TECHNOLOGY SOLUTIONS GUIDE

A RESOURCE SUPPLEMENT TO CGT MAGAZINE

SUPPLY CHAIN EXECUTION SOLUTIONS

A COMPARISON CHART OF SOLUTION PROVIDERS IN THE AREAS OF TRANSPORTATION MANAGEMENT, WAREHOUSE MANAGEMENT AND MORE.

CGT
CONSUMER GOODS TECHNOLOGY

2010

PLUS: Industry experts address top-of-mind trends in spending, sustainability and logistics.

TECHNOLOGY SOLUTIONS GUIDE

The STATE of SUPPLY CHAIN EXECUTION

Industry thought leaders from Epicor, Kane is Able, Management Dynamics and Ryder, address the current challenges and trends that consumer goods (CG) manufacturers face when it comes to supply chain execution (SCE). Read their expert opinions on smart investment decisions, decreasing out of stocks, greening the supply chain and avoiding retailer penalties.

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1 Many supply chain projects were put on hold during the recent economic downturn. Now that business is improving, which specific aspects of SCE are CG companies focusing on first? Are there any surprises in investment decisions?

KANE: Although the economy as a whole is still soft, basic consumer staples are doing well, and business in that sector is growing for us. However, we don't think you can escape the political climate, and maybe we've talked ourselves into this, but many companies are very reluctant to spend money on new projects right now. No one wants to go ahead with an initiative that's going to add a cost element, so the crucial thing is to design initiatives that are self-funding or cost-neutral. For example, a lot of projects associated with "going green" that require up-front investment for a later payback, such as seeking out alternative fuels to reduce carbon footprint, are on hold. But

other kinds of initiatives that deliver savings sooner are gearing up again, such as warehouse and transportation planning. These initiatives have truly got to pay for themselves, and even then, companies are cautious. Huge consumer packaged goods manufacturers are only just taking plans to install improved warehouse, production and transportation planning processes off the ice, where they've been for a while. If some of the biggest companies in the world are still moving slowly, you can only imagine how much these new initiatives are challenging smaller companies.

MARTIN: Domestic TM capacity and increasing ocean rates are challenges that consumer goods companies are faced with and will continue to struggle with over the next year and half. We also see the drive to consolidate business units. Companies are getting smarter in how they leverage SCE infrastructure across divisions and channels, and leverage volumes to lower costs. Because of this, they are dramatically reducing waste and excess capacity in the supply chain.

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— STEVE W. MARTIN, VP, SUPPLY CHAIN EXCELLENCE, RYDER SUPPLY CHAIN SOLUTIONS

PREUNINGER: Unlike other technologies, there has been and continues to be increasing interest in global trade management (GTM) software despite the economic downturn. Many companies, particularly manufacturers, including consumer goods manufacturers, have seen the value in using GTM software to lower costs, ensure regulatory compliance, improve customer service and automate many facets of a company's supply chain operations. Two capabilities that consumer goods companies are using to weather the downturn are supply chain visibility and international trade compliance. These tools provide an immediate and visible return on investment, enabling companies to reduce costs, improve operations, shrink manual data entry errors, facilitate cross border movements and improve customer service. Additionally, consumer goods companies are increasingly turning to cloud versions of GTM software, which can reduce operating costs by 20 percent or more and enable small and midsize companies to compete effectively in the global marketplace.

TATARA: Businesses remain cautious about the economy and are investing in ways that will benefit everyone, especially consumers. Current SCE spend is focused heavily on solutions that help businesses forecast and plan so that the right amount of resources are used to deliver the right amount of inventory to the right places at the right time. Solutions that integrate supply chain visibility and communication are getting attention since companies are looking to address supply issues proactively in real time. One surprise is that many businesses are concerned with environmental issues, not easy when things are tough, but many companies now see economic benefit in greening the supply chain.
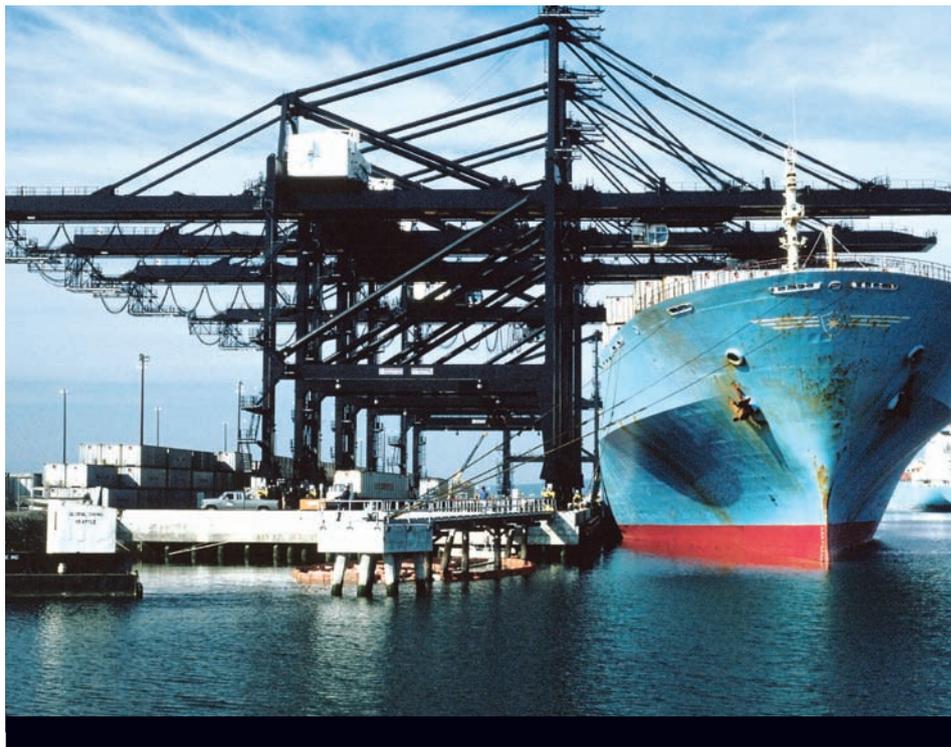
2 Are sustainability goals driving either new or re-invigorated SCE initiatives? Are transportation cost savings the major justification?

MARTIN: While sustainability is considered when implementing new SCE initiatives, it is not the sole driver. The main drivers continue to be traditional logistics costs and TM expenditures. We see companies taking a network optimization approach to reduce their carbon footprint. Reducing miles directly impacts the carbon footprint of product distribution and can be calculated as an output of the network modeling process. Once you have a baseline of current operations, the scenarios and decision trade-offs can be represented in total delivered costs metrics and total carbon footprint metrics. In fact, one of our client's, Stonyfield, through a well-thought through network design, reduced its carbon footprint by 7 percent.

PREUNINGER: While many companies have started SCE initiatives to lower costs and improve operations, many have started looking beyond monetary value to see how they can use SCE tools to address sustainability concerns. SCE tools can allow companies to address both concerns simultaneously In the case of GTM software, sustainability efforts can be addressed on a few fronts. Reducing cycle times, eliminating bottlenecks, improving distribution networks, lowering out-of-stocks and determining the best way to ship freight can also lower emissions, an ecological goal for many companies.

TATARA: Sustainability is becoming a larger part of supply chain improvements because it helps to build brand equity in markets where the environment is of particular concern to consumers. However, it is still much easier to measure transportation cost savings, and when costs can be reduced without affecting service levels this will be the true driver. At some point, political, market or consumer

pressure may put sustainability regardless of cost, at the forefront, but it's more likely that the increased cost of finite resources will make more sustainable practices an imperative.

KANE: Everyone's invested, philosophically, in sustainability. Everyone agrees it's a good thing. But they see it as something that often requires front-loaded investment, where you make a financial outlay and see the benefit later, on the back end. In fact, there are incredible strides to be made through collaborative distribution, which involves almost no outlay at all. This is a way of reducing fuel consumption, traffic congestion, air pollution and inventory holding levels — all major factors in supply chain sustainability. What's required is a change in thinking — manufacturers, retailers and 3PLs have to adopt a more collaborative attitude to distribution. The current model for consumer packaged goods product distribution is about as non-collaborative as you can get, with tens of thousands of companies managing their own individual lines of supply to the exact same retail customers. As a result, our highways and retailers' dock doors are jam packed with half empty trucks, since small and mid-sized manufacturers don't have the volume to ship in full truckloads. With collaborative distribution, consumer goods manufactures work together to create a shared infrastructure for product distribution, one where companies co-locate products in the same collaborative warehouse and ship on the same fully-loaded trucks. This is not pie-in-the-sky thinking, it's already working on a small scale today in select industries. Meanwhile, there's pressure from the retailers to make this smarter way of figuring out distribution the norm. This is the future, the way things should go. Logistics service providers have to change too, to get more proactive about bringing multiple companies together to share infrastructure and costs.

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3 How can the right SCE strategy help CG companies to reduce out of stocks while boosting customer service levels?

PREUNINGER: GTM software can be used to attack the out of stock issue through several channels. The software can be used as part of a postponement strategy which delays specific allocations of goods to endpoints until customer demand is known, thereby dramatically reducing the amount of forecasting errors and enabling a fast and accurate response to consumer demand — as well as lowering transportation and inventory costs. Eliminating bottlenecks in the supply chain and improving sourcing and distribution strategies substantially improves on time deliveries, thereby dramatically reducing out of stocks due to delayed shipments. Using GTM software to take control of your procurement process improves the operational performance of a supply chain to reduce cycle times and supply chain delays enabling a faster delivery time and an accurate order to the customer. Finally, performance management tools allow a company to establish key performance indicators, which measure processes and analyze results to develop continuous improvement strategies, benchmark actions, make informed decisions, and manage service providers and cycle times to reduce or eliminate issues that could disrupt the supply chain.

TATARA: If you reduce out of stocks, you've boosted customer service levels. The trick is to reduce inventory and increase customer service levels. Cycle counting at the distribution level is a great example. If a business can understand what products drive its business from a profitability and customer demand standpoint, and it can maintain the right inventory balance through regular cycle counting, then it can actually reduce safety stock of both essential and non-essential inventory. The result is a 10 percent to 20 percent reduction in on-hand inventory while customers enjoy near 100 percent fill rates on the items that they depend on.

KANE: Again, collaborative distribution is a terrific way of making sure that you don't have a large supply of mustard in the DC, but the stock of pickles is out. Retailers are saying: "I want one truck filled with all my items that I need for a week's activity to drive down inventory carrying costs." Blending loads so that a retailer's DC or store has a smart mix of what it's actually selling means a much lower risk of stock-outs. Also, now you don't have to hold product until there's a big enough shipment to justify the expense of sending it out, and that means getting the product out the door faster, delivering in shorter cycles, and reducing inventory levels. It's a tremendous win all around.

MARTIN: Understanding customer buying behaviors is perhaps the single most important driver in a supply chain strategy. In response, companies are increasingly using a postponement strategy for product customizations and enhancements. This allows companies to delay producing the final prod-

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uct until the last possible moment, and closer to the point of retail purchase, so the product can be customized to meet the exact consumer demand at that time. For this reason, final product assembly is increasingly happening at the domestic warehouse level. Effectively employing a postponement solution results in "shelf ready" products at the right place in the right quantity — in other words, just how the retailer wants them!

4 Given increased retailer penalties, how can CG companies leverage SCE solutions to better manage logistics and avoid such fines?

TATARA: Retailer penalties give consumer goods companies prime opportunity to partner where others can't or are unwilling. The emphasis should not be on avoiding fines, but on managing logistics better, which is what retailers really need. To this end, a consumer goods company's SCE solution must be seamlessly integrated into the rest of the company's business software platform. Without true visibility enterprise-wide, and user training where appropriate, it can be difficult at best to manage logistics at a world-class level. This is where many integrated and legacy system approaches fall short. Also, since integration to retailer information is important, governance and security issues must be given due consideration.

KANE: We're glad to say we don't see a huge number of chargebacks for our customers. Obviously, you can avoid those penalties by clearly understanding the game, and getting timely updates from the retailer so that you ensure you've got proper packaging and labeling and so on. Understanding those requirements involves getting close to the end-customer. Technology helps, because you can plug in the rules and automate them, and where you can, you should automate those processes. Manual entry tends to bring in errors. Another great way to reduce chargebacks for errors in packaging and labeling is to integrate those final processes
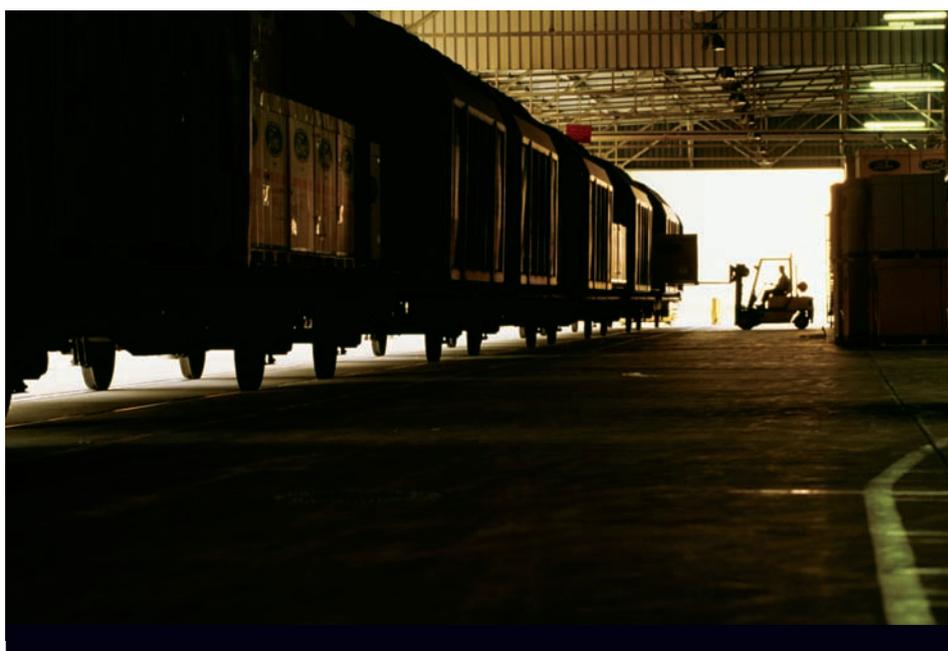
> ### "Collaborative distribution is a terrific way of making sure that you don't have a large supply of mustard in the DC, but the stock of pickles is out."
> —CHRIS KANE, CHIEF CUSTOMER STRATEGY OFFICER, KANE IS ABLE, INC.

into the 3PL operations. Many 3PLs, including Kane, are offering to take that out of the manufacturer's or third-party packaging services' hands. That's a smart solution to an old problem.

MARTIN: One way is having a detailed vendor compliance playbook and incorporating the processes found here into the warehouse management system and workflow of operations. By taking a closer look at your supply chain, you can also gather data necessary to improve inefficiencies. Maximizing your supply chain's performance hinges on your ability to measure its activities, such as order accuracy, on-time delivery and inventory stock-outs. With the right set of metrics and starting at a base-line, companies can dramatically leverage known data to continuously improve, therefore, avoiding retailer penalties.

PREUNINGER: Penalties associated with trade compliance policies and customs regulations are issues for any retailer who trades internationally. Many companies don't have adequate strategies and tools in place to efficiently cross borders, pay the correct amount of duty and protect themselves from multi-million dollar fines, penalties and even loss of export privileges. Using trade compliance software can dramatically reduce or even eliminate noncompliance by automating the documentation process and establishing reasonable care throughout import and export operations. According to the Aberdeen Group, companies using trade compliance solutions are 1.5 times more likely to report 0 percent of export shipments held at customs longer than usual, 35 percent more likely to have less than 2 percent of import shipments held at customs, and 30 percent more likely to report zero government fines for non-compliance. ❖

SUPPLY CHAIN EXECUTION SOLUTIONS CHART

COMPANY WEB SITE	SUPPLY CHAIN EXECUTION PRODUCT	KEY CG CUSTOMERS	MOST IMPACTED BUSINESS PROCESS	IMPLEMENTATION CYCLE/ TIME-TO-BENEFIT
3PD, Inc. www.3pd.com	3PD Managed Services	• Home Depot • Lowe's	Last-Mile Delivery Quality Assurance, Customer Service, Routing Services	One to two months.
Aspen Technology www.aspentech.com	AspenTech Supply Chain for Consumer Products	• FP Corporation ICO • Procter & Gamble • Tyson Foods	Detail Plant Level Planning and Scheduling, Profit Driven Supply Planning and S&OP	3 month time to value with full value achievement after 18 months
CDC Software www.cdcsupplychain.com	CDC Supply Chain – Extended Warehouse Management	• Ames True Temper • Jarden Corporation • Sony Entertainment	Warehousing/distribution stream-lined and costs reduced with on-premise and SaaS WMS solutions	Deployment averages 4-6 months; recognized benefits from initial go live.
Epicor Software Corporation www.epicor.com	Epicor Supply Chain Management	• Energizer • Lego • Zippo	Epicor provides a complete solu-tion that benefits every aspect of supply chain execution.	Average Implementation Cycle: 6 months; Average ROI: less than 24 months
HighJump Software www.highjump.com	HighJump Warehouse Advantage	• Fuji Xerox • Leap Frog • Quiksilver	Receiving, put-away/flow-through, inventory management, order processing, replenishment, etc.	Depending on complexity, 45 days to typical implementa-tion time of 4-6 months.
Infor www.infor.com/solutions/scm	Infor SCM Warehouse Management	• Blockbuster • Generac	Inventory, labor resources, fulfill-ment, distribution	Average implementation is 3 to 9 months.
INSIGHT, Inc. www.insightoutsmart.com	SAILS	• Dr Pepper/7Up • Nestlé • PepsiCo	S&OP: Classic supply chain net-work design, plus strategic sourc-ing, capacity planning, etc.	Implementation takes days provided companies have all the right data.
JDA Software Group, Inc. www.jda.com	JDA Supply & Demand Optimization Solutions	• Dr Pepper Snapple • H.J. Heinz Co. • Tyson Foods	JDA's solutions enable companies to accurately predict demand across the supply chain.	Implementation cycle times vary; immediate benefit seen on several modules.
Jesta I.S. www.jestais.com	Vision SCM (Supply Chain Management)	• Perry Ellis International • PUMA • Genesco	Bidding, Logistics, POLM, Production, Sales, Quality Assurance, Workflow Mgmt., etc.	Solutions are quickly deployed and easy to integrate, resulting in rapid ROI and reduced TCO
Kane is Able, Inc. www.kaneisable.com	Integrated third party logistics	• Kimberly-Clark • Procter & Gamble • Sam's Club/Walmart	KANE provides logistics service for the entire CPG logistics supply chain.	Seamless, aggressive imple-mentation (30-90 days) utilizing collaborative integration teams
Logility www.logility.com	Logility Voyager Solutions	• A.O. Smith • L'Oreal • Rockline Industries	Drives visibility for optimized transportation operations, cus-tomer service and efficiency.	90% of implementations completed in 9 months, time-to-benefit in less than 3 months.

QUANTIFIABLE BUSINESS BENEFITS	UNIQUE FEATURE
Real-time visibility of delivery process via customer's order management system or 3PD's Web portal; Real-time data re: the home delivery consumer experience taken from an automated survey process.	When home delivery is completed, delivery team uses a handheld device to update the status, which triggers an auto-survey to the home owner to check their experience. All complaints are addressed within an hour
1-2% margin improvement; 20-25% reduction in finished goods inventory; 50-90% improvement in planning/scheduling productivity; 25-30% reduction in production time; 20-25% increase in production output	Accurately models real-world complexity and utilizes multiple optimization techniques to create a supply plans and production schedules that maximize the accomplishment of business metrics and objectives
Establish multi-channel distribution processes; Increase throughput; Increase perfect order shipments; Eliminate overtime; Decrease cost per case; Increase warehouse utilization; Reduce inventory levels; etc.	Supports event-driven lean warehouse processes, integrates with yard and transportation capabilities, minimizes overall order fulfillment costs
Reduced cash cycle, lowered on-hand inventory, increased fulfillment accuracy, increased throughput, faster problem resolution, improved customer satisfaction, increased profitability, lower TCO	Epicor's Internet Component Environment (ICE) provides a true service-oriented architecture and enables customers to tailor Epicor applications at a business level, which lowers costs and increases agility
Real-time inventory visibility and increased inventory accuracy, increased picking accuracy and throughput and worker productivity, decrease in labor costs	HighJump Warehouse Advantage incorporates industry best practices, while also allowing you to build unique workflows into the system without altering custom code or compromising upgrades or support.
Infor WMS helps customers reduce inventory and increase its accuracy, improve labor productivity, boost perfect order rates, improve shipping accuracy and reduce operational costs	Infor Ion provides an open standards integration platform with built-in Infor ERP integration and support for non-Infor solutions.
Supply chain costs are minimized typically 7-10%, often more. INSIGHT Enterprise Strategy focuses on maximizing corporate profitability by incorporating all corporate operations simultaneously.	By incorporating marketing initiatives while simultaneously evaluating the impact on the entire supply chain from raw material procurement to final customer delivery, INSIGHT identifies which campaigns to implement.
Increase demand visibility across the entire trading network; create one view of consumer demand; improve forecasting performance/accuracy; optimize inventory levels and increasing inventory turns.	Enables companies to solve business challenges through parallel processing in any hardware configuration, even those that span hardware boundaries.
Stay connected and have instant access to information; allows customers to view order status, monitor progress/track delivery; empowers sales personnel to generate orders instantly; foster customer trust	Absolute visibility into your supply chain in real time, eliminating bottlenecks and monitoring goods from design to delivery.
KANE helps CPG companies warehouse and distribute goods throughout the U.S. CPG logistics solution includes integrated warehousing, packaging and transportation services.	When it comes to 3PLs, culture matters. KANE understands the critical role it plays in the supply chain. KANE provides flexibility and personalized service with advanced systems and capabilities.
Companies have raised inventory accuracy up to 99.8%, increased picking and shipping accuracy up to 99.99%, reduce transportation costs up to 30%, and improved customer service 15%.	Integrated performance management capabilities ensure companies stay ahead of their competition and provide great customer service. Part of an integrated suite, companies can realize substantial bottom line benefits.

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COMPANY WEB SITE	SUPPLY CHAIN EXECUTION PRODUCT	KEY CG CUSTOMERS	MOST IMPACTED BUSINESS PROCESS	IMPLEMENTATION CYCLE/ TIME-TO-BENEFIT
Management Dynamics www.ManagementDynamics.com	Global Trade Management software	• Abercrombie & Fitch • Kraft Foods • Procter & Gamble	GTM solutions successfully implement in complex supply chains.	The average implementation time is 3-18 months depending on product.
Manhattan Associates www.manh.com	Manhattan SCOPE	• True Religion • Under Armour • Urban Outfitters	Distribution Management, Inventory Optimization, Planning & Forecasting, etc.	From 6 months to 1 year, depending on the breadth of solutions.
Microsoft Corporation www.microsoft.com/ consumergoods	Microsoft's Connected Supply Chain Solutions	• Del Monte • Energizer • General Mills	Digital Marketing, Social Computing, Demand Chain Optimization, ERP, S&OP, etc.	Average implementation time for customized solutions is 6 months, 3 months TTV, 12-18 months ROI.
ORACLE www.oracle.com/industries/ consumer	Oracle Value Chain Planning and Execution	• Kraft Foods • Land O'Lakes • Tootsie Roll	Integrates and automates key supply chain processes, powering information-driven value chains	Implementation in 3-6 months depending on global supply chain complexity
RedPrairie www.redprairie.com	RedPrairie Warehouse Management	• Bradshaw International • Georgia Pacific • Stanley Tools	Help companies around the world manage their workforce, inventory and transportation operations.	Customers typically achieve return on investment in 4-12 months.
Retalix Ltd. www.retalix.com	Retalix Power Enterprise	• AG New England • Argos • Delhaize Group	The entire supply chain process from point of production through point of sale.	Time-to-benefit for Power Enterprise is an average of 6-12 months
Ryder Supply Chain Solutions www.ryderscs.com	Logistics Services	• CVS Caremark • iGPS • Stonyfield Farm	Logistics services impact inventory levels, speed-to-market and overall supply chain execution.	30-90 days
SAP www.sap.com	Logistics and Fulfillment Management	• General Mills • McCormick & Co. • Nestlé	End-to-end fulfillment cycle from order capture, transportation, storage and order fulfillment	Average implementations range between 3-9 months and time-to-benefit is seen within 6-12 months.
Swisslog Logistics, Inc. www.swisslog.com	Integrated logistics solutions for warehouses and distribution centers	• Coca-cola • Procter & Gamble • Unilever/Best Foods	Warehouse and DC automation provides increased supply chain performance at a lower total cost.	From identification of need to achieving benefit, the typical cycle is 1.5 to 3 years.
SYSPRO www.syspro.com	SYSPRO	• Bliss Manufacturing • Honest Tea • Parallax	The SYSPRO integrated, modular ERP solution facilitates operational efficiencies.	Prize-winning implementation methodology enables installation in 3-6 months.
Transplace www.transplace.com	Transplace Transportation Management System (TMS)	• Cott Beverages • Del Monte Foods • Sunny Delight	Transplace TMS bridges shippers and carriers to unlock cost savings and deliver logistics efficiency.	Cross-functional On-Boarding teams get customers up-and-operational within 45-90 days.
TAKE Supply Chain www.takesupplychain.com	Xtended Process Control (XPC)	• Darigold • Petmate • Welch's	Supplier execution, shipment collaboration, freight cost Mgmt.. and merge-in-transit	Implementation of an average company/requirements is achievable in 90 days.

QUANTIFIABLE BUSINESS BENEFITS	UNIQUE FEATURE
Management Dynamics maintains the most comprehensive and robust database of global trade content and international business rules available today. It covers 122 countries or roughly 99% of world trade.	Helps customers reduce risk , optimize their supply base, legally and efficiently across 99% of the world market.
Manhattan SCOPE is designed to capture the holistic power of the complex supply chain to increase profitability and deliver service levels that help organizations prosper.	Manhattan SCOPE is developed on a Supply Chain Process Platform that facilitates the communication of solutions seamlessly to optimize day-to-day processes from one common interface in real time.
Customers can realize significant ROI from cost reduction, efficiency improvements, time-to-market advantage, empowering the broader organization with data, shared knowledge and optimized internal spend.	Microsoft enables end-to-end visibility and collaboration across the company and externally to key partners on a single, interoperable technology platform.
Increase inventory turns 25-50%; reduce logistics costs 5-30%; increase order fill rate 75-95%; improve forecast accuracy 85-100%	Oracle Value Chain Planning and Execution enables you to predict, shape and deliver to market demands in near real time and can be deployed stand alone or in conjunction with existing ERP systems.
RedPrairie Warehouse Management customers typically see increases in inventory accuracy and throughput, and improvements in efficiency for general warehouse operations, including picking, putaway and shipping.	RedPrairie's integrated suite of productivity solutions maximizes the agility and efficiency of supply chain and retail store operations from the store shelf to manufacturing.
Retalix Power Enterprise is a supply chain management suite that maximizes automation, efficiency, visibility and control over retailers'/distributors' enterprise, warehousing, transportation and delivery operations.	Combines multiple supply chain applications, including ERP, WMS, TMS, CRM, SFA, proof-of-delivery, transportation optimization, yard management, dock scheduling, voice integration and BI technology.
Customers typically experience reduced inventory levels (including buffer inventory levels), decreased transit time, reduced retailer charge-backs and improved customer service levels.	Ryder's Control Tower solution provides the logistics expertise and technology to dynamically plan and execute product movements in response to shifts in demand, allowing for supply chain flexibility.
Logistics and fulfillment management gives consumer products companies visibility across all transport and warehouse activities, reducing risk and manual intervention while ensuring the "Perfect Order".	SAP delivers pre-configured customizable dashboards providing key order fulfillment insights and internal/external data integration, driving visibility and control, and aligns stakeholders by focusing on key metrics.
Reduced building footprint, which minimizes the land area required for warehouse/DC operations, improved labor efficiency, higher picking rates, highest service levels with increased flexibility.	Out most recent technology solution for piece picked items, combines the highest storage density with an extremely efficient goods-to-person picking process.
SYSPRO users report enhanced operational efficiencies, including higher inventory turns, inventory reductions, accurate planning, increased employee output, more effective decision making, increased profits.	SYSPRO ERP software offers unparalleled visibility, agility and control with an attractive price performance ratio. The software's single DNA facilitates installation and easy integration of added modules and upgrades.
With Transplace's TMS, customers can realize a ROI within the first 12 months.	Proven Technology Platform – our business runs on our technical solution. Transplace thoroughly exercises its solution to the tune of 4+ million shipments annually.
Benefits for a company and its trading partners include: Improved discount capture; Reduction in discrepant material; Reduction in inventory; Improved supplier lead times	Utilizes a label printed at the trading partner as a token for receipt of material. Because the token is required, LEAN/Six Sigma initiatives can be implemented throughout the supply chain.