

Supply Chain Visibility

A Critical Strategy to Optimize Cost and Service

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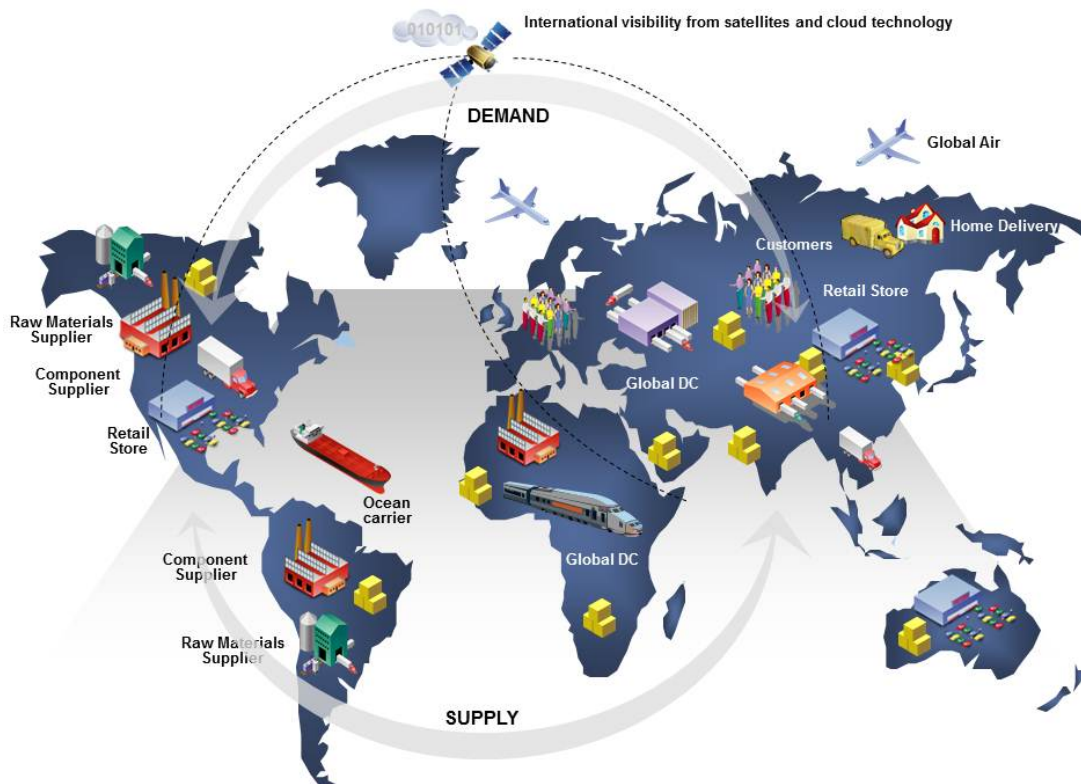
Supply Chain Visibility: A Critical Strategy to Optimize Cost and Service

Numerous Aberdeen studies have indicated the importance of supply chain visibility (see Related Research). In this survey of 149 companies with predominantly global supply chains, 63% of respondents indicated supply chain visibility (SCV) as a high priority for improvement, with an additional 28% indicating it was a medium priority. Increasing visibility is a critical strategy for enterprises aimed at reducing costs and improving operational performance in the context of their increasingly complex and multi-tiered global supply-demand networks. The importance is only amplified for those with global supply chains and partners (Figure 1).

Analyst Insight

Aberdeen's Insights provide the analyst perspective of the research as drawn from an aggregated view of the research surveys, interviews, and data analysis.

Figure 1: Global Supply Chain Execution Challenge



Source: Aberdeen Group, January 2011

Supply chain execution and responsiveness require the tight synchronization of supply and demand, as well as the orchestration of the three flows of commerce — the movement of goods, information, and funds — across an

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increasingly large number of logistic and trading partners spanning wide geographic areas. It requires supply chain visibility — defined as the awareness of, and control over, specific information related to product orders and physical shipments, including transport and logistics activities, and the statuses of events and milestones that occur prior to and in-transit.

Gaining visibility requires much more than basic track-and-trace functionality. It involves a control tower approach (see sidebar) and closing the loop between planning and execution and synchronization of end-to-end activities — from raw material to the delivery to the end customer. In the sections that follow we examine a series of 11 inbound and nine outbound activities across the end-to-end supply chain. This research reveals that the increase in the number of suppliers, customers, carriers, and transport and logistics modes and channels changes the importance of collaborative synchronization between all parties in the multi-tiered global supply chain.

Visibility is a prerequisite to supply chain agility and responsiveness. But before a company can reduce inventory or landed cost, it needs visibility into them. Only then can it apply tools to agilely adapt to the information it collects. This report will identify best practices and potential improvements in revenue and profit margins that can be derived from enhanced visibility.

Globalization and Complexity is Overtaking the Supply Chain

According to Aberdeen's study of Chief Supply Chain Officers, the top business pressures facing the discrete segment are the impact of increasing supply chain complexity (i.e., longer lead times and lead-time variability, or increasing numbers of suppliers, partners, carriers, customers, countries, and logistics channels, as shown above in Figure 1), as well as rising supply chain management costs (e.g., total landed costs, fuel costs, labor costs).

So what are the key drivers for focusing on improving visibility in the context of the complex global transport and logistics network? Figure 2 shows that operational pressures of growing global operations and complexity (45%), and the need to improve speed and accuracy (43%) are top of mind. The increased complexity and multi-party nature of global supply chains has led to longer lead times, more pipeline inventory, and the need to control downstream and upstream logistics. This, in turn, has contributed to increased supply chain management costs (supply chain visibility event accuracy at 30% is the third highest priority). It is not surprising that in light of global economic turmoil, many companies have turned to their supply chain organizations in search of ways to cut costs, while enabling faster and more efficient responses to changing customer demands as well as the chance to become more responsive and agile.

Reducing costs by driving down excessive inventory, both staged and in-transit, and proactively responding to inbound and outbound events (see sidebar) have become critical for companies in today's supply chain environment.

Challenges and Definitions

Growing Globally – 85% of companies report imports and 88% report export shipments

More Challenging and Complex – eCommerce and multi-channel or cross-channel demands are way up

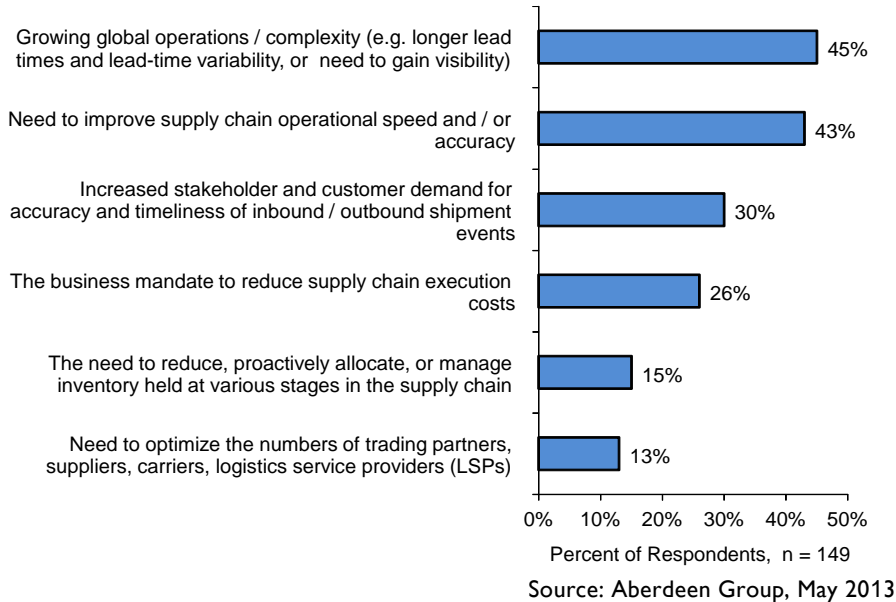
- ✓ 65% of companies bypass their own DCs and ship direct to store via others (suppliers, 3PLs)
- ✓ 45% have direct-to-home delivery models

Control tower approach – defined as a set of integrated processes and technologies that support a seamless flow of product from source to end consumer, regardless of global complexity, or sales and logistics preferences of customers

Leaders in Top 20% of performing companies are:

- ✓ **61%** more likely than All Others to gain visibility into international *outbound* shipment status within hours
- ✓ **57%** more likely than All Others to gain visibility into international *inbound* shipment status within hours

Figure 2: Top Pressures to Improve Supply Chain Visibility



Top Supply Chain Strategic Actions

Figure 3 shows a comparison of the top strategic actions that companies pursue to alleviate the pressures associated with globalization and supply chain cost or complexity. Top among these strategies relates to internal collaboration as companies struggle to synchronize and integrate data across various management systems and internal groups (44%).

All companies need internal collaboration to operate, but the level of external collaboration and its relevance grows with the degree of overseas sourcing. And, as was shown in Figure 1, consistent with the level of overseas sourcing, leading companies have both better visibility and focus on collaborating and integrating. Indeed, users who adhere to GS1 (see sidebar) standards are more than twice as likely as the others to monitor transport and logistics activities at the unit and container levels.

It is not surprising to see that when it comes to strategic actions the leading companies (those in the top 20% of performance) desire higher levels of control and coordination with the external parties they depend on. For example, they are 1.85-times more likely “to consolidate or redesign sourcing geographies across multi-tier points,” and they are 1.62-times more likely to outsource, optimize, and manage logistics services.

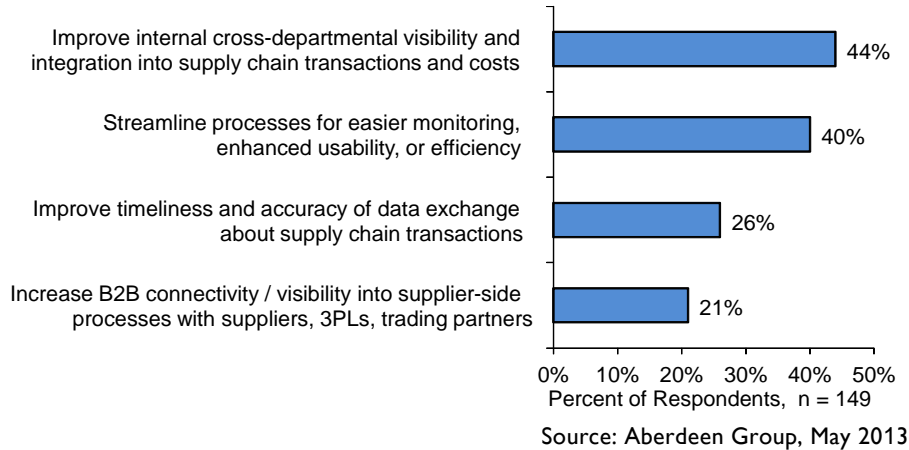
About GS1

GS1 is a neutral, not-for-profit, international organization that develops global standards and solutions to improve the efficiency and visibility of supply chains across industries. It engages a global community of trading partners, industry organizations and technology providers to understand their business needs and develops global standards in response to those needs. GS1 is driven by close to two million user companies, which execute more than six billion transactions daily in 150 countries using GS1 standards. GS1 has local Member Organizations in over 110 countries. More information at www.gs1.org.

Emerging Multi-channel Logistics Formats

- ✓ **65%** shipping direct-to-consumer
- ✓ **60%** shipping to or through a traditional DC
- ✓ **45%** shipping through 3PL or e-fulfillment provider
- ✓ **45%** shipping through a break-bulk facility (i.e., cross dock, DC flowthrough facility to either store or end customer)
- ✓ **44%** shipping direct-to-store
- ✓ **35%** shipping through a free port, freeport zone, or transition point for customs

Figure 3: Top Strategic Actions — Collaboration, Visibility



Visibility within the enterprise and across the end-to-end supply chain is a top priority. Companies of all size and scale hope to address rising supply chain costs with more seamless systems and process flows both within their own company and within their extended supplier base.

The Leaders and Followers and GS1 Usage

Aberdeen has used the following metrics to determine Leader versus Follower status in this study:

- **Inbound Perfect Orders** is the percentage of orders received from suppliers complete and on-time
- **Outbound Perfect Orders** is the percentage of orders delivered to customers complete and on-time
- **Change in Total Landed Costs** per unit shipped over the past year
- **Out-of-Stock Frequency** is measured as a percent of out-of-stock inventory to average on-hand inventory
- **GS1 compliance level** consists of all 30 Leaders, those in the top 20% of aggregate performance on the above metrics, which claim to be compliant to GS1 standards and track at the item level. In the Follower group, the remaining 119 companies, only 25% claim GS1 compliance at the item level. (see the Automating Supply Chain Visibility section for more on GS1 standards and compliance).

This set of metrics is balanced across delivery or service, inventory, and cost-related performance, and reflects the high level of adherence to GS1 standards that has become prevalent in the global supply chain.

“Our continued improvements in supply chain visibility will help us do a better job of maintaining high in stock performance for our customers while effectively managing inventory levels.”

~ VP Supply Chain, Large Distributor

Table 1: Top Performers Earn Leaders Status

Definition of Maturity Class	Mean Class Performance
<p>Leaders: Top 20% of aggregate performance scorers</p>	<ul style="list-style-type: none"> ▪ 96% of orders delivered to customers complete and on time outbound ▪ 94% of orders received from suppliers complete and on time ▪ 26% have decreased total landed per unit costs last year ▪ 31% have decreased the frequency of out-of-stock inventory in the past year ▪ 100% are compliant to GS1 standards and track at the item level
<p>Followers Bottom 80% of aggregate performance scorers</p>	<ul style="list-style-type: none"> ▪ 89% of orders delivered to customers complete and on time outbound ▪ 87% of orders received from suppliers complete and on time ▪ 18% have decreased total landed per unit costs last year ▪ 18% have decreased the frequency of out-of-stock inventory in the past year ▪ Only 25% are both compliant to GS1 standards and track at the item level

Source: Aberdeen Group, May 2013

Capabilities and Enablers

Visibility is vast and spans a wide array of events. In the next section, dedicated to the best practices exhibited by the Leaders, we can further examine areas of focus to help companies evolve and bridge capability gaps. It is in the details that we begin to see separation, allowing us to identify “visibility blind spots” across the inbound and outbound supply chain.

Process: Where Are the Top Visibility Gaps?

Figure 4 and Figure 5 show the current state of supply chain monitoring on the inbound and outbound sides. Findings show that, from a total of 20 categories of events examined in the survey, the top three least visible milestones (i.e., tracked either manually or automatically) in the supply chain are on the inbound side.

Figure 4, inbound from order to receipt, shows the overall visibility capabilities of all companies in the typical sequence of event flow of product, information, and funds on the supply-side. The specific top inbound supply chain milestones in this sequence where *Leaders are advanced in monitoring* compared to All Others are:

Least Visibility

- √ Raw material arrival at supplier – tracked by 43% with 19% automated
- √ Suppliers’ production in-process events – 45% with 13% automated
- √ Suppliers’ projected production plans – 41% with 13% automated

- Advance shipment notice (ASN) created by supplier — 1.74-times more likely to track than All Others (47% of the Leaders monitoring this milestone)
- Suppliers’ projected production plans — 1.52-times more likely to track than All Others (54% of the Leaders monitor this milestone)
- Customs clearance events (inbound) — 2-times more likely to track than All Others (43% of the Leaders monitor this milestone)
- In-transit status events at order line level (inbound) — 3.4-times more likely to track than All Others (64% of the Leaders monitor this milestone).

Figure 4: Inbound and Supply From Order to Receipt

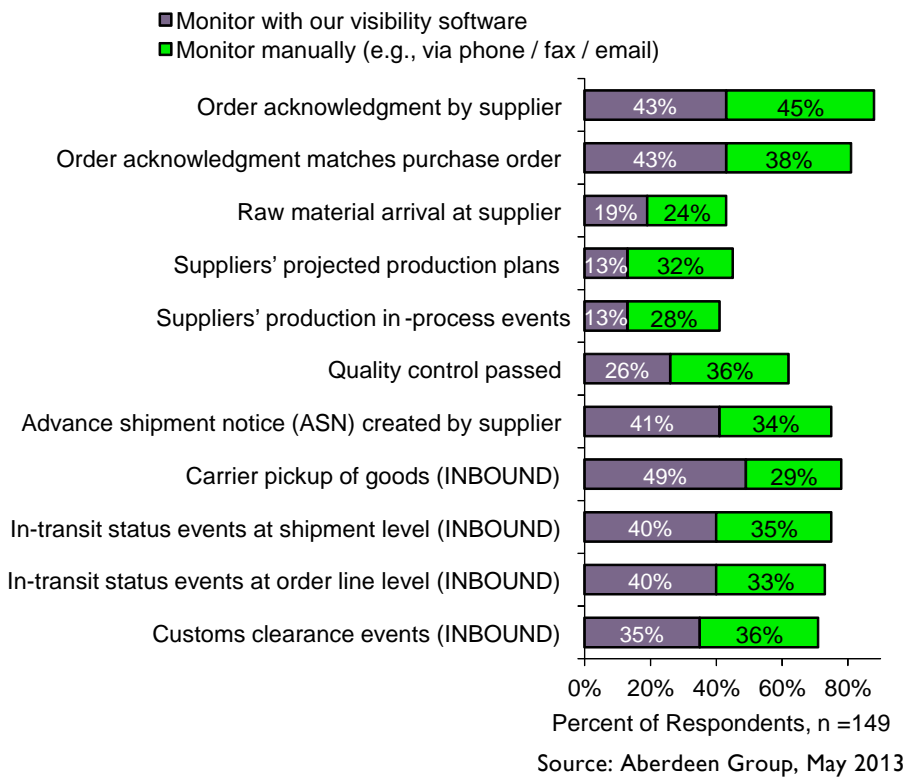


Figure 5 shows the overall visibility capabilities of all companies in the typical sequence of event flow outbound from shipment or pickup to proof of delivery and settlement to end customer. The specific top outbound supply chain milestones in this sequence where *Leaders are advanced in monitoring* compared to All Others are:

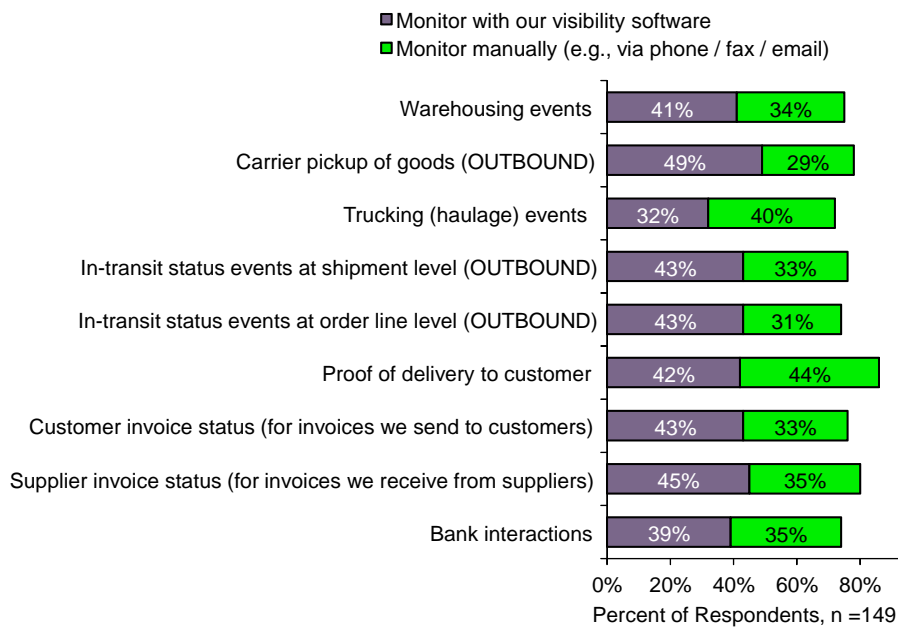
- Trucking (haulage) events — 1.24-times more likely to track than All Others (64% of Leaders monitor this milestone)

“We are bringing multiple containers in from abroad, so for us, supply chain visibility means knowing where things are while in transit. We are a low-margin high-volume business and have not historically invested much into supply chain systems. We are owned by a large company and mandated to use its systems for some, but not all, processes, which creates silos and makes it difficult to gain adequate visibility into our supply chain. We do not currently have integrated systems to provide the level of visibility that we need. Additionally, for our company there is still a lot to do on the supply chain process improvement side, so we are approaching this challenge from a process perspective first, before considering any technology enhancements. From a cultural perspective, many people within the organization are not yet aware of the improvements that could be made with better visibility, so there is strong resistance to change that will need to be overcome.”

~ Medium-sized U.S. distributor

- In-transit status events at order-line level (outbound) — 2.21-times more likely to track than All Others (62% of Leaders monitor this milestone)
- In-transit status events at shipment level (outbound) — 2.07-times more likely to track than All Others (62% of the Leaders monitor this milestone)

Figure 5: Outbound or Demand-Side Milestone Tracking



Source: Aberdeen Group, May 2013

While all companies have similar objectives as to the overall focus of their visibility initiative, this does not mean that they are all performing at equal levels. Two important areas of difference across the classes lie in the presence (or lack) of visibility to: 1) more granular events such as events tracked automatically at the Stock Keeping Unit (SKU) levels, and 2) the upstream suppliers' supply chains. This again follows from the priority gaps between the Leaders versus all other companies where they are:

- **1.42**-times as likely to outsource part or all of supply chain visibility execution
- **1.21**-times as likely to increase B2B connectivity and visibility into customer-side or the outbound processes
- **1.19**-times as likely to increase B2B connectivity and visibility into supplier-side or the inbound processes

With 85% of survey respondents indicating that they plan to increase their current level of end-to-end supply chain visibility, companies are now

“Having supply chain visibility translates into being able to meet customers’ needs. At this time, our best opportunities for improvement are on the inbound side, namely, in getting more visibility into our suppliers’ production capacity. We have good visibility after the product has left a foreign port, but would like to have more insight into our suppliers’ subcontractors and what is happening in their incoming supply chains. We believe that higher visibility is partly contributing to lower lead time variability, reduced inventory, shorter lead times, increased fill rates, and other supply chain operational improvements.”

~ Director at a Medium-sized U.S. Durable Goods Firm

primarily trying to look further upstream into their supply chains to address those visibility “blind spots.” Better upstream visibility then helps improve supply chain planning and ultimately optimize their own on time delivery to customers.

As leading companies place renewed focus on their inbound supply chains, the above gaps in capability lead to superior results. These capabilities give Leaders the more granular control they need to adapt and collaborate with their partners in transport and logistics. It is clear that these gaps in practice tie closely with superior results in both costs and service metrics — where 33% of Leaders **reduced** year-over-year landed costs per unit while only 18% of Followers were able to deliver the same results (Table 1).

Use of Logistics Service Providers Grows

In concert with the growing globalization of the supply chain (85% of companies import or export) there has been an unprecedented increase in the use of logistic service providers (LSPs or 3PLs). In this study of 149 companies we received qualified response from 25 LSPs or 3PLs. The majority of these LSPs are using solutions that provide automated track and trace capability across most of the 20 milestones. In addition, the degree to which they are automated is virtually identical to the dark blue bars (Figures 4 – 5). The weakest link in visibility for these partners tends to be on *in-transit status events at the shipment level* where 30% claim they provide automated monitoring (slightly less than the 40% level of all respondents). The major reason for this weak link for LSPs tends to be ocean shipments — where 62% claim that they are *reliant on updates and frequent status from the large ocean carriers*. Larger LSPs and shippers have improved their connectivity and event monitoring with the ocean carriers in recent years and are 3-times as likely as smaller LSPs to have *container and unit level visibility on ocean shipments*.

Seventy percent (70%) of the shippers, or brand owners, in this research have established relationships with LSPs for portions of their transport and logistics volumes. The research also indicated that 56% of the companies with established relationships use more than one LSP. A full 50% of Leaders in our study are using five or more LSPs; they are 2-times as likely as All Others to cite this level of engagement. LSPs can both enable and inhibit your overall supply chain visibility and performance. Today’s global companies are dependent on LSPs and they should not be a limiter. Make sure that your LSP is able to gear-up for leader status and can provide track and trace visibility compliant to worldwide GS1 standards at the unit level. For each of the critical milestones in the inbound-to-outbound supply chain make sure all your partners and LSPs provide unified monitoring to high standards.

Automating Supply Chain Visibility — Closing the Gaps

Leaders integrate automation tools to coordinate and synchronize visibility solutions to dynamically manage product, information, and financial flows across the extended global supply chain. For instance our research shows that the Leaders more frequently automate the following adaptive capabilities.

Automate Dynamic Process Flows

When compared with Followers, Leaders are:

- **1.70-times** as likely to find, within a reasonable time, and access **OUTBOUND** supply chain data needed for decision making — 80% versus 47%
- **1.35 times** as likely to have online visibility into **INBOUND** in-transit shipment status — 93% versus 69%
- **1.56-times** as likely to automate or redirect in-transit flows and orders to balance higher demands or inventory imbalances in-transit

When it comes to today's complex dynamic, cross-channel supply chain, it is important to be able to execute effectively and adapt to changes in supply and demand. In our study, we note that all Leaders are compliant to GS1 data standards and can track at the item or unit level. Having up-to-date information of products or inventory in-transit is necessary to make shipment reallocations and in-flight course corrections like those listed above. Automation is a key priority as illustrated by the fact that the Leaders are anywhere from 1.56- to 1.7-times as likely (above) to invest in automating the data and process steps across the multi-party supply chain.

Advanced GS1 and Track and Trace Features

When compared to Followers, Leaders are:

- **2.30-times** as likely to use GS1 Barcodes (aka EAN-barcode, UPC) — 45% versus 19.5%
- **1.70-times** as likely to use product data lookup or sharing on the global data synchronization network (GDSN), an internet-based global registry — 24% versus 14%
- **1.25-times** as likely to use lot-level or item-level product traceability — 50% versus 40%
- **1.20-times** as likely to use Cross-docking — 71% versus 59%
- **1.14-times** as likely to Auto ID and track at the **UNIT** level — 50% versus 44%
- **1.11-times** as likely to Auto ID and track at the **PALLET** level — 42% versus 38%

In general, all companies claim high levels of adoption of certain enabling technologies. For instance, over 80% of both Leaders and Followers profess to have barcode and scanning capabilities to assist with track and trace event monitoring. However, do their suppliers, carriers, trading, and third party logistics partners have the same capability? Is that capability a universal technology standard accepted worldwide? One-hundred percent (100%) of Leaders are under the universal GS1 compliant barcode and are capable of track and trace at the item level. However, only about 50% of Followers know if they are GS1 compliant at any level and only 25% claim to be GS1 compliant at the item level. In addition, 44% of Followers track and trace at the unit level but only 25% know if their tracing technology is GS1 compliant. And finally, having the unit level GS1 compliance is one thing and using it is yet another. While all the Leaders have unit level GS1 capability, they are not using it everywhere or all the time (since only 50% track at the unit level). Often the root problem is an external partner. You are only as strong as your weakest link; make sure you strive for unified compliance across the board.

RFID technology and adoption has tended to lag over the years but appears to be on the uptick. Overall about 32% of all companies are using this capability today an increase of about 20% from last year's findings. When compared to Followers, Leaders are:

- **2.40-times** as likely to utilize EPC / RFID at the unit level
- **2.10-times** as likely to use RFID based event logging and sharing using EPCIS

RFID technology has become more reliable and adopted. It is important to make sure that all your partners can support it and that it is compliant to hardware and software standards across each process step in your end-to-end supply chain.

It is important to be able to track and trace at all levels — from shipment to pallet to item level to be successful in some of the new logistics formats. Leaders leverage advanced levels of capability and are anywhere from 1.1- to 2.3- times as likely to utilize the features found in the lists above. Cross-docking for instance requires pallet and/or unit-level barcoding or scanning and information exchange. To facilitate this and item or inventory-level dynamic rerouting and rebalancing requires a common universal scan and trace capability across all legs and transition points in the multi-party end-to-end supply chain.

Cross-channel logistics has overshadowed the supply chain in recent years and require multi-level monitoring and scanning to be efficient (see sidebar). Today's more complex multi-channel, multi-party extended order-to-fulfillment process relies on collaborative technology and tight synchronization of product, shipment, cost, and financial data within the transport and logistics community.

Leaders are more capable than All Others in Multi-channel

They are several times more likely to support:

- √ **1.82-times** – shipping through a free port, free port zone, or transition point for customs
- √ **1.65-times** – shipping through a break-bulk facility (i.e., cross dock, transload, or DC flowthrough facility to either store or end customer)
- √ **1.45-times** – shipping through 3PL or e-fulfillment provider
- √ **1.33-times** – shipping direct-to-consumer
- √ **1.26-times** – Customer service visibility of outbound shipping schedules for improved order promising

Supply Chain Finance or Trade and Intelligence Features

When compared to Followers, Leaders are:

- **1.92-times** as likely to automate online visibility into the customs events status — 50% versus 26%
- **1.52-times** as likely to automate online visibility to landed costs (to include tariffs and duties as well as COGS, dollar value, freight and logistics) — 67% versus 44%
- **1.86-times** as likely to automate the ability to segment supply chain based on customer profile data — 69% versus 37%
- **1.37-times** as likely to automate monitoring of logistics bottlenecks (e.g., ports) and adjust plans to avoid congestion — 71% versus 52%

Today's more complex, multi-channel, multi-party, extended order-to-fulfillment process relies on collaborative technology and tight synchronization of product, shipment, cost, and financial data within the transport and logistics community. Indeed, one area that is emerging with more prominence is the monitoring, analyzing, and streamlining of trade and financial flows between transport and logistics providers and trading companies. The need for visibility to total landed cost is clear. From strategic planning to collaborative execution, itemized costs are critical for supply chain professionals to be successful. Global trade duties and tariffs, and segmented transport and logistics costs from order to final delivery, are now collected in a myriad of multi-party platforms and systems. Proficient planning and execution is not possible if the relevant cost components are not maintained across your third-party partners. Leaders are better equipped and several times more likely to have the capabilities to capture and share costs and finances. They invest in 1) collaborative systems, 2) shared data and decision support systems, and 3) control tower processes. With these capabilities in place they are anywhere from 1.3- to 1.9-times as likely to adapt dynamically to not just shipment and product movements but also the financial and trade flows required to transact business.

For planning, this is true on the *data sharing side with other companies* and it is true with order promising and *order splitting or consolidation across logistics channels and fulfillment partners*. For dynamic execution, it is true for redirecting *in-transit flows and orders to balance higher demands or inventory imbalances in-transit* or to in-flight product and inventory contingency plans under port or supply chain disruptions. The successful company needs to integrate these planning and execution steps in a seamless, integrated fashion that provides a unified view of logistics activities and finances on order-to-fulfillment activities. If items and inventory are to be split across multiple logistics channels or fulfillment partners to fulfill and then aggregate to a customer's order, both product and financial transaction need to be transparent to the consumer. From order promising and order or product splitting allocation, to order delivery and reconsolidation, Leaders rise to

the challenge and lead the way with the integration of Supply Chain Finance or Trade and Intelligence automation capabilities.

Key Takeaways

Today's companies address a series of new challenges ranging from supply chain globalization, increased complexity, cross-channel pressures, and more collaboration across the multi-party order-to-delivery cycle. As the number of partners and length of shipments increase so too does the degree of complex, multi-enterprise interactions and the need for seamless integrated visibility and responsiveness across multiple enterprises.

Throughout the order to fulfillment cycles, companies of all types race to close visibility gaps. Leaders do a better job of closing process and technology gaps within the enterprise and across the multi-party, multi-channel supply chain. They are both more efficient and responsive to ebbs and flows in the supply-demand network.

To address these visibility challenges, Leaders have a significant advantage. But even Leaders must push to do more to enhance their visibility across the following areas:

- 1. Product and Shipment Visibility** — Leaders have taken control of their own supply chains; sitting in the middle of dozens of supply chain partners they share data and adopt universal standards for barcoding, track and trace, and data exchange. That control generates more information, but also requires more collaborative technology as companies adopt GS1 standards at all levels (order, shipment, container pallet, and unit). Leaders are both more capable of controlling and monitoring inbound and outbound events and are ahead in the rush to exchange, manage, and analyze that data in real time.
- 2. Transport and Logistics Events** — with the increased globalization of the supply chain shipments are spending more time in the transport and logistics pipeline, particularly ocean. Transport and logistics is the glue that interconnects a myriad of actors from raw and component suppliers through manufacturing, warehouse and 3PL facilities and on to the final customer (Figure 1). Visibility to item, shipment, and pallet flows through each of the 20 milestones (Figures 4 – 5) are dependent on universal, worldwide standardization of product IDs and barcodes. Leaders are 4-times more likely than All Others to be compliant to GS1 standards at the unit level. One weak link for some is ocean carrier event tracking and visibility. Shippers and LSPs are tightly interconnected — make sure each partner in your supply chain is compliant to the unit level and is providing updated status to transport and logistics events.
- 3. Supply Chain Finance and Intelligence** — By leveraging available and emerging financial solutions, Leaders have visibility into

logistic, trade, and financial costs. Supply chain finance is an integral part of a well-run global supply chain. Visibility from a trade and financial standpoint has to mean more than track and trace on the transportation leg. It means following a shipment from order through final delivery, with all the itinerant compliance and finance milestones, and cost and financial settlement transactions in between. Supply chain intelligence and analysis is dependent on detailed track and trace, product, and shipment capability, and requires tight data and logistics coordination with external parties and organizations.

- 4. Enable Dynamic Collaborative Processes** — Gaining visibility at all levels of product and shipment details and to all trade and financial costs and transactions does nothing but expose problems and opportunities. However, by enabling adaptive and collaborative processes, Leaders clearly demonstrate superior cost, service, and competitive advantage (see Table 1). They first gain visibility into shipment and financial information and then they invest in dynamic collaborative technologies to build responsive “control center” technologies that are able to act on that intelligence when changes, roadblocks, or opportunities occur.

Most companies (80%) are exposing the blind spots or gaps in functionality of visibility systems. By adopting visibility and control tower technology, companies enable trade and cross-channel, multi-party, end-to-end efficiency and agility. These enhanced and more unified processes help bridge the blind spots and company silos as well as reduce current gaps in internal and legacy systems. Collaborative solutions require flexible architecture that unifies multi-party supply chain interactions behind a high-level, easily adapted business process framework.

The more seamless, integrated, and efficient the order-to-fulfillment process is across the partnerships with vendors and operations, the faster the turnaround times. There are other important benefits, as well — increased visibility and coordination of incoming shipments, reduced transport and delivery costs, better customer service, and a unified order-to-fulfillment process.

For more information on this or other research topics, please visit www.aberdeen.com

“Multi-channel provides a branded customer experience anytime anyplace anywhere. A brand can differentiate themselves and their services across multiple channels that can apply to any customer segment.”

~IT Manager, Tier 1 Retailer,
Europe

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