, we could potentially provide better service.
- There is a lack of shared understanding of innovation and current digitalization activities within KPMG.
- KPMG needs to change the way of consulting to stay competitive in the changing market.

**Why does KPMG want to innovate?**
- Staying competitive in the market
- Avoiding obsolescence
- Making money
- Preparing for the future, changing the mindset

**Food for thought**: *"You now mainly deliver software solutions next to our standard consulting services. After having been a competitor of an international consultancy service for a long time, KPMG wants to focus more on work that actually brings important insights, so you no longer deliver competitive prices."*

*"What is the one pieces of innovation, and what is the other one not more than digit- alization?"*

*"If you only stick to the traditional consulting in addition with some software solutions, at a certain point in time you no longer provide the "normal" consulting service because you cannot deliver competitive gross margins because your process is too expensive today."*

*"We expect our clients to say "KPMG, please become innovative", but actually the client is expecting you, as a digital consultant, as advisor, to tell them"*

*"We have to focus more on work with our clients "instead of for our clients".*

*"We have big digital webinars on the client journeys, in the future this should be much simpler tools, focusing more on answering the client question."*

**Innovation within KPMG Advisory**

As the relationship with our clients and human insight is viewed important in KPMG, we are in contact with a client several times a week, learning how to better serve our future client challenges before they become everyday matters. To do this, we offer clients the best possible solutions.

---

"The coffee network"

- LinkedIn
- Twitter
- Facebook
- YouTube
- Medium
- Blog

"The coffee network"

Acquire

Engage

Deliver

Maintain

0. Company vision on how consulting and their client relationship will change.
1. The thinking
2. The mindset
3. Brand value KPMG gives security, innovation gives immediate
4. BLinda blending the blind. KPMG expects innovative push but needs to pull
5. How to market targets shortterm policy and strategy
6. KPMG as a small firm, so the question arises. "Shouldn’t KPMG hold for digital innovations?"
7. Technologies are being adopted after they are proven by competitors
8. KPMG strategy of a people driven organization

---

"What are digital tools being used?"

"What uses digital tools and even own products thought their client relationship, hence delivered confidently throughout the company or even projects."

"Which uses digital tools and even own products thought their client relationship, hence delivered confidently throughout the company or even projects."

"Which uses digital tools and even own products thought their client relationship, hence delivered confidently throughout the company or even projects."

"Which uses digital tools and even own products thought their client relationship, hence delivered confidently throughout the company or even projects."

---

**Features client-consultant relationship**:
- Labor intensive
- Personal and trustworthy connection
- Deliver competitive prices anymore because your process is too expensive now.
- Trust is very important.
KPMG’s Current use of digital tooling

Data analytic & Visualization tools:

- **Alteryx Analytics**
  - 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.
  - Specialties: Cloud computing, analytics, Office integration

- **Qlik Sense**
  - The solution allows organizations to combine all their data sources into a single view.
  - Specialties: Dashboards, reporting, visual analytics

- **SAP**
  - SAP offers a broad range of BI and analytics tools in both enterprise and business-user driven editions.
  - Specialties: Predictive Analytics, reporting, dashboards

- **Tableau**
  - 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:

- **Alteryx Analytics**
  - A software package designed to create electronic presentations consisting of a series of separate pages or slides.
  - Specialties: Reporting, visualizing

- **Excel**
  - Excel is used to organize data and perform data analysis.
  - Specialties: Data entry, data management, financial analysis

- **SoFlo 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.
  - Specialties: Data management, platform solution

- **Online tool**
  - 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**
  - 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.
  - Specialties: Sales, CRM, Service, Marketing cloud, additional apps

- **HubSpot**
  - HubSpot is a cloud-based customer relationship management (CRM) platform with Marketing Hub, Sales Hub, Service Hub, and CMS Hub software applications.
  - Specialties: CRM, Sales, Lead management

Project Management Tools:

- **Azure DevOps**
  - A cloud-based collaboration tool to collaborate, chat, call and share documents online.
  - Specialties: Video-conferencing, Online-collaboration, communication

- **Azure DevOps**
  - 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.
  - Specialties: Project development, Agile planning, software development, visualisation

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Appendix A.4
Overview digital tooling within client-relationship

Use of digital tooling within the client-consultant relationship

Client journey
- Communication
- Collaboration
- Sharing
- Client-focused digital tools
- Client touchpoints
- Client-focused consultant activities
- Back-end activities
- Digital tool touchpoints back-end

1. Acquisition
- Acquire
- Excite
- Engage
- Deliver
- Maintain

2. Execution
- Acquire
- Excite
- Engage
- Deliver
- Maintain

3. Retention
- Acquire
- Excite
- Engage
- Deliver
- Maintain

Coffee Network
Public Tenders
Referrals
Landing pages
Events
Co-creation
Meeting
Project Support
Interviews
Collaboration
Presentation
Report
Dashboard
Product
Software solutions
Digital product
Personal

Marketing
Sales
Proposals
Acquire
Excel
Store Data
Analyze Data
Delivering value to the client

Salesforce
HubSpot
SAP
Qlik
Alteryx
Tableau
SlySuite
Power BI
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

Competitor scan 2: Dialogue
B2: Overall market scan on digital tooling
Appendix C
Trend Map

Office of the future

Data as the new gold

Future of CX

Human x Technology

2022 2024 2030
### D1: Participants design iterations

#### Design iteration 1.0

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Function</th>
<th>Field of interest</th>
<th>Why important to Dialogue:</th>
</tr>
</thead>
<tbody>
<tr>
<td>S1.1</td>
<td>Business Innovator, KPMG</td>
<td>Driving innovation and digitization across the KPMG organization, part of the</td>
<td>Horizontal view on innovation efforts across the firm</td>
</tr>
<tr>
<td></td>
<td></td>
<td>horizontal smart tech solutions team</td>
<td></td>
</tr>
<tr>
<td>S1.2</td>
<td>Business Innovator, KPMG</td>
<td>Driving innovation and digitization across the KPMG organization, part of the</td>
<td>Horizontal view on innovation efforts across the firm</td>
</tr>
<tr>
<td></td>
<td></td>
<td>horizontal smart tech solutions team</td>
<td></td>
</tr>
<tr>
<td>S1.3</td>
<td>Head of business innovators, KPMG</td>
<td>Driving innovation and digitization across the KPMG organization, part of the</td>
<td>Horizontal view on innovation efforts across the firm</td>
</tr>
<tr>
<td></td>
<td></td>
<td>horizontal smart tech solutions team</td>
<td></td>
</tr>
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</table>
### D2: Participants design iteration 2.0

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<th>Stakeholder</th>
<th>Function</th>
<th>Field of interest</th>
<th>Why important to Dialogue:</th>
</tr>
</thead>
<tbody>
<tr>
<td>S.2.1</td>
<td>Director digital Assurance &amp; Innovation, KPMG</td>
<td>The Audit &amp; Assurance industry is being disrupted. Weaving new technologies and</td>
<td>Big stakeholder: interested in applying Dialogue within the Assurance unit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>skillssets in the fabric of the industry is essential. At KPMG, together with</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>inspiring colleagues, I have the opportunity to shape the future of audit &amp;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>assurance. People driven progress!</td>
<td></td>
</tr>
<tr>
<td>S.2.2</td>
<td>Partner: Asset Management &amp; Pensions, Leadership Team</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Advisor: Risk &amp; Regulatory Lead, Financial Risk Management Lead, KPMG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>S.2.3</td>
<td>Director of Business Development and Sales, EMA Region, KPMG</td>
<td>Working with multinational teams to develop and effectively implement sales and</td>
<td>Connection to global: interested to get Dialogue on global scale COO markets team :</td>
</tr>
<tr>
<td></td>
<td></td>
<td>business development strategy to enhance client relationships and drive revenue</td>
<td>focused on organizing market activities within the region ; connect people;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>growth. Responsible for a multi-functional team and budget.</td>
<td>coordinate higher initiatives; number of member firms ; responsible for taking on the</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>monitoring of the team</td>
</tr>
<tr>
<td>S.2.4</td>
<td>Director of Sofy Solutions, KPMG</td>
<td>Expertise on Delivering Digital solutions to clients:</td>
<td>Cooperation partner</td>
</tr>
<tr>
<td></td>
<td></td>
<td>KPMG Sofy Suite bundles ready-to-use analytics solutions on a common platform to</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>help clients accelerate their digital ambitions and leverage their data to tackle</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>various business challenges.</td>
<td></td>
</tr>
<tr>
<td>S.2.5</td>
<td>Head of Technology KPMG</td>
<td>Global ambassador Dialogue</td>
<td>Contact with member firms and global technology perspective</td>
</tr>
<tr>
<td>S.2.6</td>
<td>Senior Manager Asset Management Risk &amp; Regulatory, KPMG</td>
<td>Frequent Dialogue User</td>
<td>Responsible for driving digital initiatives within the R&amp;R Business Suit</td>
</tr>
<tr>
<td>S.2.7</td>
<td>Head of business Innovators, smart tech solutions, KPMG</td>
<td>Responsible for the Dialogue product within R&amp;R</td>
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## F.1: Stakeholders involved in design iteration 1.0

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Function</th>
<th>Field of interest</th>
<th>Why important to Dialogue/future of consulting:</th>
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<tbody>
<tr>
<td>P1</td>
<td>Business Innovator, KPMG</td>
<td>Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team</td>
<td>Horizontal view on innovation efforts across the firm</td>
</tr>
<tr>
<td>P2</td>
<td>Business Innovator, KPMG</td>
<td>Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team</td>
<td>Horizontal view on innovation efforts across the firm</td>
</tr>
<tr>
<td>P3</td>
<td>Head of business Innovators, KPMG</td>
<td>Driving innovation and digitization across the KPMG organization, part of the horizontal smart tech solutions team</td>
<td>Horizontal view on innovation efforts across the firm</td>
</tr>
<tr>
<td>P4</td>
<td>Process Manager, topsector logistiek</td>
<td>Use of data,</td>
<td>Experience of hiring big consulting firms for over 25 years.</td>
</tr>
</tbody>
</table>
F.2: Design Probes/ Presentation material

Slide 1

The future client-consultant relationship.

Validation 1.0

Slide 2

- Generating insights instead of hours, continuous stream of information
- One Digital physical touchpoint seamlessly connected with the personal life, replacing most of the face-to-face interaction
- A continuous relationship with seamless touchpoints, where trust and security are ensured and collaboration and personalization are the norm.
- Multidisciplinary answers are needed in the future
- Secure data and knowledge sharing
- Firm belief in the reliability, truth, or ability of someone or something
- Every project needs to be even more specifically tailored to the client needs

Slide 3

Continuous

Seamless

Slide 4

Trust

Security
**Slide 5**

**Collaboration (co-creation)**

**Personalization**

**Slide 6**

**Scenarios: KPMG and digital client relationship scenarios**

KPMG views 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.

KPMG as a big professional service network, it can readily and efficiently facilitate large-scale digital 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 kinds of projects in every step of the way, from orchestrating to real-time insight into stakeholder views.

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 test-knowledge of the consultant and N to quickly give answers to questions and developments.

#KPMG #KIPhiaDigitalConsulting

**Slide 7**

**Scenarios: Future client-consultant relationship**

1. **The consultant as quick solution provider**
   - Digital project
   - Competence set is on top of specific solutions
   - Need for quick decisions and a fast pace
   - Quick results, innovative concept

2. **The consultant as orchestrator**
   - Big picture
   - Large projects and cross-disciplinary solutions
   - Multiple parties involved in project

3. **The consultant as digital advisor**
   - Proprietary digital tools
   - One digital developed with consultant
   - Operating environment - personal advice
   - No project based

4. **The consultant and client as co-creators**
   - Project for clients and one party involved
   - Client drives the project from every step of the way
   - Modular consulting business

**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.

The Digital Office
Dialogue as one-stop platform for tailored knowledge spaces, proactive presenting real-time knowledge and data.

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.

Digital, interface.

#AlwaysAvaliableInTheNewConsulting

#PersonalTheDigitalSpace

#RelatableDialogue
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 je presentert, 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 jezekersterk zijn. Zeker als software de grootste touchpoints over gaat nemen is de consultant niet bezig met hoe laat ik het er mooi uit zien, nie 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.


P2: Content is king. Zowel in de marketing, maar ook überhaupt in as 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 doet.

P1: Het is niet meer normaal met wat voor gede- taillierde 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 van de relation digitaler wordt, en dat ademt echt KPMG. Ik kan me wel voorstellen, dat bij andere bedrijven zoals start-ups, ze echt niet praten over security en trust.

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: Als jeDialogue 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 zon interactieve klant omgeving.

P1: Ik ben nu ook bezig bij R&R met een overzicht van alle regelgeving, maar wat zij willen die regelgeving 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 van de consultante 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 zon relaties?
- 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-consul-
tant relationship.

Insights from exploratory interview:

- We need the full journey
- All these scenarios are services
- How is this going to translate into KPMG offers?
- 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?
### G.2 List of involved stakeholders during design iteration 3

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Function</th>
<th>Field of interest</th>
<th>Why important to Dialogue:</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>Director digital Assurance &amp; Innovation, KPMG</td>
<td>The Audit &amp; 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 &amp; assurance. People driven progress!</td>
<td>Big stakeholder: interested in applying Dialogue within the Assurance unit</td>
</tr>
<tr>
<td>P3</td>
<td>Director of Business Development and Sales, EMA Region, KPMG</td>
<td>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.</td>
<td>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</td>
</tr>
<tr>
<td>P4</td>
<td>Director of Sofy Solutions, KPMG</td>
<td>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.</td>
<td>Cooperation partner</td>
</tr>
<tr>
<td>P5</td>
<td>Head of Technology KPMG</td>
<td>Global ambassador Dialogue</td>
<td>Global ambassador Dialogue</td>
</tr>
<tr>
<td>P6</td>
<td>Senior Manager Asset Management Risk &amp; Regulatory, KPMG</td>
<td>Frequent Dialogue User</td>
<td>Frequent Dialogue User</td>
</tr>
</tbody>
</table>
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,
3. Dialogue however is increasingly used to bring digital reporting
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 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.

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 continous 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:

- 
- 
- 

---

Checklist for closure

- 
- 
- 

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List of generic probes (optional)

- 
- 
- 
- 
- 

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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

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.

1. Digital Experience LAB
2. Supportive Project Space
3. KPMG’s prize cabinet
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

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

“It 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

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 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 the best way.
- Interaction is becoming more important within projects
- KPMG 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

**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

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**Appendix G7: Transcripts**

The transcripts are confidential and available upon request.
The future KPMG client-consultant relationship: A digital but human interaction.

**Attract**

“Making sure the client notices KPMG”

**Interact**

“Establishing a trustworthy relationship and delivering instant value”

**Sustain**

“Ensuring an ongoing relationship with the client.”

**G8. Framework of the future client-consultant relationship**

1. Trigger
2. Inspire
3. Personalize
4. Interact
5. Secure

- Hybrid Client Space
- Update deliverables
- Quick knowledge translator
- Involve the client

**Recommendations:**

Welcome Client,
Please pick your preferences.

Wow look at this.
Hi Jarrod! Did you see the changes on the market?
Perhaps you should consider .. X.
You can leave a voice message here.

Your library.
## H: List of involved stakeholders during design iteration 3.0

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Function</th>
<th>Field of interest</th>
<th>Why important to Dialogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>S3.1</td>
<td>Product Manager, Dialogue</td>
<td>Product innovation and driving digitization across KPMG</td>
<td>Owner of Dialogue, Responsible for developing and operating Dialogue.</td>
</tr>
<tr>
<td>S3.2</td>
<td>Head of Technology KPMG</td>
<td>Global ambassador Dialogue</td>
<td>Global ambassador Dialogue</td>
</tr>
<tr>
<td>S3.3</td>
<td>Business Development specialist within the Branding Reputation &amp; Marketing team and Markets department within KPMG</td>
<td>Supporting the lead development process of the Advisory, Assurance and Markets campaign teams with a multi-disciplinary (Audit/Advisory/Melburg)</td>
<td>Advocate for Dialogue within KPMG</td>
</tr>
</tbody>
</table>
H2: Boundary object/Presentation material

Future positioning: Dialogue as client experience expert.

The 3 pillars

- KPMG’s Digital experience inventory
- Combining knowledge with sales
- Smart Experience creator

User Scenario

Smart experience creator

“Enabling consultants to quickly build fitting digital client experiences.”

User Scenario

Digital inventory

“Building the client relationship together with our clients.”

User Scenario

Owning the client relationship

“Triggering clients in the new reality, combining the business with the sales.”
Appendix I
Additional documents final Design

Appendix I.1
Client experience creating journeys.

CREATING A SELLING EXPERIENCE

1. Choose the experience
2. Specify the experience
3. Specify your client
4. Choose from previously made experiences
5. Get to know your market and design experts

Experience is created.
**SPECIFYING THE BUSINESS SOLUTION**

1. New or old client?
2. Specify the experience
3. Specify your client
4. Specify the aim of the solution
5. Choose the solution
6. View your market experts

**SPECIFYING THE PROJECT EXPERIENCE**

1. Specify the experience
2. Specify the client
3. Choose a project experience
4. Involving the client
5. Add co-create module
6. Choose type of client-interactions.
Appendix I.2
Screen Designs

HOME PAGE

Welcome Charlotte

Hey Charlotte,
Let's make an experience that your client will love!

MY EXPERIENCES

MY TEAMS

MY OVERVIEW

TEAM
THEME
PROPOSAL 1
Culpa qui
CLIENT
GOAL 1 GOAL 2
INDUSTRY

SMART CREATOR

Hey Charlotte,
Let's make an experience that your client will love!

SELLING EXPERIENCE
PROJECT INTERACTION
BUSINESS SOLUTION

NEED MORE INSPIRATION?
LET'S GO!
Take a look at the inventory!
I WANT TO KNOW MORE!

HOME PAGE SMART CREATOR
SMART CREATOR

integrate technologies

SMART CREATOR

Personalize the experience
This proposal is all about interactivity. The experience created is focused on showcasing data and information in an interactive way. Especially loved by clients from professional service companies.

**Project Interactions**

- **PROJECT 1**
  - **INTERACTIONS**
    - 10 WINS
    - 10 WINS
    - 10 WINS
    - 10 WINS

**Business Solutions**

- **Selling Experiences**

**Digital Inventory**

- **Overview Inventory**

**Selling Section**

- **Selling Experiences**

**Experience of the Month:**

- **My Experiences**
  - **Saved Experiences**
  - **My Overview**

**Welcome to the Experience Inventory**

- **Look for a specific client journey:**
  - **Charlotte Visser**
  - **Home Creator Inventory**

**Let your potential client experience KPMGs offerings with pre-made demo solutions.**

- **Tableaux**
  - **Microsoft Teams**
  - **Sharepoint**

- **KPMG Shop Experience**
  - **Pensions**
  - **S&O Shop**
  - **KPMG Shop Experience**
FUTURE IMMERSIVE EXPERIENCES
The KPMG shop

IMMERSIVE SELLING EXPERIENCE: KPMG’S SHOP

SOLUTIONS TO SHOWCASE:

MAIN SHOWCASE
ADDITIONAL
PLAYGROUND

EXISTING SOLUTIONS

POSTAL PORTAL
POSTAL DATA PROGRESS
POSTAL KNOWLEDGE LIBRARY

ACTIVATE INTEGRATIONS

ACTIVATE INTEGRATIONS

FUTURE IMMERSIVE EXPERIENCES
The KPMG shop

HYBRID EXPERIENCE

HYBRID PROJECT EXPERIENCE

MAIN SCREEN
BOARDS
TABLE

CONNECT CLIENT EXPERIENCES

POSTAL PORTAL
POSTAL DATA PROGRESS
POSTAL KNOWLEDGE LIBRARY

ACTIVATE INTEGRATIONS

ACTIVATE INTEGRATIONS
How would you rate your experience?

1 2 3 4 5

Please enter here..

Do you have any additional comment?

Thank you so much!