

The Supply Chain Digital Disruption.

Its impact on executive talent.



Executive Summary

Across all industries—from consumer goods to health care, manufacturing to financial services—more companies are “going digital.” Digitisation is very much at the forefront of any CEO’s mind. Predictions are that every company and virtually every job will be touched and most likely transformed or eliminated by digital innovation. For supply chains to fulfil their full digital potential companies need to connect disparate systems, provide end to end visibility, capture and analyse massive amounts of data. The availability of advanced analytics and affordable cloud-based technologies allows companies to go beyond the improvement of service levels and cost reduction.

Historically over the last 30 years, the supply chain has undergone a tremendous change. What was once a purely operational logistics function that reported to sales or manufacturing and focused on ensuring supply of production lines and delivery to customers has become an independent supply chain management function that in some companies is already being led by a CSCO—a chief supply chain officer. The focus of the supply chain management function has shifted to advanced planning processes, such as analytical demand planning or integrated sales and operations planning (S&OP), which have become established business processes in many companies, while operational logistics has often been outsourced to third-party logistics providers. The supply chain function ensures that operations are well-integrated, from suppliers through to customers, with decisions on cost, inventory, and customer service made from an end-to-end perspective rather than by each function in isolation.

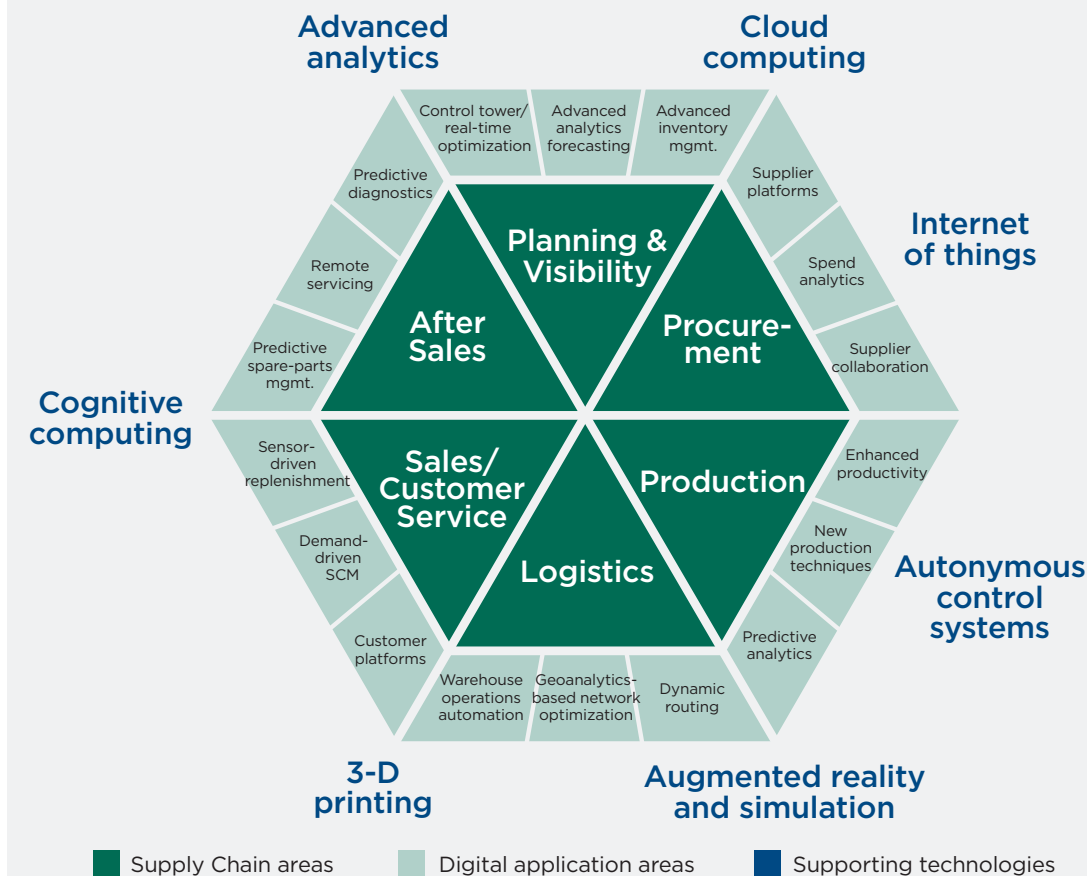
Digitisation creates a disruption and requires companies to rethink the way they design their supply chain. At the same time, customer expectations are growing. The online-enabled transparency and easy access to a multitude of options regarding where to shop and what to buy drive the competition of supply chains. This does not only apply to B2C but also B2B companies.

More and more data will become available, RFID sensors, for example, track and manage in-store replenishments increasing on shelf availability, enabling direct delivery to stores, driving sales up and delivery costs down, increasing the retailer’s profitability.

A study by The Boston Consulting Group shows that the leaders in digital supply chain management are enjoying increases in product availability of up to 10 percentage points, more than 25% faster response times to changes in market demand, and 30% better realization of working-capital reductions, on average, than the laggards. They have 40% to 110% higher operating margins and 17% to 64% fewer cash conversion days. With the help of three key strategies, these agile companies are quickly leaving behind their less nimble competitors.

The general consensus is that companies cannot afford to wait and the leaders in digital supply chain management are building a financial advantage that will be more difficult to overcome with each passing year. Companies will need to map opportunities for each of the newly available technologies. BCG for example have defined the landscape of digital supply chain management and developed a map of the major areas of activity.

The landscape of digital supply chain management.



Talent Implications

However, in order to deliver its potential, the function is being driven to transform, and there is increased pressure on the talent who are expected to deliver this change.

The war for supply chain talent to drive digital transformation is further intensifying. The war spans all industries and is at the forefront of most CEO's agendas.

With digital disruption changing markets everywhere, top executives around the world are changing their priorities. Korn Ferry International surveyed 100 senior supply chain executives, along with interviewing academics and consultants, to explore issues that leaders face and their approach to building and organising the required talent to support this transformation. More than half of the respondents (53 percent) had a formal position to lead digital supply chain management, with most (92 percent) reporting to a COO, Chief Supply

Chain Officer (CSCO), or to a supply chain leadership member.

"The Supply Chain Digital Disruption" aims to provide some insights, particularly from a talent perspective, on the contexts, visions, and challenges of supply chain leaders facing the looming implications of digitisation, as well as suggesting a framework for building capability and culture and addressing a target operating model to respond to the challenges ahead. The executives were asked for their views on three main issues:

- The impact and context of digitisation in their business
- Their capability building and the availability of digital talent
- Their biggest challenges in the coming years and how they intend to meet them

Their answers in this report provide many revealing insights, with four themes in particular standing out that are detailed below. It is clear that supply chain is not ready from a talent perspective for the impending transformation, and leaders of the function will need to learn what it means to lead in the digital world.

To what extent are companies armed with talent for the supply chain digitisation? Digital technology has demonstrated its capacity to augment existing systems and improve productivity and has started to have major impact in the creation of new business models. What this means for supply chain leaders and the talent required in the future is unclear for companies of all sizes and scales of complexity. This report explores the current status of companies' digital strategy, existing talent base, and roadmap for the future.

Key Insights

The data gathered from Korn Ferry's survey of 100 supply chain executives highlighted four key themes:

Digitalisation Unfulfilled

1. Digitisation is highly relevant for supply chain management, with three-quarters (74 percent) of executives rating this as 4 or 5 out of 5.

None of the executives we interviewed raised any doubt about the immense potential of a digitised supply chain to provide the highest possible value to the customer while minimising cost. This, in turn, will have a revolutionary effect on the workforce. The positive impact of digital technology on the supply chain is widespread, with three-quarters of respondents rating digitisation as highly relevant or imperative for supply chain management. "Digitisation could redefine the entire business model and strategy," said Janet Godsell, University of Warwick's professor of operations and supply chain strategy at WMG. "It has the potential to be revolutionary." Indeed, McKinsey projected that "the biggest future impact [of digital] on revenue and EBIT growth is set to occur through the digitisation of supply chains." The function is expected to develop greater flexibility, lower cost and risk, and even develop new ways of analysing its potential revenue impact.

"We will have different enablers, so the systems need to evolve and change. In terms of service (including lost sales), there is the possibility of a 90 percent improvement. We have much better forecasting, which translates into more targeted supply chains," said Knut Alicke, master expert in McKinsey's Supply Chain Management practice, about the impact of better data in improving execution. "With respect to warehousing and transport, there is a 20 to 40 percent improvement

possible. We expect supply chain administration (planning and order management) will be automated from 60 to 80 percent as master data is more reliable; we expect a big impact on inventory through better planning and 3D printing, which could slice inventory in half."

Diverse opportunities are being explored in every industry: food retail businesses consider the future implications of printing food; pharmaceutical companies put sensors in medicine bottles to meet regulatory requirements to track drugs throughout the supply chain; global consumer goods businesses are evolving into omni-channel to deliver direct to consumers; and third-party logistics (3PL) businesses are investing in robots, increasing big data, and using wearable technology to increase the accuracy of picking in their warehouses.

Disruptive companies such as Amazon continue to expand and threaten established businesses, including 3PL providers. Indeed, one of the largest freight-forwarding businesses views Amazon as its biggest threat. Business models are being fundamentally re-created, with companies that previously had B2B business models having the potential to become B2B2C.

In fact, digital disruption will cause an entire supply chain mindset shift: "There will be a change of Key Performance Indicators (KPIs) in the future. Many of today's supply chain indicators such as 'On Time, In Full (OTIF)' will be obsolete. In the longer term when looking at revenues (which before we couldn't calculate) the KPI will change," said Carlos Gordon, Lego Professor of Strategy and Supply Chain Management at IMD. "Supply chain needs to try to understand and substitute the KPIs to show the impact on profits and sales. There will be a huge learning curve on how we adapt to new measurements."

2. About three-quarters (74 percent) of executives positioned themselves in the middle of the scale of advancement, saying that a start had been made on Digitisation, but there was still a way to go.

Most executives surveyed and interviewed admitted they were at the exploratory stage, and it is evident from our research that there is a discrepancy between the anticipated importance and impact of digitalization and work that has been done so far. None of the senior executives surveyed indicated that their supply chain was fully digitised, suggesting that their businesses are not well enough prepared for the challenges to come. While three-quarters of the executives stated that Digitisation had begun, about half (48 percent) of those surveyed advised us that their strategy only considers the impact of Digitisation on the business, and less than a third (28 percent) had a strategy redesigned for digital integration or was digitally native.

These findings suggest that Digitisation of the supply chain has yet to deliver game changing impact. Despite the fact that three out of four executives rated Digitisation as highly relevant or imperative for supply chain management, only two out of three executives indicated they had seen significant improvement in their supply chains to date. At the same time, two out of three executives responded that service will be most heavily impacted by Digitisation (over inventory and cost).

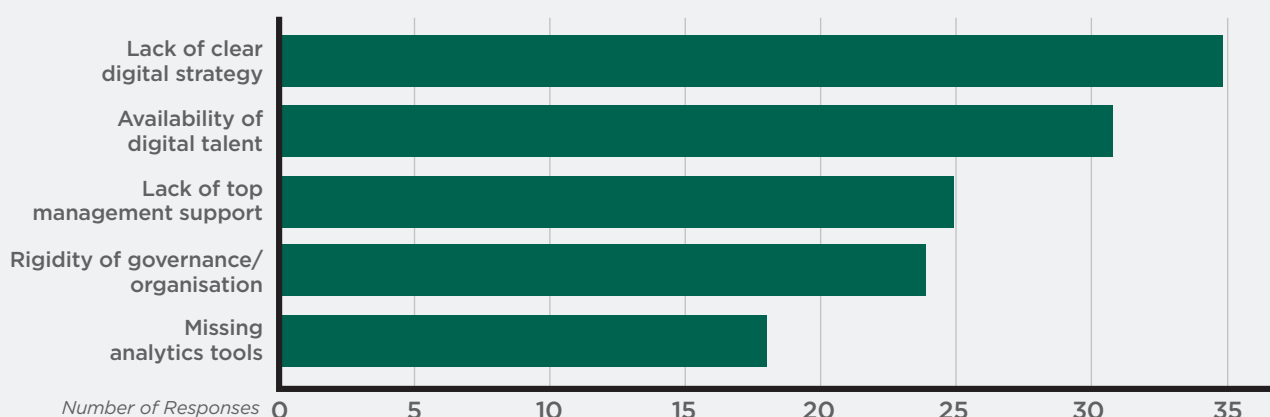
Korn Ferry's research suggested that the biggest barrier to digital transformation was the lack of a digital strategy, and lack of digital talent was a close second, offering an explanation for the marginal improvement seen to date (see Figure 1). This was caused in turn by a lack of investment in this area, with 88 percent of executives stating that less than 20 percent of their learning and development budget was being spent on developing Digitisation capabilities.

A respondent to our survey offered an interesting explanation for the lack of clear strategy: "The missing capability is understanding of supply chain at board level. Supply chain is seen as cost down, whereas we should see it as a new revenue model generator. Everything comes back to the leadership challenge; why are we failing to get the right leadership at the top?" asked Professor Godsell. "UK boards are dominated by commercial and financial backgrounds, and even if you change the gender and ethnic mix, this does not overcome every angle of the lack of diversity. Chief Supply Chain Officers are a relatively new addition to the executive board, but are not usually on the main board at the top table."

In addition to the leadership and strategy issue, when reflecting on the challenges of building digital capability in the supply chain, many of our interviewees felt that digital supply chain experts are hard to find, and can be hard to attract. Generation Y is considered easily bored, meaning its members could be hard to retain if not given new challenges regularly.

Figure 1.

What are the main barriers when it comes to digitising the supply chain? (can choose more than one)



3. About four in 10 of those surveyed (41 percent) said a key barrier to digitising the supply chain was the availability of digital talent.

Two out of three executives with whom we spoke built digital capability in their organisations through hiring, with about half of those doing so by hiring consultants or by “hiring from companies that are more digitally advanced” (See Figure 2). About one out of five hired from universities and research organisations, while other respondents told us they leveraged learning-development tools through internal training of existing employees to improve their foothold in digital talent.

Despite the acknowledged importance of the digitised supply chain, the financial commitment to developing the required skills is low, with nearly two out of three organisations allocating less than 10 percent of their L&D budget to digitisation, and about the same number of executives admitting that it was not enough. At the same time, three out of four respondents said they had not formally assessed the digitisation readiness of supply chain employees, and roughly half had no plans to do so.

Undoubtedly the impact on talent will be huge; smaller, more educated workforces need to be organised in more agile ways to respond to changing supply chain KPIs (revenues, not just cost). The war for talent is increasing,

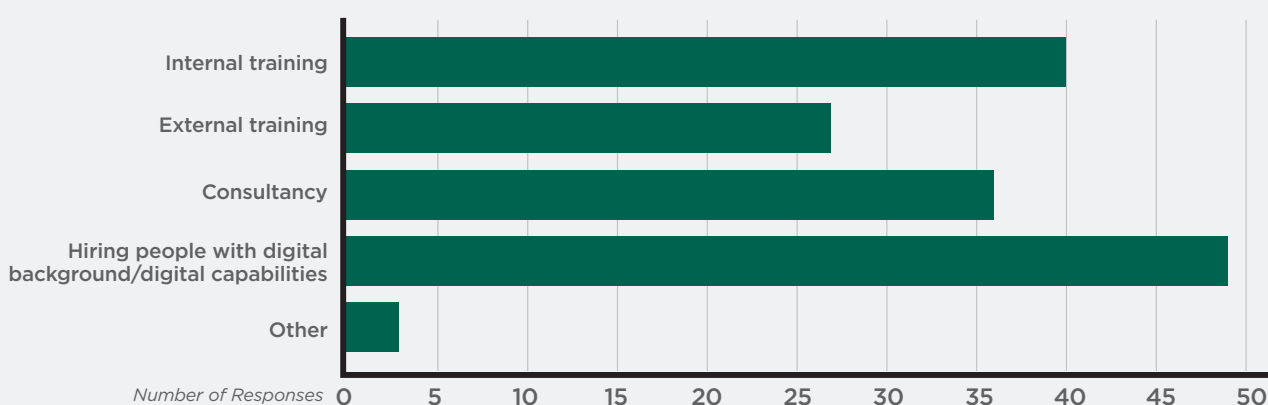
and supply chain leaders and HR business partners for supply chain must take an active role in attracting, developing, organising, and rewarding supply chain executives in innovative ways.

“In ten years, we will be looking at a supply chain that is being driven by digital, by supply chain simulation that can predict what needs to happen, where infrastructure should be built, and where products should be shipped from,” said Prasad Srinivasamurthy, president of BXB Digital, Brambles. “In the future, this will be done through technology, rather than through tribal knowledge. If you look at a lot of supply chains today, they are run through people’s knowledge. We need to focus more on customer needs, letting technology run supply chain.”

However, while there will be a transition towards a smaller, more educated, and technologically savvy workforce in the future, “digital transformation is about bringing people in, not just out, but those that stay will require a more agile, flexible approach,” said Dirk Holbach, corporate senior vice president and CSCO, laundry and home care, and managing director at Henkel Global Supply Chain B.V. “The implication is that people will cost more. The equation is positive to pay more for fewer people.”

Figure 2.

How do you build and develop digital capabilities the supply chain? *(can choose more than one)*



4. A third of executives surveyed had organized digital talent as a centre of expertise or some form of unit in the supply chain function, and the reasons for this are apparent from an attraction, retention, and cultural shift perspective.

While about a third of the organisations we spoke to organised their digital talent into a centre of expertise (CoE), roughly one in four had decentralised talent across the supply chain function. About half of respondents identified technical skills, such as analytics and big data, as the main gaps within their organization; lack of strategic and user-experience skills was also prevalent.

“E-commerce businesses such as Amazon have the data scientists to plan better, creating innovation opportunity, which allows them to lead in this space,” said Knut Alicke. “GE has their Silicon Valley incubator. Vodafone has cognitive procurement, a department that pushes these topics. Kellogg’s funds a couple of start-ups, and then integrates them if they are promising... There’s not a single best-practice approach yet—people are experimenting and there are several ways of doing that: a digital taskforce; classical project teams; internal development; or a small venture-capital fund where they second people to a start-up funded by the company; if successful they buy it back.”

The supply chain leaders we interviewed supported Alicke’s view. Brambles has a standalone digital business unit, which its leader, Prasad Srinivasamurphy, sees “as a game changer” for the business. He built a team in Silicon Valley and Bangalore focused on bringing in technical capability. “I’ve taken a broad holistic view of what needs to be done instead of looking narrow, and have started to engage with customers on what opportunities they see for themselves, and how Brambles can enable them,” he said.

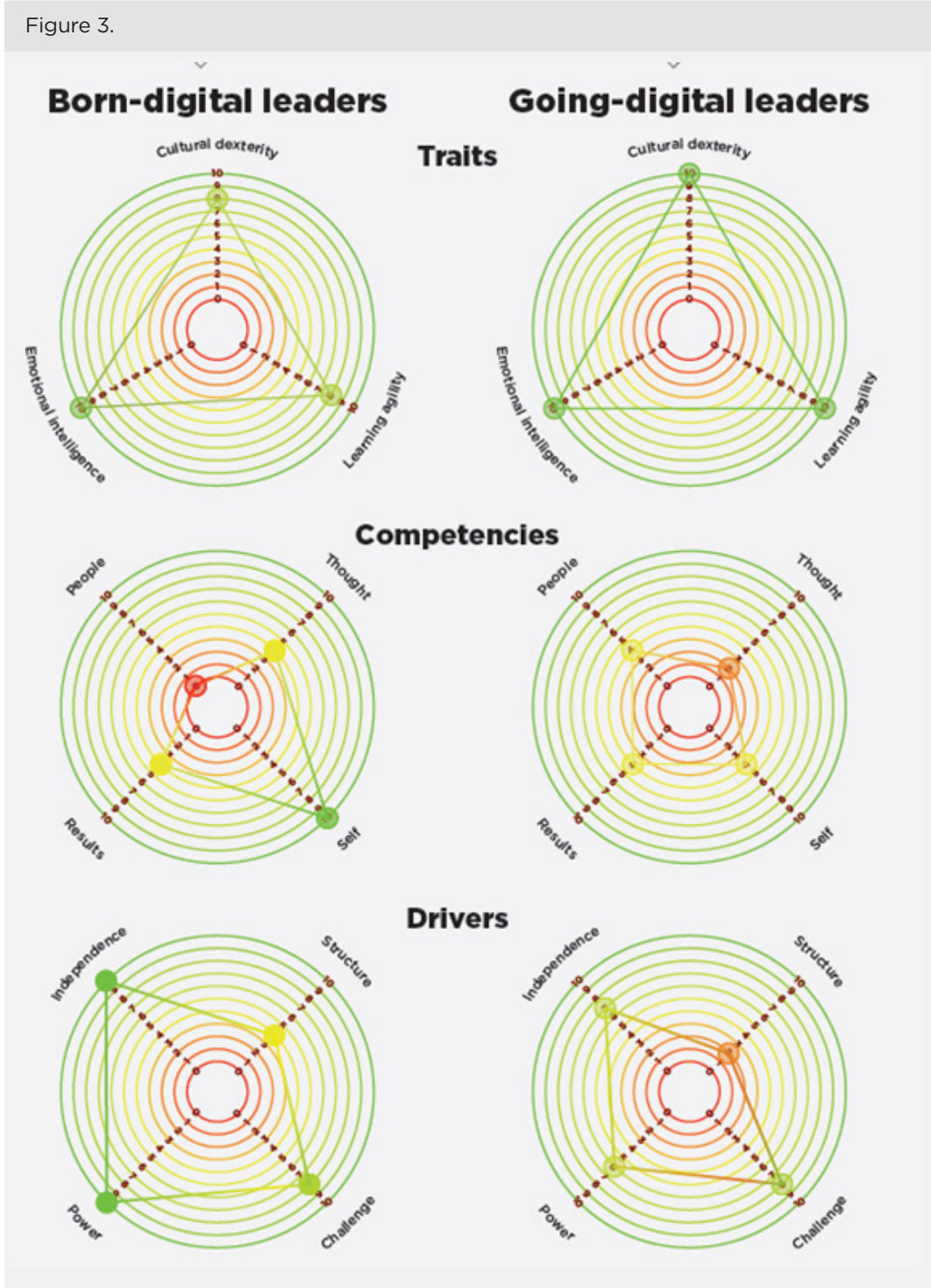
“I hope in the future we will have a mindset that every function in the supply chain is primarily focused on digital,” said Mark Tusveld, Senior Director, Global Supply Chain for Digital, at Nike. “My organisation is an incubator, so you

want people out in the organisation as well. While there still might be a central team setting the strategy, deployment will need to move into the functions.”

These CoEs or digital units allow for a different culture to exist within an organisation. It allows a rare fail-fast mentality that thrives in digital environments but often fails in traditional corporate organisations. Some companies are setting up their digital labs in separate buildings that imitate a Google-style working environment to attract digital talent. In these sub-cultures, digital pilots are incubated, tested, and allowed to fail quickly or be implemented if successful.

“We [supply chain executives] are very good at planning, doing things well, and looking at best-practice models, but digital is about testing, which comes with success and failure,” said Professor Gordon. “Born digital cultures such as Amazon are much more adventurous with teams empowered to make changes. [The] dilemma in supply chain is that we are perfectionists, but perfectionism goes against Silicon Valley.”

Korn Ferry research has shown the difference in personality traits between leaders in “born digital” organisations, and those leading a “going digital” effort (see Figure 3), and our interviews further support the cultural challenge of integrating advanced digital talent into traditional businesses undergoing transformation. “Born digital” leaders have deep digital expertise and can develop a radically different digital solution to an activity (e.g., a sales transaction) whereas “going digital” leaders can help influence the broader organisations to develop and evolve existing ways of doing business to leverage digital technology (e.g., by automating parts of the existing supply chain).



With a lack of clarity about talent needs and hiring, there is a related disconnect between supply chain and the HR function, with only about one in four survey respondents suggesting they were closely aligned. Three out of four respondents said their organisations lack a clearly defined success profile for digital transformation of supply chain leaders, with many leaders suggesting that “we don’t know how to improve our level of digitisation in supply chain.” With a clear skills gap in digital technology, acknowledged under-investment in L&D in this space, and limited intention to assess digital readiness, there is a significant role for HR to play in driving the digital transformation of supply chain.

People, organisation, and the role of HR in digital transformation

Digital requires new organisational models (to support new business models), new people, and a shift in culture. HR needs to take on a strategic role in close partnership with the wider business to help these shifts occur. What form do some of these interventions take?

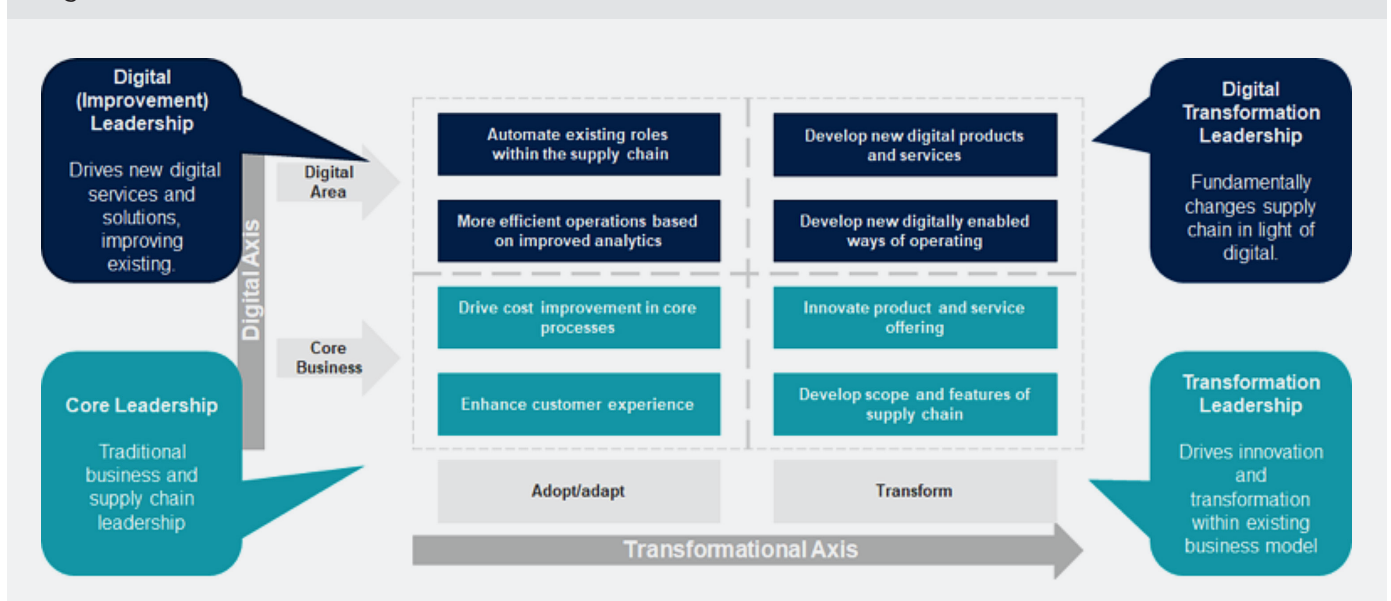
Recruiting and developing digital talent

For an organisation to “go digital,” there is a variety of talent that needs to be in place. Figure 4 below shows the segmentation of leadership talent that Korn Ferry typically assesses and develops. There are two axes. The digital axis shows the level of digital expertise required to undertake a role in the future organisation. The transformation axis looks at the degree to which leadership is involved in business as usual (and incremental improvement) as against transforming operations.

HR, drawing on appropriate assessment tools, can then support the business in three ways:

1. Assess the type of talent that is required to support the future operating model (types and numbers of talent in the four quadrants)
2. Assess the current talent—against the differing “success profiles” for these four quadrants
3. Recruit and develop the talent to match the demand identified in the first tape

Figure 4.



Supporting an innovative, digital culture

While there is no single “digital culture,” the fast-moving pace of digital innovation does thrive better in a supportive culture. Employers like Google and Amazon are characterised by a freedom to experiment, low “power distance” between leaders and staff, and resources (time and money) to try out new ideas. HR can play a supportive role in developing these types of culture in many ways including:

- Diagnosing the current culture—and the enablers and blockers to innovation—using tools such as the cultural diagnostics to develop action plans
- Creating environments in which innovation develops best, where innovation is actively rewarded (through awards, recognition, and bonuses) and taking risks is something that staff are actively measured positively against
- Experimenting with policies such as “10% time” where a proportion of employee time can be spent on innovating alongside concepts such as “scrum teams” or “tribes” where informal groups develop new approaches

Further support from HR may come in other forms such as:

- Supporting organisational and business model redesign to facilitate integration of different sales channels or new digitally enabled service or supply chain processes
- Enabling innovation via performance management against new measures
- Ensuring new behaviours and efforts are suitably recognized by means of reward and compensation

The pragmatic approach to digitally disrupting your supply chain

A Q&A with Prith Banerjee



Prith Banerjee recently joined Korn Ferry as a Senior Client Partner for the Global Industrial Practice. Before that he was Chief Technology Officer at ABB and Schneider Electric, where he oversaw large scale digital transformations. Banerjee lays out the top opportunities—and steps—leaders should take as they journey from a focus on logistics to a holistic digital supply chain.

What defines digital transformation?

The idea behind digital transformation is using technology to radically improve the performance and the reach of enterprises. The technologies themselves are varied: cloud computing, mobile applications, the Internet of Things, social networks, Big Data and analytics, machine learning and artificial intelligence, 3D printing, robotic process automation, augmented reality and virtual reality, and the block chain.

Why should the CEO care about all of this?

It can help drive top-line revenue, either through new business models or an extension of products and services. And on the cost-saving side, there's improving operational efficiency or improving the employee, customer, and supplier experience. They have access to all the data and their life can become easier.

In your role, what are your top tips for your Chief Supply Chain Officer

A CSCO needs to adopt digital technologies such as Cloud, Mobile, IOT, or AI/ML not because they are cool and new, but because it can significantly impact the business outcomes in the supply chain. Some example business outcomes may be reducing the manufacturing

cost, reducing the time to produce a product, the ability to integrate supply chains with the suppliers to reduce inventory, and improving the quality/reducing defects of your products, and the ability to track and trace root causes early as soon as defects are identified.

As a leader, you should not try to boil the ocean and try to embrace all digital technologies and solve all business outcomes at the same time, but instead:

1) Test Simple Things. Get early wins to win the support of your stakeholders, and the morale of your team.

2) Evaluate the talent of your supply chain workforce in the new digital world. Your team members must have the talent and skills to embrace this digital technology and get the maximum out of it. Your people right now may not have those skills. The people, in general, need to be more agile.

3) As a leader, always be curious and agile in your mindset. Empower your team to take risks, try new ideas, fail fast and fail often, but learn quickly from these failures, and adapt your approach in the new digital world.

Looking Ahead

Over the past 10 years, supply chain has transformed from back office to strategic enabler with the ability to create competitive advantage in a much more strategic way. Whilst supply chain leaders are increasingly represented at the executive board level in several industries, there still remains a lack at the most strategic or highest governance level, with few non-executives on main boards bringing this insight. Even companies that embrace the value of an effective and sufficient supply chain often stick with incremental changes rather than choosing a high-risk/high-reward transformation towards a truly integrated, re-invented supply chain whose DNA is fundamentally digital. Most organisations are welding digital capabilities onto traditional supply chains, thus creating hybrid models with additional complexity. In effect, these organizations are trying to construct new buildings on old foundations: re-fitting, re-wiring, and re-adapting instead of re-inventing, but the cards are stacked against them in the long run. The low rate of supply-chain digitisation to date has much to do with the capabilities of the technologies that companies have had available until recently.

Real digital transformations—as opposed to digital add-ons—are a huge challenge. However, the potential growth and profit-enhancement opportunities that digital technologies offer are even larger. Some argue it will be an evolution rather than a revolution but no one disagrees that the pace of digitisation will increase as cross-industry initiatives aim to better connect supply chains among companies to achieve next level cost and delivery speed optimisation. The degree of transformation for supply chains will depend on the industry sector and company.

McKinsey observes that most of the disparity between potential and actual gains from supply chain digitisation can be explained by technology gaps and poor management choices. However, now that better digital solutions have become available, companies can make greater and faster improvements in supply-chain performance. Korn Ferry argues that digitally enabled supply chains have new talent requirements that are quite different in many ways from those of conventional supply chains. A critical mass of selected supply chain managers will need to be able to translate their business needs into relevant digital applications leveraging all new technologies at hand. The integration and effective deployment of data scientists into a traditional workforce requires a cultural shift. This requires a new breed of supply chain leader who is able not only to develop a road map planning several years ahead but can also correctly gauge the ease of implementing changes, partly because technology is continually improving at rapid speed. What is impractical today might become an obvious solution in a years' time.

Digital transformation needs are being driven from the top, personally mandated by the CEO. This applies also to the supply chain. A supply chain leader who cannot get the CEO's ear, however technically savvy, has little chance to meet the challenges ahead. This calls for a new type of supply chain leader, the digitally savvy CSCO who is both a trend spotter and resource provider (see below).

Who is the future chief supply chain officer (CSCO)?

It has been argued for some time that the modern chief supply chain officer needs to think like a CEO, foster collaboration, have excellent communication skills, and be a strategic relationship builder. As the focus turns to digital transformation, what does a digitally savvy CSCO need to bring over and above these demands? As digital technology is reshaping supply chains, the CSCO's role keeps evolving. Fundamental drivers such as hyper-customisation and customer-centricity are calling for a new type of executive who thinks beyond supply-and-demand networks to consider the entire company and its competitive position in the marketplace.

The supply chain leader requires great technical skills across various functions, as well as high levels of commercial acumen, entrepreneurship, and leadership capability; Korn Ferry has identified learning agility as one of the most important competencies for the supply chain leader. Their capabilities are akin to those demanded by general management roles, and many executives are taking a broader career path to the top supply chain position. This war for talent is further compounded as the additional digital requirement comes in—to drive performance as well as revenues through supply chain—and this needs to be done from the very top. Most supply chain leaders do not have the strength of IT/technology knowledge, and therefore need to put this expertise in their teams.

The following critical traits define the digitally-savvy CSCO:

Highly Analytical

Digital CSCOs must be able to quickly interpret large amounts of data and make better informed strategic decisions to drive business competitiveness. They aren't required to be the information-technology experts of the company, but they must demonstrate a solid understanding of the scope and scale of data from multiple, diverse channels and make an intelligent response. It is not required that digital leaders be literate in coding or advanced experts in machine learning, but there must be a desire to understand the impact of breakthrough disruptive technologies. Digital CSCOs will know where and when to bring in data scientists who know how to analyze massive amounts of data and interpret the results accurately.

Trend Spotter and Resource Provider

Today's CSCOs must have the ability to identify technology trends across different sectors, such as big data, cloud computing, automation, and robotics. However, first and foremost, they must possess sufficient knowledge and the vision to use these resources most effectively, secure the funds to pilot new applications, foster entrepreneurial behaviour, and empower the workforce. Digitisation will have major impact on the workforce structure. The increased emphasis on speed and flexibility creates a need for a different kind of workforce. Especially in manufacturing and warehousing, organisations will rely on contingent labour to respond to demand fluctuation. Within manufacturing and warehousing, there will be an increased reliance on automation, especially robotics and the Internet of Things (IoT). While these technologies replace some skills, they call for new capabilities to master digitised processes.

Survey and Interview Respondents

Interviewees

Jan Roodenburg
VP Supply Chain at Hewlett-Packard Enterprise | EMEA

Rutger Nouwen
Chief Supply Chain Officer, Leapp

Dirk Holbach
Corporate Senior Vice President, CSCO Laundry and Home Care,
Managing Director Henkel Global Supply Chain

Willem Vesters
VP Global Supply Chain Planning, Liberty Global

Hans Ehm
Lead Principal Supply Chain Management, Infineon Technologies

Danny Van der Ster
COO Benelux at ASSA ABLOY Nederland

Wim van Aalst
Supply Chain Director Waitrose at John Lewis Partnership

Chris Tyas
Senior Vice President Supply Chain at Nestlé SA

Simon Smith
(extra, GEN)

Professor Jan Godsell
Professor of Operations and Supply Chain Strategy at WMG,
University of Warwick

Professor Kai Hoberg
Associate Professor of Supply Chain and Operations Strategy,
Kuehne Logistics University

Mark Tusveld
Head of Analytics - Global Product & Merchandizing, Nike

Professor Carlos Cordon
Lego Professor of Strategy and Supply Chain Management

Knut Alicke
Master Expert, Supply Chain, McKinsey & Company

Prasad Srinivasamurthy
President at Brambles, BXB Digital

Tim Rudolph
Head of Digital Lab at Hermes Germany

Rahul Teotia
Group Senior Vice President—Supply Chain Management at ABB

Survey Respondents (where given)

Prasad Srinivasamurthy
President at Brambles, BXB Digital

Rahul Teotia
Group Senior Vice President - Supply Chain Management at ABB

Mark Tusveld
Head of Analytics - Global Product & Merchandizing, Nike

Phil Hodges
EVP Group Supply Chain, Carlsberg

Ivanka Janssen
VP Supply Chain, Beverages, Europe

Andy O'Connor
Director, Digital Development, BASF

Carlos Cordon
Lego Professor of Strategy and Supply Chain Management

Oscar Franco
Director, CS at Medtronic

Dirk Petermann
Director Competence Center Supply Chain Management bei
Continental

Olivier Carnet
VP Supply Chain, North America, Unilever

Joris Jellema
Global head of Supply Chain Flavours at Givaudan

Fares Sayegh
Vice President Supply Chain-Europe & Global Business
Services/Supply Network Operations at Procter&Gamble

Valerio Trifoni
Vice President Global Supply Chain at Ferring Pharmaceuticals

Roberto Canevari
Chief Supply Chain Officer at Burberry

WSM van Haaren
title not given

Ebbe Gubi
Vice President, Customer Supply Chain, Dinex Group

J.A. van Rooden
title not given

Simon Smith
title not given

Edwin de Boer
Sr. Director Supply Chain Operations at Cisco

Michael Liesfeldt
VP Global Supply Chain Management at ARLANXEO

Line Ramm Sandberg
title not given

Rhiannon Davies
Vice President SC and Member of the GrandVision Management

Perry Buenen
Senior Vice President Canon Business Operations EMEA at Canon Europe

Jeroen Both
Chief Supply Chain Officer at Accell Group
Manuel Wildberger VP Operations EMEA (Flavor Division) at Givaudan

Luis de Leon
Global Operations Executive

Lars Hall
VP Supply Chain Operations & Strategy at DSM

Ulf Suerig
Director EPD SC Business Processes and Program Lead
Serialization & Traceability (ad interim) at Abbott

Jean-Yves Rotte-Geoffroy
Global SVP Procurement and Chief Procurement Officer at GlaxoSmithKline

Claudio Cervellati
Senior Vice President, Head of Performance Improvement
Corporate Task Forces, Lafarge Holcim

Daniel Helmig
Group Head Quality & Supply Chain at ABB

Dirk Holbach
Corporate Senior Vice President, CSCO Laundry and Home Care, Managing Director Henkel Global Supply Chain

Jeroen Janssen Lok
Group Director Strategy Logistics Germany at METRO AG

Susanne Hundsbæk
Senior Vice President - Devices and Supply Chain Management at Novo Nordisk

Dirk Petermann
Director Competence Center Supply Chain Management bei Continental

Rutger Nouwen
Chief Supply Chain Officer, Leapp

Mike Wheeler
Senior Vice President Supply Chain and Chief Procurement Officer at Fluor Corporation

Maarten Cornelissen
Chief Supply Chain Officer at Ahrend

Ronno Holtslag
VP International Supply Chain at Activision-Blizzard

Alex Bahr
Director Supply Chain Information and Integration at McDonald's Corporation

N. Romeijn
Director Procurement & Logistics at Yokogawa Europe

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VP Supply Chain at Hewlett-Packard Enterprise | EMEA

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Hans Ehm
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Wim Jagtenberg
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Jan van Roden
Title not given

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Contributors



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