# The GIS Professional Services Consulting Market

>> The professional services consulting market for geographic information systems is changing rapidly. Can you keep up and what must you do differently to be relevant and successful?


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**Idea in Brief – *Document Reading Time ~10 Minutes***

This document summarises Michael's Rhodes research, experience, and perspective on the Geographic Information Systems Consulting Market (GCM).

From Michael's deep experience and recent global consultations, he has synthesized and analysed where the market is heading, outlined trends that matter and what the implication will be for GCM service providers.

Michael reveals the market is ripe for change, and innovation, which is necessitating the need for deeper client engagement which will facilitate, if executed well, explosive growth. He outlines in summary what it will take to be relevant and profitable and why thinking beyond GIS is as important as GIS itself.

## Advisor Background – Michael Rhodes

### Summary

Michael is the Director of Rhodes Management, a program delivery, advisory, and consulting business. He has *extensive experience* leading enterprise-scale EAM, ERP, GIS, and business transformation programs across several industry sectors.

Positioned at the intersection of business and technology, Michael has advised many organizations on maximizing the value of their technology platforms to benefit their business, customers, employees, and shareholders. Importantly he has led substantial programs and functions to achieve this – some of which have received awards.

Michael holds undergraduate qualifications in IT and separate master's degrees in business administration, e-commerce, and project management.

### Vendor Side Experience

As a contracted partner with a leading GIS software vendor, Michael managed their strategic programs for over five years. His responsibilities included successfully agile leading the world's largest utility network GIS implementation for Australia's largest geographic electricity provider.

During this period, Michael also provided consulting services to more than fifteen utility clients regarding their GIS platforms. He was the highest-charged resource ever and the second most utilized and closed over eight million dollars in GCM deals in addition to his delivery achievements.

### Client-Side Experience

On the client side, Michael has served as the lead representative in project implementations for several electrical and water utilities. His unique experience allows him to understand the GIS market from both vendor and client perspectives.

Altogether, Michael has consulted with more than twenty companies on GIS, EAM, and ERP implementations, strategy, roadmaps, and program rescue throughout Australasia and is very well-acquainted with the competitive GIS consulting market landscape.

## GIS Consulting Market Trends and Growth

Michael predicts the following general trends in GIS Consulting Market (**GCM**):

| Trend Drivers | Description |
|---|---|
| **Artificial Intelligence** | AI will increasingly influence GIS consulting through applications in data accuracy, such as automated image interpretation and LIDAR ingestion for asset structure creation. It will also impact data structures and analysis, especially in utilities, supply chain, government (health, environment, meteorology), and defense (real-time satellite, aerial imagery, and events). While AI is not yet a complete solution for adoption or velocity, its influence is absolutely growing. ***GCM Implication:*** *Companies must continually invest in technical capabilities to provide and demonstrate these capabilities and services. If AI capability is not top of your list, it should be.* |
| **Consulting Professionals** | Many GIS consulting professionals are highly technical. There is a growing need to combine technical expertise with industry sector proficiency, which will take time and is long overdue. Additionally, sales competency must improve for GCM service providers to outperform competitors. Selling software licences is only half the value equation. ***GCM Implication:*** *Companies need to employ top geospatial business analysts who understand process, data, and technology within each sector to ensure meaningful engagement with the market. Mastery across sectors will drive substantial growth.* |
| **Mobility** | The development of apps underpinned by GIS technology is increasing. Government agencies, for example, track numerous geospatial and geographic data sources, which will gradually integrate. There is also a merging of technology and asset works management in mobility, with some GCM providers already gaining traction. ***GCM Implication:*** *Companies must be prepared to create proofs of concept demonstrating value and opportunity.* |
| **GIS Pervasiveness** | The ubiquity of GIS-based apps continues to influence everyday life for individuals and businesses. ***GCM Implication:*** *Companies should capitalize on this trend by offering plug-in capabilities such as outage maps for utilities or heat maps for healthcare, which can be accessed by both businesses and consumers.* |
| **“Idea” Growth** | GIS technology, originating in the 1960s, keeps rapidly evolving. Commercial and government entities are realizing that everything happens everywhere, and GIS is limited only by imagination and available data sources. Location matters, and it has always mattered. ***GCM Implication:*** *Companies must lead in generating sector-specific ideas to add real value.* |
| **Cloud Adoption** | Cloud technology adoption is increasingly ubiquitous. GIS technology is inherently complex due to its deep geospatial data structures and architecture compared to EAM/ERP. Michael notes, “EAM is wide while GIS is deep.” ***GCM Implication:*** *Companies need to offer comprehensive plug-and-play cloud solutions, partnering with major providers such as Amazon, Azure, IBM Cloud, or GCP. The value lies in providing managed, secure, operational, integrated, maintained, and up-to-date solutions for clients.* |
| **Market Growth** | The GIS software and consulting services market is healthy and highly competitive, with expected compound annual growth rates ranging from 8% to over 30% through 2034 (Gartner, Forrester, IDC, Info-Tech Research Group). The professional services market is increasingly fragmented, making the necessity for clear differentiation essential. ***GCM Implication:*** *GCM service providers must develop and maintain a clear and sustainable competitive advantage to remain ahead of competitors. If successful they’ll reap the rewards.* |

Each of these trends is founded in deep research. They are real, prevalent and evolving. Some GCM service providers will thrive while others will lose market share and struggle for relevance. Each trend represents a multi-variate challenge requiring a renewed focus to execute that some GCM service providers will find challenging, while others will flourish.

## GIS Consulting Differentiators

Michael identifies four key differentiators for GCM service providers, referred to as the "4 P's":

1. **Proof** – Demonstrate past achievements.
2. **Process** – Show the ability to replicate success.
3. **People** – Capability is essential and flexibility enhances it.
4. **Price** – Increasing competition makes pricing both lucrative and critical.

These differentiators form the foundation of a sustainable competitive advantage for GCM service providers.

**Proof and Process**

The challenge that GCM service providers face against their competitors is that *expertise* makes a poor differentiator, and competing on *capability* is a *moving target*. So, the *only thing* that matters for professional services is ***Proof*** and ***Process*** to deliver and each of these will be key *differentiators* of delivery in the future competitive landscape. Caution should be noted for ceding out work to partners because they will be future competitors who will steal and adapt your intellectual property for their own gain at your expense. I'm seeing it happen.

Proof and Process augment, and in time will substitute, capability and expertise. When documented, Proof and Process add to the corporate knowledge bank which your marketing function will need capture, so it is not lost. Long after people depart, well run GCM Professional Services companies can still claim to "have done it before" and "know how to do it again" – AKA Proof and Process. *This is because having your success dependent on key people is a recipe for unpredictability.* With the right resources it can be enormously successful, but it is rarely sustainable and that is why attraction and retention incentives are essential irrespective of whether that resource is engaged. *It is also why your AI capability will be critical going forward for both Proof and Process*. Any business can claim their people are the difference, as many do, but few do it well to manage and exploit the knowledge the best have. The problem is some sales cycles are long, lumpy, and complex. The only thing that matters is:

- ✓ **Proof** - that you have done and can do the work through referenceable examples, and
- ✓ **Process -** have a structured method to meet client needs, benefits, and projects.

**People**

In GIS professional services, delivery and client relationships *often depend on a concentrated group of talented individuals*. The market requires a balance between technology competence and sector-specific knowledge and experience. Unlike the ERP field, where consultants deeply understand business processes, GIS consultants frequently lack comprehensive knowledge of the sector they're consulting to. For example, in the utilities sector, generally recognised as the largest user of GIS systems, consultants may not grasp asset or works management, which is crucial for effective GIS system implementation and utilisation.

When consulting to a large power utility, Michael and his team identified over 165 business processes and 60 system integration points within the GIS business process ecosystem. Clients seek to understand the business benefits *and beyond* of GIS systems through consulting services.

If GCM companies are on their game, there is typically a potential of 30 to 40 different service types they can provide to clients, and AI will only expand this. If they do it well their growth will match and likely exceed market estimates.

It is also important to outline the importance of sales competency as well. Too often many GCM providers have overlooked the importance of the *sales relationship* and what can be provided to clients. Michael has personally witnessed the forfeiture of tens of millions of dollars in potential revenue because the sales leadership saw little value in the depth of the relationships their people had with clients in the early to mid-stages of opportunity development.

*The longer a strong sales relationship is in place the greater the credibility of the GCM provider and the opportunities that will be afforded to them.* This is *as important* as the professionals who provide the consulting and technical services. Further to this, good GCM service providers who are aligned to their customers with either deep sector or customer knowledge, *know how to have dozens of discussions around GIS services and technology*, thus eliciting a greater number of opportunities.

GCM service providers will need to be cognizant of internal client resources as they are "direct competitors" to the GCM market. This is neither good nor bad; it just is and magnifies what point of relevance a GCM must bring. GIS remains a very specialized technology and service offering – often being put in the operating technology (or OT) basket – however companies are increasingly seeing the importance of GIS and are working to employ GIS technical specialists. Critically, these internal specialists *typically* lack the *very detailed* technical *and* project experience some GCM service companies provide, because they are not exposed to the vast array of what is in the market like vendors are, but they are improving. GCM service providers need to be at the cutting edge of the technology, innovation, and service offerings they provide to be relevant. The risk of *resource inflexibility* is:

- You erode margin by carrying high-cost resources who are either not utilised or not performing, or
- You miss business because you don't have the proof or process to get the work, or
- You are not adding to your intellectual property by engaging the best the market has to offer

No GCM provider has a monopoly on talent, and all must be flexible in their resourcing model to maximise opportunities and margins.

Finally, and Michael says "unsurprisingly", GCM providers *must be flexible* on the mix of professionals they have, be it full time or contract. He has witnessed significant losses in potential business because some GCM providers have either not retained or not engaged high performing contractors. *Contractors to a GCM service provider* will bring deep loyalty to those who have engaged them. *Partners to a GCM service provider* will eventually become competitors to those who subcontracted or engaged with them – do so with care or you'll lose revenue.

## Price

GIS is seen as an important yet niche technology. In the increasingly competitive GCM market, consulting rates matter. However, price becomes less significant when resource capability is high, and their track record is proven. For instance, as strategic program director for a leading vendor, Michael was the highest-charged out and second most utilized resource meaning clients *are willing to pay* for capability and value, demonstrating that proof and process are essential.

Without differentiated capability, charging a premium is not possible because your competitors will beat you every time if the marginal difference between resources cannot justify the maximum difference in price. Price remains one of the top variables in proposal and tender decisions and is *often still the most decisive* factor – despite what clients say. Conversely projects selected for the lowest price often fail (which Michael has had to rescue) because they were priced to a capability commensurate with the margin expected. *Michael notes one example where a major utility chose the cheapest price option for their utility network implementation. This led to the client receiving an out-of-date legacy version of the software, on a project that was 200% over budget. They were still not live on the most recent and substantially better platform and version, which would cost another 100% of their original budget to get there. The irony is that the 20% price difference between doing it right the first time, has now cost them more than 300% for failing to do so, not to mention the very substantial ongoing cost saving benefits this project would have delivered. So yes, dumb in the extreme.*

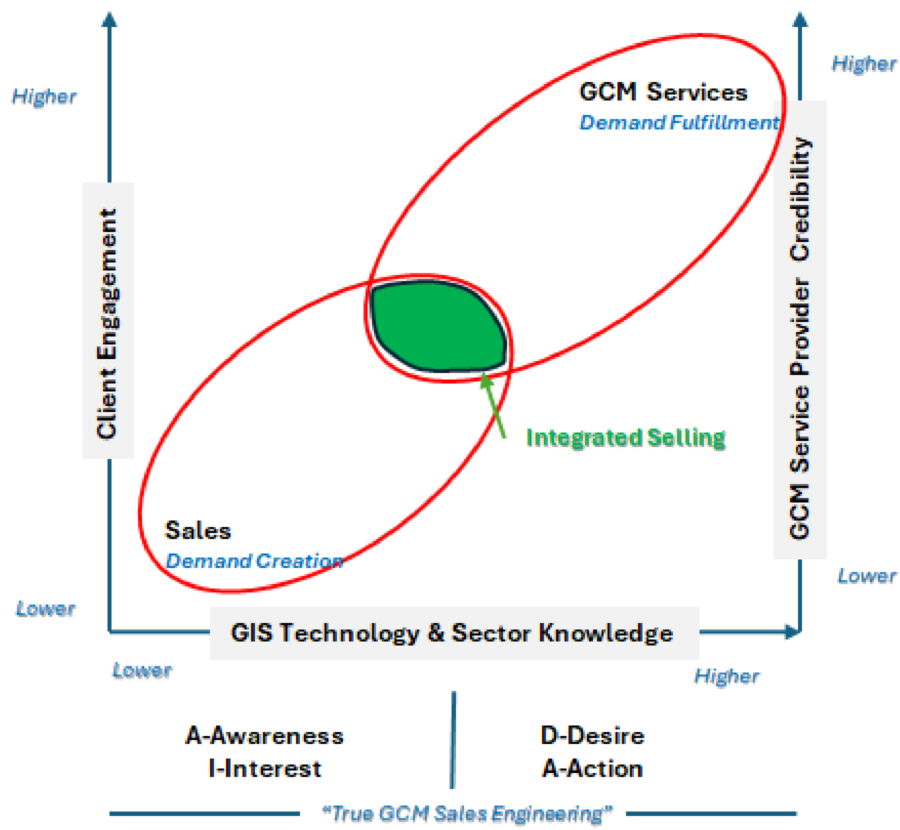
In summary charging slightly above market rates is advisable for the *right resources* and track record but be prepared to negotiate reductions of 10% to 20% of your rate to remain competitive. This also means GCM providers must tightly manage their fixed costs as a percent of revenue.

## Other Considerations

The GCM market engagement operates in three dimensions:

1. Y - Client **Engagement** Depth
2. X - Product and Sector **Knowledge**
3. Z - GCM Service Provider **Credibility**

The diagram below explains this.




These dimensions interrelate along the sales and marketing paradigm of awareness and interest (sales), desire, and action (GCM service provision). The challenge for GCM service providers is where each are on the Y, X , & Z axis. How credible you become across the spectrum, will be dependent on your reputation, how much you know, who knows it, and how well integrated your sales, marketing and services functions are.

The "**secret sauce**" here is the **integrated selling component** of how to engage the market.

For those that know how to do it well they will move higher on all three axes of Engagement, Knowledge, and Credibility reaping increased demand for services and software.

GCM service providers who do not do that will be treading water in the **Awareness** and **Interest** domain losing business to those GCM service providers whose clients had the **Desire** to engage and **Acted** accordingly with those that could meet their needs.

## Conclusion

The GCM market is becoming ever more competitive and fragmented. While corporate acquisitions are increasingly testing the GCM services market the opportunity to succeed is prevalent if the factors of differentiation are accomplished and well-executed through an integrated selling approach and highly capable consulting and project delivery.

> What dozens of service types can you possibly provide to your clients? How can AI assist you? If this has got you thinking and you'd like more information, or simply a confidential discussion, **reach out to Michael at the contact details below**. He can assess where you're at and help you get to where you need to be.