

REPORT

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The Top 6 Supply Chain Breakthroughs 2017



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Executive Summary

Earlier this year, SCM World celebrated its third consecutive year of recognizing breakthrough successes in supply chain through the Power of the Profession Awards.

The Supply Chain Breakthrough Award recognizes the initiatives that are shaping the organizations that will lead supply chains, and business as a whole, for the future. This category also included scores for three subcategories, each of which is recognized with an individual award:

- Customer Innovation of the Year recognizes supply chain initiatives that have created a more valuable customer experience and achieved a positive, quantifiable impact on customer loyalty.
- Business Win of the Year recognizes supply chain initiatives that have contributed to outstanding top-line business performance, profitable growth, savings, and/or created a distinct competitive edge.
- Social Impact of the Year recognizes supply chain initiatives that have achieved a positive, quantifiable impact on society, local communities and/or the environment.

The overall award is given to the most impressive demonstration of how supply chain can create greatness in business.

This report features the six finalists selected for the Supply Chain Breakthrough of the Year 2017 Award. Here, we also recommend how you can apply their learnings to strategies and initiatives you might be considering in your business. A separate report celebrating the finalists' efforts in the talent category was published earlier this month¹.

Here's a brief summary of how our six finalists have created supply chain initiatives that are having a transformative effect on businesses' contribution to global challenges.

Bayer developed an innovative and unique approach to supply chain management within agriculture through its Supply Chain Integrated Planning program.

Colgate-Palmolive's five-year global supply chain vision utilizes Customer Service & Logistics (CS&L) processes to streamline and standardize its operations across more than 100 subsidiaries.

General Mills has focused on both regenerative acquisitions and coming up with creative solutions to create shared value for its consumers, customers, brands and suppliers.

Kimberly-Clark has implemented a series of innovative initiatives to tackle sustainability, primarily by putting used product, materials and packaging – even diapers – back into the value chain.

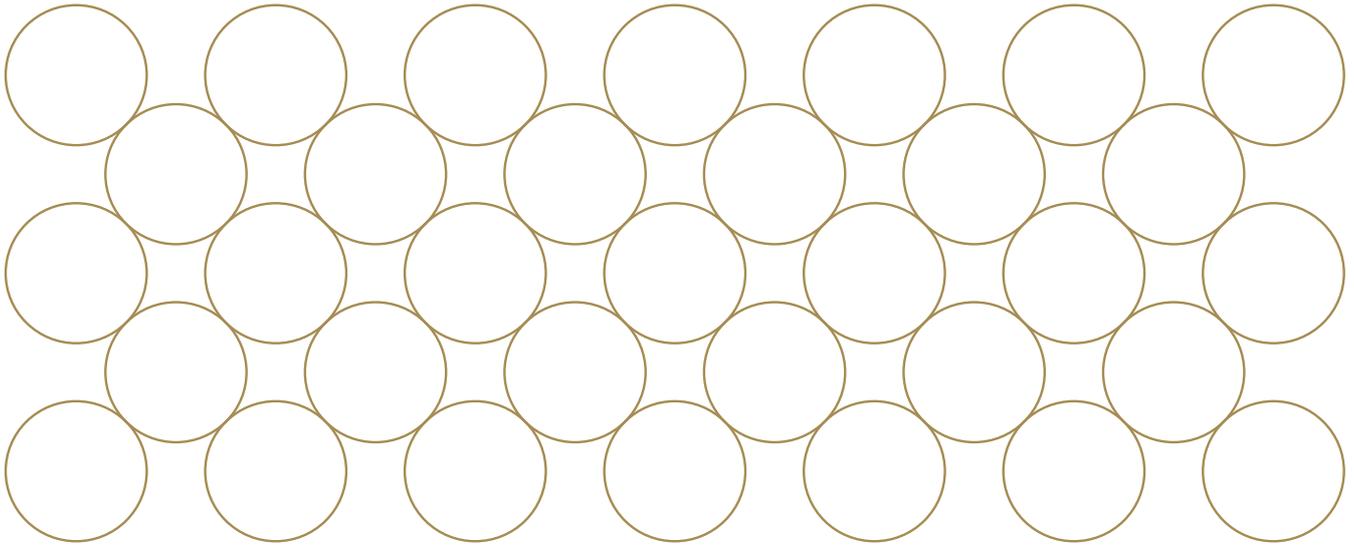
Mondelēz International was presented with the unique opportunity to quite literally reinvent its supply chain by unleashing the creativity of the 65,000 people in its supply chain.

Verizon took steps to position its global supply chain as a strategic enabler and equal partner for influencing and driving the business following its evolution from a telco to a technology company.

Among the six finalists and the entire pool of nominations, Bayer Crop Science was awarded Customer Innovation of the Year, Mondelēz International was recognized for Business Win of the Year, and General Mills received Social Impact of the Year.

The overall winner of the prestigious Supply Chain Breakthrough of the Year Award, exemplifying what supply chain excellence is all about and recognizing success across all three areas, is Bayer Crop Science.

Congratulations to all for their successful and inspiring initiatives!



Partners in Excellence

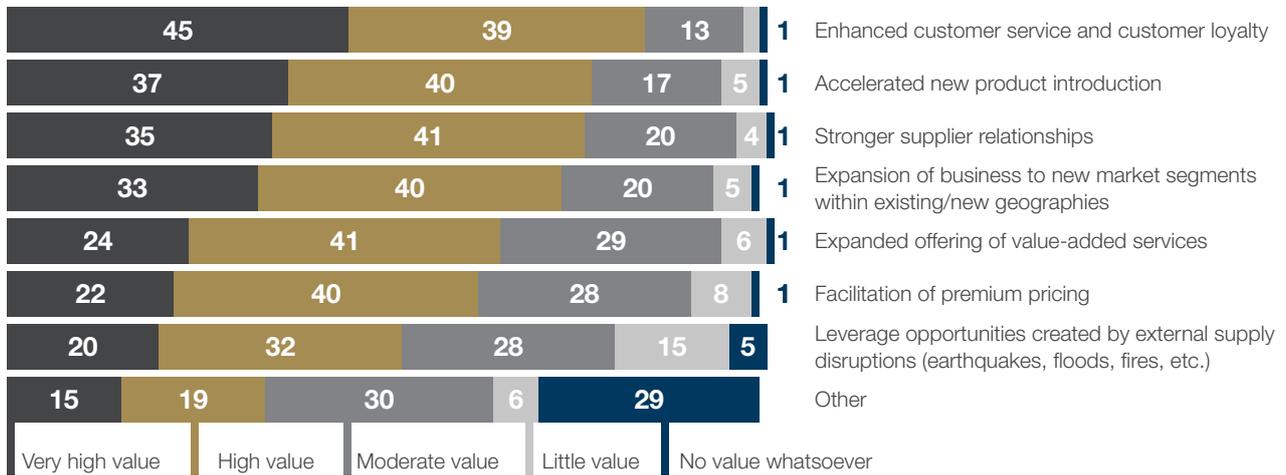
Since 2012, we have asked the supply chain community about the alignment of business and supply chain strategy. In each year, including 2016², over half responded that “supply chain is understood as an equally important part of business success as sales & marketing or R&D/product development.” While not on the level of equal partnership, another third of the community found supply chain to be “an enabler of product or sales-driven business strategies.”

When factored together, nearly 90% agreed that a high-performing supply chain plays a significant role in creating business value. Of the value that’s created, of utmost importance is enhanced customer service and customer loyalty (Figure 1), followed by a group that includes stronger supplier relationship, accelerated new product introductions and expansion of business to new markets.

Each of these cases are illustrative of the variety of roles that supply chain plays in shaping business success. Furthermore, while not listed here, supply chain also plays a significant role in addressing the global challenges of ensuring long-term sustainability, providing accessible healthcare and feeding the world.

1. Value of a High-Performing Supply Chain

At your company, what is your assessment of the value created by having a high-performing supply chain?

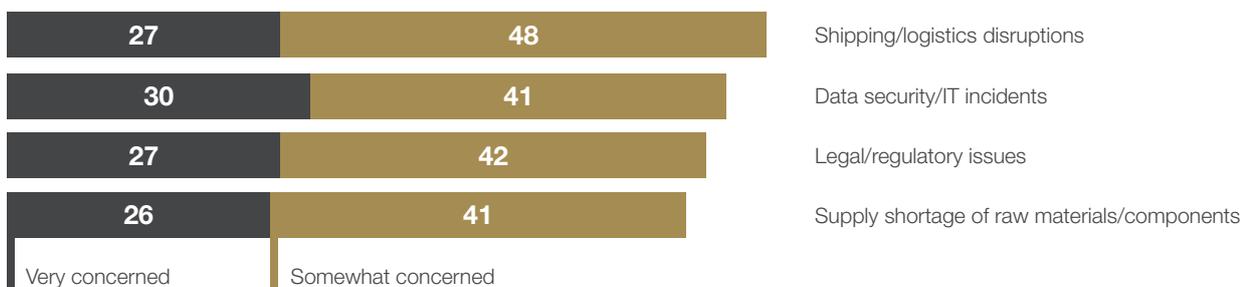


Source: SCM World Chief Supply Chain Officer Survey 2014

% of respondents
n=1,125

The diversity of roles that supply chain plays in shaping business success is also impacted by increasing complexity and risk. As supply chain’s network of influence expands, it must now address topics such as IT incidents and regulatory issues, especially as the sharing economy, and other new concepts emerge. However, even though data security is most likely to be viewed as very concerning, the topic with the highest overall concern is disruptions in shipping and logistics.

2. Top Four Supply Chain Risk Concerns in 2016-17



Source: SCM World Chief Supply Chain Officer Survey 2014

% of respondents
n=1,409

This means that even as supply chain asserts its position as an equal partner, it must still execute the fundamentals consistently and adapt to each moment to connect the value chain from the source to the customer. Executing these fundamentals consistently builds a platform for growth, but enabling supply chain breakthroughs requires further optimization and innovation.

Therein lies the opportunities highlighted by the finalists in SCM World's 2017 Power of the Profession Supply Chain Breakthrough Award. Each of the six initiatives show how supply chains have delivered tangible business results through optimization, transformation and extended partnerships.

Among those initiatives key themes highlighted within this report are:

- Optimization of standard supply chain practices, such as demand forecasting and supply planning, including documentation of best practices and enhanced capabilities through digital technologies.
- Development of internal networks and centers of excellence to streamline continuous improvement while maintaining or exceeding existing service commitments.
- Alignment of top-down and bottom-up objectives, creating a sense of continuity throughout the organizational hierarchy.
- Identification of environmentally friendly initiatives, such as circular economies and regenerative practices, which benefit both business and the planet.
- Utilizing savings from improved spend management to reinvest in the business.
- Creating partnerships that enable continuity of supply and drive logistics efficiency, as well as positively impacting local communities and economies.



Supply Chain Integrated Planning (SCIP) Leads the Way to a Digitalized Business Platform

For decades, the US agricultural chemical industry supply chain has been stagnant in terms of innovation and focus. Historically, very little has been researched, studied, benchmarked and published regarding the agricultural supply chain, especially when compared to other industries. Collaboration among channel members was non-existent, ERP development was fragmented at best and inventory visibility was a void. Meanwhile, executive leadership throughout the industry has primarily focused on more pressing problems of the times including product discovery and innovation, product development, NGO and societal pressures, channel consolidation and relationships, digital farming technology, and the increasing challenges of the global regulatory environment. Simply put, supply chain has not been the highest priority over the past decade and as a result has only seen incremental improvement, primarily internal, and limited to the individual enterprise only.

As a result of this historical lack of supply chain focus and innovation across enterprises within the industry, channel members and basic manufacturers broadly suffered from poor forecasts (<50% at the SKU level), frequent stock-outs (2%+ missed sales), geographically mis-positioned product (50% DRP accuracy), high season-ending inventory (30%+ at retail, 50%+ at distributor/wholesale), sub-optimal logistics costs and under-utilized supply chain assets throughout the value chain.

Customers of Bayer and Bayer's supply chain management leadership once mutually referred to the agriculture supply chain as a "dinosaur" in most aspects. Given the depressed agricultural economy of the past 2-3 years and the tremendous revenue loss throughout the channel, there was no better time for Bayer to innovate, differentiate and create additional customer value vs competition. In the US, Bayer's Crop Science Supply Chain Management division recognized that there was significant opportunity for value capture through novel and innovative approaches to customer-integrated supply chain solutions. It launched Supply Chain Integrated Planning (SCIP), a collaborative, integrated and comprehensive approach to supply chain management with its most valued customers.

A Win-Win For All

Through the B2B SCIP platform, Bayer was able to collaborate demand planning with customers in a targeted market territory in real-time using digitally-exchanged local market

conditions and historical data, then plan production, create supply plans, calculate and deliver optimized, multi-SKU/multi-cube full truckloads and project customer warehouse storage footprint requirements, which is critical at certain times throughout the season in distribution and retail. Throughout the process, working capital efficiency is improved and logistics costs are optimized and gain-shared with the customer.

Finally, and after earning the infamous “seat at the table,” Bayer soon realized that the emerging SCIP digital platform could be expanded to host a broader set of B2B services (such as marketing and business services) to help achieve its desired target of establishing strategic and integrated business partnerships with key channel partners.

Little did it know that what started out as a collaborative supply chain management platform could actually serve as a broader B2B cross-enterprise tool.

Customer Innovation Breakthrough

A First for the Industry

SCIP is an innovative and unique approach to supply chain management within the agricultural industry. Never before in the industry has a basic manufacturer such as Bayer been able to forecast, plan and optimize the supply chain with preferred channel partners and collaborate through a digital platform. The common objectives are to maximize sales, improve flexibility toward the grower, reduce logistics costs through increased asset efficiency, minimize end-of-season stocks, and improve capital efficiency through a more optimized approach to inventory, payables and receivables management. From a customer’s perspective, the business case is compelling.

The process and results can be summarized as follows:

- Bayer and the customer collaboratively forecast based on history and local market conditions in real time through a customized digital platform
- A supply plan is created and agreed with the customer
- Bayer product is pre-positioned ahead of season at the customer location
- The customer has full supply visibility and no concern about product allocation or shortage
- Bayer maintains ownership of the product, allowing the customer to purchase on-demand as the seeds become available. As a result of this, both parties optimize capital efficiency
- Customer flexibility and speed to grower is vastly increased in the highly volatile agriculture market

- Logistics costs are reduced through the SCIP process as the combined assets of Bayer and the customer are more efficiently utilized. Assets include warehousing, fleet assets, carriers, formulation plants, bulk tanks and terminals
- The customer receives a financial gain-share payment from the reduced cost of logistics
- The enabling of instantaneous purchases and delivery transactions keeps the customer happy with the service they're receiving

The successful implementation of SCIP required three primary changes in Bayer's supply chain. First, it required greater external focus on the customer. This meant a fundamental mind-set shift from internal (to Bayer) to external (customer). The opportunity for SCIP collaboration only became clear after spending months listening to its customers in the field. Supply chain personnel were compelled to improve their business and financial acumen, engage in marketing program development and take sales training courses such as 'Customer Conversations'.

Secondly, SCIP success depended on organizational realignment to create dedicated SCIP Customer Account Managers to serve as a single point-of-contact for the customer account and to navigate across the end-to-end supply chain. The traditional functional and shared approach to customer management simply would not work. Additionally, SCIP Account Managers align perfectly with its National Sales Key Account Managers structure.

Finally, SCIP required the successful development of digital tools, analytics, and calculators to drive efficiency and enable scale-up of the SCIP customer network. During the initial SCIP concept development and customer pilots in 2015, all processes and customer interfaces were executed manually. In 2016, once Bayer gained critical mass and began to onboard all major accounts, the pursuit of the digital platform and interfaces began. It was then time to digitalize, scale and expand.

Positive Feedback From Channel Partners

The improvement of the customer experience is clear as measured from many accounts. Context Consulting, a leading agriculture industry channel survey provider, recently confirmed Bayer as a leader in both the category of Supply Chain Improvement Partnership and Fulfillment Service & On-Time Delivery. However, the ultimate proof in the early success of SCIP comes from direct feedback from its channel partners.

Business Win Breakthrough

Being a First Mover Leads to Enhanced Business Performance

With SCIP, customer focus is the company's passion, driving force and the primary measure for success. At the same time, enhanced business performance is a natural result, especially when Supply Chain and SCIP are integrated and aligned with its sales & marketing "Go to Market Strategy." Including SCIP in its overall business strategy, which aims to create strategic partnerships with key channel partners through integrated business planning concepts, is a logical and natural fit. Once again, this reinforces the "seat at the table" that supply chain has earned.

SCIP, now clearly aligned and integral with the business strategy, is a clear contributor to top-line performance. Net sales improved by 0.5% in 2016 due to more accurate product placement and opportunistic sales on behalf of customers where product placement previously may have been too far from the market or non-existent. Cost savings generated through SCIP implementation are largely returned to the customer, thereby improving the customer's profitability with Bayer's product portfolio vs. competition. The initial customer pilot concluded that logistics savings amounted to an effective 1% net product rebate equivalent, which is significant by industry standards. Additionally, most customer locations have been able to reduce season-ending inventory levels from 30-50+% of net sales to below 10%, which improves the overall capital efficiency for the customer. Likewise, inventory at Bayer has reduced by 5-10% through SCIP collaboration.

Social Breakthrough

Reduction in Excess Pesticides

The implementation of SCIP has benefited both society and the communities in which we live as well as the environment. Primarily, the innovative and collaborate approach to supply chain management, connecting partners along the value chain, has greatly reduced the typical excesses of pesticides remaining in the agricultural distribution channel at the end of a given season. Ultimately, this means that a more accurate amount of pesticide is planned and produced and a reduced amount of pesticide is leftover in the distribution channel at the end of the growing season. Generally speaking, most leftover stock remains in storage until the next growing season which could be nine months away. The unnecessary storage of pesticides in high quantities year-round presents risks to environment, especially in the event of a catastrophe, fire, theft or terrorism. Through collaboration and integrated planning among partners, pesticide storage and handling has been reduced.

Experience in 2016 indicates that distributor locations can reduce end-of-season inventory from 30-50% (of sales) to 10% or less through SCIP, therefore reducing the overall risk profile of pesticide storage.

Overall Improvement in Sustainability and Carbon Footprint

In addition to reducing the amount of pesticide storage in our agricultural communities, there are other environmental benefits stemming from SCIP. As SCIP drives collaboration and efficiency in all areas of the supply chain, there's no surprise that an overall improvement in sustainability and carbon footprint is being achieved. Its 2016 results indicate an overall reduction in shipments of 70% to the 23 customer locations integrated through SCIP.

This reduction is directly attributable to collaborative planning across the entire portfolio, the new ability to plan supply and replenish with a broader market and portfolio view, and new logistics tools to build and arrange optimized, multi-SKU truckloads, as well as to calculate warehouse space requirements for customers. In short, through customer collaboration and new interactive planning tools, Bayer is shifting fulfillment to SCIP-enabled customers from predominately less-than-truckload shipments modes to 90% or greater full-truck-load shipments, thereby reducing total shipments, total miles transported and fuel consumption.



Driving Efficiency and Effectiveness with Global Supply Chain Shared Services

As a global company, Colgate-Palmolive's challenge was to utilize consistent Customer Service & Logistics (CS&L) processes and technology related to work streams such as order to invoice, supply network planning and logistics management activities across more than 100 subsidiaries. Each subsidiary was using different tools and processes with varying degrees of system utilization. In some regions, the processes weren't sustainable and it was difficult to develop and maintain expertise. The complexity of having more than 100 subsidiaries individually managing their own CS&L activities created redundancies across the organization, generated a higher cost structure and formed an environment of inefficient decision-making.

Implementing new technology tools or upgrading existing tools was a cumbersome process over so many operating locations, and it needed to be able to quickly and effectively manage system enhancements and upgrades across the entire organization.

It also identified that, globally, it needed to have its subsidiary-based CS&L teams more focused on engaging with customers and commercial partners to create value versus focusing on transactional activities. The company needed to streamline and standardize the transactional activities and create an environment that enables rapid global deployment across 100+ locations. It recognized that global process standardization would have a large payoff, including cost savings, better business outcomes and increased agility.

In order to do this, the organization changed its operating model to incorporate shared service centers called Colgate Business Services (CBS) in Mexico City, Warsaw and Mumbai that are staffed by Colgate employees to deliver cross-functional business support. Designing and implementing effective end-to-end global processes is quite different from daily execution. While it has excellent functional experts, driving process standardization requires a broader worldview.

The first step was to define the global future state for each function within CS&L. The second step was to identify specific elements within each work stream that made sense to be performed centrally and could be sustained over time across three CBS centers. Once these two steps were completed, the roles and responsibilities were updated based on a future framework and evaluated to determine whether they should be managed locally or centrally. The design phase considered both a top-down and a bottom-up view that was

validated through work activity analysis. Additionally, more than 70 subject matter experts globally were involved in designing detailed future processes.

The new model required migration of the identified work activities from the local subsidiary to the appropriate CBS center. As such, Colgate created centralized, consolidated platforms to perform the bulk of process execution. This allows for faster, targeted changes in technology, processes and policies, and reduces localization to a closely governed minimum for those specific work streams or processes. With clear performance metrics and commitments, both process leaders and internal business leaders knew their objectives and responsibilities for the change.

The company envisages CBS very much as a journey, not an end point.

Customer Innovation Breakthrough

The Key is Making it all About the Customer

The design phase considered both a top-down and bottom-up view that was validated through work activity analysis. Additionally, over 70 subject matter experts globally were involved in designing detailed future processes. Through this process, it identified that globally, it needed to have its subsidiary-based CS&L teams more focused on actively engaging with its customers and commercial partners to create value versus focusing on transactional activities. The CBS model ensures consistent use of standard processes and tools globally, even to support smaller commercial units that previously did not have the resources to do so locally. Order fulfillment is a key focus for the CBS centers, which are directly connected to its customers and suppliers to ensure on-time and complete deliveries.

What's the Impact?

The analytics that are shared with customers are more robust as a result of standardization, automation and scenario planning, plus analytics are available for all countries regardless of size. The company has also found that more time is now spent on action and decision-making as opposed to data gathering. Moreover, as a result of the local team being more focused on customer engagement, it was able to improve KPI alignment, joint value creation and mutual cost to serve. The local teams that have gone through this migration are now more focused on value-added activities that facilitate joint collaboration on supply chain initiatives with customers.

Colgate-Palmolive's guiding principles for applying this shared services model to CS&L globally reflect its commitment to enhancing business partnerships. The local teams that have gone through this migration are now more focused on value-added activities that facilitate joint collaboration on supply chain initiatives with customers.

Based on the global vision of CS&L, the CBS migrations have created new positions and tools that allow it to more effectively allocate stock, leverage customer segmentation strategies and streamline fulfillment processes. As a result of the local team being more focused on customer engagement, it's now able to improve KPI alignment, joint value creation and mutual cost to serve. It has also centralized Supply Planning, Logistics Management and Inventory Management to ensure the end-to-end CS&L processes are optimized.

The analytics that are shared with customers are more robust as a result of standardization, automation and scenario planning plus analytics are available for all countries regardless of size. More time is now spent on action and decision-making rather than simply gathering data.

Business Win Breakthrough

The Vision for Shared Service Centers

The vision for Colgate-Palmolive's supply chain shared service centers has been to create a network of multi-functional centers providing best-in-class services utilizing advanced technologies. The Colgate Business Services model ensures consistent use of standard processes and tools globally, even to support smaller commercial units that previously did not have the resources to do so locally. Order fulfillment is a key focus for CBS, which is directly connected to its customers and suppliers to ensure deliveries are on time and complete.

Processes were transformed to align with global standards and enhanced tools were implemented in parallel with the migration of work activities. Centers of Expertise have been leveraged along with the regional CBS centers to ensure processes are being maintained and supported.

Migrations were managed by a dedicated global team, including regional migration leaders. The execution of this change followed a rigorous migration roadmap which includes process transformation, the implementation of standardized tools and organizational design. The success of this large scale and complex organization change required a disciplined change management approach with robust program/project management oversight and governance along with a strictly controlled migration timeline for each subsidiary. This detailed planning was necessary to accommodate local conditions, worldwide systems, and investment constraints.

The benefits of centralization and channeling operations spanning 100 locations into three CBS centers are summarized below:

- Simplifying and standardizing how works get done with sustainable best-in-class processes and systems
- Delivering \$6 million reduction in structural costs
- Enabling more efficient logistics sourcing that delivered \$11 million in freight and warehouse savings
- Accelerating adaptation to market changes
- Faster and disciplined roll-out of new processes and technology
- End-to-end planning co-location driving efficiency in inventory and asset utilization
- Reducing variation and locations for audits and IT maintenance/upgrades
- Local CS&L organizations are driven to be more customer-focused

Centralization has Been the Key to Success

As a result of this initiative, Colgate's CS&L operational framework is stronger with CBS centers now in place working closely with the local subsidiaries, as well as a Global CS&L Center of Expertise team that continuously upgrades core processes and focuses on end-to-end supply chain visibility. Restructuring efficiencies due to the centralization of functions has improved customer service, significantly reduced inventories and lowered transportation costs.

This is a five-year global initiative that will deliver increased service and reduced inventory through implementation of standard processes and tools to leverage resources in the CBS centers. It will also allow for enhanced customer collaboration on the ground.

Global standardization in the CBS gives Colgate a competitive edge: strong oversight, a detailed plan, competent partners and a realistic timeline have been crucial to this successful transformation. A smart approach makes for an intelligent outcome.

Social Breakthrough

Creating Colgate Values

By living the Colgate values of caring, global teamwork and continuous improvement, people develop a sense that they're part of the Colgate team, working together toward a common goal. Colgate's three fundamental values are part of everything it does, and this project was

conducted in a manner consistent with these corporate values. Further, the CBS organization is committed to building a successful global business community. It's one seamless global team, fostering connections among all Colgate businesses and Colgate people.

CBS centers are staffed with Colgate employees that are integrated into Colgate's disciplined talent management and succession planning processes providing cross discipline opportunities and experiences. They are an extension of the local subsidiaries and participate in business meetings with its customers and suppliers.

From a change management perspective, there was an integrated approach focused on communication, talent management and providing support through every phase. Engagement with all levels of the organization was critical to keeping the project on track. It followed standardized recruitment, on-boarding and training processes at the CBS centers along with a structured knowledge transfer process to ensure a seamless transition for customers. In addition, global support was provided during all phases of the change – from planning and preparation to stabilization.

Leadership visibility and communication were a high priority during the transition to ensure the local teams fully understood the future state and the roadmap for getting there. In communicating and engaging people at all levels of the organization throughout the various phases, it was able to remove barriers by integrating feedback and getting people onboard, challenged and excited.

The migration to Colgate Business Services centers forced the team to develop an unprecedented level of training materials and standard operating procedures to enable faster onboarding and training, which ensures that each center is self-sufficient in training new team members. Documentation for training materials and standard operating procedures had to be well defined and consistent across the three centers to adhere to our global standards. There continues to be significant onboarding and training programs as the regional centers mature.

On its journey toward continuously leveraging and maximizing business value, CBS offers exciting experiences through exposure to a variety of functions and geographies within Colgate.



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GENERAL MILLS

Creating Shared Value Through the Trifecta of “Securing Supply, Supporting Growth and Saving the World”

“Consumers, stakeholders and shareholders are going to reward companies that do well by doing good and we need to think creatively around that.” John Church, Farm Tank conference, 2016

General Mills’ vision is to create shared value through the trifecta of securing supply, supporting growth and saving the world. Simply, it serves the world by making food that people love while protecting the natural and human resources the business depends on. While many would say that big is bad, Big Food has a tremendous impact on agriculture and has to be part of the solution. For General Mills, this means developing creative solutions to create shared value for consumers, customers, brands and farmer suppliers. Its strategy is to source direct from origin. The company is also advocating for change, convening the right partners to help them and creating an economic incentive for farmers to do the right thing.

General Mills’ creative solution is to build long-term agreements with up-front support and investment in a system that intentionally builds human and natural resources. Its main initiatives include:

- The Sweet Harvest African honey supply chain
- Organic Valley partnership
- Investment in the grass-fed bison system with a small family ranch

Customer Innovation Breakthrough

Meeting Demand for Organic Food

While demand for organic food is increasing in the US, supply has not been able to keep up. In the US, acreage devoted to organic agriculture is about one percent of total cropland, according to the US Department of Agriculture. General Mills has made sizeable

investments to meet growing consumer interest in natural and organic foods, which is expected to drive double-digit industry sales growth over the next five years.

Helping Dairy Farmers Transition to Organic

General Mills announced a strategic sourcing partnership with the largest organic cooperative in the US, which will help around 20 dairy farms add around 3,000 acres to organic dairy production over the next three years. General Mills has transformed its portfolio in recent years and is committed to ensuring it's able to deliver great-tasting organic yogurt to its customers. In fact, it's now the number three maker of natural and organic foods, with nine brands including Cascadian Farm, Muir Glen, LÄRABAR, Liberté, Mountain High, Food Should Taste Good, Immaculate Baking, Annie's and EPIC Provisions.

Since 2009, General Mills has increased the organic acreage it supports by 120% and is now among the top five organic ingredient purchasers — and the second largest buyer of organic fruits and vegetables — in the North American packaged food sector.

Organic Valley

The program with Wisconsin-based Organic Valley will drive more acres in the US into the organic certification process and builds on General Mills' commitment to double the organic acreage from which it sources ingredients by 2019. This strategic alignment will build General Mills' relationships with the organic farmers who will be supporting its yogurt operating unit in the US, which includes brands like Yoplait, Annie's, Liberté and Mountain High.

"To ensure we are able to deliver great tasting organic yogurt offerings to our consumers we are committed to supporting a framework in partnership with Organic Valley that will not only ensure a consistent supply chain, but also make it easier for dairy farmers to successfully manage through the transition to organic," said David Clark, President of the General Mills Yogurt Operating Unit.

In addition, General Mills will launch the Organic & Regenerative Agriculture Transition Council, which will bring together sustainable agricultural leaders, farmers and industry stakeholders with the mission of advancing organic and regenerative agriculture practices. The first project will focus on dairy.

"We recognize that one of the biggest challenges to accelerating organic supply is enabling farmers to bridge the three-year period required to attain certified organic status under USDA rules. There is tremendous opportunity for Annie's — with the scale of General Mills — to increase the organic ingredient supply needed to support the rising consumer interest in organic foods," said John Foraker, president of Annie's.

Business Win Breakthrough

Regenerative Practices and Collaborations

General Mills' acquisitions are centered on supporting regenerative practices that take heed of its social responsibility and positively impact the environment we all live in. In January 2016, it acquired EPIC Provisions, a rapidly growing, premium meat snacks company based in Austin, Texas. EPIC will operate under General Mills' Annie's business, which has experienced strong sales growth since General Mills acquired the company more than a year ago. EPIC will help to significantly increase the positive impact of its business on global, large-scale grassland restoration and proper livestock management practices, including an innovative program for large herds of bison to help restore damaged grasslands and increase biodiversity. General Mills and EPIC are committed to accelerating this through partnering with organizations and ranchers that focus on the proper management of these systems.

In order to sustain the rapid growth planned for the Epic business, General Mills will invest in the purchase of bison calves with a small, family-owned ranch, to build the grass-fed supply. This partnership will support business growth while at the same time, nourish the land and rural communities.

Social Breakthrough

Thinking Creatively Around Developing Economies

General Mills works with smallholder farmers, NGOs and industry partners in order to pursue sustainable development that addresses economic, environmental and social challenges through its strategy of creating shared value. This strategy helps to ensure sustainable sourcing of raw materials while boosting the incomes of smallholder farmers and raising living standards in their communities. General Mills is moving its raw material supply chain toward more sustainable solutions using a range of approaches, including certification, verification, continuous improvement and origin-direct investment.

Spreading Opportunity in Brazil and Sierra Leone

Honey is an important supplemental source of income that increases food security and enables families to pay school tuition for their children. This growing honey industry also provides employment in the community.

General Mills has been purchasing honey from Sweet Harvest Foods since 1998, and supports the company's outreach efforts to help smallholder farmers develop sustainable beekeeping businesses in Sierra Leone and Brazil. The honey is produced organically

without herbicides or fungicides; and the team is working toward achieving organic certification in 2016.

In Sierra Leone, the Sweet Harvest Foods Africa Uplift project is helping to build scale in the growing honey industry and, as part of this effort, General Mills and Sweet Harvest Foods helped establish Mel-O Africa as a registered business in Sierra Leone, contributing to the economy and local tax base. General Mills also has helped fund beekeeping equipment, including bee suits, supplies, tools and jugs.

To date, 5,000 smallholder farmers have been trained as beekeepers. Additionally, by the end of the 2016 harvest season, it expected to have purchased 1,000 drums containing 55,000 gallons of honey from these farmers.

Income and Education

General Mills also helps fund Africa Uplift educational programs, including a high school science teacher, apiculture curriculum and honey collection training centers.

Building on the Africa Uplift project, the International Fund for Agricultural Development (IFAD), a microloan organization, is helping to establish local banks in the villages of Falaba and Timbakor. Using these banks, smallholder farmers can deposit and borrow funds to build their apiary enterprises.



“Trash Talk”

Nearly one-quarter of the world’s population purchases Kimberly-Clark’s (K-C) products every day and experiences the health, hygiene and other social benefits they offer. While continuing to ensure its products deliver the essentials for a better life to people every day, its waste programs challenge the company to design products and packaging that are more environmentally preferred, efficient to produce and that bring secondary value after use. By thinking differently about design, manufacture and disposal, it’s able to harvest value from its products and packaging even after they and their customers are finished with them.

Kimberly-Clark began talking internally about a zero-waste mind-set as early as 1995. In the first decade, it was very focused on keeping manufacturing waste out of landfills but wasn’t fully recognizing the value of these materials. As an industry-leading provider of consumer products, it has a responsibility to its customers to invent innovative solutions to tackle sustainability. As a result, it’s constantly striving to reduce the environmental impacts of all of its products at all stages of their lifecycles and convert waste into valuable opportunities.

Customer Innovation Breakthrough

Enabling its Customers to be More Sustainable

Kimberly-Clark’s commitment to helping its customers and its company be more sustainable starts with the products it makes. That’s why it continually works to reduce the environmental impacts of its products at all stages of their lifecycle – from raw materials through to ultimate disposal.

Putting Used Product, Materials and Packaging Back Into the Value Chain

Kimberly-Clark’s RightCycle program is an innovative platform to enable its customers to collect previously hard-to-recycle items, such as nitrile gloves and single-use apparel, and have them turned into eco-responsible consumer goods. Used products are collected after being worn at its customer’s facilities and are then shipped to its recycling centers. The used products are then sorted and processed into plastic pellets or nitrile powder. Lastly, the materials are molded into new eco-responsible plastic products like flower pots, patio furniture and plastic shelving.

From 2011 to 2015, the RightCycle program has grown from recycling just under two tons of material to 101 tons. It works with customers across more than 140 collections sites across the US and Europe to recycle used gloves and garments. This is a great example

of how K-C's innovative waste & recycling strategy embraces the 'circular economy' concept in order to find a second life for its materials that preserves their value after use.

Kimberly-Clark sees each by-product as a valuable resource for either its own use or the use of someone else in the marketplace. If the company doesn't need it, someone else does. So whether it's the materials it puts into products, the packaging, or the leftover material from manufacturing, it's always trying to convert it into the highest-value opportunity possible.

Business Win Breakthrough

Converting Waste into Opportunities

Today, creating more circular business models is essential for long-term business success and will have significant social and economic benefits for companies and countries across K-C's diverse supply chains. With this in mind, Kimberly-Clark is also identifying higher-value opportunities for its packaging materials and making it easier for consumers to understand not only the recycling requirements for different types of materials, but best practices across its geographic regions.

K-C has joined the On-Pack-Recycling label in the United Kingdom and the How2Recycle program in the US, which provide simple, consistent recycling instructions for packaging. Through the How2Recycle store-drop off program within retailers throughout the US, its flexible film packaging is labeled on-pack for its brands such as Poise, U by Kotex, Depend, Huggies, Viva and Scott. Labeling instructs consumers to return those materials to stores, where it's collected, baled and shipped to be turned either back into flexible films as post-consumer resin, or into high-value plastic construction materials or park benches.

Further, to help people recycle flexible plastic packaging in Australia and New Zealand, K-C partnered with the RED Group to start REDcycle. The recycled plastic can be converted into useful products like outdoor furniture and fitness equipment. Now, there are more than 500 drop-off points across the two countries to collect these materials. In 2015, REDcycle processed more than 2.3 million pieces of Kimberly-Clark branded packaging, which is more than 9.5 tons. Also, recovered materials has increased by 108% since the partnership was started in 2012.

Its initiative is not just about diverting waste from landfills, but converting it into valuable opportunities. At the end of 2015, it was generating nearly twice as much revenue from the sale of material that was previously considered waste, than it spent on disposal. It also reduced its waste intensity (MT of waste per MT of production) by 17% from 2010 to 2015, which is a huge marker/determinant that its manufacturing processes are becoming more efficient.

Social Breakthrough

Converting Diapers into Compost

Kimberly-Clark is also setting up programs to enable its customers to recycle products after use, which has a hugely positive impact on the environment. For example, in New Zealand, it has created and implemented a program that turns diapers into compost. Also, in Costa Rica, it's working to promote recycling drop-off stations across the country. There are many programs like these already, and it's always looking to develop more.

Since the company first began to talk internally about a zero-waste mindset back in 1995, it has come a long way toward realizing the true value of the material it uses in its production. By the end of 2015, it was diverting more than 95% of its manufacturing waste from landfill; and from 2010-15, it successfully reduced the tons of landfilled materials from its operations by a huge 67%.

Kimberly-Clark has realized that identifying opportunities to reduce impact at every stage of a product's lifecycle reduces global dependency on the world's natural resources, leaving more for the future – for our children, for our planet and for our businesses.



Supply Chain Reinvention: Imagine If...

Imagine if you were responsible for the supply chain of what was, in September 2011, the second largest food company in the world. Imagine if the CEO said you would have the opportunity to reinvent your supply chain.

The opportunity to step back and reinvent a function doesn't come along often. Yet this was the opportunity that Daniel Myers, Executive Vice President of Integrated Supply Chain at Mondelēz International, and his team were presented with.

Following a series of acquisitions over nearly a decade, the supply chain for Mondelēz International (MDLZ) was complex and characterized by a very high number of SKUs, formats and formulas, a lack of standardization, a fragmented supplier base and plants with low efficiency. Also, in 2012, its net productivity as a percentage of cost of goods sold was low, it had a high cash conversion cycle and its total incidents recorded (TIR) rate was well above the world-class benchmark. These led it to establish a list of priorities to develop a clear, compelling need to reinvent its supply chain to meet the needs of the business.

The company's transformation started with its dream, which is to create "delicious moments of joy" in snacks. Its brands are some of the most well-known and loved in the world and one of its favorites is *Oreo*, which marked the beginning of its journey.

As a supply chain organization with a focus on delivering speed of global innovation and breakthrough productivity savings, it has now achieved this in biscuit, in chocolate and in gum operations.

Here's how the team did it.

Customer Innovation Breakthrough

Imagine If... Meets the Taste Buds

MDLZ wanted to ensure that it had a consumer and customer driven supply chain, so it looked at the future with a five- to ten-year view. It then modelled the entire network end-to-end and streamlined its logistics operations.

MDLZ is home to some of the most well-known and beloved brands in the world, but fundamentally it needed to maintain its competitive advantage. It set out to achieve this by quite literally unleashing the creativity of the 65,000 people in its supply chain by putting out a simple idea: "Imagine if..." creativity fuels what's possible for innovation, and innovation is implementing the idea, but 'Imagine if' is unleashing everyone to do the extraordinary.

Business Win Breakthrough

Unleashment of Creativity

Before embarking on its journey, the team developed a clear business need with financial goals over three years (2013-15). First, it didn't just harness, but unleashed the creativity of the 65,000 people in its supply chain. Many companies are creative, but MDLZ has taken this many steps further: creativity fuels what's possible for innovation, and innovation is implementing the idea, but 'Imagine if' is unleashing everyone to do the extraordinary. It believes that companies can continue to learn from the power of harnessing creativity among their supply chains.

But how do you inspire 65,000 people?

It developed a clear business need with three end-goals:

1. To create \$3 billion of gross savings
2. To deliver \$1.5 billion net reduction in cost of goods sold
3. To generate \$1 billion of incremental cash flow

Its three goals have remained the same over the past five years, and in order to achieve these, it focused on five priorities to reinvent the supply chain:

1. Get the right leadership, talent and capabilities in place
2. Create advantaged assets and platforms to produce all of its 'power' brands

3. Design its work and the entire network with the future customer in mind
4. Step up its case capability, its net productivity
5. The safety of employees, safety in supply chain and driving world-class sustainability

Its first priority was to get the right leadership, talent and capabilities in place to recreate the value chain from end-to-end. Daniel asked his whole organization to list the top 100 roles – the most critical roles it had in the company – and, interestingly, they came up with 115.

It then renamed the function Integrated Supply Chain (ISC) to foster a stronger team mentality and took a look at these 115 most critical roles it had in the ISC. For each, it identified the skills and leadership qualities that were needed for the future, and evaluated that need against existing talent. It further refined the talent bench by organizing the function around seven disciplines of excellence – from order, purchasing, manufacturing and delivery through to cash. The business ended up repositioning 52 out of 115 people within 24 months of starting this work: 40-45% were internal promotions or lateral moves to get people in the right positions, and 55-60% were external hires. Second, it built a more agile and flexible manufacturing footprint for its power brands, using Oreo as its pilot. It created modular, one-time designs for specific product lines that used standard equipment and operations to create speed and supplier scale.

It also started measuring unleashment – how its people are engaged and unleashed in their ability to bring their creativity to drive the company to be the best in supply chain operations. In 2015, it held the first global engagement survey using an unleashment barometer, which included nearly 100,000 employees around the world.

Based on the success of these efforts, it documented best practices and rolled it out across the power brands. Amazingly, for the last two-and-half years, roughly every 10 days, it's started up one of its new lines somewhere in the world.

Its second strategy was to use existing assets as a template for all of its power brands. In order to do this, the team started with an 'Imagine if' supply chain reinvention slide, as it did with Oreo, and developed a slide for each and every one of its priority categories, provided funds and turned its people loose.

The quantifiable impact on business has been tremendous and it's achieved breakthrough productivity savings. As a headline achievement, it's increased revenue sustainably for three consecutive years. To provide some detail, it's tripled net productivity during the five years: in 2011, it stood at around 1% and it ended 2015 above 3.5%; moreover, two-thirds of its entire savings of more than \$3 billion has come from improving its core base operations: integrated lean six sigma, procurement transformation and driving simplification. Its cash cycle has improved dramatically by 32 days in two years and it generated more than \$1.3 billion incremental cash in 2014/15. Also, it has lowered its cost

of debt, and, in 2015, returned more than \$4.6 billion of cash to shareholders.

As one of its initial objectives, MDLZ has successfully solved the problem of the previously high number of SKUs: in 2015 alone, it reduced 3,000 SKUs and its revenue per SKU increased 13%. Moreover, it has sustained this for three consecutive years.

Its European organization alone is on track to achieve a 60% reduction in complexity by the end of 2016, compared to when the supply chain team started out on its journey. In manufacturing, the new *Oreo* lines deliver three times the volume of existing lines at a much lower cost. And, in Brazil, the team presented Daniel with a check for the savings that they generated in the first six months of their line of the future.

Social Breakthrough

Utilizing Brownfield Sites

In redesigning its supply chain with a focus on world-class efficiency, MDLZ has built more than 10 new brownfield and greenfield sites, and it's moving 70% of its power brands to these advantaged assets.

Ensuring Safety in the Workplace

When MDLZ looked at safety, it focused on benchmarking the company that's performed the best across-industry over the last 20 years. Today, its results in safety actually outperform this company: two of its regions are under point one total incidents reported (TIR), which is a performance that's never been seen in large manufacturing operations across entire regions. This means the company is not afraid to compare themselves to those companies that are setting out best practices.

The supply chain team at MDLZ thinks it's vitally important that its journey and what it has achieved so far is sustainable and lasting. It believes that this stems from leadership and the culture that it's trying to create – that its best today is not good enough for tomorrow. To do this, it learns, practices and then teaches the organization as leaders to keep pace.

It's maintaining a level of dissatisfaction with the status quo that's always key.



Supply Chain Transformation: Building and Executing an Integrated Supply Chain Strategy

Previously, Verizon Wireless's supply chain functioned in siloes across the organization, and with the proliferation of complex smartphones, customer issues were on the rise resulting in increased and often unnecessary returns. Around six years ago, it was operating at more than \$1 billion inventory. If it did not make changes to its supply chain, its inventory would have surpassed more than \$3 billion, which would have been a huge drain on its working capital. As a legacy of the business, it was spread across many different locations with local inventories, operated segregated business segments and had a huge SKU proliferation.

With Verizon's evolution from a telco to a technology company with revenue more than tripling to over \$130 billion in 2015, its global supply chain organization faced a need to change. It could no longer be perceived as simply a logistical operator responsible for transportation, warehousing and sourcing operations. It had to position the global supply chain as a strategic enabler and equal partner for influencing and driving the business.

Its challenge was twofold: changing how management viewed the forward and reverse supply chain, and managing disruptions to the industry. Until a few years ago, the perception of supply chain at Verizon Wireless was that supply chain equaled logistics – they were the people that handled transportation and warehousing. The supply chain team wanted to flip this perception and position supply chain as an equal partner that has a holistic view of the business. It also had to find a way to manage and keep up with the changing habits and demands of mobile/tech consumers.

Customer Innovation Breakthrough

Supply Chain Meets the Customer

The telecommunications industry has changed considerably from six years ago, when tablet sales were a non-entity, to today, when more than 60 million units were sold in 2016 alone.

In 2010, Verizon created the role of supply chain leadership, directly reporting to the Chief Operating Officer. Prior to this, logistics was part of the finance function and product procurement and supply planning was part of marketing. At this point, the company made a very conscious decision to integrate the needs of all the different business segments in light of the fact that the fundamental business dynamic was changing.

To handle the shift in customer expectations and systemic-wide inventory levels, it put in place a variety of process innovations, such as:

- establishing and enhancing very traditional aspects of supply chain, such as forecasting, fulfillment and supplier partnerships;
- creating a centralized inventory pool;
- setting its sales and customer-facing teams at ease by continuing to meet their service level needs and keeping the shelves appropriately stocked during the transformation.

Also, based on consumers' rapid adoption of smartphones and tablets, it had to think about the following:

- improving the customer experience and dealing with the explosion in apps and demands on what a device is capable of;
- staying ahead of the increased demand for data usage and growth;
- cost to serve, which increased dramatically based on returns, defects, customer support etc.

To manage the changes in the market, supply chain's efforts required a tremendous amount of buy-in from across the organization. In response to these challenges, it put in place a variety of process innovations:

1. First and foremost, it addressed the notion that inventory reduction comes at the expense of service levels and product that's available on the shelves. There's no notion that this is an inherent trade-off – you can improve product availability while managing inventory. So, its first priority was to set the sales and customer-facing teams at ease – it would meet their service level needs and keep the shelves stocked, and then it would build on the efficiency aspect. Building trust was key.
2. Second, it established building blocks, such as an end-to-end service model that guided them on the levels of inventory it needed to carry to reach the customer service levels.
3. It instituted an accelerated sales and operations planning process – different levels of leadership were responsible for coming together to make some tough calls.
4. It established very traditional aspects of supply chain, such as forecasting, fulfillment and supplier partnerships.
5. It created a centralized inventory pool. From a supply chain perspective, local inventory stashes lead to inefficiency and a lack of pooling.
6. It radically turned around the frequency with which it would replenish its 1,700 Verizon-owned stores.

Verizon now has four distinct supply chains: wireless devices, network infrastructure, broadband and video, and global IP network, and manages more than \$50 billion supply chain spend annually.

To reach this, it also educated its employees on detecting potential repairs rather than simply exchanging a product, and enhanced innovations such as on-device diagnostics allowed reps to more easily troubleshoot with the customer. From a reverse supply chain perspective, this led to a reduction in the number of defective returns to the business, resulting in over \$500 million/year cost avoidance consistently over the past two years.

Importantly, it re-tooled its employees to test a good portion of returns, so that ideally it could avoid exchanges. The company identified this as one of the main opportunities to dramatically change and indeed, improve, the customer experience. The team saw this as an integrated problem-solving challenge that could be led by supply chain.

Business Win Breakthrough

A Transformation Journey

Fast forward 15 years from 2000, and Verizon's revenue has tripled to more than \$130 billion and its revenue streams are dominated by wireless. The composition of its revenue streams has flipped, which is down to innovation in the industry and changes to its business. Verizon recognized that it was initially behind the curve on baseline and realized there was an opportunity to become more competitive.

Verizon seized this disruptive change in consumer demand and converted it to an opportunity: simply, if the cost was going to increase by 2.5x and it did not want inventory to increase, it would need to accelerate its velocity turns by 2.5x. The company realized that if it could execute on that, it would result in tremendous returns to the balance sheet.

As such, the company has gone through a significant transformation journey over the last several years.

To achieve this, the business recognized the opportunity to become more focused and competitive with its sourcing and procurement capabilities. So, from its legacy of 40 locations, it created two centers of excellence. It brought in category expertise, re-tooled and shifted the focus from transaction-based to strategic analytics in the way it looked at contract, spend and operations, and it aligned and integrated business units.

The new team embraced this strategic perspective and within a year, its accounts payable balance increased by \$1 billion. This was a key deliverable, which was substantial even given its massive scale. Today, the function comprises four distinct supply chains, handling more than \$50 billion annual supply chain managed spend.

New Revenue Stream

From a reverse supply chain perspective, it has also more effectively leveraged secondary markets for monetization of old devices and accessories as appropriate, which has become an entirely new revenue stream for the business.

Financially, Verizon has reduced operating costs and saved a tremendous amount in annual expenses. Looking at the results from the start of its journey in 2009, cost of goods followed the forecast 2.5x increase, from a spend of more than \$10 billion annually back in 2010 to almost \$25 billion last year and net inventory has remained flat. However, it was able to radically accelerate the inventory turns velocity from about eight to around 20 – a measure it has been able to sustain since 2014 and even in 2016. This result was fantastic in terms of the magnitude and the impact of the bottom line, and gave the supply chain team a high level of credibility at the leadership table.

Social Breakthrough

Business Benefits Aligned With Social Responsibility

The business benefits realized throughout its transformation are aligned with the company's corporate social responsibility initiatives, which include steps to reduce waste and consumption of fuel. For example, as noted in its 2015 corporate responsibility report, the improvements in customer service have also helped improve efficiency in its vehicle fleet. By employing more effective diagnostic and troubleshooting tools and relying on its reliable network, the number of trips required for technicians has been reduced, leading to improvements in fuel usage and emissions.

Reduction in Waste to Landfill

One example of this coupling is the optimization of Verizon's returns program. Quantitatively, returns have dropped by about 75% from previous levels. This dramatic reduction has had a positive effect on the customer experience, which has helped to drive improved net promoter scores, and also contributes to its corporate initiatives by incentivizing customers to recycle wireless devices and keep them out of landfills.

Moreover, Verizon's sourcing and procurement innovation is also supported by a supplier code of conduct that facilitates high ethical standards across the supply chain network. In particular, this agreement focuses on health, safety and environmental laws, protecting confidential and proprietary information, and forbids the use of conflict minerals.

Conclusion & Recommendations

Supply chain's role as a business leader is still emerging, but as shown by our awards finalists, the path to success builds upon impeccable execution with innovation and ingenuity. These organizations built upon the credibility created by consistently delivering against functional expectations, and sought out further opportunities for strategic differentiation.

In determining how you can learn from these breakthrough initiatives in setting a course of action for your supply chain, consider the following recommendations:

Create a system of standards. Each of these supply chain initiatives executed against core value propositions for their businesses and then added additional layers of capability. Creating a system of standards within your business identifies a hierarchy of success that aligns the organization in pursuit of those core values. To do so:

1. Define specific core strategic values – identifying measurable and achievable values is an important part of creating meaningful work. Generalized objectives such as becoming a customer-centric organization may sound good, but are too subjective. Instead narrow the focus to a limited set of core targets – for example, lowest cost to customer, on-time in-full, or even return on capital.
2. Develop a hierarchy of performance – using strategic values as the guide, establish what measures are most important – not everything can be top priority. With that in mind, individuals must be trusted to make intelligent decisions that impact the most important aspects of the business. These trade-off decisions will also highlight key opportunities for improvement that can be targeted.
3. Determine process standards – work that's both in line with strategic values and performance oriented is of most importance. Creating process standards allows for identification of best practices and further highlights what can be done to drive efficiency and consistency in executing. In evaluating process standards, work that

delivers to either the core strategy or the performance hierarchy, but not both must be questioned; Can this process be improved upon, or if not, should the standards and values be reconsidered? Any other work falling outside of these categorizations may not be meaningful and should be scrutinized.

4. Act within your control. In order for initiatives to be considered as breakthrough, they must deliver tangible results. This means having a thorough understanding of what changes are within your control, and what control lies in the hands of others. For example, technological innovations, such as drones, have the potential to disrupt last mile delivery, but current regulations in the US prohibit such actions. Instead, begin with what you can directly influence – technology solution implementation, creating a system of standards, redesigning your organizational structure – and make changes that have limited external contingencies that can impede progress.
5. Empower partners. Supply chain, by nature, cuts across organizational boundaries and integrates with internal and external parties. In developing initiatives, look for opportunities to create value across the entire value chain by extending partnerships and co-developing solutions. Empowering partners to achieve breakthrough success results in aggregate success that outweighs isolated improvement.

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About SCM World

SCM World is the cross-industry learning community powered by the world's most influential supply chain practitioners. We help senior executives share best practice insights in order to shape the future of supply chain.

As a member of the SCM World community, you have access to our predictive, groundbreaking research, which is focused on driving innovation in supply chain. Our agenda is set by an advisory board of the world's top supply chain leaders and the world's leading business schools. We also have our own team of expert researchers who are committed to providing insights into important trends affecting the profession.

We are passionate about making a difference to critical world issues like the distribution of food, delivery of healthcare, and environmental sustainability. Our mission is to help companies address these challenges within their supply chains.

We provide you with a powerful external perspective on supply chain through a combination of exclusive peer connections, practitioner-driven content and predictive research. Members of our community include Unilever, Amazon, Nike, Caterpillar, Cisco, Chevron, Dell, Nestlé and General Mills.

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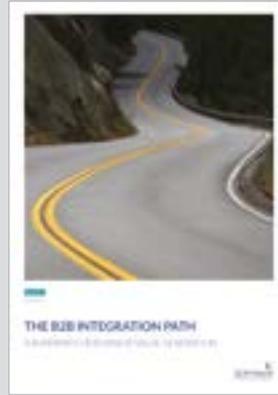
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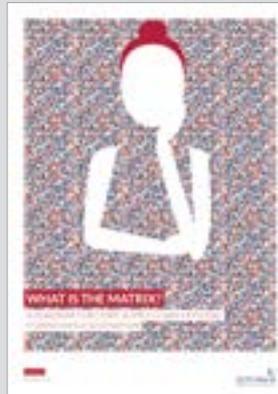
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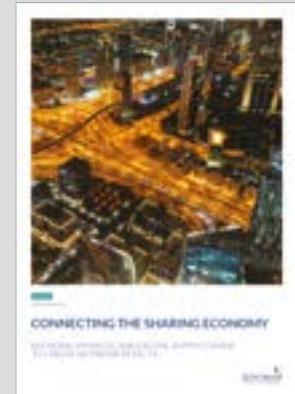
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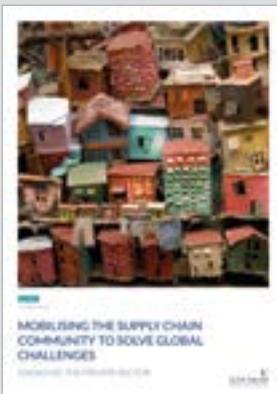
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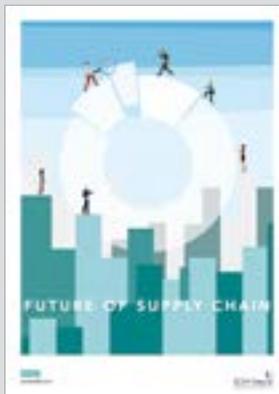
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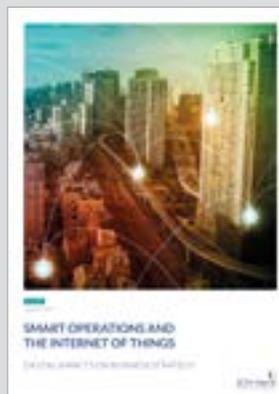
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