



WHAT THE BEST COMPANIES DO

The Next Generation Supply Chain

Manage Volatility and Complexity
to Capture New Opportunities

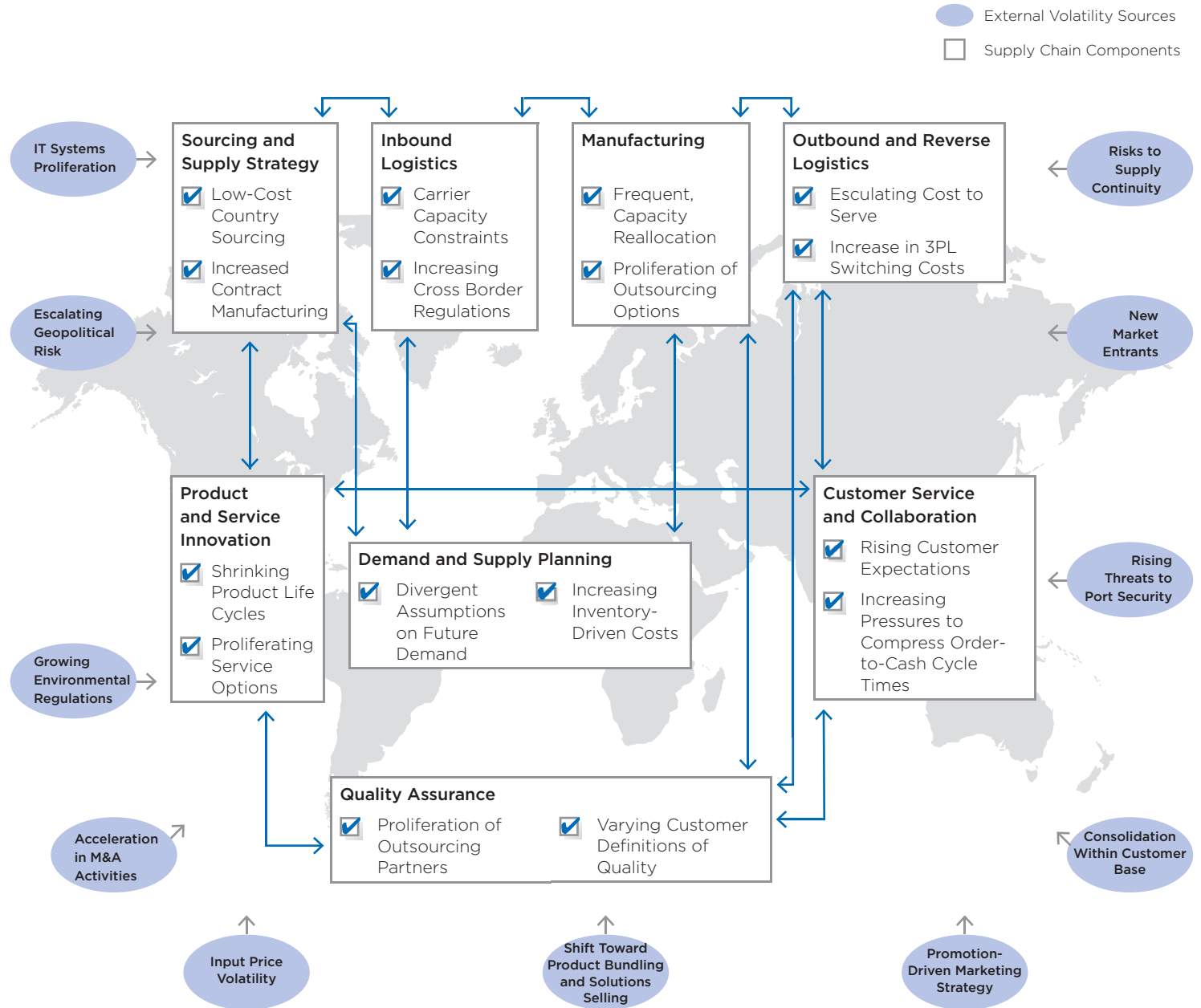
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External volatility and internal supply chain complexity will continue, although their specifics are likely to change.

VOLATILITY MEETS COMPLEXITY



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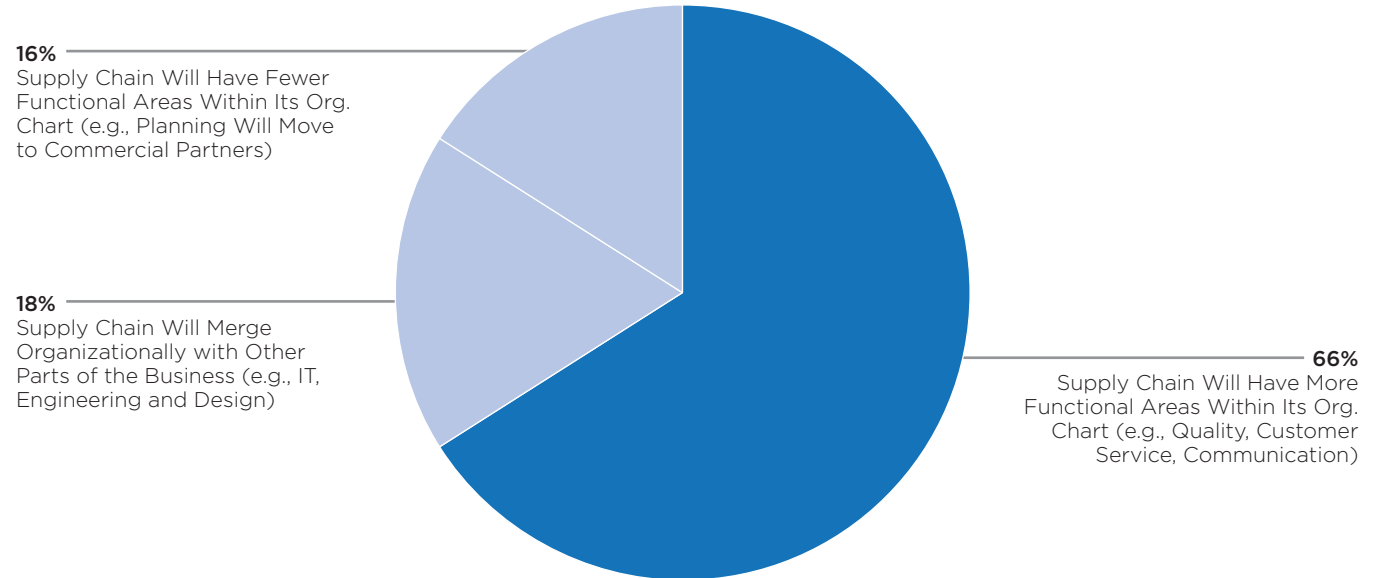
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Two-thirds of supply chain executives anticipate control over more of the enterprise across the next 10 years.

SUPPLY CHAIN GETTING MORE COMPLEX

Most Likely Organizational Model for Supply Chain 10 Years from Now
Percentage of Respondents



n = 145.

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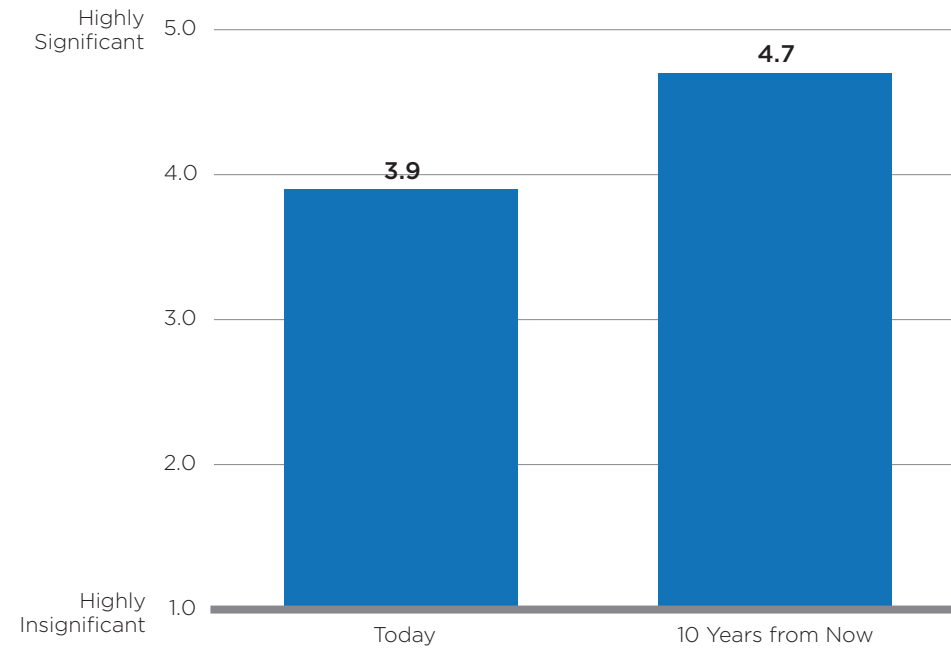
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Supply chain executives anticipate their contribution to company competitive advantage becoming very significant over the next 10 years.

GROWING IMPORTANCE TO THE BUSINESS

Significance of Supply Chain as a Driver of Competitive Advantage
Average Response



n = 144.

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INTRODUCTION	THE FUTURE SUPPLY CHAIN	RESULTS BY INDUSTRY	RESULTS BY LEVEL IN THE ORGANIZATION
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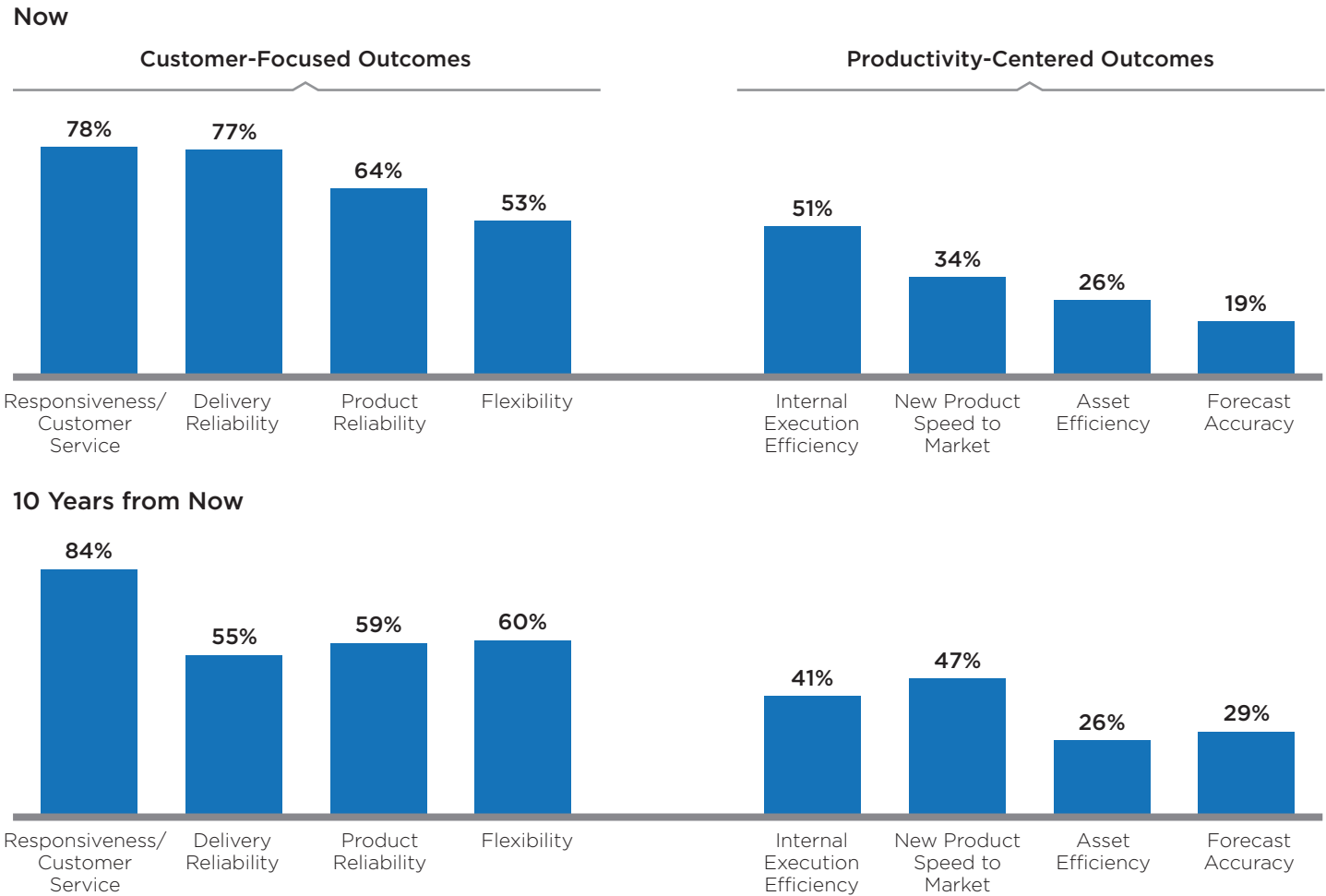


Customer-focused performance outcomes will continue to drive competitive advantage over the next decade.

- Among customer-focused outcomes, flexibility will assume much more importance in the next decade, moving to second-most importance overall.

CUSTOMER CENTRICITY DRIVES COMPETITIVE ADVANTAGE

Relative Contribution of Performance Outcomes on Company's Competitive Advantage
Percent Ranking Among Top Four



n = 146.

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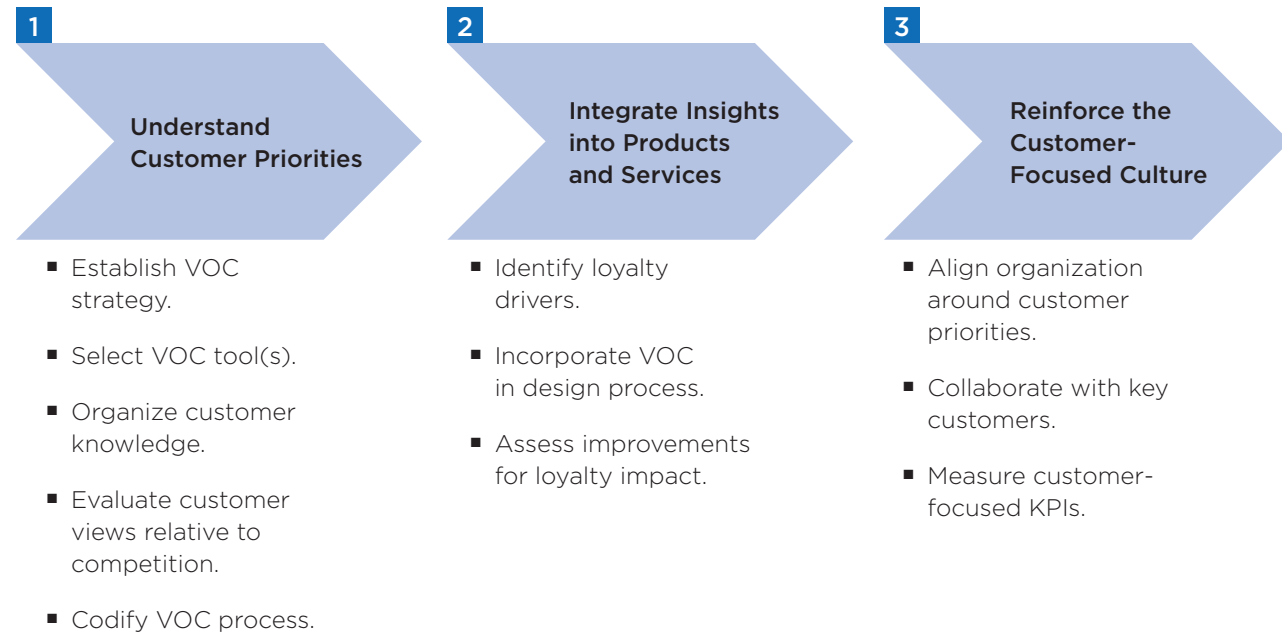
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Customer-focused Supply Chains align their organizations around customer priorities.

- Products and services are then built around these priorities.

THREE STEPS TO BECOMING CUSTOMER-FOCUSED

Putting the Customer at the Center
Operations Leadership Exchange Guidance



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INTRODUCTION

THE FUTURE
SUPPLY CHAIN

RESULTS
BY INDUSTRY

RESULTS BY LEVEL
IN THE ORGANIZATION

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