



A LICENSE FOR GROWTH

Customer-centric supply chains

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Efficiency is table stakes

Supply chains have traditionally been seen as drivers of efficiencies and scale, providing competitive cost advantage.

In recent years, though, the role of supply chains has evolved beyond efficiency to growth.



The stakes for growth are high

In Accenture's most recent supply chain research,¹ our surveyed companies have invested, on average, US\$153.4 million to transform their supply chain for growth (2017-2019).

In 2020, the COVID-19 pandemic hastened and intensified changes to the consumer and customer landscape. Beyond business growth, supply chains became more important than ever, helping save lives by getting critical supplies to the people who need them.

Companies with robust supply chains are showing resiliency through this crisis, combined with a responsibility not just to the business, but also to the greater good of society. In the aftermath of COVID-19,

we expect customers to continue to demand an experience in which supply chains respond with a higher purpose.

Our research, with top-level executives across nine industries at 900 companies around the globe, shows a few select leaders are transforming their supply chains to contribute to a customer experience that leads to purpose-led growth.

We discovered this 10%—our Masters²—have been able to successfully reshape their supply chains to create significant impact on their topline growth, versus their peers.

“With increased disruption in the world in general, I think everybody is realizing how important it is to have a supply chain that is solid and resilient, in the sense of being able to recover faster from any challenging situation. Having such capabilities is making the role of the supply chain officer a stronger competitive element of the leadership team.”

Alberto Lupano, Global Senior Vice President of Supply Chain, Health, Reckitt Benckiser

Masters' topline growth sails above peer companies

The investments that Masters are making, in time and money, are paying off in four ways:



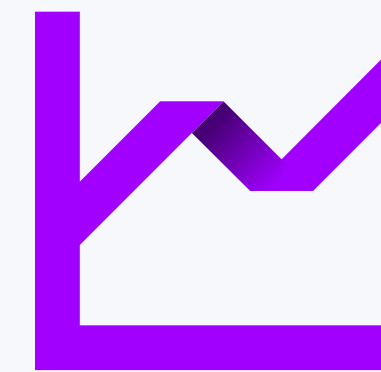
13%
Revenue
growth rate



2.5%
Higher
EBITDA margin



3x
Higher
contribution
to total revenue



A daily share price
during the **COVID-19** crisis that
remains above their peers

See appendix on page 31-32 for more detail. Source: Accenture 2020 Supply Chain Survey and analysis based on CapIQ data

What do supply chain Masters do differently?

The good news: The Masters' approach is an imitable formula that can help companies create more resilient, purposeful supply chains that fuel growth. And we know that is more essential than ever in today's world.

01. Masters begin with the customer in mind. They base their supply chain strategy on what the customer values.

02. Masters help turn insight into innovation. They invest in digital architecture, creating a foundation for collaboration, inside and out.

03. Masters are highly mature in select capabilities. They focus on those that enhance supply chain agility and foster innovations, building security in.

04. Masters engage their Chief Executive Officer (CEO) to move beyond conversation to true transformation. These CEOs ensure board-level support while funding supply chain innovation and talent.

Let's explore these four areas in more detail.

Top supply chain challenges

Our analysis reveals five major challenges companies experience, as they rebuild for resiliency and growth. While these challenges existed before COVID-19 struck, they're magnified by the pandemic.

Flexibility – Difficulty differentiating customer offerings on demand because manufacturing and supply chain lack flexibility.

Ecosystem design – Inability to identify the right partners to innovate and deliver value on demand.

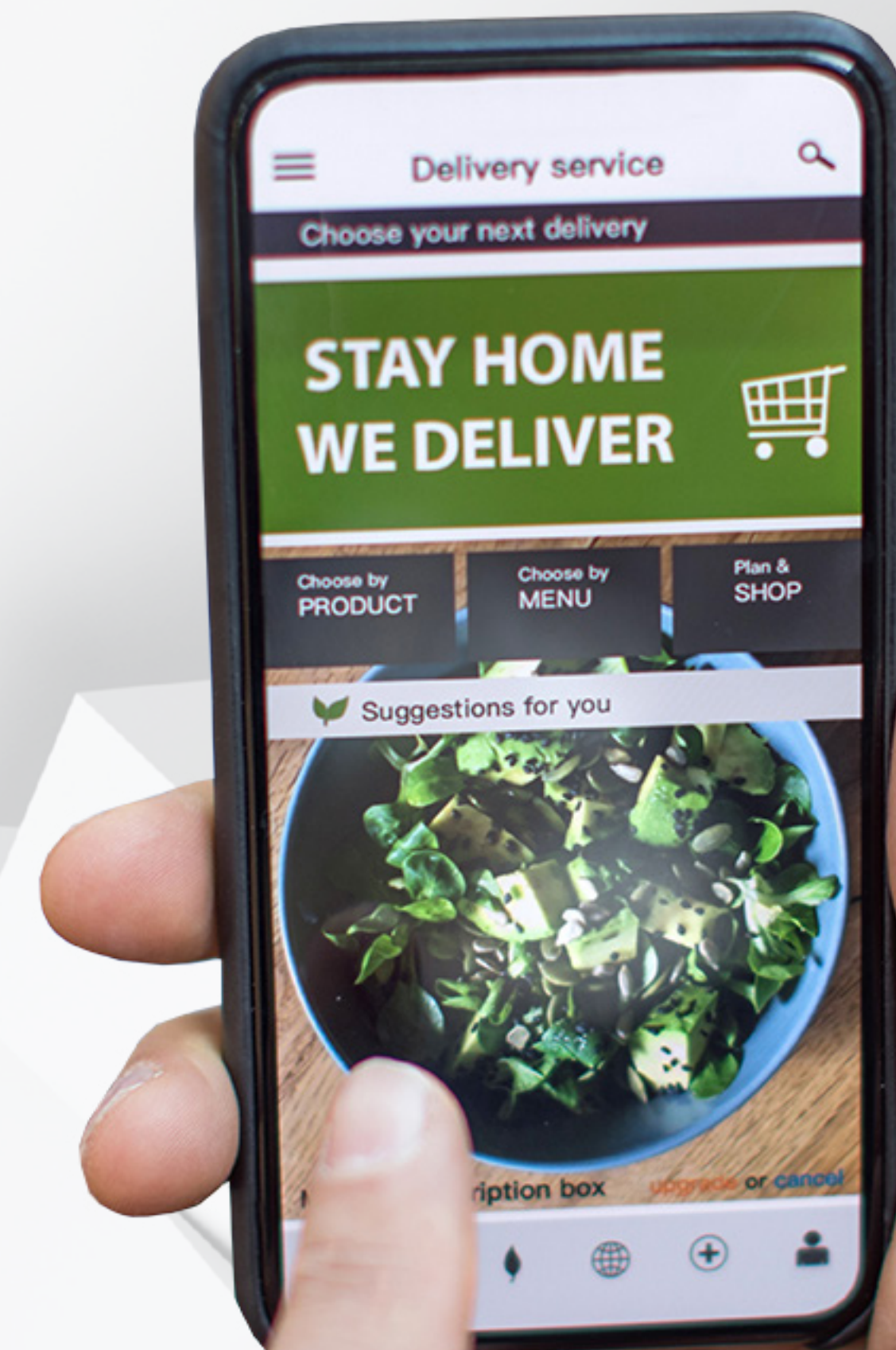
Digital Architecture – Technology architecture is not designed to drive cross collaboration and co-innovation.

Innovation – Supply chain innovation pipeline is not robust enough, and lacks the ability to scale beyond prototype testing.

Visibility – Supply chain lacks the end-to-end, real-time visibility that creates trust and transparency for customers.

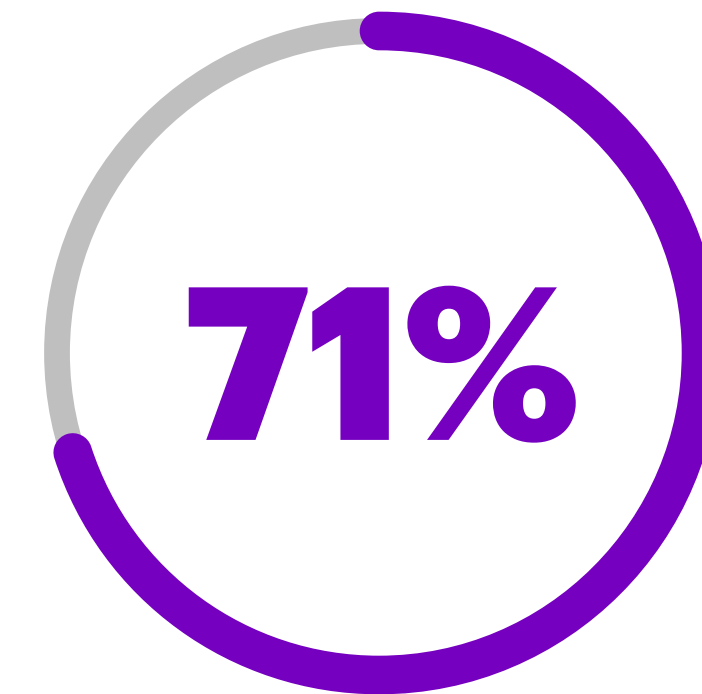
01 **Masters begin with the customer in mind**

They base their supply chain strategy on what the customer values, which is a more complex endeavor than it used to be because customer experience is now tailored and personalized.



Customers demand more connected, seamless, customized and secure experiences.

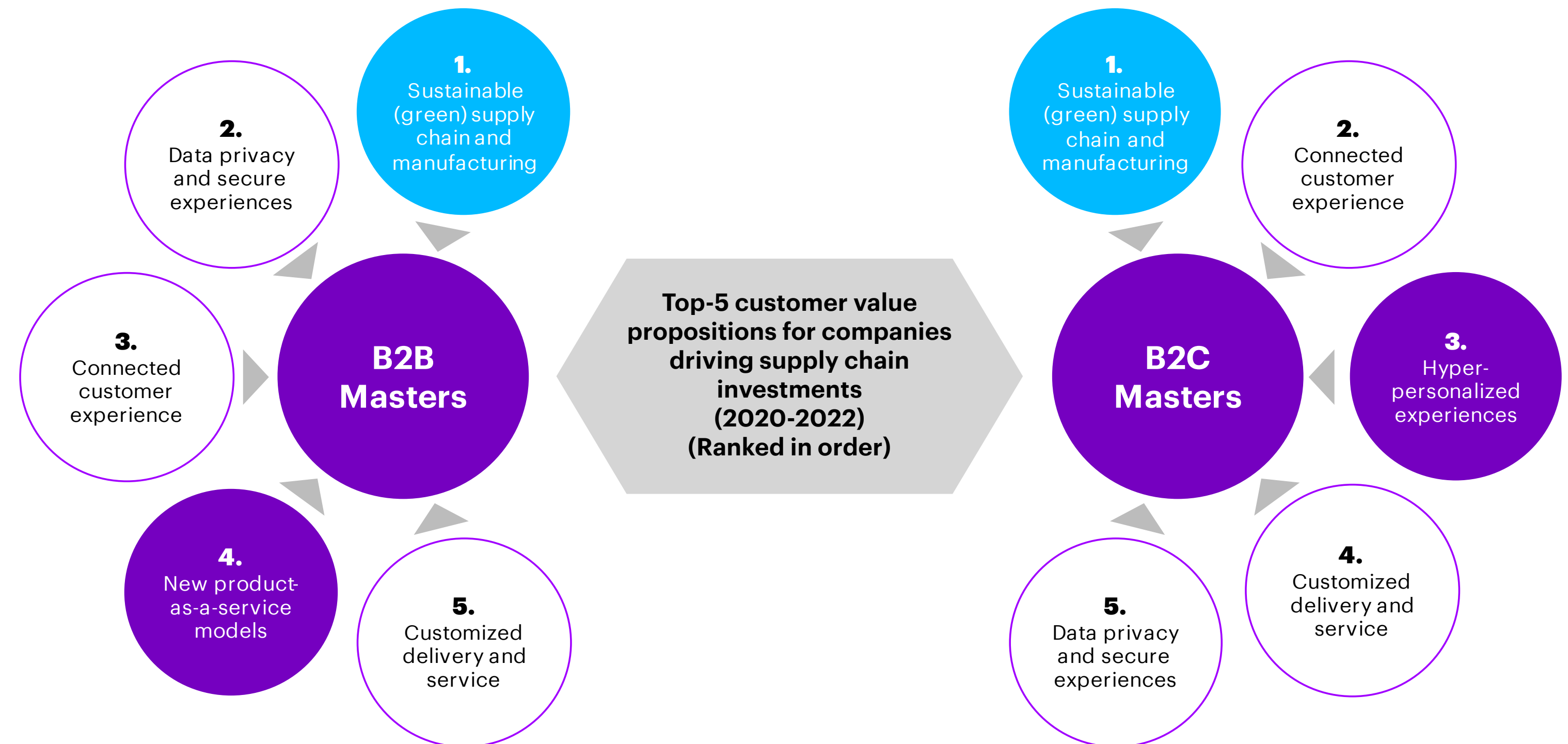
As customers rapidly move toward products and services as experiences, they expect companies to provide a more holistic package. Supply chains play a crucial role in creating this value-driven customer experience.



of Masters deliver experiences linked to the right customer value propositions.

Masters understand that addressing changing customer expectations makes a huge difference, so they focus on the value propositions that matter most when investing in their supply chains.

Customer value propositions prioritized for supply chain investments



- Highlights customer value proposition given as a top priority by both B2B Masters and B2C Masters
- Highlights the unique customer value proposition between B2B Masters and B2C Masters

Source: Accenture 2020 Supply Chain Survey

B2B and B2C shared value propositions

B2B and B2C industries share a few customer value propositions. Top of the list for both is supply chain and manufacturing sustainability.

People around the globe are more conscious about the products they are consuming—where they are sourced, how they are made and how they are recycled. They are increasingly looking for companies that share their environmental, ethical and social values. Buying and sourcing ethically, recycling, and reducing environmental footprints have now become an integral part of a company's brand value. It is not surprising, then, that the Masters in our survey have identified creating sustainable supply chains as their top priority.

In the B2C sector, we see companies like Conagra Brands making firm commitments to sustainability. Conagra is aiming to convert its plastic packaging into renewable, recyclable or compostable packaging by 2025.³ And in the B2B sector, DHL was a pioneer on emissions reduction in the transportation industry, reaching its 2020 goal of a 30% reduction four years ahead of schedule.⁴ The company's new mission is to drive toward zero emissions in 2050.⁵


Beyond sustainability, Masters share some common value propositions, from **data privacy and secure experiences** to **customized delivery and service**.

And in both sectors, B2B and B2C, Masters are working on a seamless, **connected customer experience**. For example, Accenture helped a consumer goods company create hundreds of segments of all their customer/product combinations. For each of these segments, they defined a complete set of supply chain requirements. Segments with similar requirements are now plotted in one of five supply chain types, each with their own supply chain strategy.

This setup allows this big global player to create a level of customer intimacy and accuracy similar to what smaller niche players can achieve.

Abbott: An industry leader in sustainability, seven years running

Abbott has been named the Global Industry Leader for the seventh consecutive year by the Dow Jones Sustainability Index (DJSI) for sustainable and responsible business.⁶ Their aim is to integrate sustainability into every aspect of their business. For example, they embrace a circular model where all waste, from factory waste to cafeteria waste, is recycled, reused, composted or responsibly incinerated, with much of that energy being recaptured for future use. The results: 27% less water usage and 42% lower overall emissions in 2018. Improving environmental performance also strengthened their business by improving operational efficiency. Since 2010, reduced product packaging has eliminated approximately 41 million pounds of packaging and resulted in more than US\$100 million in savings.⁷



The results:
27% less
water usage
and 42%
lower overall
emissions

B2B Masters emphasize product-as-a-service models

The B2B Masters are working toward product-as-a-service models, to deliver **connected customer experiences**. The aim is to provide products as managed services, which enables greater control and monitoring of the products for the companies, and better service and experience for their customers. Product-as-a-service moves companies into longer-term relationships with consumers, versus just a sale.

It also helps free up customer resources—in terms of finances, expertise and dedicated personnel—to be invested in their core business activities. For example, agricultural manufacturer John Deere has broadened its focus from building state-of-the-art farm machinery to the value-added services their products can provide.

The company now collects data insights from machines in the field to help farmers with precision agriculture.⁸

HPE Chief Executive Officer (CEO) pledges to sell “Everything as a Service” by 2022

HPE CEO, Antonio Neri, has made a bold promise: by 2022, every product Hewlett Packard Enterprise sells will be available as a service. “In the next three years HPE will be a consumption-driven company and everything delivered to you will be delivered as a service,” Neri said. “You choose what you want, where you want it, and only pay for what you consume.”⁹

The company has recognized customers want the flexibility and security a cloud experience provides, which includes pay-per-use and not having to sink capital to build, run and maintain extensive infrastructure. This model gives customers the constant innovation they expect, including a constant stream of new features from which to select.

B2C Masters focus on hyper-personalization

B2C Masters are more focused on creating hyper-personalized customer experiences. B2C companies work closely with their customers and their ecosystem partners to deliver innovative tailor-made products and solutions anytime, anyplace, leading to the type of customer loyalty that produces growth.

Netflix is a fitting example. To start with, each subscriber has a different view of the content on their webpage adapted to their preferences and interests. With 182 million Netflix subscribers worldwide,¹⁰ this enables Netflix to have hundreds and millions of products instead of just one. Starting from the homepage design and layout, personalization flows through to the messages and alerts sent to customers, based on numerous algorithms

to address their unique viewing habits.¹¹ Not only that, Netflix uses predictive analytics for guiding and scaling original content into localized content that is accessible and relatable to as many viewers as possible across different cultures and in different languages. Historical viewing trends across a range of languages and viewer segments enable them to create a seamless localized experience.¹²

Creating a seamless, connected experience requires a supply chain that is agile and customer focused. As our Masters have shown, a customer-centric supply chain can influence revenue growth significantly.

Customer centricity in action: Product customization at the retail point of sale

Multinational chemical company BASF has partnered with French company B2B Cosmetics to create a system that allows customers to formulate and take home customized personal care products—from haircare to skincare.¹³ Emuage, a small machine that looks and operates a bit like a coffeemaker, combines water with individual pods that make up a product's texture, fragrance and active ingredient. This can be done at the point of sale to provide the hyper-personalization customers demand in today's personal care market.

The modular approach to manufacturing product ingredients allows an agility and response to demand that exceed what a traditional supply chain can offer.

“We’re focused on better forecasting, better replenishment, and working with our suppliers to optimize that side of the supply chain. Right now (due to COVID-19), we’re testing those systems to their limit because we’re seeing demand that we’ve never seen before. We’re seeing customer buying patterns that we’ve never seen before, but that’s giving us better forecast insight than we’ve ever had. If we’re to have something again like this, we’ll be able to utilize that type of data to better forecast what we can do to get in front of it.”

General Manager/Senior Director of Supply Chain, Walmart

Q2

Masters help turn insight into innovation

They invest in digital architecture, creating a foundation for collaboration, inside and out.



Masters have recognized that creating value for customers relies on continuous, iterative collaboration.

Data has become the new currency feeding that value, so Masters are investing in new technologies to turn data into insights. As they mature, they move from diagnostic to predictive and prescriptive business models. This helps provide a solid basis for collaboration inside the company and with ecosystem partners to meet customer expectations.

During the coronavirus crisis, Unilever NV used artificial intelligence (AI) to comb through millions of deliveries and thousands of suppliers to spot potential risks or shortages—so it could quickly innovate on alternatives.

The company's Chief Supply Chain Officer, Marc Engel, explained why being predictive and proactive matters in a Bloomberg interview: "It's all about can I get my raw materials, do I have enough people to run my factories, and can trucks drive across countries to deliver the goods. You can sit and wait around until it happens, but then you're usually too late."¹⁴

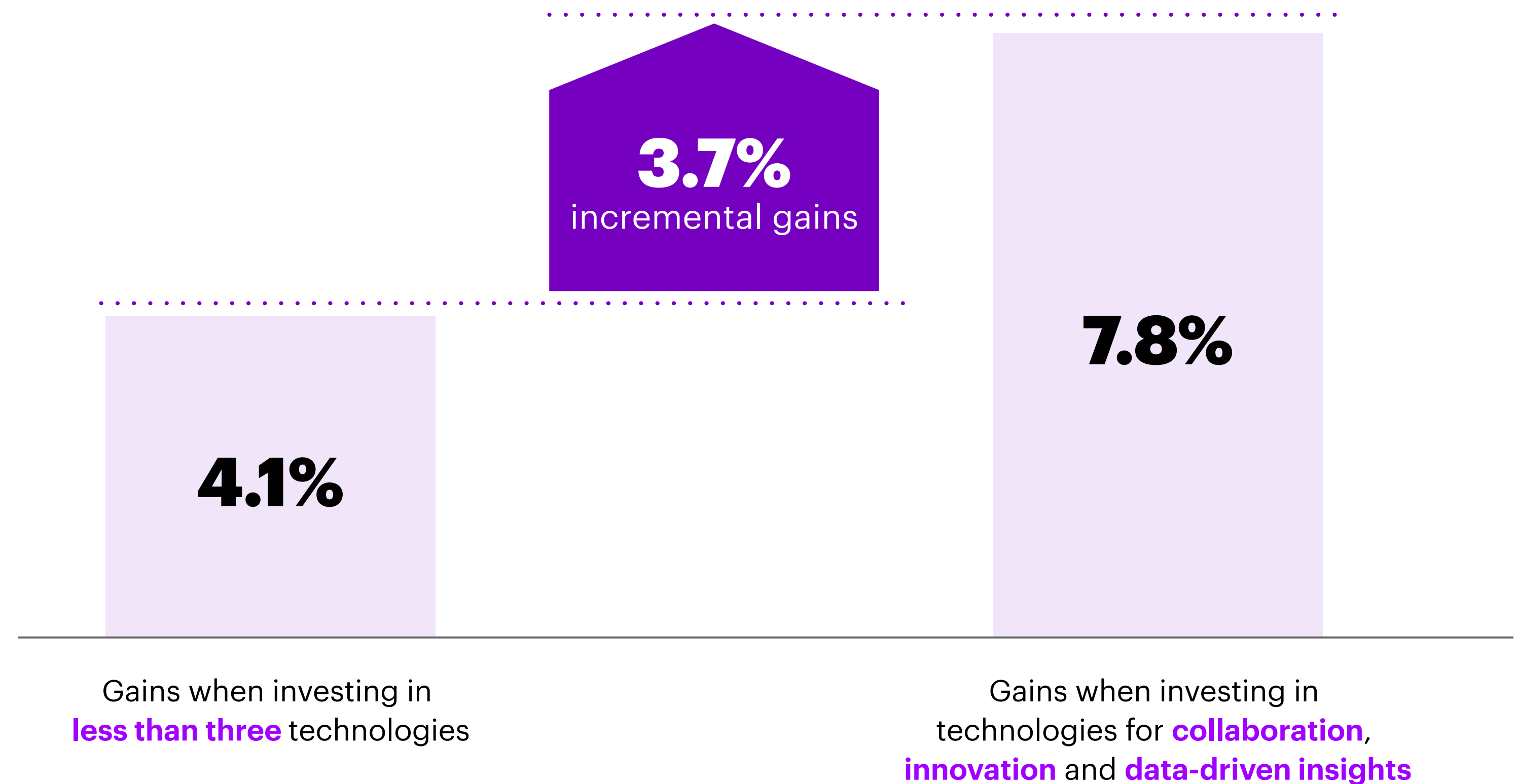
More than two-thirds of Masters' 13% average revenue growth came from collaboration, innovation and data-driven insight technologies.

"We have a platform called R360 (Resilience360) where we take all different types of data—weather feeds, political situations, traffic patterns and feeds from our own systems and assets—using technologies like satellites and smart sensors. Combine that onto a visual map, powered by [direct applications], and you have visibility of your supply chain."

Jim Mulhern, Senior Vice President, Global Head of Business Development, DHL Global Forwarding

Accenture analysis shows that investing in building analytical, asset-light collaboration architectures may significantly increase the supply chain's impact on revenue. Collaboration, innovation and data-driven insight technologies accounted for more than two-thirds of Master's 13% average revenue growth.

Investments in analytical asset-light architecture pays off



Kenco has now created a 10,000 square-foot warehouse space, which is a prototype development center.



Kenco Logistics: Turning leading-edge ideas into prototypes

Kenco Logistics, North America's leading third-party logistics provider, launched the Kenco Supply Chain Innovation Lab to create competitive advantage by combining their integrated suite of technologies with a data ecosystem. Its team of innovation specialists collaborate with customers, vendors and entrepreneurs from various industries to identify, research and prototype leading-edge ideas and processes.

Kenco has now created a 10,000-square-foot warehouse space, which is a prototype development center where supply chain management solutions and technologies are tested for accuracy and sustainability.

New technologies like robotics, augmented reality, 3D printing, vision picking using smart glasses, and voice picking are all brought into this space to deliver insight through industry experience.¹⁵

“We are really changing how we run things. We have a production system which is built on digitalization. For example, we’re not physically building any prototypes anymore.

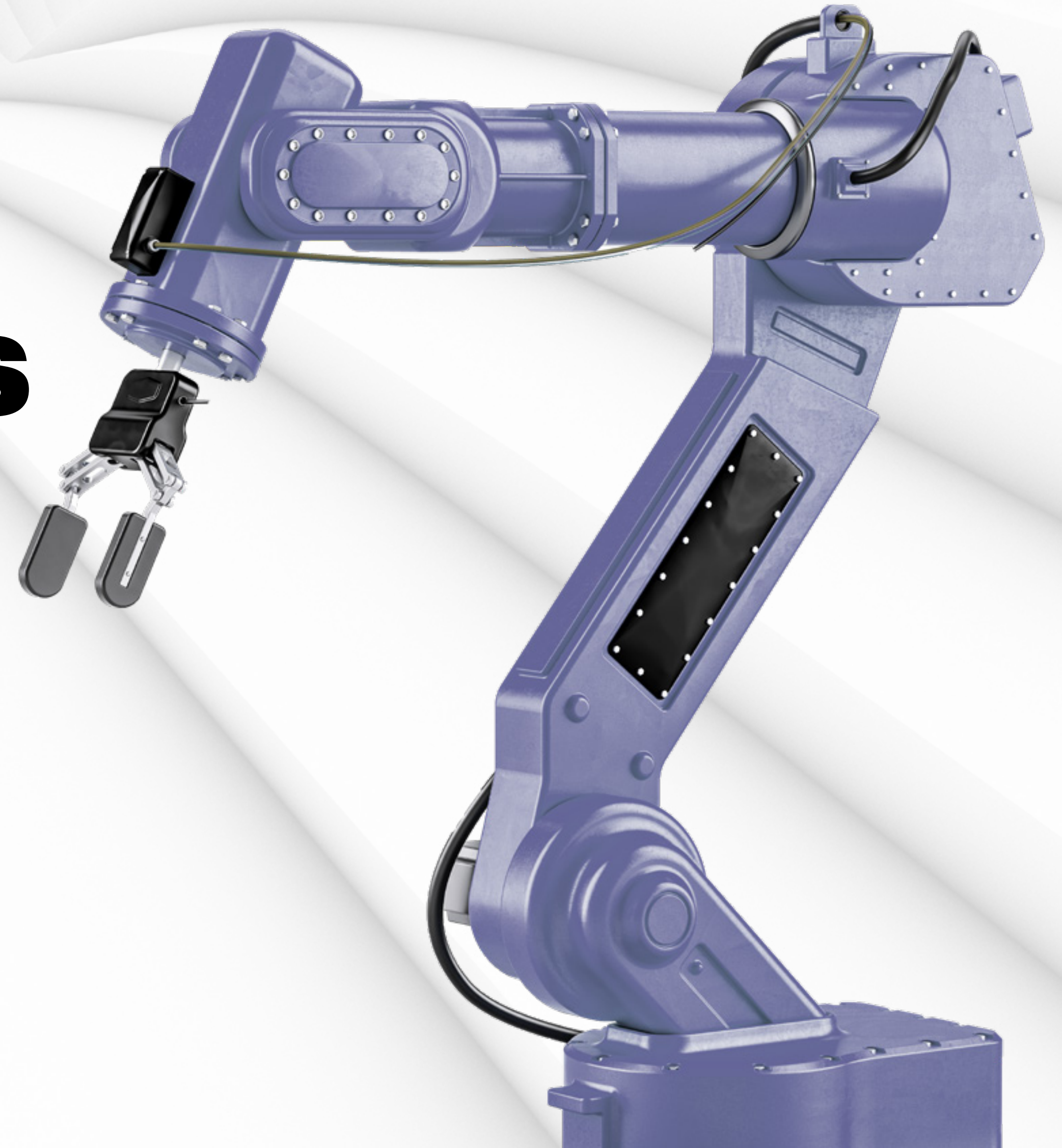
Instead, we build digital twins of products we want to manufacture. There is no physical ‘thing’ anymore. We test products in an augmented reality environment. From design to product, it’s all digital.”

Senior VP Supply Chain of a multinational industrial conglomerate

03

Masters are highly mature in select capabilities






They focus on capabilities that enhance supply chain agility and foster innovations, while building in security.






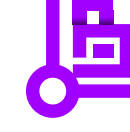

Top 5 capabilities where companies enjoy the highest level of maturity

 Difference in B2B vs B2C capabilities

B2B MASTERS

1		Blockchain	Have made significant investment in piloting or scaling blockchain capabilities
2		Design to margin capabilities	Partnered with procurement to identify value add , and products to be designed to meet target margins
3		Customer and product segmentation	Have implemented customer and product segmentation on real-time basis
4		Predictive asset maintenance	Have implemented predictive analysis and maintenance systems based on applied intelligence for company and their customers
5		Cybersecurity and data privacy	Have implemented proactive risk assessment using predictive data analytics and continuous monitoring

B2C MASTERS

1		Customer and product segmentation	Have implemented customer and product segmentation on real-time basis
2		Cybersecurity and data privacy	Have implemented proactive risk assessment using predictive data analytics and continuous monitoring
3		Design to margin capabilities	Partnered with procurement to identify value add , and products to be designed to meet target margins
4		Warehouse automation	Have fully automated their warehouse operations with machine-to-machine order management and mobility solutions using augmented reality/virtual reality, radio-frequency identification, robotics
5		Collaborative & agile innovation internally & with ecosystem partners	Have established external partnerships to improve efficiencies as well as to innovate new products

Capabilities shared by B2B and B2C Masters

Masters are rapidly developing key customer-experience capabilities and are ahead of their peers in implementing these capabilities, which gives them greater supply chain agility.

Both B2B and B2C Masters are focused on understanding their customers better and providing differentiated on-demand products and services. Masters have invested in building advanced capabilities to **segment their customers and products in real time** so they can better deliver personalized product and service offerings.

In tandem, they are investing in advanced **cybersecurity** to address the growing digital threats from security breaches and data theft. They realize keeping company and customer data safe while avoiding system breaches and breakdowns is crucial. Today, 84% of organizations spend over 20% of their cybersecurity budget on advanced technologies like artificial intelligence (AI), machine learning or robotic process automation (RPA), compared to only 41% of organizations three years ago.¹⁶ With 40% of cybersecurity attacks now occurring indirectly through the supply chain, cloud or managed providers,¹⁷ companies across industries are stepping up their efforts in this area.

In B2B and B2C industries, Masters are also **partnering with procurement to help design products and services** and to identify potential suppliers, **to achieve target margins**. They work with procurement to innovate on sourcing and sustainability.

Beyond these shared approaches, Masters in each sector are maturing capabilities with the most value to them.

B2B companies make strides towards “pay-as-you-use model”

B2B Masters are moving toward a **product-as-a-service model**, making transparency and traceability more important than ever. They are integrating **blockchain** with AI, the Internet of Things (IoT) and robotics to enhance their capabilities in this area. As products-as-a-service rise in popularity, companies are monitoring and maintaining a large pool of connected assets for their customers—making **predictive asset maintenance** a critical capability. Using cognitive and predictive capabilities to help optimize a product’s lifecycle enables drastic reduction in service disruptions and proactive maintenance services to customers.

B2C companies find Human + Machine balance

On the other hand, as **B2C Masters** are focusing on delivering hyper-personalized experiences to their consumers, they are building **warehouse automation** capabilities. Machine-to-machine order management not only helps them achieve speed and accuracy in fulfilling consumer orders but also helps enable customization at a micro level. Companies can fulfill customized orders and handle diverse inventories quickly and with minimal human intervention. With the number of direct-to-consumer orders increasing, spurred by the COVID-19 situation, automation has become even more essential to speed and business continuity.

Also, for B2C Masters, hyper-personalized experiences bring a complexity that makes **collaborative innovation**, internally and with ecosystem partners, a must. Innovation center networks are helping more companies make collaborative innovation a reality.

“Through our DHL Innovation Center network, we collaborate with more than 50 partners to help our customers. People talk about drone deliveries. We’re already doing that in Africa, thanks to this network.

We deliver medical supplies and samples three times a day from a hospital to a village on the other side of a massive lake. It would probably take three or four hours to drive around, pick up samples, and then drive back for them to be tested. We have an unmanned drone that does this faster by flying over the water. It’s all automated and this solution started with a customer need.”

Jim Mulhern, Senior Vice President, Global Head of Business Development, DHL Global Forwarding

Q4 **Masters engage their CEOs to move beyond conversation to true transformation.**

**CEOs ensure board-level support while funding
supply chain innovation and talent.**



Masters' CEOs are more likely to drive supply chain discussions with the board. And they translate those discussions into results—actively allocating funds and talent that fuel innovation capabilities and transformation for their supply chain.

Apple's Tim Cook has been a vocal proponent of supply chain transformation for his company, with an eye toward sustainability. He is working with his team toward a circular supply chain that eventually would require no new materials to be mined.¹⁸ And, at the end of 2019, Apple bought the first-ever commercial batch of carbon-free aluminum, eliminating the CO² emissions traditionally generated when manufacturing the metal.¹⁹ He explained: "If we can change the world with the devices we make, then we ought to be able to change the course of climate destruction worldwide."²⁰

"Previously, the person who ran our supply chain was a director. So, we've hired a Chief Supply Chain Officer reporting directly to the CEO. She's really transforming the organization and driving it with the backing of the CEO."

Unnamed source in the Chemicals Industry

Home Depot CEO, Craig Menear, has been heavily involved in helping the home improvement retailer transform its supply chain, particularly from an omnichannel perspective. In early 2020, online sales were up 21.4% year-on-year.²¹ Accenture has been a part of this effort, helping the company align its supply chain to support various customer segments (pro, DIY consumer, etc.), including design of their next-generation distribution centers and the best use of automation.

Menear explains: “We have opened a dozen Market Delivery Operations—or MDOs—that have enabled us to transition 20% of our clients’ deliveries from an outsourced model to one in which we control more of the customer experience. This is translated to meaningful improvements in our customer satisfaction scores for appliance deliveries. Our supply chain build-out will continue to ramp from here with the largest number of new facilities coming online in 2021 and 2022.”²²

A circular infographic with a purple outer ring and a grey inner ring. The number 52% is displayed in large purple font in the center.

52%

of CEOs drive discussions on supply chain transformation during discussions with the board

A circular infographic with a purple outer ring and a grey inner ring. The number 53% is displayed in large purple font in the center.

53%

of CEOs allocate funding to drive innovation required to accelerate supply chain transformation

A circular infographic with a purple outer ring and a grey inner ring. The number 49% is displayed in large purple font in the center.

49%

of CEOs allocate top talent to drive supply chain transformation

CREATING YOUR OWN LICENSE TO GROW

Higher growth rate. Higher contribution to total revenue. Higher EBITDA margin. All are the rewards reaped by companies moving their supply chains beyond efficiency into customer-centric growth.

The good news is that these rewards are within reach, following the example set by the supply chain Masters in our study. Never before has supply chain been so crucial to not only a company's well-being, but also to society.

With companies investing an average of US\$153.4 million in their supply chains during 2017-2019, generating growth from that investment is crucial.

Masters do that by keeping the customer at the center of all they do, creating digital architectures that help them turn data insights into innovation, maturing the capabilities that matter most, and engaging their CEOs to help them forge true transformation.

Making the most of your supply chain investments is within reach. And there's never been a better time to do it, as not just business—but the world at large—relies on companies getting supply chain right.

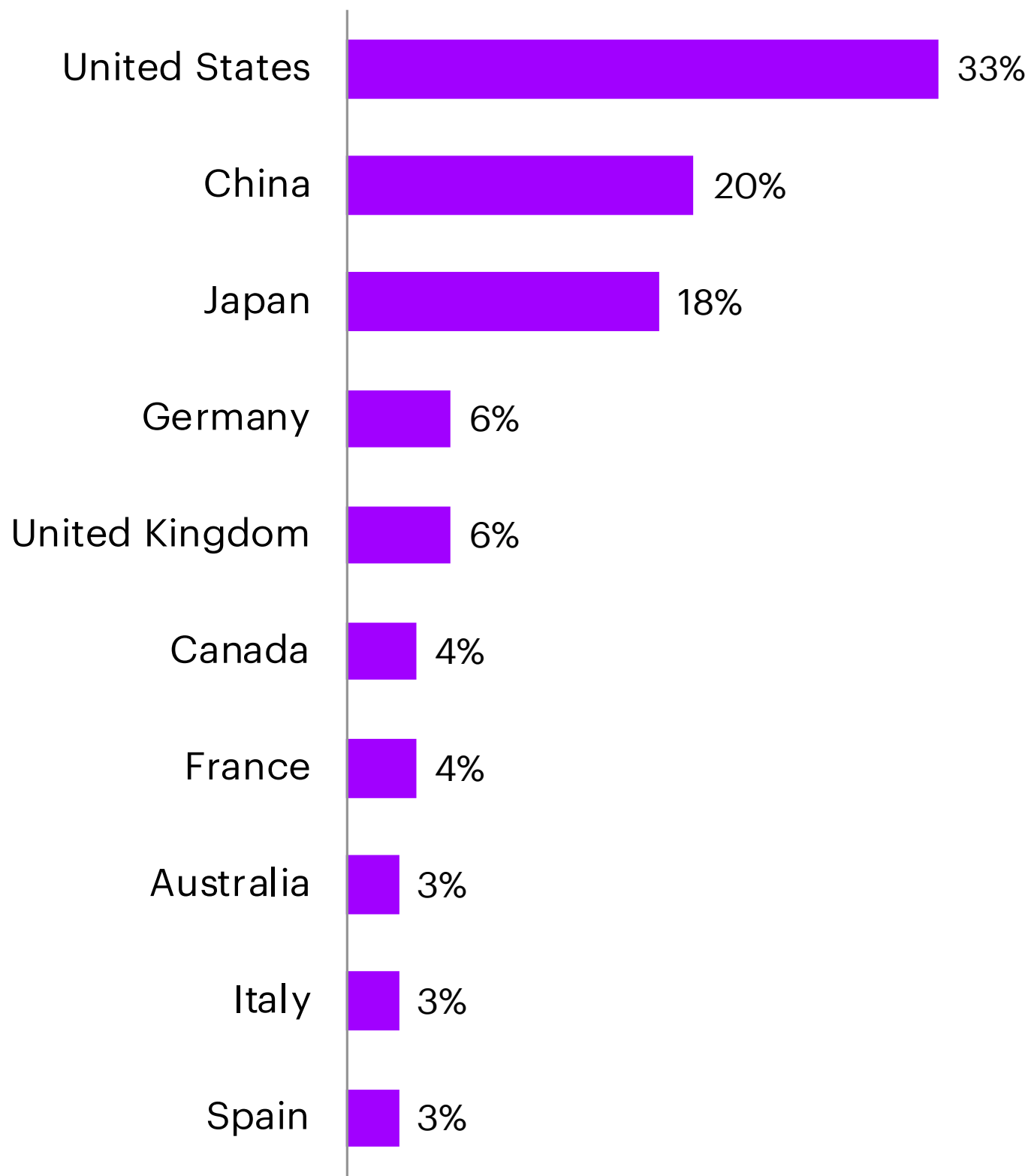
We look forward to helping you think about what comes next, using these insights to drive tangible business value and widespread societal trust.

About the research

Our survey covers 900 companies from nine industries across 10 geographies

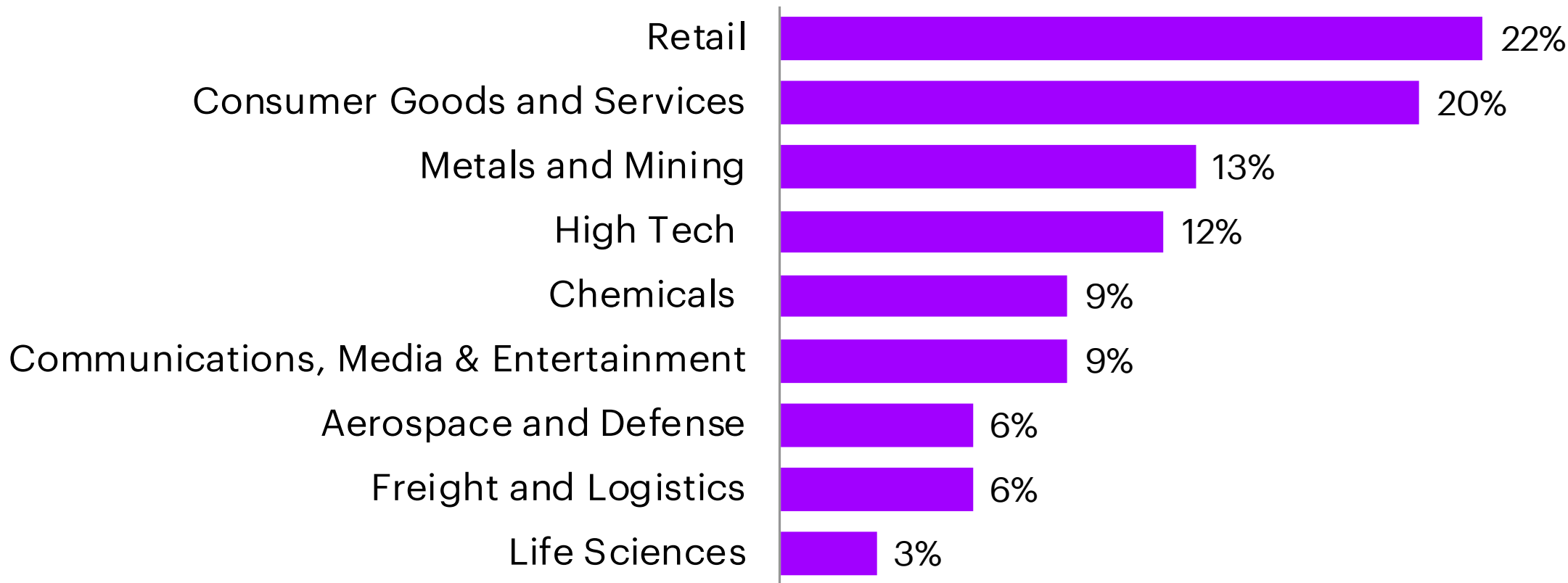
Distribution by geography

(Percentage of respondents)

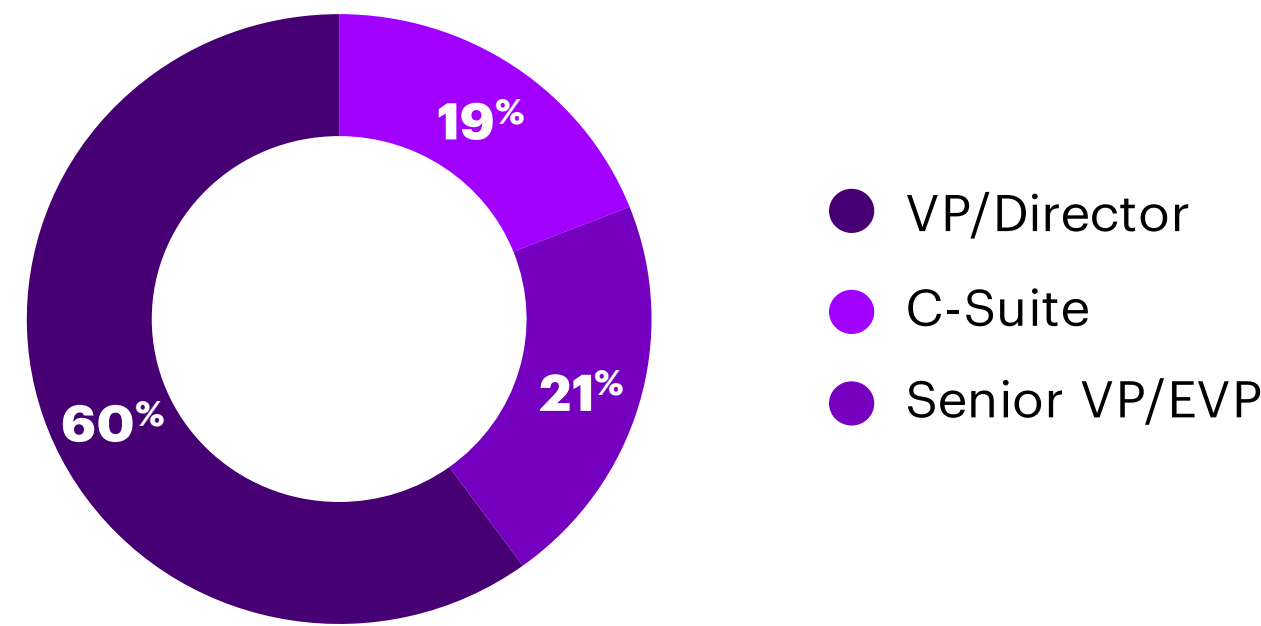


Distribution by industry

(Percentage of respondents)



C-suite participation



- I. We interviewed seven top supply chain executives from six industries to understand how they are transforming their existing supply chains into ones that deliver customer experience-led growth.
- II. We used econometric modeling to estimate the impact of collaborative analytical asset-light architecture on revenue growth.
- III. We also used the CapIQ database to highlight the differences in the performance of Masters versus Others on indicators such as EBITDA and share price movements.

Appendix

FIGURE 1

Masters show higher growth rates due to customer centricity | 2017-2019

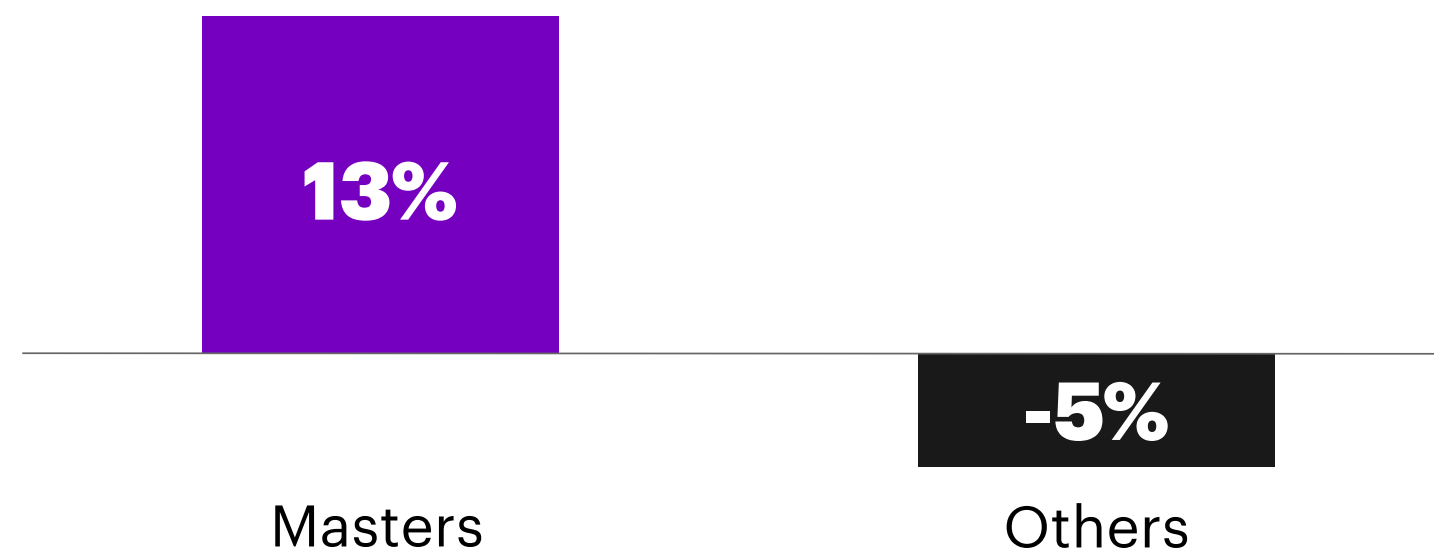


FIGURE 2

Masters supply chain contribution to total revenue is 3X higher than Others | 2017-2019

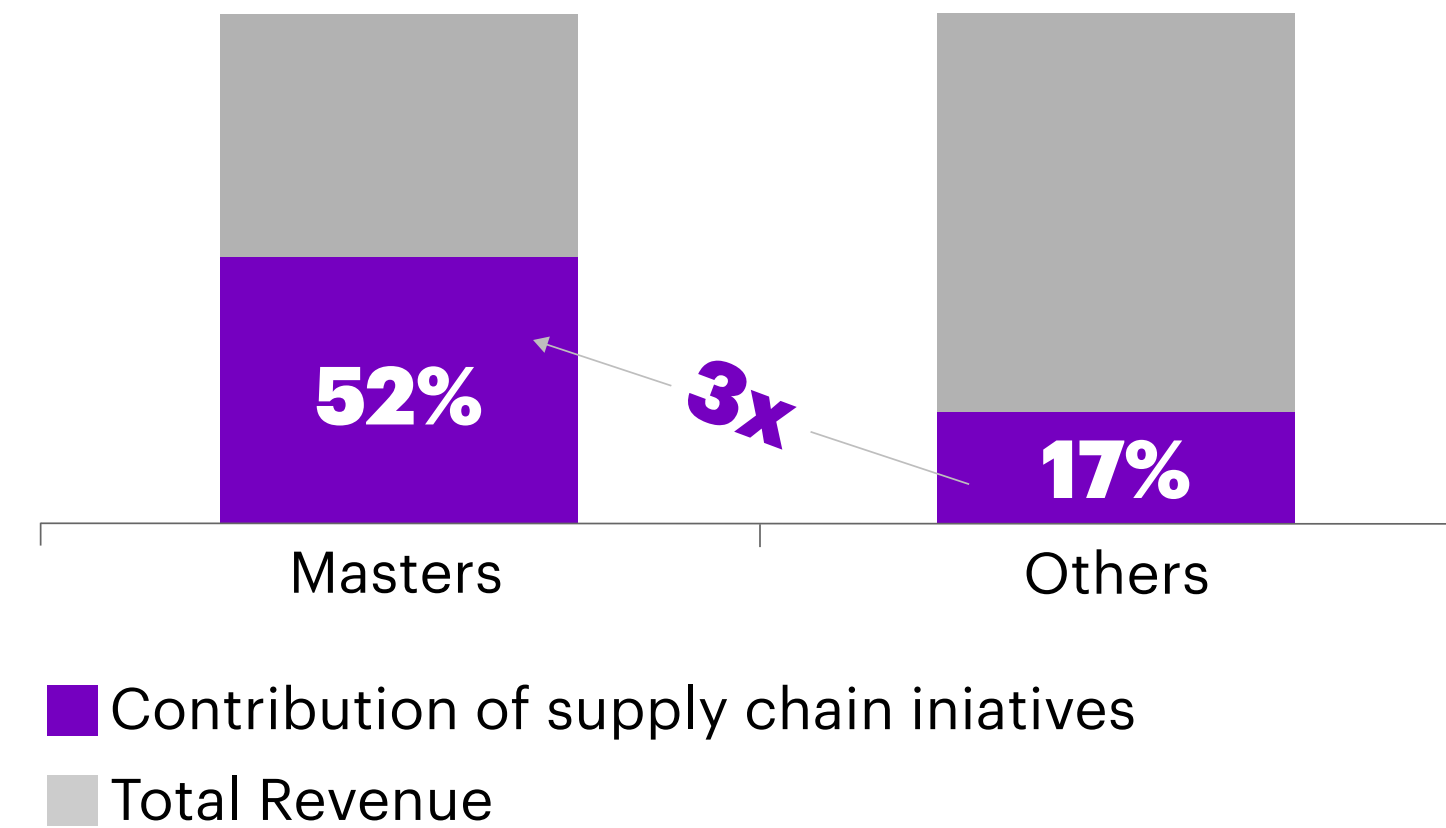


FIGURE 3

Masters enjoy 2.5% higher EBITDA margins | 2017-2019

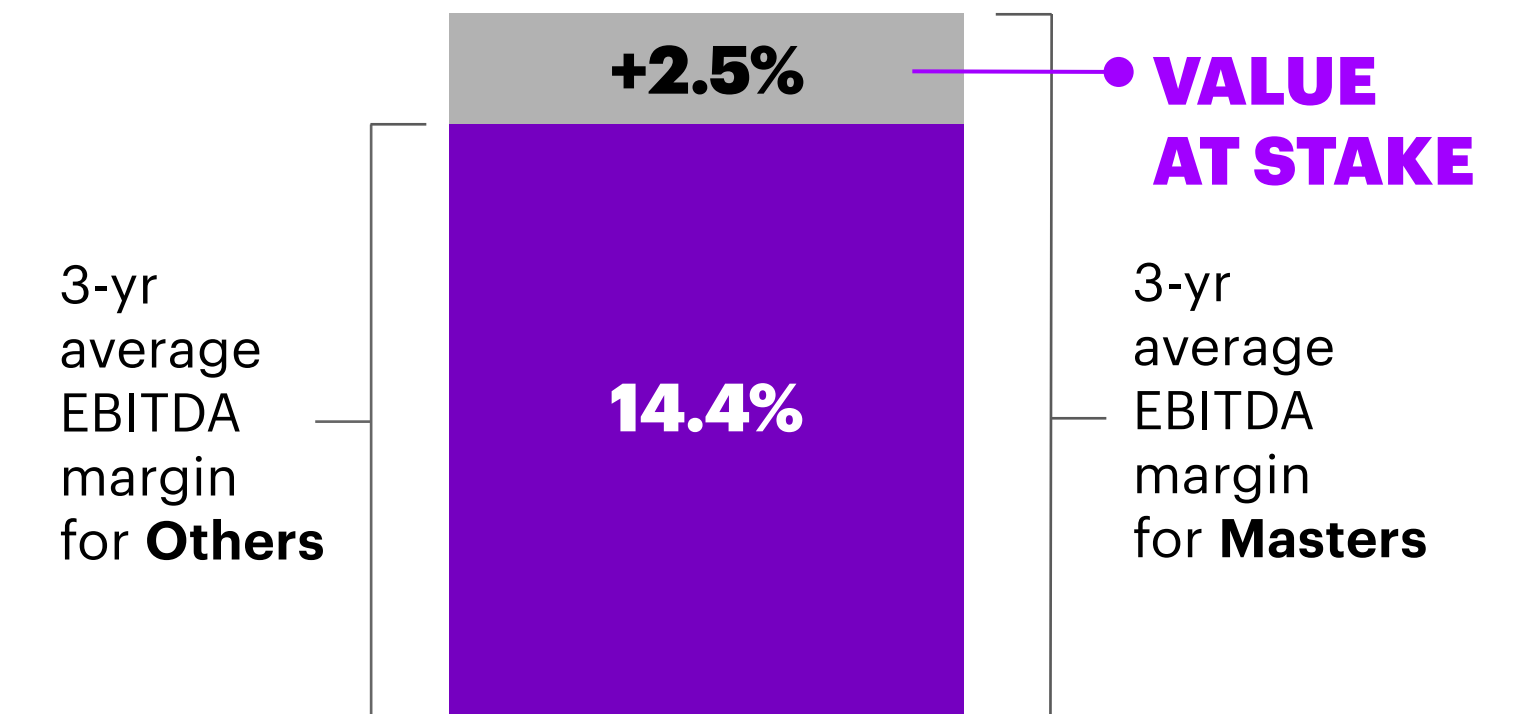
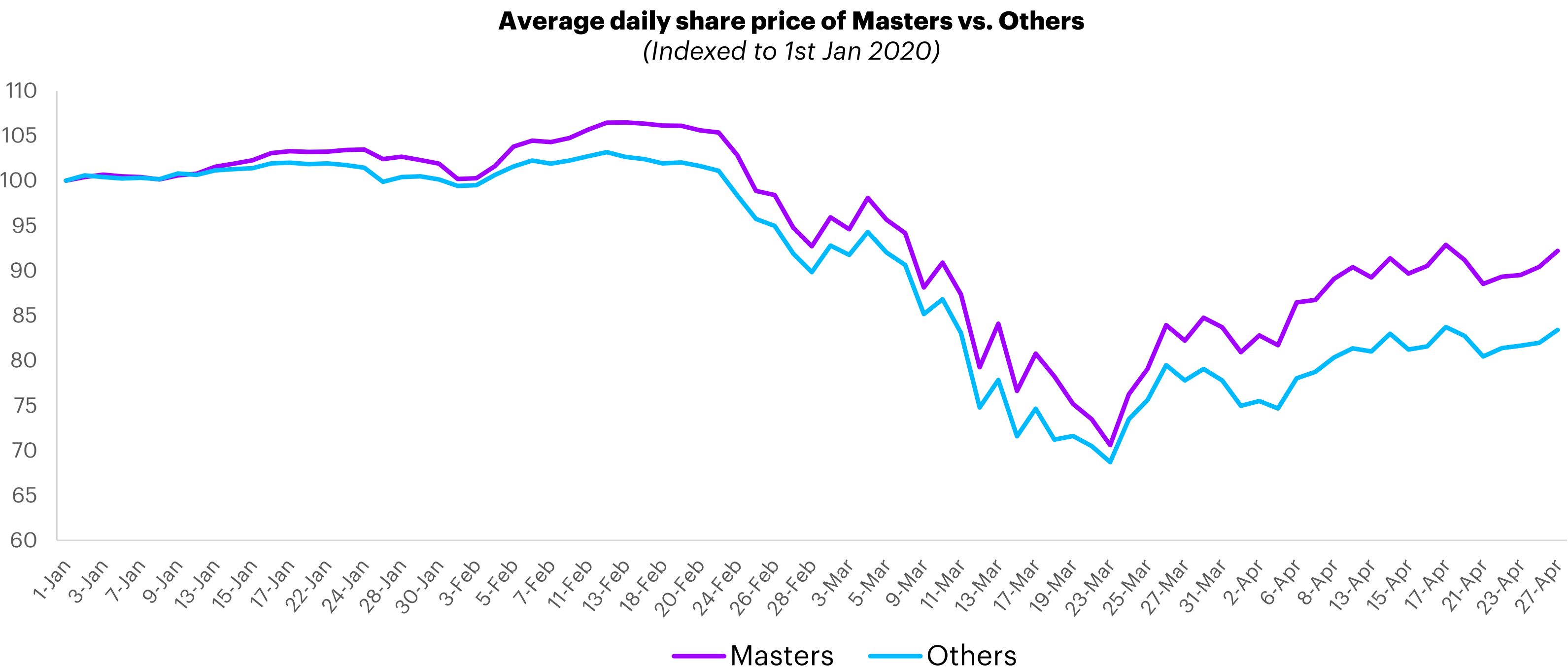


FIGURE 4

During COVID-19 the Masters are being rewarded for building customer-centric supply chains



Notes & References

Introduction

1. All data and quotes are sourced from Accenture's 2020 Supply Chain research, unless otherwise noted.
2. To identify 'Masters', we asked supply chain executives in our sample to identify the customer value propositions their supply chains were addressing during the 2017-2019 timeframe. We also asked them to self-assess their supply chain's contribution to their company's overall revenue and revenue growth experienced while driving these customer value propositions growth during the same time period. The companies making it to the top quartile on both counts are our Masters. They achieved an average revenue growth of 13% between 2017 and 2019, and attribute as much as 52% of that revenue to their supply chain initiatives. In contrast, others who have registered an average revenue growth of -5% over the same period, say that their supply chains have only 17% impact on their revenue.

01. Masters begin with the customer in mind

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04. Masters engage their CEOs to move beyond conversation into true transformation

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