SUSTAINING OPERATIONS THROUGH COVID-19 PANDEMIC
EXECUTIVE ROUNDTABLE
MISSION

Evangelize and Drive Industrial Transformation (IX)

We are trusted advisors for business, operations, engineering, and technology leaders.

Data-driven insight, deeply experienced analysts  Technology-focused research for cross-functional transformation teams  Outcome-based advisory services
SELECT IX PROGRAM MEMBERS
AGENDA

• Share survey data and interactive discussions
  • What are the best and worst time-line scenarios your organization is planning for to sustain operations through the pandemic?
  • How has your organization decided which roles work from home and which must come into work? At corporate and at plants?
  • Are you planning on hiring additional works to rotate shifts or backfill potentially quarantined workers?
  • What projects/initiatives are you slowing down, which are you speeding up? Why?

• Q&A
DEMOGRAPHICS – 43 INDUSTRIAL RESPONSES, DATA COLLECTED 3/24 & 3/25

Geography
- North America: 53%
- Europe: 19%
- Asia/Pacific: 12%
- Rest of the World: 16%

Industry group
- Batch: 33%
- Discrete: 37%
- Process & infrastructure: 30%

Company size (by revenue)
- Large: More than $1B: 28%
- Medium: $250MM - $1B: 9%
- Small: Less than $250MM: 53%
IMPACT ON PLANTS AND COVID RESPONSE

- Closed some or all operating sites: 26%
- Reduced operations: 35%
- Not closed any site: 38%

Following existing crisis management plans: 44%
Formed a corporate-level COVID-19 response team supporting...: 56%
Formed site-level COVID-19 response teams: 49%
No formal response: 16%
WHO IS LEADING THE COVID-19 RESPONSE TEAM?

**Corporate**

- CEO: 50%
- Other: 17%
- Industrial Transformation (IX) team lead: 13%
- EHS/ safety management leader: 13%
- COO: 8%

**Operating site**

- CEO: 42%
- Plant level manager: 32%
- Other: 11%
- COO: 11%
- Industrial Transformation (IX) team lead: 5%
- EHS/ Safety management leader: 0%

*Other responses: General manager, president, etc.*

*Other responses: HR and safety managers, managing director, etc.*
WORK FROM HOME

Does your company have a work from home policy?

- Yes: 86%
- No: 12%
- Planning to: 2%

Which corporate roles work from home?

- All corporate staff: 76%
- Non-essential corporate staff: 24%
OPERATING SITE ROLES WORKING FROM HOME

- Information technology: 75%
- Finance: 75%
- Human resources: 63%
- Procurement: 56%
- Engineering: 50%
- Marketing: 44%
- Sales: 44%
- Quality: 38%
- Supply chain: 38%
- EHS/ Safety management: 31%
- Research and development/engineering: 31%
- Logistics: 31%
- Compliance: 25%
- Sustainability: 19%
- Operations/ manufacturing: 19%
- Field service and MRO: 13%
- Maintenance: 13%
- Energy: 6%
- Manufacturing, industrial and/or process engineering: 6%
Has your existing IT infrastructure been able to support these work from home requirements?

- Yes: 89%
- No: 11%

For the distribution of IT infrastructure types:
- Public: 16%
- Private: 51%
- Hybrid: 33%
CONTROL MEASURES

Other responses:
- follow CDC and local requirements
- split & isolate teams, temp control room, workplace policies
- most of these things were already in place just accelerated implementation
- Deep cleaning 2 hours
- Plant is closed for visitors, reduce amount of procurement activities, implement on-line meetings
- all employees and subcontractor working virtually

- Change PPE requirements to minimize risks for infection: 70%
- Use existing general collaboration tools technologies to help implement COVID-19 response: 53%
- Change shift start and stop processes to allow for social distancing: 42%
- Establish remote expert access to scale subject matter expertise that can no longer travel: 35%
- Implement 2- or 3-week rotating shifts to minimize risks that large portions of workforce become sick: 35%
- Change manufacturing process flow to improve social distancing: 28%
- Rapidly develop new digital apps to support the COVID-19 response: 14%
- Implement specialized Connected Worker technologies to help implement COVID-19 response: 12%
- Begin preparing a knowledge capture and rapid training system to help quickly on-board new...: 12%
- Implement new technologies like Cobots, AGVs, and Vision Systems, to minimize reliance on people and...: 5%
- Hire additional workers: 5%
CONTROL MEASURES - TIMELINE

- Change PPE requirements to minimize risks for infection
  - 67% done in 30 days, 30% in 60 days, 3% in 9 months

- Implement 2- or 3-week rotating shifts to minimize risks that large portions of workforce become sick at the same time
  - 60% done in 27 days, 27% in 27 weeks, 13% in 11 months

- Establish remote expert access to scale subject matter expertise that can no longer travel
  - 47% done in 27 days, 27% in 27 weeks, 27% in 13 months

- Change shift start and stop processes to allow for social distancing
  - 61% done in 22 days, 17% in 17 weeks

- Use existing general collaboration tools technologies to help implement COVID-19 response
  - 57% done in 35 days, 9% in 9 months

*Didn't have enough data points to report on other control measures
TRANSFORMATION PROJECTS IMPACT

Large Transformation programs, i.e. Industry 4.0, smart manufacturing, etc.

Transformation pilots, i.e. connected worker or self-service industrial analytics

Large IT projects, i.e. new ERP system

MES/MOM projects

EAM/APM projects

EQMS projects

EHS projects

- Staying on schedule for now
- On hold
- Speeding up
Questions?