Thriving in the New Business Environment

Why The Strategic Supply Chain Matters

Society for the Advancement of Consulting

SIG SUPPLY CHAIN

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Introduction

If you are a CEO, CXO, senior leader, company owner, or supply chain manager of a company that provides products and/or services to customers, this eBook is for you. A global group of independent management consultants—with decades of experience working to develop competitive advantage, profit, and growth for their clients—have collaboratively created this just for you and your team. This eBook is one in a series and will focus on Supply Chain Management (SCM).

SCM is a vital strategic competency in any organization. It encompasses the processes and activities necessary to design, make, deliver, and support a product or service. Disruptive forces remind us how important it is to integrate supply chain strategy with business strategy and to have well thought-out crisis management, mitigation, and contingency plans in place for when the unexpected occurs.

It might appear that the foundations of SCM have changed dramatically with the COVID-19 pandemic, but in fact, they have not.

What has changed, however, is the weight a business places on considering closeness to customers and suppliers, Total Cost of Ownership (TCO), partnerships, and technology. Factors such as these should serve as cornerstones for your strategy.

This series is written and produced by expert supply chain thought leaders within The Society for the Advancement of Consulting (SAC). Together, we represent over 140 years of consulting experience supplementing over 150 years of management experience in Supply Chain, Operations, IT, Logistics, Sustainability, and other areas. This international group includes:

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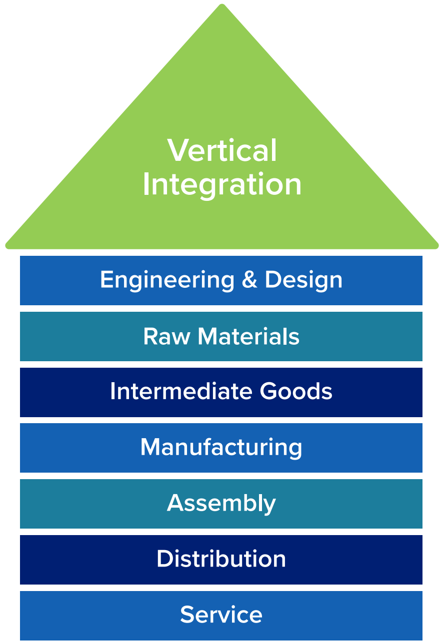
We hope that you and your team will find the first installment of this series valuable in the days, months, and years ahead. Enjoy!

It Began with Vertical Integration

The nature of the management of acquisition, modification, and distribution of goods and services has evolved over the years. Most companies have long had a function they called Procurement and a role they called Buyer. The job was to simply acquire the materials and services the company needed, and to do so as inexpensively as possible without ever shutting down operations.



During the 1920s, Henry Ford famously vertically integrated his entire supply of materials by owning all the companies and resources needed to manufacture automobiles. At that time, the supply chain was an internal-company, cross-subsidiary process. The Ford Motor Company did it all.

Ford owned and operated power plants, machine shops, foundries, rubber plantations, coal mines, timberland, and iron-ore mines, as well as automobile assembly plants and sales showrooms. In this way, companies like Ford were able to securely acquire the supply of inputs they needed to control the quality and price of those inputs. There is a downside to vertical integration, however. It comes with huge fixed overhead, large capital investment requirements, and a high degree of complexity within the business.

This may be an extreme example, but vertical integration was common throughout much of the 20th century. Certainly, there was no need for an extended, global supply chain in the early 1900s. Thus, procurement and logistics were far less integral then to the success of the enterprise.

Bottom Line: In a fully vertically integrated company, the supply chain is much simpler.

Flattened Out

The significant upfront costs of vertical integration and associated high barriers to entry pushed entrepreneurs and business leaders to look for new alternatives. This desire to find new, lower cost ways to operate, combined with infrastructure improvements and technological advances, led businesses to start flattening their organizations. As they did so, they began to include external suppliers in their supply chains.

Markets expanded broadly with the development of rail, air transportation, and high-speed interstate/intercountry highways. Potential sources multiplied almost overnight. Executives started to evaluate make vs. buy decisions with an entirely new set of options at their disposal.

Technology advances further spurred this flattening of the organization. The Internet and evolution of Enterprise Resource Planning (ERP) software, coupled with other technological advances, made it easier, simpler, and far less expensive to communicate across organizations and borders. As Procurement began coordinating with multiple suppliers via electronic methods (such as EDI, email, and fax), the world opened, and alternate sources of supply entered the scene. Logistics also increased in importance, as the supply chain expanded to keep the linear manufacturing model running without interruption.

As additional sources of supply became more accessible, companies became increasingly focused on core competencies.

Boeing, for example, made a significant strategic shift at the turn of the 21st century when they decided to move from manufacturing planes to managing an extended supply chain instead. That led the company to focus on the final assembly of aircraft in-house. Many companies jumped on board with this philosophy because they saw the opportunity to focus on their strengths and divest the rest.

Horizontal integration made it much easier for a business to enter the market and be competitive rapidly without extensive capital investment.

> **Manufacturers focused on what they saw as essential, and formed partnerships with suppliers who could handle the "nonessential."**

Manufacturers focused on what they saw as essential, and formed partnerships with suppliers who could handle the "nonessential. Thus, companies would no longer control manufacturing, quality, and price directly. Instead, they needed to exercise control through horizontal integration, which was dependent on the quality of their relationships with a myriad of independent suppliers, service providers, as well as logistics and transportation partners. Supply Chain Management emerged in response as an approach to coping with the intricacies of an extended supply chain. Rather than consider each function or process step as distinct and disconnected, a systems approach views SCM as a single process throughout the value chain.

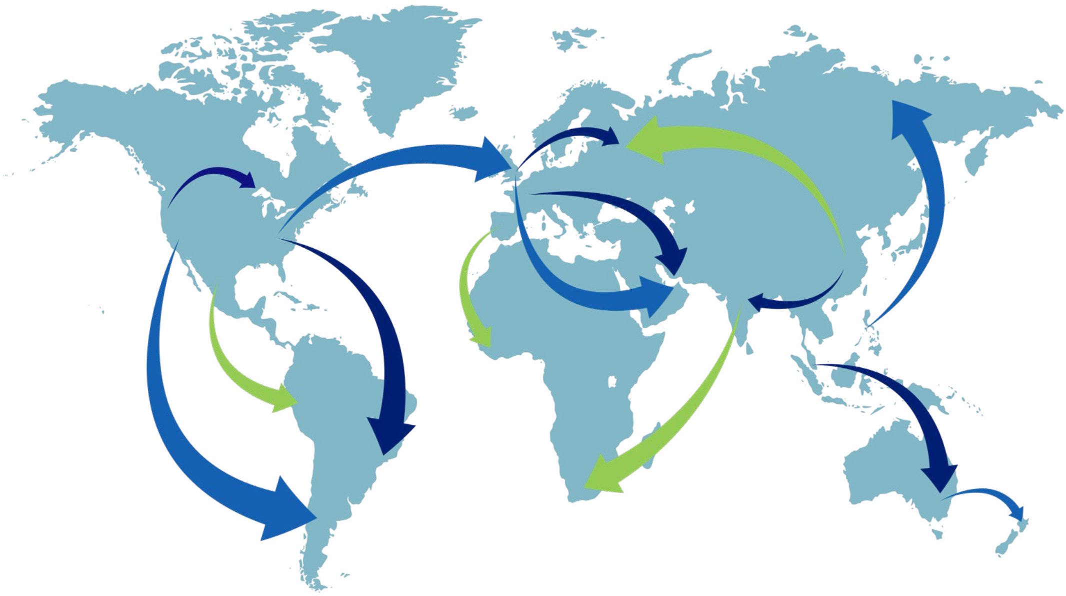
Bottom Line: When companies outsourced aspects of their production, they became horizontally integrated, creating the need for a holistic approach.

Going Global

In addition to flattening the supply chain, the business environment became much more global in the 1980's. This accelerated rapidly between 2001-2009. Infrastructure enabled this transition, but it was spurred forward as corporate policy changed from an inward, nationalistic focus to one that favored global trade. Simultaneously, customers started demanding lower prices. Thus, countries which provided goods at a lower cost (due to lower wage rates) became more attractive. Everyone jumped on the outsourcing bandwagon to reduce costs. Strategy quickly evolved in a rush to acquire cheap labor. While appropriate in many cases, large numbers of manufacturers simply joined the herd chasing cheap labor.

The spread to China and many other low-wage cost countries (LCC) was set in motion in the 1980's, bringing unintended consequences. As the number of interdependencies increased, functions such as purchasing, shipping, planning, scheduling, and inventory management were no longer so straightforward. In fact, the external complexities frequently offset any labor savings from moving offshore. The concept of Total Cost of Ownership (TCO) was often overlooked, as too many organizations focused on the profit and loss (P&L) labor-expense line. They did not understand that many costs had not been eliminated, but rather had moved to the logistics, inventory, and sales, general, and administrative (SGA) expense lines.

> **As the number of interdependencies increased, functions such as purchasing, shipping, planning, scheduling, and inventory management were no longer so straightforward.**



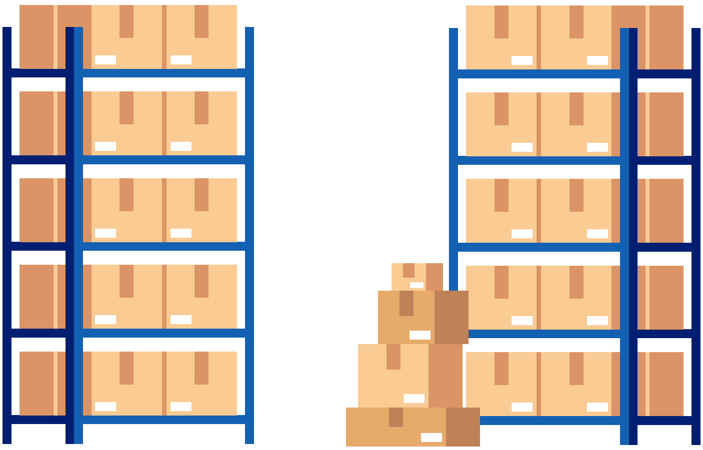
Additional costs were not the only difficulties. Inventory levels increased with the increased lead times associated with an extended remote supply chain. Quality was inconsistent, and other threats seemed to lurk around every corner, including intellectual property theft and difficulties navigating different cultures. In addition, when making sourcing decisions, companies had to answer questions about whether their workers were being treated fairly and what impact their sourcing decisions had on the environment. This became an issue of vastly increased importance to the investment/finance community. Supply chain complexities reached unprecedented levels.

JIT and Lean

Just-In-Time (JIT) is an inventory management system that aligns raw/partially finished material delivery with a company's production schedule. It is used as a tool to increase efficiency and lower inventory levels. Lean is a managerial approach focused on creating customer value and eliminating waste and defects to achieve improved company performance (i.e., process efficiency). These two business strategies are interdependent.

There has been a misunderstanding within the media about JIT, with statements such as "Is JIT broken?" or "Has JIT seen its final days?" The real issue is there is nothing just-in-time about supply chains stretching halfway around the world. The real question should be, "Is globalization finished?"

JIT was originally developed to manage material flow and demand between work centers and manufacturing facilities on a local and regional level. As supply chains expanded globally, JIT expanded to include logistics processes. JIT worked in this environment of long lead times so long as demand was relatively stable. Many did not understand this philosophy and interpreted it as a method to reduce inventory at all costs.



On the other hand, those who understood lean and JIT have succeeded even during times of disruption. When the Great Sendai Earthquake hit Japan in 2011, stockpiling inventory would not have helped. Toyota and its Japanese competitors took the lead to restore supply. Rather than acting in their own interests, these competitors worked together to contact mutual suppliers and develop recovery plans. For example, Aisin Seiko, a leading automotive parts maker, supplied parts to Toyota while its competition worked to recover operations. Aisin Seiko succeeded by following the Toyota Production System—one of the most highly regarded examples of JIT. Toyota has taken Ford's original vertical integration manufacturing approach control and implemented it on a horizontal integration model with incredible results. Other non-automotive companies have implemented Toyota's system in their business operations. However, for those that misapplied the JIT philosophy, producing only the right amount at the last minute put further pressure and stress on the supply chain, leading to a much less positive outcome.

Bottom Line: As companies went global, supply chains continued extending, while sacrificing responsiveness, flexibility, and quick turnaround times.

Flexible, Responsive, and Resilient

Despite a globally extended and stressed supply chain, customers' expectations continue to rise. The "Amazon Effect" is in full force. This means expectations are set for an exceptional customer experience, ideally with same day delivery using the latest technology. Rapid delivery within 24 hours is no longer considered differentiated service: it has become the standard. Whether B2B or B2C, customers expect an Amazon Prime-type turnaround with free or low-cost freight and easy returns. If they don't receive it, they'll move to the next supplier option. These quick delivery/low-cost expectations have added stress on the extended supply chain. To satisfy these stringent requirements, companies have resorted to increased inventory levels.

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Customers are also increasingly moving to e-commerce. This has increased dramatically during the COVID-19 crisis[1], with lockdowns around the world. Like Amazon, Alibaba, China's e-commerce leader, provides direct marketplace services for consumers, third-party wholesale services for retailers, and cross-border transactions into and out of China. Their volume increased 22% during the COVID-19 crisis. E-commerce carries additional complexity in managing the supply chain. It not only requires additional order taking capabilities, but also drives significant complexity and logistics costs, since the model changes from few deliveries of larger volumes to many deliveries of fewer items.

The membership economy and subscription model are also gaining momentum. As referenced by Robbie Kellman Baxter in *The Forever Transaction*, today companies and organizations aim to create long lasting relationships with their customers[2]. Whether supplements provided by Elemental Labs, wine shipped by Dry Farm, or hygiene products supplied by Dollar Shave Club, companies now offer customers a reliable renewal mechanism. Amazon now offers product subscription services to customers for recurring orders. This concept of automatically supplying products and services based on customer preferences/needs provides convenience and creates customer loyalty. It also provides valuable data for companies to utilize to expand sales and proactively manage the supply chain. On the other hand, this business model creates additional supply chain complexity in automating orders and creating the expectation that inventory will arrive as needed—regardless of demand and supply volatility.

As a result, there's a tremendous amount of pressure on a horizontally integrated global network. Seamless orchestration of the end-to-end supply chain is required to meet these expectations, while still making a profit and not tying up a significant amount of working capital in inventory. Disruptions may be felt throughout the system. Thus, supply chain management has become integral to not just supply, but also to revenue growth.

Bottom Line: Elevated customer expectations have increased pressures and complexity in managing the supply chain.

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[1] Emily Barry, Alibaba earnings: After COVID-19 recovery, U.S.-China tensions still loom (August 19, 2020). Retrieved from https://www.marketwatch.com/story/alibaba-earnings-after-covid-19-recovery-us-china-tensions-still-loom-2020-08-19

[2] Baxter, Robbie Kellman (2020). The Forever Transaction: How to Build a Subscription Model So Compelling, Your Customers Will Never Want to Leave, New York, New York: McGraw Hill.

Global Crises Cause Disarray

As businesses source, sell, and produce products in multiple far-flung geographies, natural and man-made crises from any part of the world can unexpectedly throw a business into chaos.

The current crisis precipitated by the COVID-19 virus highlights our global supply chain interdependencies, while exposing the large amount of risk inherent in a horizontal supply chain. For example, a pharmaceutical manufacturer in Ireland sourcing Active Pharmaceutical Ingredients (API) from India hit severe supply disruption problems due to export restrictions early in the COVID-19 crisis. Re-opening supply required involving government officials. These types of issues were widespread.

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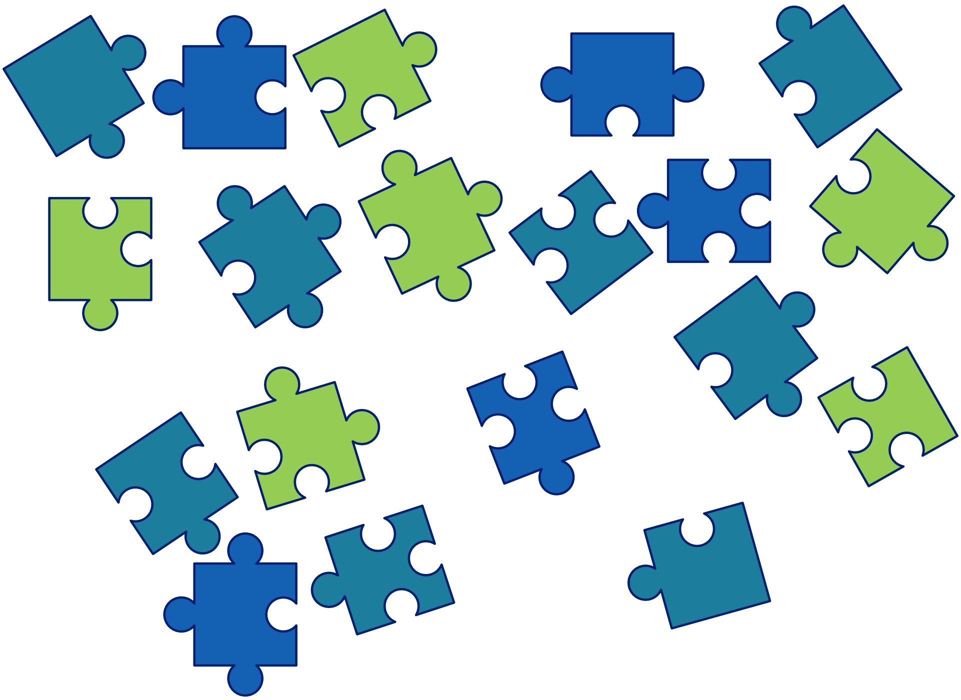
Unfortunately, what once appeared to be sound decisions to source globally are no longer viable. Assumptions used to make those quick decisions are no longer relevant.

These previously accepted assumptions now appear to be flawed:

- The customer will remain loyal even if they have to wait.
- Security will be fine since our global partners appear friendly.
- The inventory I have in transit is what my customer will need.
- The past dictates the future.
- Suppliers consider our needs as their top priority.

- We can count on other countries to treat our "essential" supplies to be as essential as we do.
- Suppliers who could support us in the past will be able to continue doing so in the future.
- If we have multiple suppliers, we are diversified (even if those sources are in the same geography or are using the same sub tier suppliers, etc.).
- Low-wage cost countries and their associated working conditions are of no concern to consumers and investors.



COVID-19 Immediately Became a Global Crisis

As a result of COVID-19, supply shortages were felt globally by multiple industries. Even if the stockout was only temporary, consumers felt the disruptions. Certainly, hand sanitizer and toilet paper received much attention as hot commodities, but the issue was widespread. For example, consumers in lockdown decided they wanted to bake—much more than anyone ever anticipated. As a result, Bob's Red Mill Natural Foods, Inc., a Portland, Oregon, U.S.-based whole grain food company, saw a 200% demand increase in their shelf stable products[3], and several countries saw a scarcity in active dry yeast.

Spikes in demand, sudden cancellations, and pushouts of orders all caused major swings. From adjustments in production schedules to mass layoffs and empty containers, COVID-19 created a ripple effect downstream. Such volatility occurred in a matter of weeks.

These deficiencies allowed innovative companies to shine. What took six months pre-COVID-19 now had to be available in six days or even six hours. Factories retooled, redesigned, and revamped their supply chains. In less than two weeks, air-flow expert Dyson quickly pivoted to develop a new ventilator for use by hospitalized COVID-19 patients. It didn't take much longer than that for Estée Lauder to convert its perfume manufacturing lines at three US plants to hand sanitizer production.

After addressing immediate material shortages, organizations began rethinking strategies. Like the mass movement of supply sources and production to LLC countries, voices today are now crying out to re-shore. "Bring it all back!" they holler. This knee-jerk reaction, however, is just as flawed as the original decision to move it all offshore. Such decisions must be made by re-evaluating strategy and reviewing underlying business assumptions in light of recent circumstances.

Bottom Line: A global emergency seen across the world exposed risks and faulty assumptions that organizations have chosen—consciously or unconsciously—to implement.

[3] Joe Raineri, Bob's Red Mill working nonstop to fill depleted store shelves amid baking trend (April 27, 2020). Retrieved from https://www.kgw.com/article/news/health/coronavirus/bobs-red-mill-fill-grocery-shelves-with-baked-goods/283-d6d3c588-f00b-4aac-a305-c04f443e4614

Where Does the Supply Chain Go Next?

We find clients asking us several key questions.

***Is re-shoring a good idea?* It depends.**

We're seeing a surge of interest in reshoring. Re-shore, offshore, and nearshore are all simplistic phrases describing different supply chain tactics. They do not describe where a company wants to head; instead, they describe alternatives for getting there. How can you choose a route to take a cross-country trip if you don't know your destination?

Be wary of getting caught up in an "everyone else is doing it so it must be correct" mindset. No single organizational structure, set of relationships, or technologies will be optimal for all, or for all time. It is important that leaders understand the high-level relevance of supply chain management to their future and ensure that SCM decisions are consistent with the organization's vision, mission, and core values.

***Are we running inventories too tight?* Perhaps.**

What if the next pandemic affects the kidneys instead of the lungs? All those excess ventilators now sitting in inventory will continue to collect dust as the world feverishly hunts for dialysis equipment instead.

Inventory is not necessarily good or bad: the reason for the inventory determines how much is needed. Many best-in-class companies carry strategic inventory to cover expected volatility in demand or supply. For example, DIV Group, who specializes in fastener products and shipbuilding in Croatia, holds tons of iron to avoid supply disruptions and price volatility. The key question remains, "Does JIT support your strategy?"

Where do we see the supply chain heading?

Companies with long international supply chains have realized how vulnerable these supply chains are for mission critical components, materials, and ingredients. Some were caught by surprise as supplier plant closures, labor shortages, and export restrictions around the world put their businesses at grave risk. Low cost, minimal inventory, and low-cost labor are no longer as attractive as they seemed just a short time ago.

The pandemic has highlighted and exacerbated the fragility of these configurations in the face of major global shocks. This is driving the most successful companies to rethink supply chains strategically to make them more robust, resilient, and secure. We expect an increase in regionalization of intercontinental supply chains within geographical zones such as Europe, North America, and East Asia.

Back to Strategy

It's tempting to charge forward in response to an immediate disruption. That can be dangerous. Resist that temptation and go back to strategy. What were your key assumptions? How have they changed? Supply chain management should be integral to your strategy. It's also essential to your customer experience, revenue growth, profitability, and working capital. Clearly, supply chain management must be at the table when the organization rethinks strategy.

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Here are the critical topics to consider as you think about strategy and the future of supply chain management:

- **Customers & Markets:** Customer needs are rapidly changing. COVID-19 is changing consumer buying behaviors very quickly. Do you know what your end consumer thinks now? Business buying behaviors are changing just as dramatically. What's on the mind of your customers and their customers?

- **Products & Services:** Are you in tune with your customers' evolving needs? A good place to begin is by rethinking design—product, delivery, and pre/post purchase support. The goal is to simplify, while also evolving to meet expected customer needs in the future.
- **Product Supply Strategy:** How should you rethink your supply chain network? How often? Should you make or buy? Where are your customers and suppliers? What are your customer requirements? Which countries and geographies support your plans? Where will there likely be challenges?
- **Strategic Partnerships:** Think through your end-to-end supply chain partnerships. Which are strategic? Should you change any relationships, add new ones, or end partnerships that are no longer relevant?
- **Climate Change:** Your company likely has a commitment to reduce its carbon emissions or align with the UN Development Goals. Know that your supply chain partners, both current and future, will be critical to your success in achieving these goals and business efficiencies. Are they the right companies? Do they have the capabilities you need to allow you to measure and manage their impact for which your company is being held accountable?

Bottom Line: Ensure your supply chain leaders have a voice in developing business strategy.

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Questions or comments? Contact the members of the special interest group that created this report.

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Patrick works with many top Fortune 500 companies in manufacturing, distribution and logistics services in Europe, Asia, and the Americas, helping them to achieve dramatic improvements in their supply chain capabilities and performance through supply chain excellence. In his consultancy assignments, Patrick has worked with clients all over the world in countries such as China, India, Uruguay, Puerto Rico, Egypt, UAE, US, UK, Spain, Croatia, and others.

Patricks hosts Interlinks, a weekly radio program broadcast on Dublin South FM that explores the positive and negative effects of globalization through interviews with business people from around the world. He is the author of the book *International Supply Chain Relationships: Creating Competitive Advantage in a Globalized Economy*, published by Kogan Page in 2019.

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She recently published Future-Proofing Manufacturing & Supply Chain Post COVID-19, an eBook on successfully emerging and thriving post COVID-19. Lisa is president of the Inland Empire Chapter of the Association for Supply Chain Management, one of the most active and innovative chapters in the United States. She has been instrumental in engaging students by fostering the environment that has earned national recognition for students from Harvey Mudd College and Cal Poly Pomona. She is an executive director of SAC.

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Rick has published two books, *1 + 1 = 100: Achieving Breakthrough Results Through Partnerships and Moving Into the Express Lane: How To Rapidly Increase the Value of Your Business*. His articles have been published by *Industry Week, Supply Chain World, Global Supply Chain* and *CEO Refresher*, among others. Industry publications that routinely quote and interview Rick include *Forbes, the National Foundation of Independent Business, Oregon Business*, and *The Electrical Distributor Magazine*. He has both a BS and MBA and has attended executive programs at MIT and Stanford.

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About the Society for the Advancement of Consulting

The Society for the Advancement of Consulting (SAC) is the premier association for independent consulting professionals who subscribe to an industry code of ethics and provide significant consulting results among their clients. Founded by Million Dollar Consulting® guru Alan Weiss in 2003, SAC offers a series of in-person and online programs to help consultants share best practices, and to learn from industry experts and thought leaders in the business world. SAC today has members in 14 countries around the world.

To help as many consultants as possible navigate through the ongoing COVID-19 crisis, SAC is temporarily waiving the application fee and offering a reduced first year price for new members. More information.

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