

# The Fifth Annual Global Survey of Supply Chain Progress

Findings from a survey jointly conducted by Computer Sciences Corporation,  
*Supply Chain Management Review* and Michigan State University



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# Executive Summary

The 2007 Survey of Supply Chain Progress was approached differently this year to better reflect what was taking place with individual business efforts. Previous surveys and analyses confirmed that progress has steadily been made by virtually all firms responding — around the globe. However, this year the survey documents how firms differ in terms of their “maturity,” particularly along eight dimensions of supply chain competence (see insert below), and then compares the practices and performance of firms with greater or lesser maturity. An analysis of the data indicates that companies tend to fit into one of three groups: mature, moderately mature, and immature. For the purposes of this report, we will also refer to those in the various groups as leaders, followers and laggards, respectively.

## *Eight Dimensions of Supply Chain Competence*

- Alignment with Business Strategy
- Strategic Customer Integration
- Strategic Supplier Integration
- Cross-Functional Internal Integration
- Supply Chain Responsiveness
- Planning and Execution Process and Technology
- Supply Chain Rationalization/Segmentation
- Risk Management

In its fifth year, CSC and SCMR Magazine collaborated with faculty in the Eli Broad Graduate School of Management at MSU to develop the survey questions and conduct analysis across a range of 22 industries. MSU created a profile from the results, which is useful for determining the specific characteristics of firms in the three levels cited earlier. The variations in these profiles suggest what must be done to move from one level to the next, and what the benefits can be for doing so. The difference can be as much as two to three points of profit on the bottom line.

Earlier surveys placed emphasis on determining advancement along the five levels of the familiar supply chain maturity model<sup>1</sup>. This year the questions went deeper, exploring why some firms were not at the highest possible level of progress after many years with their efforts. Analysis of the data has revealed patterns that explain the differences and show what leads to greater overall success or lack of progress.

## Lessons to be Learned

To begin, future supply chain efforts will be favorably enhanced if those in the follower and laggard categories focus stronger attention on the lessons learned by the mature leaders. Familiar themes resounded from the leader firms: showing greater collaboration with business partners and paying more attention to the areas of weakness need to be addressed by the less mature companies. One example appeared early in the analysis: firms with a Chief Supply Chain Officer (CSCO) reported significantly stronger strategic alignment with business goals and objectives. They also were well above average, while others were well below, in terms of documented results. Having greater strategic alignment, moreover, correlated well with having significant, positive involvement of top managers, especially the Information Technology (IT) Executive. Having IT working in close concert with supply chain is a definite mark of the leaders.

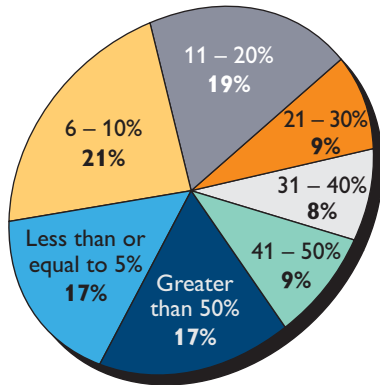
General results from the 2007 survey indicate all firms remain squarely determined to use attention on supply chain as a means to reduce costs, with such efforts showing a movement forward in terms of the amount of savings generated. Over 70 percent of all respondents indicated costs savings in a range from 1 to 5 percent to as high as 15 percent or more. Most firms appeared to be in the area of 10 percent savings. At the same time, the leaders were showing greater gains and more progress with revenue increases. More than 50 percent of the leaders showed at least six percent gains in revenues attributable to supply chain initiatives. About 32 percent of followers and only 23 percent of laggards showed this level of improvement.

Among the interesting patterns discovered, the firms making greater progress have moved from a cost-only perspective to primary objectives that are more customer-focused. These goals were oriented around such things as faster and more personalized order fulfillment, shorter order fulfillment lead times, creating and delivering perfect orders, and enhanced cash-to-cash cycle and asset turns. Leaders also have a greater correlation between executive involvement and development of specific supply chain plans that become an integral part of the corporate strategy and planning system. An absence of such a connection is a characteristic of less mature firms.

<sup>1</sup> CSC's Supply Chain Maturity Model

From another aspect, the previous survey concentrated on differences on a geographical basis, and conclusions were drawn regarding the distinctions between North America, Europe and Asia. This year’s survey paid particular attention to the factors that lead to greater or less success, regardless of locale. As one interesting example, when we asked about supply chain management spending as a percent of revenue, we received answers shown below, primarily in the 20 percent area. When we made a separation by our three categories, however, we found spending for the leaders is less (20 percent) than for the followers (28 percent) and the laggards (29 percent). It would appear that it’s not a question of how much is spent on supply chain improvement, but how wisely.

**Question 16. What is your supply chain spending as a percentage of revenue?**



**Percentage of Respondents**

In terms of self-rating performance, 38 percent of the leaders consider themselves industry leaders compared to 10 percent of the follower firms and only 2 percent of the laggards. The 2007 survey appears to have drawn out some very frank and honest observations. Leaders also seem to be much further along with efforts that include product management design and engineering — an area that has been reported as generally lacking across the board in previous surveys.

**Differences in Attitudes and Results Across Four Key Areas**

There was much greater selectivity in the answering of questions this year. Some respondents selected questions of interest and ignored others. The choices appear to be related to the topics of most interest to the respondents. There were sufficient numbers of answers for each question, however, for responses to be statistically significant.

The 2007 survey was completed by 179 individuals, with a dichotomy in terms of size of company. Fifty-seven percent of the firms indicated sales of \$500 million or greater, while 43 percent indicated revenues of less than \$500 million. The companies responding were largely corporations with a heavy emphasis on manufacturing and distribution, with 32 percent indicating retail as their industry.

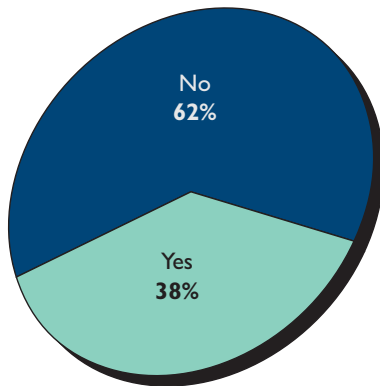
To provide a more in-depth report into what is actually taking place as a result of supply chain efforts and to document how firms differ along the eight dimensions of competence, respondents were asked to provide data on progress in areas of importance. The questions were separated according to these four areas:

- Supply chain management policies and practices
- Supply chain continuity and protection
- Investment and performance
- Tools and initiatives

Some immediate findings appeared as profiles were established in the three levels of maturity mentioned earlier. Laggards show considerably less involvement between supply chain efforts and product development, for example. This condition is no doubt one of the reasons for poor overall results with new product introductions and application of product lifecycle software. Surprisingly, collaboration with IT to enable improvement efforts is still a missing link for the lesser achieving firms, and even some of the leaders. Only 28 percent of all responses indicated a high collaboration rating between supply chain and IT.

The survey revealed that there is a general opportunity for more participation and support from financial officers with respect to supply chain advancement. When asked to rate the level of involvement of financial managers in supply chain activities, only 24 percent indicated the level was “high.” Similarly, there was an indication of continued greater involvement of top management in supply chain efforts, but the amount of such involvement is not where it should be. Nearly one-third of respondents indicated a “low to no support” rating in this area. The leading firms typically have very high participation and support from senior management. Unexpected results occurred when we asked: Does your firm have an executive officer who manages all of supply chain funding? Nearly 40 percent responded affirmatively, while 61.7 percent answered negatively. This result left us wondering as to who makes the important supply chain decisions.

**Question 23.** Does your firm have an executive officer who manages all supply chain functions, for example, a Chief Supply Chain Officer or similar office?



Percentage of Respondents

When we queried respondents in earlier surveys on their opinion of the overall level of supply chain competence on a “one to five” (one being low and five being most advanced) maturity scale, we received another indication of continued upward movement. A little more than 78%, or more than three-fourths of all firms, placed themselves in three or higher.

Several interesting differences appeared in the profiles. In terms of product reliability and product conformance, 60.7 percent of firms rated themselves in the top one-third of the industry. We interpret that as an indication most companies think things are working and resulting in improved product performance. At the same time, when we asked respondents to rate sales forecast accuracy, we received a bell-shaped set of replies — 28.4 percent rated themselves in the bottom one-third, 49.7 percent in the middle and 21.9 percent in the top one-third. Here we see an opportunity area, as leaders have made great strides in increasing sales forecast accuracy. Most are using sales and operations planning (S&OP), greater collaboration with suppliers and customers, and some form of enhanced enterprise interaction to bring much higher reliability to what amounts to the actual demand for products and services.

## Supply Chain Management Policies and Practices

Previous surveys have indicated a strong correlation between success and the involvement and support of senior management, an important ingredient in most change efforts. To determine how this factor

varied across the three categories of supply chain maturity, and how specific factors affected results, a series of questions were asked relating to policies and practices, and how they relate to the eight critical dimensions, with some very interesting findings.

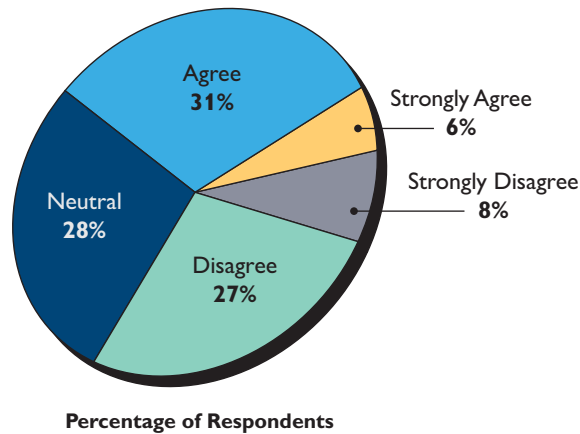
First, we asked if supply chain strategy was aligned with overall business strategy — and we were disappointed by the split in responses. Fourteen percent “strongly agreed” and 40.5 percent “agreed” with that issue, while 45.5 percent were “neutral” or “disagreed.” Going further, we questioned if the firm had clearly defined strategic goals and objectives and found a similar split. Almost 58 percent (an improvement from previous surveys) rated themselves “high” or “very high” in this respect, while 42.4 percent replied neutrally or negatively. However, when we looked at whether or not corporate strategy drove supply chain decisions, 60 percent gave their firm high ratings. Apparently, those who are driving supply chains are taking their lead from the business plan rather than the reverse approach of building their plans into the business strategy.

As part of our aim to get at the real values from supply chain, we asked if the firm’s strategy exploited unique supply chain capabilities, and found only 40 percent giving high ratings and 60 percent neutral to low ratings. This condition carried over when we investigated if supply chain strategy accommodated for supply chain constraints, and found only 41 percent responding positively. Moreover, when asked if supply chain strategies and goals are communicated to all employees, a very disappointing 34 percent responded positively. Once again, we find it hard to reconcile how a firm expects to get the optimum benefit from a supply chain effort without a clear understanding by those involved of how the inherent strategy is going to exploit the gains being made.

Here we see a definite opportunity for further improvement. Previous surveys have documented how the supply chain leaders have a strong connection between the supply chain plan/effort and the firm’s strategies and business operating plan. This year’s survey shows a serious group of firms that do not have this essential ingredient.

To test our thesis a bit more, we asked how often the organization formally reviews or updates its supply chain strategic plan. Although we had seen some progress in this area in previous surveys, we found 56 percent indicating “only as business conditions dictate” in the 2007 survey. Once more, there is evidence that the majority of supply chain efforts result in high returns on effort, but low on connectivity with what drives the business plan.

**Question 1F. Supply Chain strategies and goals are communicated to all employees?**



## Making the Strategic Customer Connection

In 2007, we attempted to determine the degree to which strategic customer integration is being addressed, and how supply chain is being linked to customer satisfaction and building of new revenues. We started in policies and practices by asking if the firm had transformed from a push to a pull approach to supply chain, a fundamental for making advanced progress. To our surprise, only 39.5 percent indicated they had made that crucial shift in focus. Firms did, however, generally indicate they had supply chains with multiple channels focusing on different market segments. Over 69 percent responded positively to that question.

We did better when we asked if the firm pursues relationships and involvement beyond individual sales transactions and discovered that a resounding 82 percent answered positively. Fifty-seven percent of firms said they exchange operational information with suppliers and customers, indicative of a continuing good trend in that direction. On a more specific basis, 72 percent reported their firm had plans that address individual customer requirements. The leaders appear to share some of this information with key suppliers to assure delivery compliance.

The results were not quite as good when we delved into whether or not the firm synchronized internal activities with customers, a measure of supply chain responsiveness. Only 42 percent responded positively to that query. This finding is consistent with previous results that show customer orientation is difficult to sustain when there are pressures that negatively impact operating

performance. Firms that produce favorable performance metrics based on throughput, for example, are hard pressed to interrupt schedules or to make changes to be more flexible and responsive in the eyes of the customer.

We went deeper in this area by asking if the firm had clearly-defined roles and responsibilities for managing customer relationships. Sixty-two percent of respondents provided high ratings, a very positive result. Fifty-nine percent said they had guidelines for acceptable practices for customer cooperation. Interestingly, 69 percent reported their firm was constantly exploring new working relationships with customers.

Continuing our look at responsiveness, we asked if performance metrics promoted rational trade offs among customer service and operational cost. Forty-six percent gave high marks and the remaining 54 percent indicated neutral to poor ratings, not especially encouraging. Then we asked if the firm had programs to increase turnover through improved responsiveness — 55 percent replied positively and the balance were either neutral or negative. Finally, we looked at whether or not functional teams have a common prioritization of customers in case of supply shortages. Fifty-seven percent responded neutrally or negatively, while 43 percent gave positive ratings. All of this indicates a movement toward the customer orientation, but not to the degree demonstrated by the leaders. Leaders have a much stronger focus on customer satisfaction, making needed changes and being flexible and responsive to accommodate the most strategic customers. These leaders have taken the time to segment customers by strategic importance and carefully match what they deliver to meet actual needs.

We concluded this portion of the survey on a very high note when we asked if the firm recognizes that different products contribute to the bottom line differently, and 87 percent responded positively. Moreover, 60 percent of the firms indicated their inventory policies differed by product segments. Obviously, as supply chains mature, the idea of segmenting customers and products and using some form of activity-based costing to determine the real profitability leads to better results.

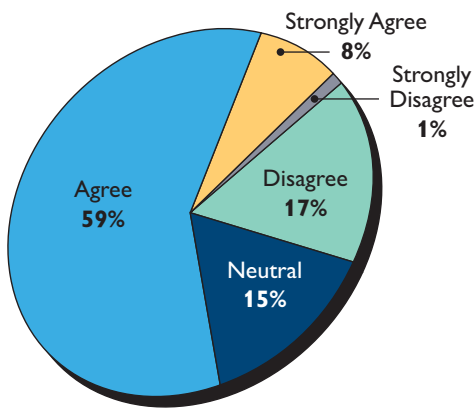
## Cross-Functional Relationships

A consistent theme appeared in earlier annual surveys and has persisted to the 2007 results. The supply chain maturity model indicates that lower level companies have difficulty establishing inter-functional or inter-business collaboration. Indeed,

there has been strong evidence that despite the ability to find better processing at many locations within a supply chain, there is difficulty getting people to share this information across the business or with other supply chain partners.

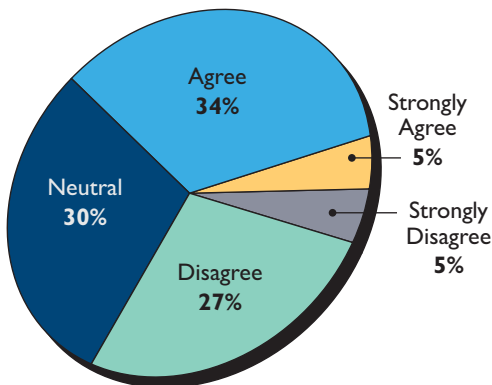
To probe this area of cross-functional internal integration, we asked if functional teams are aware of each other’s responsibilities. The results show an interesting pattern from strongly disagreeing to strongly agreeing:

**Question 4. Internal integration — extent to which intra-firm functional teams (operations, logistics, sales, marketing, supply management) work together to accomplish supply chain planning and execution.**



Percentage of Respondents

It appears that most firms have found the way to share some responsibilities. Next, we asked if operational and tactical information is regularly exchanged between functional teams. Nearly 49 percent agreed or strongly agreed, but disappointingly more than half were neutral to negative. In a specific area, we queried if purchasing decisions were based on plans agreed upon by all functional teams and found another indication of weak progress.



Percentage of Respondents

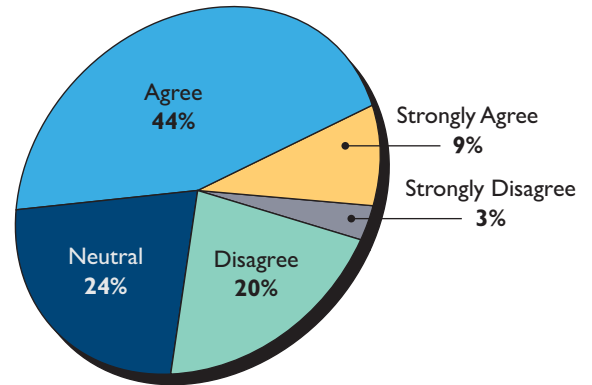
Going even further, we checked to see if all functional teams use common product roadmaps and other procedures to guide product launches. Only 36 percent of the respondents rated their firm “high” in this area. We found more confirmation that most firms need to spend more time breaking down the stovepipes that separate functional teams and inhibit sharing the kind of knowledge that leads to solid supply chain progress.

From a specific viewpoint, we were curious to see if the policies and practices orientation of the firm had shifted from managing functions to managing processes, and found firms clustered in the middle of the ratings with very few “fully satisfied” or “fully disappointed.” Overall, our conclusion was that some progress has been made, especially among the more mature firms, but functional collaboration is still a mark of the advanced firms and not the followers or laggards.

## Planning and Execution Process and Technology

Another area where we thought a deeper analysis would be helpful was that of planning and execution process and technology. Most supply chain professionals acknowledge that planning is a key element in overall success. They also recognize the necessity to involve multiple constituents across the enterprise in both planning and execution to establish a clean and seamless flow from supply through manufacture and delivery. Once the processes are established correctly, technology becomes the enabling ingredient. In an effort to see if there had been as much progress in this area as other supply chain factors, we first asked if the firm used a formalized, disciplined planning process in most supply chain areas. As shown in the chart below, 53 percent indicated a positive response, but nearly half were neutral to negative.

**Question 7A. Planning Effectiveness — We used formalized, disciplined planning processes in most supply chain areas.**



Percentage of Respondents

In a fundamental vein, we asked if the planning processes address both long-term and short-term objectives, and found 71 percent indicating good results in this area. When we took a look at whether or not the firm typically sees small variances between what is planned and what is actually done, however, only 40 percent were positive. Going somewhat further, we found only 45 percent indicating their firm's planning processes include feedback loops to address reasons for variance between plans and execution.

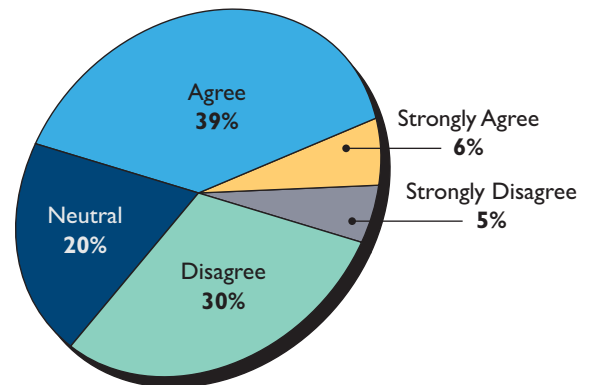
Planning is not necessarily a strength for any supply chain effort, other than for the leaders. Although a critical element of the Supply Chain Operations Reference (SCOR) model (a frequently applied supply chain tool), most companies simply do not put the amount of effort into this area to truly match supply with demand. Rather, the focus is on supply chain efficiency in terms of cost, and planning is expected to follow in step with emphasis on throughput and efficiency.

## Supply Chain Continuity and Protection

It is worth noting that while risk and vulnerability remain crucial issues for most supply chain professionals, the survey once again did not indicate the kind of concern or preparedness one would expect. Risk management is another of the critical supply chain dimensions apparently in need of greater attention. To probe this area, we asked a series of question related to supply chain continuity and protection.

When we asked, for example, if planning identified contingencies with a risk analysis and scenario evaluations, 46 percent were positive but the balance were neutral to negative. When questioned to see if organizations had sufficient executive visibility and accountability for supply chain and continuity, half responded positively with the other half neutral to negative. Indeed, only 41 percent of the firms indicated the organization pays sufficient attention to supply chain vulnerability and risk mitigation actions.

**Question 7B.** Our planning identifies contingencies with a risk analysis and scenario evaluations.



Percentage of Respondents

Trying to get a little closer as to why there was not more concern in this area, we found it remains a neglected area. Respondents were asked, for example, to indicate the issues of concern related to continuity. Nearly all of the issues we suggested failed to gather more than 33 percent of the replies indicating it was of most concern. Only when we asked about inventory planning and inventory level strategy did we find 50 percent of the firms listing that issue as being of most concern. Such matters as unstable global sourcing, new import and customs regulations, terrorist attacks, and critical trading partner vulnerability generally showed three-fourths of the replies indicating moderate to least concern.

With supply chains becoming ever more extended and global in nature, we struggle with understanding why firms do not pay more attention to the critical factor of risk management. In general, immature firms seem to be more concerned with inventory planning and associated concerns, whereas mature firms seem to be more concerned with such matters as port congestion and global sourcing issues.

## Investment and Performance

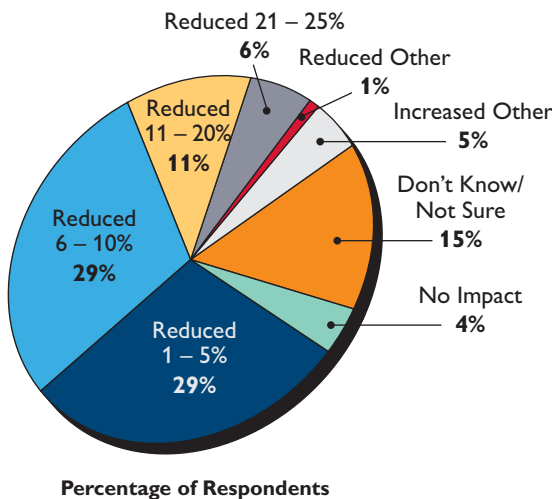
Moving to another of the four key factors, we explored the areas of supply chain management in which firms made investments over the past three years. The categories of choice were supply chain soft technologies, such as planning and decision support, supply chain hard technologies such as RFID and material handling equipment, and training and workforce development. Overall, there was no statistical difference across the groups in profiles of investment between software, hardware and training.

When we inquired about the primary objective driving supply chain investments, we were not surprised to find the favored response was to “lower supply chain operating costs.” A large gap appeared after that category until we came to “faster, more accurate and more personalized order fulfillment” and “profitable sales growth.” A larger proportion of leaders listed “faster more accurate more personalized order fulfillment,” “profitable sales growth,” and “streamlining fulfillment across multiple channels” as the primary objective driving their investments. The followers are more likely to emphasize “minimize supply-demand imbalances.” The laggards are more likely to stress “lower supply chain operating costs.” This finding suggests that the leaders have addressed tactical cost and imbalance issues and are now concentrating on more strategic concerns.

### Actual Results Confirm the Value of Supply Chain Efforts

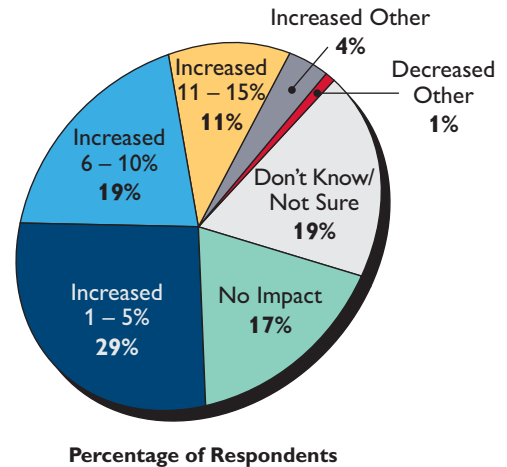
Realized results continued to validate what can be accomplished through a concerted supply chain effort. Those firms indicating some level of cost savings increased from 75 percent in 2006 to 81.9 percent in 2007, again in a range from 1 to 5 percent to 16 percent or more, with nearly 60 percent indicating they were in the one to ten percent range. Proportions of firms that stated 0 to 10 percent cost reductions attributable to supply chain initiatives were comparable across the maturity groups. However, about 25 percent of leaders and 20 percent of followers showed cost improvements of 16 percent or more. Only 3 percent of the laggards stated they had reached this level of improvement.

**In the past 3 years, what has been the overall impact of your supply chain initiatives on costs?**



Revenue growth showed another substantial move upward. When we began including this element as a factor of improved supply chain processing, nearly three-quarters of respondents indicated they saw no progress or had no understanding of the connection. The 2007 survey showed that the number had been reduced to 36 percent — a strong improvement, but still indicative of a great opportunity to use supply chain advantages to increase sales. More than 50 percent of the leaders showed at least 6 percent gains in revenues attributable to their supply chain initiatives. About 32 percent of the followers and only 23 percent of the laggards showed this level of improvement.

**In the past 3 years, what has been the overall impact of your supply chain initiatives on revenue?**



We asked if the orientation of the company had shifted from managing functions to managing processes (a distinct requirement for Level IV progress in the supply chain maturity model) and found weaker progress, as we again encountered a bell-shaped curve with most firms clustered in the middle to possibly the moderately high side.

We next asked the respondents to indicate their level of performance relative to industry average in a number of specific operational areas, such as:

- Delivery performance to commit date
- Fill rate
- Perfect order fulfillment
- Order fulfillment lead time
- Supply chain response time
- Value-added productivity (sales per employee)
- Warranty/returns processing costs
- Cash-to-cash cycle time (receivables + inventory) — payables
- Inventory days of supply
- Asset turns
- Forecast accuracy

Leaders outperform the laggards in every supply chain performance category except one, product design quality (performance and features). Leaders outperform followers in 9 out of 16 categories. Biggest differences between leaders and followers are in order fulfillment lead time, perfect orders, inventory days of supply, cash to cash cycle time, and asset turns. The largest differences between followers and laggards are in fill rate, supply chain total cost, cost of goods sold, productivity, asset turns, and forecast accuracy. These results lead us to infer that performance gains are realized by moving from an immature to moderately mature to a mature status.

The respondents' self ratings are also highly correlated with maturity status. When asked if they considered their firm a leader in the industry, 38 percent of the leaders responded positively, with 10 percent of the followers and only 2 percent of the laggards giving that indication.

## Tools and Initiatives

A particular distinction occurred when we studied the differences in levels of usage of supply chain technologies. Leaders are more experienced users of every supply chain technology than the other two groups, except that they are not more experienced than followers in the use of planning systems. Followers use planning systems and relationship management systems more than the laggards. The laggard firms appear to have little preference for enabling technologies. This pattern has become more apparent as we have seen in previous surveys; the tendency for leaders to work more on improvements on an extended enterprise basis than the laggards.

## The Renewed Call for Action

And so we return to the call for action. There was so much information contained in the 2007 survey that many conclusions and recommendations could be drawn on future courses of action. Based on the general review of the responses, we find several observations appropriate.

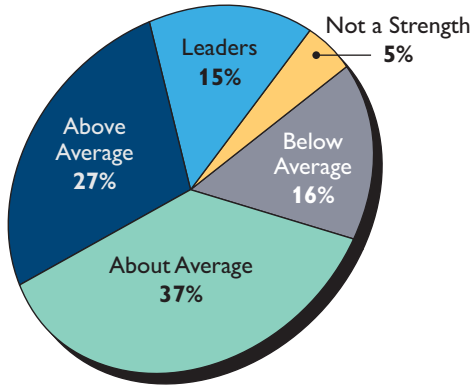
- Supply chain management (SCM) continues to meet with mixed results, although general progress is evident. The laggards are part of that progress, but the gap versus the leaders is worth several points of profit and must be a factor in generating revenues with the most strategic customers. Efforts must be made by the followers and laggards to incorporate more of the practices of the leaders to close that gap.

- There must be someone in charge, with full responsibility for what happens within the supply chain across the extended enterprise. To optimize results, this senior officer must be a direct report to the CEO and have the full support of the CIO and CFO.
- SCM efforts deliver the greatest results when it is an integral part of an overall business strategy — it should not be a standalone effort. A lack of strategy alignment and planning based on the principles that need to be within the strategy will inhibit firms from achieving the highest levels of progress.
- There is a large opportunity for financial officers to be more involved in supply chain efforts, particularly drawing attention to the actual improvements that can be made to financial performance. The leaders' use of costing and financial information to impact strategy and tactics is evidence that a closer relationship can be beneficial.
- Making progress with revenue increases as well as cost reductions is a real opportunity that the leaders use to establish an advantage. With the growing sophistication of customers being a fact of business life, the focus of supply chain improvement must take a stronger orientation toward reaching mature levels of customer satisfaction. A maturity model similar to the supply chain model should be applied to measure progress to a leader position, in terms of gaining a distinctive position with customers.
- IT must continue its progression from being a necessary evil to becoming an important component of supply chain success. This characteristic is a clear advantage for the leaders. Stovepipes must be completely destroyed in this area and collaboration brought to the highest levels.
- While technology is an absolute necessity for advanced supply chain progress, poor impact of technology as an enabler is still a major thorn in the side of many practitioners, especially the followers and laggards. Getting the process right must come first, followed by successful enablement through application of the correct software and technology. We see advantages to be gained by applying this axiom to such areas as warehouse management and transportation management systems, followed by network analyses that lead to collaborative improvement of the end-to-end linked processes.

We conclude with a note for the previous survey. In general, companies across the industries represented are continuing their relentless march forward with supply chain as a business driver. But the roadmap is not being followed in many instances, as firms slip on the path to optimization. To reach the highest levels of potential improvement it is time to get the train on the tracks and move forward with what are clearly proven techniques. That means collaborating better internally to optimize processing, and then working with key suppliers and customers to pinpoint the remaining areas of needed improvement and more effectively apply technology as an enabler and factor in achieving total success.

# Summary of 2007 Responses

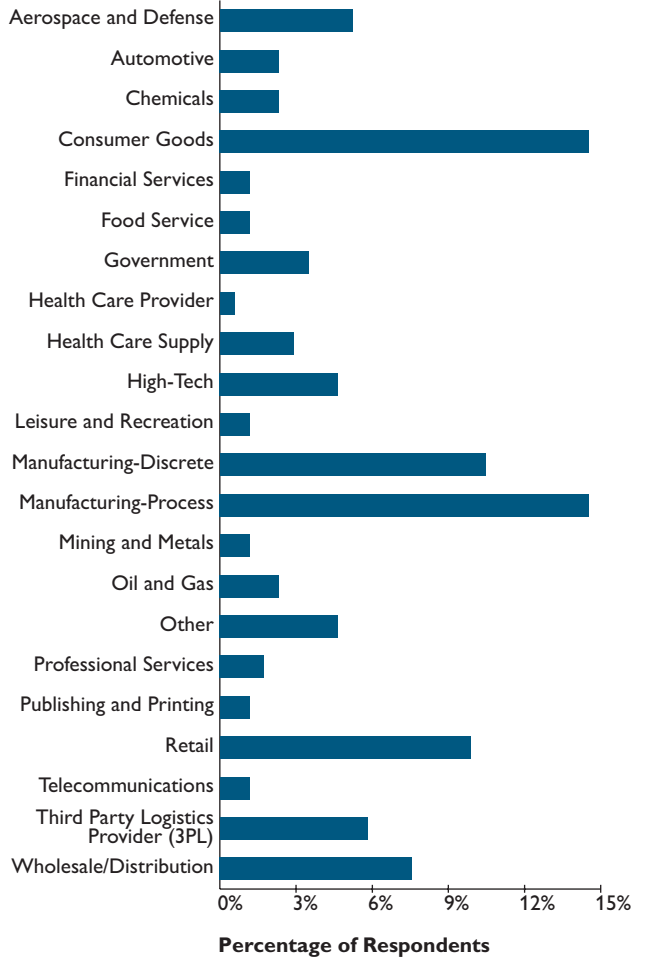
**Question 15.** How would you rate your overall level of supply chain competence?



**Percentage of Respondents**

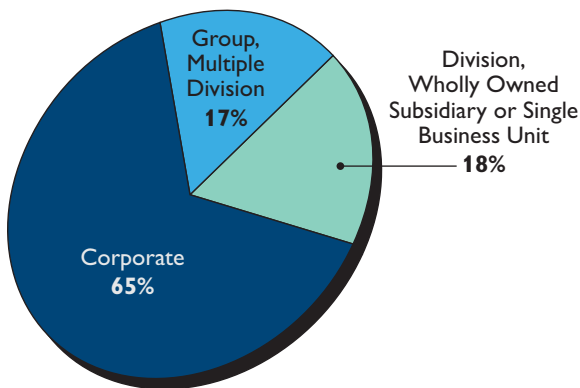
- SCM is not a strength relative to others in our industry
- Our SCM competence is below the average for our industry
- Our SCM competence is at about the average for our industry
- Our SCM competence is above the average for our industry
- We are among the leaders in SCM in our industry

**Question 20.** In what primary industry does your organization operate?



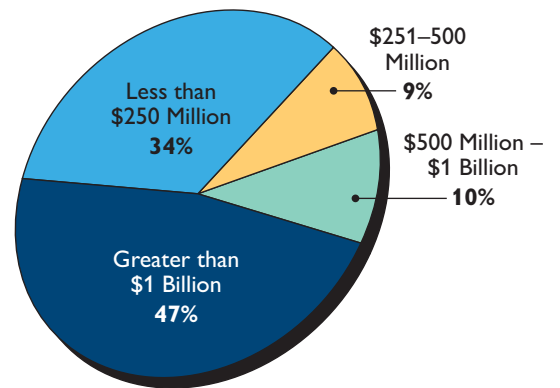
**Percentage of Respondents**

**Question 19.** Describe the organization for which you are responding.



**Percentage of Respondents**

**Question 22.** Please indicate your firm's annual sales in U.S. dollars.



**Percentage of Respondents**

# Methodology

The 2007 Global Survey of Supply Chain Progress was sent to supply chain professionals in North America, Europe, Asia, Australia, and other countries around the world. The names were drawn from CSC's client base, readers of Supply Chain Management Review Magazine and other publications of Reed Business Information, and special mailing from Michigan State University. Particular efforts were extended by the non-North American CSC regional offices.

A total of 179 respondents completed the comprehensive, eight-page questionnaire. The majority of the responses came from North America, mainly the United States. Twenty-one industries were represented, ranging from aerospace and defense to retail and consumer packaged goods to high technology and telecommunications. An "other" category was also included. Organizationally, 51 percent of the respondents represented corporate entities; 28 percent were from wholly-owned subsidiaries or strategic business units; and 21 percent were from groups or multiple divisions.



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*CSC makes a special point of understanding its clients and provides experts with real-world experience to work with them. CSC is vendor-independent, delivering solutions that best meet each client's unique requirements.*

*For more than 45 years, clients in industries and governments worldwide have trusted CSC with their business process and information systems outsourcing, systems integration and consulting needs.*

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