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SAPinsider Benchmark Report

Transforming the Intelligent Supply Chain

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Executive Summary

Much like the Industry 4.0 movement has already started to reshape the manufacturing sector, a confluence of technologies has hit the supply chain management (SCM) market that demand action and deployment to stay competitive and relevant. These technologies transform supply chains by collecting appropriate data, delivering it to applications based on advanced analytics, and using insights to trigger appropriate actions.

SAPinsider surveyed 302 of our members from 134 customer companies to understand the progress SAP customers have made in planning the digital transformation of their supply chains and found that a majority (84%) of respondents either currently focus or plan to focus on digital transformation in the supply chain in the next year or two. This report takes an in-depth look into the data behind this finding, including how and why companies approach this transformation, the outcomes customers have seen thus far, and the actions that SAPinsiders can take to ensure successful results going forward.

Survey results show several interesting findings:

- A majority (53%) of leaders prioritize development of a digital transformation strategy versus only 39% of laggards.
- Leaders have adopted order promising and delivery monitoring technologies: 71% of leaders have taken this step versus 17% of laggards.
- A majority (65%) of leaders currently use supply chain performance analytics versus 22% of laggards.
- Most leaders currently use mobile applications for SCM: 53% of leaders have adopted apps while only 26% of laggards have taken this step.

Required Actions

In addition to the actions outlined in detail later in this report, to ensure a successful digital transformation of the supply chain, SAPinsiders must:

- **Organize existing data and evaluate intelligent technologies now.** Intelligent technologies hold significant potential to positively impact SCM operations. Most (53%) of leaders plan to use Internet of Things (IoT) applications within the next year versus only 30% of laggards.
- **Identify the problems that need solving and the technologies that can help your organization solve them.** Leaders currently use order

SAPinsider PERSPECTIVE

> Start early and before it becomes a necessity. Usually you realize that you need a transformation when it is already late, so it is harder, more expensive and painful to react.
>
> **~ Director of Operations Planning, Mexican Consumer Good Manufacturing Company**

promising and delivery monitoring as well as supply chain performance analytics at much higher rates than the other groups.

- **Start tracking supply chain performance with performance analytics first.** Set your KPIs and ultimate goals for supply chain performance and leverage advanced analytics to drill down to ensure that the KPIs actually lead to real results and to find the root causes of issues. Leaders do this because they can then better track the impact of other technologies and run experiments on what provides value and what does not.
- **Develop a long term strategy with a detailed but adaptable architectural roadmap.** Leaders do this because every technology implemented needs to build upon the others, and without a detailed archictectural plan, organizations will end up with siloed applications of technologies.

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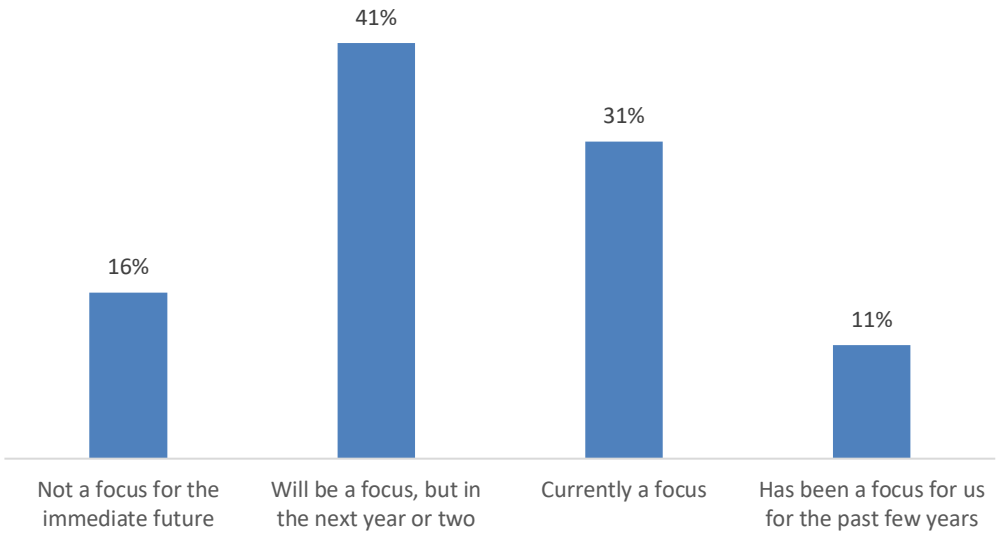
Chapter One: Supply Chain Market Overview

SAP customers have digital transformation of the supply chain in their crosshairs, with 84% of them either focusing on it or planning to focus on it in the next year or two (see **Figure 1**). In this case, digital transformation of the supply chain means multiple departments and functions practicing agile innovation in a flexible manner and at a competitive pace. To gain this ability, organizations need to build on a foundation of cleansed and harmonized data with performance analytics and other analytics tools on a collaboration platform before experimenting with newer technologies such as IoT for real-time drilldowns into issues or AI for predictive analytics. From there, companies can use these technologies to lower logistics costs by catching issues earlier and improving inventory planning.

Figure 1: Organizations' focus on digital transformation of the supply chain



Source: SAPinsider, October 2019

SAP PERSPECTIVE

"When I think of a digital supply chain, I think of a connected supply chain with everything connected: equipment, trucks, products. By having real-time information, you can be more predictive, sensing things when they happen and automating mundane processes. Then you can leverage people for more value-add processes."

~ Richard Howells, Vice President - Solution Management for Digital Supply Chain, SAP

Competitive Maturity Assessment

Based on the answers of these survey respondents and our in-depth conversations with them, SAPinsider identified three categories of SAP customers when it comes to their supply chain digital transformations:

- **Leaders:** These are early adopters that have said they are significantly ahead of the competition when it comes to their digital SCM strategy. This group represents 13% of the survey respondents.

- **Industry average:** These are companies that have said they are equal to or only somewhat ahead of their competition. This group represents 47% of the survey respondents.

- **Laggards:** These are companies that have admitted to falling behind their competition. This group represents 40% of the survey respondents.

Respondents' answers to the survey and to our interview questions revealed clear trends within the leader group, which are summarized in **Figure 2** and which we will examine over the course of the rest of the report. Leaders see increasing logistics costs as the biggest pressure they face, and they have responded by investing time and money in a digital transformation strategy.

Figure 2: DART model framework for digital transformation of the supply chain

Category	Drivers	Actions	Requirements	Technologies
Leader	• Increasing logistics costs • Customer demands for 'faster, better, cheaper.'	• Developing the digital transformation strategy and architectural roadmap for SCM • Investing in systems, technology, and integration • Defining and implementing a 'learn to innovate' strategy • Developing advanced strategic sourcing practices	• Scaled, high-volume system processing capabilities • Cleansed and harmonized product and customer master data • The ability to drill-down in real-time into performance and supply chain issues • Industry-standard security tools, policies, and practices – both on and off cloud	• Order promising and delivery monitoring • Electronic data interchange (EDI) • Supply chain performance analytics • Supply chain sustainability analytics • Warehouse management system (WMS) • Mobile applications for SCM operations • Internet of Things (IoT) devices and applications • Artificial intelligence (AI) for predictive analytics

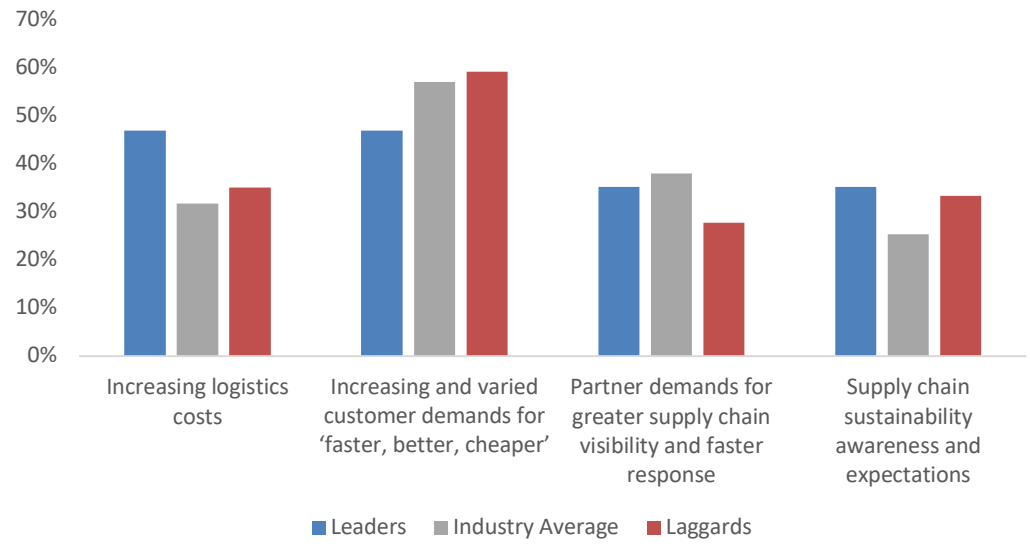
Source: SAPinsider, October 2019

As part of this digital transformation strategy, leaders implement order promising and delivery monitoring as well as more advanced analytics to drill-down into issues to prevent logistical problems and make better use of inventory. All of this goes back to address that main driver of logistics costs.

What Drives Customers' SCM Strategies?

All three groups realize that they must respond to customer demands for 'faster, better, cheaper,' but the leaders chose this driver at the lowest rate of the three groups. They still recognize the importance of customer demands and chose it at a significantly high rate (47%) (see **Figure 3**), but they chose reducing logistics costs at the same rate, while the other two groups chose logistics costs at significantly lower rates. By lowering logistics costs, leaders can pass the savings onto their customers and help meet those demands.

Figure 3: Business drivers for SCM strategies by respondent group



Source: SAPinsider, October 2019

SAPEXPERTS PERSPECTIVE

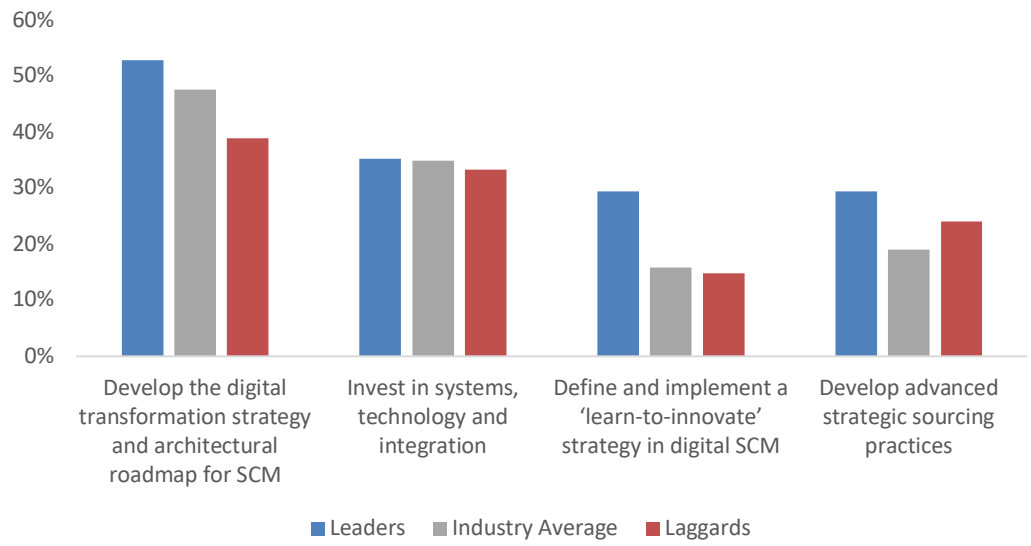
"Most distributors and manufacturers are still working on good old problems, such as cleaning up large volumes of product and inventory data… Responding to these critical needs is not something that goes away, but it doesn't equate to "digital" or "digitizing" the supply chain per recent common definitions."

~ Christer Wadman, Founder and Principal Strategy Consultant at Teccelerators, SAPExpert

How Do Leaders Plan to Transform Their Supply Chains?

Leaders prioritize developing the digital transformation strategy and architectural roadmap more than laggards and industry average respondents (see **Figure 4**): 53% of leaders — versus 39% of laggards — chose developing a digital transformation strategy as one of their top strategies. Leaders use digital transformation - leveraging data and analytics to prevent problems and fulfill order promises - to meet their driver of lowered logistics costs. Every company that manages a supply chain should try to identify opportunities to improve logistics operations with analytics and intelligent technologies. They can also apply these technologies to advanced sourcing strategies to lower inventory costs.

Figure 4: Top strategies prioritized to address the top drivers of change



Source: SAPinsider, October 2019

SAPinsider PERSPECTIVE

"Some specific products are limited to a few customers. It is very easy to set such customizations with ERP tools. SCM makes organization of business easy. Business requirements can be fulfilled easily."

~ Analyst, North American Consumer Goods Manufacturing Consulting Company

How Are Industry Average Respondents and Laggards Planning to Move Forward?

According to our research, over the next year or two, members of the industry average group will start to bridge the gap between the technologies they currently use and the technologies that leaders currently use. Currently, most of the industry average group's large technology investments settle on EDI (63%).

Over the next year, 64% of the industry average group plan to use order promising and delivery monitoring technologies, and 57% plan to use performance analytics within a year. In addition, 79% of this group will use IoT devices and applications over the next two years. These technologies will

address much of the gap between the industry average group and leaders. Order promising and delivery monitoring helps improve the customer experience, and performance analytics empower companies to identify problem areas and lower logistics costs. IoT applications will improve the group's ability to dive into the root causes of issues in real-time, catching issues earlier and further lowering logistics costs.

The laggards will also implement supply chain performance analytics within the next year with 54% planning this investment within twelve months. Companies need to measure performance to know how they can improve. However, laggards will come along with order promising and delivery monitoring about a year behind the industry average group as 67% plan to use this technology within two years.

Over the next two years, non-leaders have shown they intend to invest in technologies that measure performance with analytics, improve the customer experience with order promising and delivery monitoring, and dive deeper into the root causes of issues to lower logistics costs.

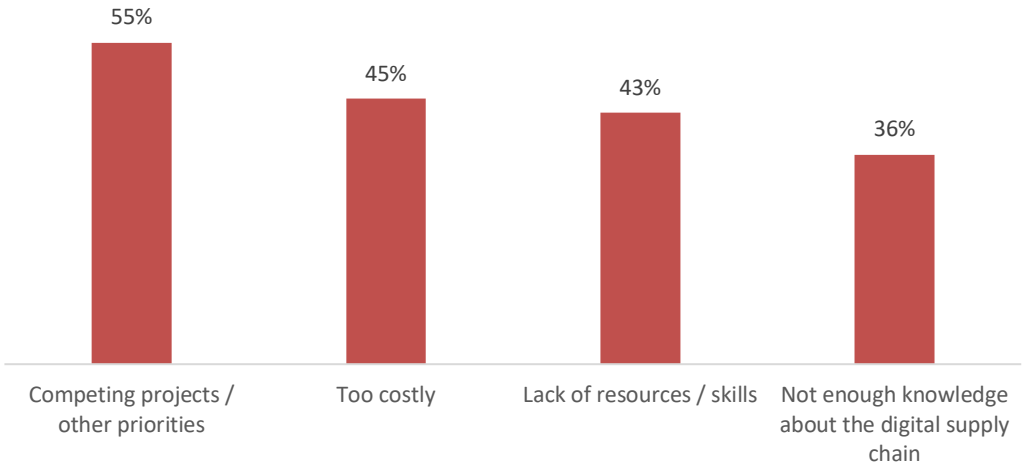
SAPinsider PERSPECTIVE

> Initiatives need a focused team dedicated to delivery. It can't be done as a part-time responsibility.
>
> **~ Senior Logistics Manager, Large Consumer Goods Company**

What Holds Back Laggards?

Competing projects, cost, and lack of resources represent the three biggest reasons laggards delay investing in the digital transformation of the supply chain (see **Figure 5**). Laggards seem to prioritize more traditional initiatives, such as demand forecasting, over cutting-edge digital technologies, but most have an awareness of more transformative technologies and plan to invest over the coming years.

Figure 5: Challenges preventing digital transformation for laggards



Source: SAPinsider, October 2019

Lack of knowledge also holds back laggards. Because they have not prioritized a digital transformation, many laggards have not taken the basic first steps of educating themselves, strategizing, and preparing to evolve. As a result, many respondents have pushed back plans to deploy SCM technologies over the next two years and will only change when their customers demand it.

Key Takeaways

Based on our research, when it comes to the progress SAPinsiders have made in their digital transformation of the supply chain, the following takeaways are clear:

- **Plan your digital transformation strategy with an architectural roadmap for SCM.** More leaders cited developing the digital transformation strategy and architectural roadmap for SCM as a prioritized strategy than any other option, with 53% identifying this as a top strategy. Planning the roadmap provides technology deployment goals toward which the organization can work.
- **Those that have not yet made plans for their digital transformation have already fallen behind.** These companies need to take concrete steps to start their transformation or they will see their market position weaken relative to the competition. A majority of SAPinsiders have made plans to focus on their supply chain transformation, with 84% of survey respondents overall already taking steps forward or planning to focus on digital transformation of the supply chain in the next year or two.
- **A focus on lowering logistics costs can help meet customer demands.** This means using data, intelligent technologies, order promising, and delivery monitoring to lower inventory costs and better meet customer's needs. Leaders identified lowering lostics costs and customer demands (47% each) as the key business drivers for their SCM strategies.

SAPinsider PERSPECTIVE

> We have not started our holistic digital transformation of the supply chain.
>
> **~ Production Applications Lead, Large Mining Company, Laggard**

Chapter Two: How Do Customers Support Their SCM Strategies with Intelligent Technologies?

Digitally transforming the supply chain involves a range of technical and strategic considerations. SAPinsiders not only need to have access to cleansed and harmonized data, but also need the computing power and tools to process and secure that data.

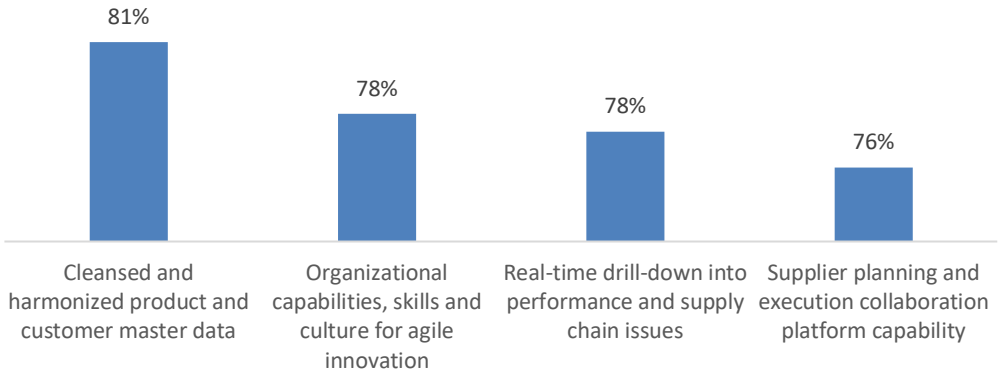
Here, we look at how survey respondents have and will approach these considerations, including the top requirements identified for digital transformation of the supply chain, the progress SAPinsiders have made so far, and the technologies in which they intend to invest.

Top Requirements for Transforming the Supply Chain

Survey respondents identified several requirements for digitally transforming the supply chain, with a few emerging as top priorities.

Digital transformations always require access to large volumes of high-quality data, and to collaborate, especially across supply chains, organizations need different departments in different locations to have access to the same real-time data. Therefore, respondents chose cleansed and harmonized product and customer master data as the most important requirement for implementation, with 81% overall saying they either currently use this capability or plan to use it in the next two years (see **Figure 6**).

Figure 6: Key capabilities required for SCM projects



Source: SAPinsider, October 2019

SAPEXPERTS PERSPECTIVE

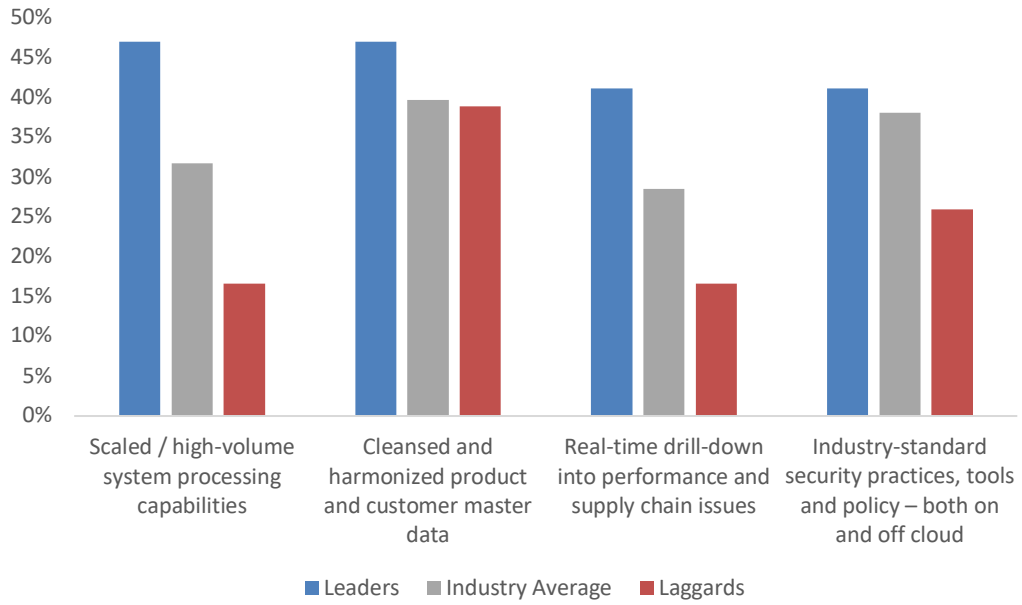
Digital supply chain management is a strategic opportunity to differentiate. It is not easy, but companies need to bring clarity to what digital transformation in their supply chains means for them.

~ Christer Wadman, Founder and Principal Strategy Consultant at Teccelerators, SAPExpert

To redesign a supply chain involving multiple departments and functions in a flexible manner and at a competitive pace, organizations need to practice agile innovation. For this reason, 78% of respondents overall identified organizational capabilities, skills, and culture for agile innovation as a key requirement, making this the second-most important capability.

A closer look at the data by respondent group reveals a few notable differences between the groups (see **Figure 7**). Perhaps most importantly, leaders differentiate by placing the highest emphasis on scaled and high-volume processing capabilities. Having the infrastructure in place to handle large volumes of data empowers leaders to get more value out of that data.

Figure 7: Key capabilities currently used in SCM projects prioritized by group



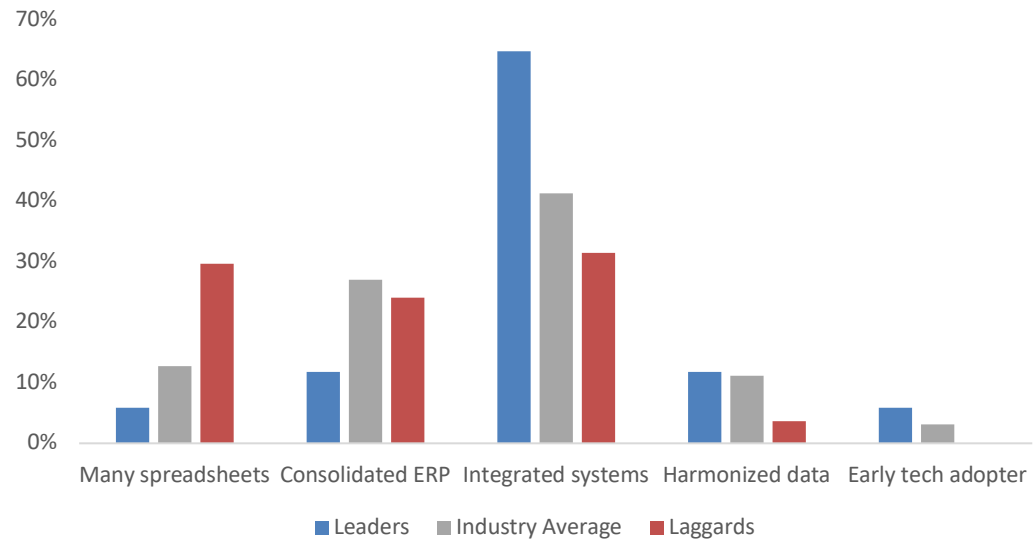
Source: SAPinsider, October 2019

How Much Progress Have SAPinsiders Actually Made?

SAPinsiders can measure their digital transformation progress with a simple tiered framework in which they work their way up from using many siloed spreadsheets to consolidating ERP, integrating systems, harmonizing data, and finally adopting technology earlier. In this analysis, 30% of laggards described their SCM system as spreadsheet-driven, where the use of spreadsheets dominates forecasting, planning, and reporting activities, while

only 6% of leaders reported the same (see **Figure 8**). Additionally, 82% of leaders reported having at least consolidated ERP or integrated systems, with 18% claiming harmonized data (with high-quality master and operational data synchronized across systems) or status as an early technology adopter (with broadly accepted IoT connectivity or predictive analytics). Only 4% of laggards reported harmonized data or early technology adoption.

Figure 8: Customers' current SCM profile



Source: SAPinsider, October 2019

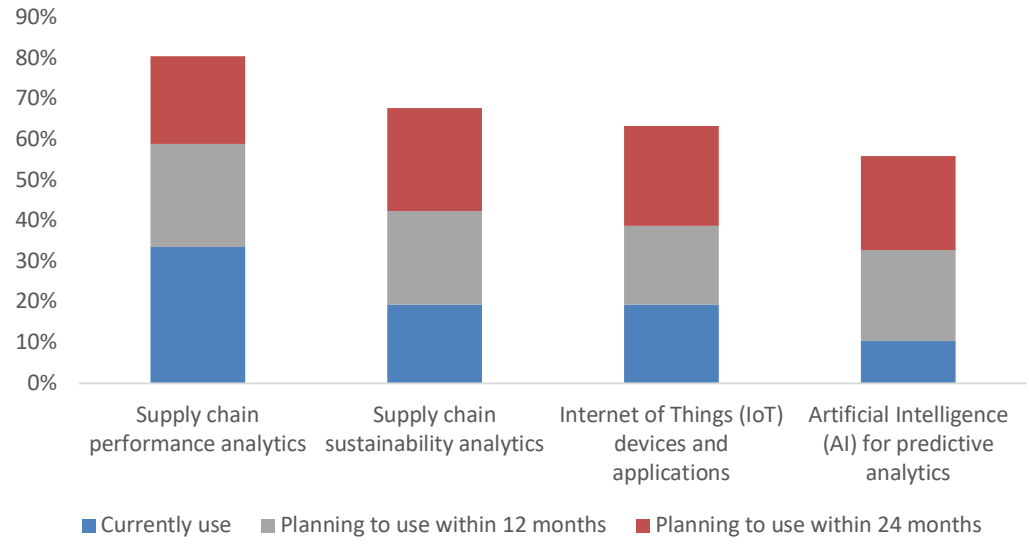
SAPinsider PERSPECTIVE

"We are moving away from a fully integrated IT landscape. Beyond our transactional core, we now prioritize more technology-agnostic connectivity and flexibility, especially in the front layer [for customer experience capabilities]. It is critical for us in or to enable a digital business model that requires much faster implementations."

~ Digital Program Manager, Large Chemicals Company

As illustrated in **Figure 9**, as SAP customers mature, they will invest more in advanced analytics, IoT, and AI. Only 10% of respondents currently use AI for predictive analytics, but 56% will do so within two years. Of course, they will need the data from IoT connections to train the machine learning models and neural networks, and as a result, SAP customers will adopt IoT devices and applications at a slightly faster pace than AI.

Figure 9: Technologies drawing investment by group



Source: SAPinsider, October 2019

Even before they start collecting more data through IoT though, many SAP customers will apply advanced performance and sustainability analytics to existing data and data sources.

Key Takeaways

Our findings reveal the following key takeaways when it comes to how to approach a digital transformation of the supply chain:

- **Ensure the right people in the organization have access to large volumes of the appropriate high-quality data in real time.** This data empowers the organization to implement the higher-level applications based on the data — respondents chose cleansed and harmonized product and customer master data as the most important requirement for implementation, with 81% saying they either currently use this capability or plan to use it in the next two years.

SAPEXPERTS PERSPECTIVE

“By far, most SAP supply chain products and technologies deployed by customers are earlier generation. As customers explore and deploy SAP’s next-generation ERP system – SAP S/4HANA – deployment and product roadmap questions likely remain for SAP’s next-generation supply chain products.”

~ Christer Wadman, Founder and Principal Strategy Consultant at Teccelerators, SAPExpert

- **As organizations gain access to their data, they should ensure they have all the processing power they need.** Leaders differentiate by placing the highest emphasis on scaled and high-volume processing capabilities. Having the infrastructure in place to handle large volumes of data empowers leaders to get more value out of that data.
- **After harmonizing high-quality data, organizations can take the next step and adopt technology earlier.** Organizations can use performance analysis on the data to measure the success of supply chain initiatives. They then plan to turn toward IoT connectivity, sustainability analytics, and AI. Advanced analytics, AI, and IoT lead the way for investments planned over the next 24 months.

Chapter Three: Required Actions

To help ensure a successful digital transformation of the supply chain, companies need to start the process now and, critically, develop a strategy that the organization can align around, at least at first. The following actions will help leaders, the industry average group, and laggards navigate the digital transformation of their supply chains and maximize the value of their investments.

Leader Steps to Success

Our research revealed that leaders should follow several key steps to ensure a successful digital transformation of the supply chain:

- **Develop a digital transformation architectural roadmap.** Deciding to focus on SCM only gets companies so far. Leaders should continue to invest in integration, harmonization of data, analytics, and new technologies and innovation across every area of the supply chain.
- **Support the digital transformation with data and technologies that will lower logistics costs and meet customer demands.** Leaders have already taken steps to provide order promising and delivery monitoring for customers. As they implement IoT and AI they will gain the abilities to better monitor operations and predict issues to lower costs even more and better meet customer demands.
- **Explore how a digitally transformed supply chain can affect areas beyond itself.** Right now, most companies only see the direct benefits of SCM initiatives. By integrating further with product lifecycle management (PLM) and manufacturing via IoT connections, however, the supply chain could potentially have further-reaching effects where it proactively adapts to fill needs in the manufacturing plants or to better serve end customers.
- **Dive headfirst into AI.** AI applications have enormous potential for predicting issues before they arise, but machine learning-based predictive analytics require large volumes of data from a variety of situations and time to recognize patterns in that data. The sooner an organization starts using predictive analytics and training its models, the sooner those models will start providing accurate and helpful insights.

SAP PERSPECTIVE

“Identify where your biggest business challenges are. If manufacturing, improve manufacturing systems; if time to market, focus on design; if planning, improve flexibility to move from quarterly to monthly or weekly cycles to improve responsiveness to demand and environmental situations. Identify the top two or three pain points.”

~ Richard Howells, Vice President - Solution Management for Digital Supply Chain, SAP

Industry Average Steps to Success

Based on what we've learned from leaders, the following guidelines can help those in the industry average group take their SCM plans to the next level of digital transformation:

- **Integrate and harmonize your data in high-quality, synchronized master data management services.** Leaders make this a priority for a reason. This will require consistent data cleansing and management practices and possibly switches to SAP S/4HANA and SAP Integrated Business Planning. Cloud computing will prove crucial for collaboration across roles and locations. This serves as a prerequisite to get the most out of other data-based technologies such as AI, IoT, and advanced analytics.

- **Track performance of the supply chain with performance analytics.** Most leaders already do this. It empowers the organization to run experiments with other technologies and techniques and measure the results. This helps the organization decide which technology applications to scale.

- **Ensure the organization has all the processing power it needs both at the edge and in the cloud.** Leaders differentiate by placing the highest emphasis on scaled and high-volume processing capabilities. Having the infrastructure in place to handle large volumes of data empowers leaders to get more value out of that data.

- **Increase the emphasis on innovation to lower logistics costs as much as possible.** Leaders separate themselves from the industry average group largely due to an emphasis on innovation that lowers logistics costs. Companies that genuinely want to adopt new technologies to make their operations as finely tuned as possible will always outstrip those that only want to keep up with the rest of the competition.

Laggard Steps to Success

Laggards can set themselves on a path toward success by following the example of those who have already moved forward:

- **Focus on the supply chain.** A solid majority (71%) of laggards admit that they do not currently focus on digital transformation of the supply chain. Obviously, they will not catch up to their competition and will not see value in any SCM initiatives until they have SCM initiatives under way.

- **Break the data siloes.** Laggards need to ensure they have cleansed and harmonized data between the systems they do run, not siloed islands of data in the warehouse or in the transportation systems that do not line up.
- **Enhance data quality to improve demand and supply planning.** Many leaders started by simply gathering the right data to make better demand and supply planning decisions. This can lead to a rapid reduction in inventory costs and should help build the business case for a larger transformation.
- **Use a digital transformation to lower logistics costs and better serve customers.** Leaders make meeting customer demands a priority but prioritize logistics costs at the same level. They use digital transformation as the primary way to address these pressures.

Key Takeaways

Going forward, leaders, industry average organizations, and laggards should keep the following in mind:

- **Leaders need to leverage the position they have gained.** Using the early lessons learned and benefits gained from taking tangible steps to digitally transform the supply chain, leaders can now take steps that no other companies have yet taken. Do not lose that spirit of innovation. Keep experimenting with new technologies and scaling those that provide value. Explore how the digitally transformed supply chain can benefit other areas of the business. Use advanced system architectures to start training AI models and do not let off the gas.
- **Industry average organizations should make sure they have the proper data management services in place, track supply chain performance and start innovating with more data.** Leaders have paved the way and industry average organizations can catch up, but they need to prioritize innovation. As these companies put the proper systems and architectures in place, they can then start their own experiments with advanced analytics and IoT.
- **Laggards need leadership to prioritize digital strategies within the supply chain.** Laggards have not even started to focus on digital transformation of the supply chain. As soon as the leadership within these companies decides to prioritize the digitization of this part of the business, they can then identify

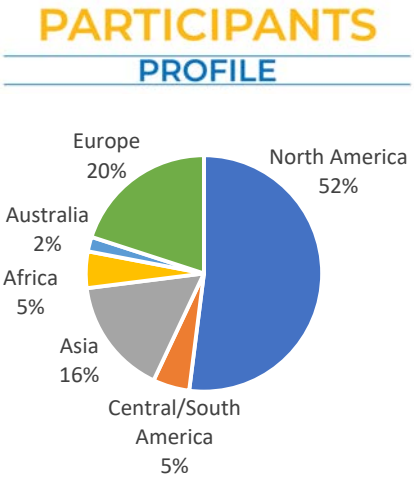
SAP PERSPECTIVE

> Within the organization, the line of business organization executives have to drive the project. They have to align with business processes.

~ Richard Howells, Vice President - Solution Management for Digital Supply Chain, SAP

weaknesses and start to take steps to organize the capabilities they currently have and to implement new ones. Making the supply chain a focus usually requires an executive champion to take the time to make the business case. Someone in the C-suite needs to take meetings with technology vendors that can help start this transformation.

Methodology



SAPinsider examined the issues, intentions, and experiences of business and technology professionals related to their plans for digital transformation of the supply chain. Our survey generated 302 responses and included 134 customer companies.

Responding professionals completed online surveys that questioned them on topics such as the following:

- When it comes to their digital SCM strategy and associated business results, how their organization is performing relative to their competition
- The main business and technology drivers that influenced their plans for digital transformation of the supply chain
- The strategies they prioritize to address their top drivers of change
- The capabilities they need to implement their top strategies
- The SCM technologies they are currently using or planning to use
- The business or functional areas driving their general SCM strategy and satisfaction
- The SAP SCM systems, modules, and technologies they are currently using or planning to use

SAPinsider supplemented the online survey responses with in-depth telephone and in-person conversations so that we could better understand the context and reasoning behind the responses, trends, and patterns within the survey data.

Demographic information on the respondents included the following:

- **Job title:** The job titles of the survey respondents included CXO (3%), VPs and Directors (17%), Managers (24%), Consultants (17%), Architects (14%), Analysts (14%), Developers and Administrators (6%), and Project Managers (2%).
- **Industry:** The survey respondents represented a range of industries, with consumer goods representing the highest percentage of respondents. The top industries represented were consumer goods (12%), industrial manufacturing (9%), food & beverage (8%), consulting services provider & software provider (7%), automotive (6%), biotech &

pharmaceuticals (5%), chemicals (5%), high tech (5%), retail (5%), and energy (5%).

- **Company size:** A majority of responding companies were larger organizations, with 18% reporting revenue of over $10 billion, 22% stating revenue of $1-$10 billion, 11% indicating revenue between $500 million and $1 billion, 10% reporting revenue of $200-$500 million, and 23% stating revenue less than $200 million. The remaining 15% did not know the previous year's revenue.
- **Geography:** Of our survey respondents, 52% were from North America, 20% hailed from Europe, 16% were from the Asia-Pacific region, 5% came from Central and South America, 5% were from Africa and the Middle East, and 2% were from Australia.

Appendix A: The DART™ Methodology

SAPinsider has rewritten the rules of research to provide actionable deliverables from its fact-based approach. The DART methodology serves as the very foundation on which SAPinsider educates end users to act, creates market awareness, drives demand, empowers sales forces, and validates return on investments. It's no wonder that organizations worldwide turn to SAPinsider for research with results.

The DART methodology provides practical insights, including:

Drivers: These are macro-level events that are affecting an organization. They can be both external and internal and require the implementation of strategic plans, people, processes, and systems.

Actions: These are strategies that companies can implement to address the effects of drivers on the business. These are the integration of people, processes, and technology. These should be business-based actions first, but they should fully leverage technology-enabled solutions to be relevant for our focus.

Requirements: These are business and process-level requirements that support the strategies. These tend to be end-to-end for a business process.

Technology: These are technology and systems-related requirements that enable the business requirements and support the company's overall strategies. The requirements must consider the current technology architecture and provide for the adoption of new and innovative technology-enabled capabilities.

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