APQC.®

Supply Chain: Supply Chain Planning

OSBC DATABASE PRIVACY AND PROTECTION OF PERSONAL INFORMATION
Please refer to APQC's [privacy statement](#) for disclosures relating to the collection and use of your personal information.

Instructions

Research project structure
APQC OSBC research projects are designed to collect a wide variety of information about your entire organization, with a specific emphasis on the particular business entity for which the research is being collected.

Each survey is divided into a number of sections, separated by a block of introductory text. The first section contains questions about your organization as a whole. The second section contains general questions about your particular business entity. Each of the subsequent sections of the research project presents questions about specific processes and activities in your business entity. Each of these process-specific sections corresponds to APQC's [Process Classification Framework](#).

Before each section containing process-specific questions, you are presented with a list of components of the PCF. This list identifies which components of the PCF are addressed by this particular section of the research project. The numbers in the list correspond to the PCF's unique numbering scheme. Questions within the section will address specific activities for the stated component of the PCF.

Navigation, saving results, and submitting a survey
The survey is presented in pages. Each page has at least one question on it. Each question on each page should be answered. A survey may also have a question that must be answered in order to proceed. Required questions are identified by the word "Required" in red letters.

Use the buttons at the bottom of each page to navigate throughout the survey. To avoid data loss, do not use the browser "Back" and "Forward" buttons to navigate through the survey. As you navigate through the survey using the "Back" and "Forward" buttons, your data are saved to APQC's secure servers.

The progress indicator at the bottom of each page displays a bar graph and a percentage that indicate your progress in navigating through the survey. The progress indicator does not account for completed questions, only for your relative position in the survey.

To exit the survey before you have completed all questions, click the 'Save' button at the bottom of the survey page, then close your browser. The system will present you a link to your particular instance of the survey. Use that link to return to the survey at any time.

Once you have completed the survey, click the 'Submit' button on the last survey page. By submitting your survey results, you will notify APQC that your data are ready for validation. You will not be able to create, review, update or delete your answers after you have submitted the survey, so ensure that you have accurately documented your answers before you submit it.

Cookies, one browser
The APQC OSBC survey tool uses a "cookie" to associate you to a particular survey instance. Your cookie is unique to the computer you used to start the survey, and is the only key that you have to access your data. Should you lose your cookie, you will be unable to complete the survey and will need special assistance from APQC. Do not delete your APQC cookies until after you have submitted your survey data.

Because this cookie is unique to the computer you used to start the survey, other users will be unable to contribute results and data to the survey unless they have physical access to the browser you used to start the survey.

Visit the [Browser Setup](#) page for more information about configuring your browser to use cookies.

JavaScript
The APQC survey application uses JavaScript for enhanced validation and usability features. In order to complete these surveys, you must use a browser that supports JavaScript, and you must have JavaScript enabled. Visit the [Browser Setup](#) page for more information.

Printing
To print a copy of the entire survey, you should use the "Preview" version of the survey. This view consolidates all of the questions associated with the particular survey onto a single printable browser page. No answers or personal data are contained on the "Preview" version of the survey.

As you navigate through the survey, you may print each page to record your answers. There is no facility to review all of your answers on one page.

Definitions
Each survey has a set of definitions associated with it that are unique to the process grouping covered by the survey. Throughout the survey, questions may have links to survey definitions.

Accurate results depend on a common understanding of the terminology used across survey respondents, so take special care to review the definitions in the glossary thoroughly. Common terms may be defined differently than you expect. When in doubt, contact APQC for guidance.

Reasonable numbers
The survey asks for a number of detailed pieces of information. If you do not have the exact information that a question asks for, please provide a reasonable approximation. If you cannot provide a reasonable approximation, please leave the answer blank. If you are not sure, contact APQC for guidance.

Reporting period
All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk. (Contact information is provided below.)

Question numbers may skip
Occasional changes to the survey may result in the addition or removal of questions. Due to this activity, the question numbers in the survey may occasionally skip one or more numbers. Furthermore, some surveys will hide questions depending upon answers to previous questions. If you have any questions about the order of questions in the survey, please contact the OSBC help desk.

Contacting APQC with questions
For any questions regarding the survey mechanics, the survey content, or general survey inquiries, please contact the OSBC helpdesk via telephone at +1.800.776.9676 (toll free, US only) or +1.713.681.4020, or via email at osbc@apqc.org.

General Background Questions

Please provide your value responses with no currency marks, thousands separator, or other formatting. Also, a period should be used for a decimal mark, not a comma (e.g., 1325.23, not $1,325.23).

*190.0010 Please indicate the currency (e.g. US Dollar, Euro, Japanese Yen, etc.) used for monetary responses provided in this survey.
This question must be answered in order to proceed to the next page.

Choose one

190.0020 What is the total annual revenue of your entire organization? *(Note that this question refers to the entire organization rather than the business entity defined for purposes of this survey effort. For example, the surveyed business entity could be a business unit of a publicly traded company, in which case this question should be answered as the corporate parent's total annual revenue.)*

Total annual revenue

The remainder of this survey will refer to the surveyed entity as the "business entity." You may be responding for a subset of the entire organization with which you are most familiar (such as a geographical unit) rather than the entire organization. If so, please ensure that all data provided is consistent with this business entity definition; for example, if the business entity is a combination of business units within the organization, then the revenue, cost, and FTE figures provided should be an allocation from those business units rather than the entire organization.

190.0030 Provide the end date of the twelve-month period for which your business entity will be providing data. *(All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Pro-rata data are not acceptable, only actual data should be submitted. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk on osbc@apqc.org.)*

Period end date

Year	Month
Choose one	Choose one

Please provide the following financial information about your business entity.

Financial Information	Value
190.0040 Total annual revenue	
190.0050 Total annual cost of continuing operations	
190.0060 Cost of goods sold(COGS)	

Please provide the following information about your cash flow.

Information	Value
190.0070 cash-to-cash cycle time (in days)	
190.0080 Days sales outstanding	
190.0090 Days payable outstanding	

190.0100 What is your business entity's average return on fixed assets? *(Calculate using annual operating income [revenue, less cost of goods sold, less operating expenses excluding interest and taxes] divided by your business entity's average fixed asset balance [calculated as beginning fixed assets less accumulated depreciation plus ending fixed assets less accumulated depreciation divided by two].)*

Average return on fixed assets

%

190.0110 What is the number of all employees (temporary, part-time, and full-time) at your business entity? *(If your business entity is a support unit such as a shared services center, please include employees for the areas you support.)*

Number of employees (headcount)

190.0120 In how many countries, including your own, does your business entity operate?

Number of countries

190.0130 What is your assessment of your business entity's overall performance relative to industry peers?

Top quartile
Middle half
Bottom quartile

190.0140 Which of the following best describes your organization's maturity with regards to information availability and analysis capabilities? *(Options are listed in increasing order of maturity; select the option that best describes your organization's maturity.)*

We don't have regular access to data beyond basic transactions. Data is stored in spreadsheets or system extracts. Analysis is not performed on a regular basis and decisions are based on instinct or anecdote.

Data is in department or line-of-business silos. Insight generation is only performed on an ad hoc or periodic basis. Decisions may be supported by data, but are primarily based on past experience.

Structured operational data is available and may include some basic external data. Insights are generated at department or line-of-business level. Decision making is focused on analyzing past actions and consequences.

Traditional and unstructured data is integrated and available from enterprise sources as well as some external data. While data is available to many people based on their roles and needs, using it might require some technical assistance. Decision making involves historic analysis and predictive algorithms.

Real-time, internal and external data is readily accessible across the enterprise based on need. Information is shared extensively across the enterprise. The data is integrated real-time and users can access, manipulate and visualize data on demand. Data-driven decision making is part of the organization's culture.

190.0150 Which of the following best describes the maturity with regards to information availability and analysis capabilities, that you think your organization SHOULD have in order to be competitive / on par with peers? *(Options are listed in increasing order of maturity. This question is intended as a subjective measure of the level of analytics maturity required to compete within the industry.)*

We don't have regular access to data beyond basic transactions. Data is stored in spreadsheets or system extracts. Analysis is not performed on a regular basis and decisions are based on instinct or anecdote.

Data is in department or line-of-business silos. Insight generation is only performed on an ad hoc or periodic basis. Decisions may be supported by data, but are primarily based on past experience.

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190.0160 Does your organization use an enterprise resource planning (ERP) system to coordinate key business information, resources, and activities across the value chain?

Yes
No

*190.0170 Which of the following best describes your business entity's primary capability model? *(Select only one.)* This question must be answered in order to proceed.

Build-to-Stock
Build-to-Order
Engineer-to-Order
Retail

Planning Process

190.0180 Which of the following best describes the structure of the **supply chain planning** operation with respect to your organization overall? *(Select only one.)*

Centralized
Decentralized
Other *(Please specify below)*

If you selected "Other," please specify.

190.0190 Does your business entity have a formal sales and operations planning process?

Yes
No

190.0200 What functions within your organization are involved in the sales and operations planning or demand planning process? *(Select all that apply.)*

Manufacturing

Purchasing
Logistics
Sales and marketing
Finance
Research and Development
Information Technology
Other *(Please specify below)*

If you selected "Other", please specify.

190.0210 To what extent do the following statements describe your sales and operations planning process? *(Select only one in each row.)*

Statements	To no extent at all	To little extent	To some extent	To a significant extent	To a very great extent
a. Formal meetings with sales, marketing, and supply chain operations					
b. Demand and supply plans are formally aligned and agreed upon across business functions (consensus-based forecasting)					
c. External demand collaboration with customers					
d. External supply planning collaboration with suppliers					
e. Supported by integrated demand and supply planning applications					
f. Transportation management is optimized based upon the integrated demand/supply plans					

Forecasting

190.0220 What is your average monthly forecast error measured as an absolute percentage (mean absolute percentage error - MAPE) at the following levels?

Monthly forecast error	Mean absolute percentage error
a. National	%
b. Shipping location	%
c. Product Family	%

Customer Outcomes

190.0230 What is your business entity's growth in revenues over the past year, from the top twenty percent of your customers? *(Top customers are determined by currency volume of sales. Revenue growth is computed as revenue value from this year, less revenue value from last year, divided by revenue value for last year, then multiplied by 100. If a company loses money, the value may be less than 0, but if the growth is significant, the value may be greater than 100.)*

Growth in revenues

%

190.0240 For primary products, what is the average customer order cycle time in days (including weekends)? *(The customer order cycle begins when the customer places an order and ends when the product/service has been delivered to the customer.)*

Cycle time in days

190.0250 What is your business entity's perfect order performance? *(Perfect order performance is the percentage of sales orders delivered on time, with all line items filled correctly, and with an accurate invoice.)*

Perfect order performance

%

Inventory

190.0260 On which of the following is your business entity's inventory planning based? *(Select all that apply.)*

    Volume
    Customer sales
    Geography
    Category/product group
    Margin
    Market share

Provide your annual inventory turns.

Inventory Types	Value
190.0270 Total annual inventory turns	
190.0280 Finished goods inventory turns	
190.0290 Raw material inventory turns	

190.0300 What is your business entity's inventory carrying cost (as a percentage of average inventory value)? *(Appropriate values are in the range of 0 to 100.)*
Inventory carrying cost includes opportunity cost / cost of capital (for the money tied up in inventory value), storage space costs, insurance, taxes, handling/administration of inventory, shrinkage, and total obsolescence of all products' inventories (raw material, work in progress, finished goods, channel obsolescence, and field samples).

Inventory carrying cost percentage

        %

190.0310 What is the total annual value of your business entity's shrinkage? *(Shrinkage is defined as the costs associated with breakage, pilferage, and deterioration of inventories.)*

Value of total shrinkage

Cost and FTEs

190.0320 What is your business entity's total supply chain management cost? *(Total supply chain management cost is the sum of the costs associated with the processes to plan, source, deliver, and return. This includes supply chain IT costs, finance and planning costs, inventory carrying costs, material acquisition costs, order management costs, and returns management costs.)*

Supply chain management cost

190.0330 What is your business entity's Demand/supply planning cost? *(Demand/supply planning cost includes costs associated with forecasting, developing finished goods or end item inventory plans, and coordinating demand/supply process across the entire supply chain including all channels. (Not including information systems associated costs.)*

Demand/supply planning cost

190.0340 What is the number of FTEs employed during the year to perform the supply chain planning processes and related activities? *(Use a decimal if needed.)*

Number of FTEs

Practices

190.0350 Which of the following business processes have been adopted at your business entity? *(Select one in each row.)*

Supply chain practices	Not adopted	Somewhat adopted	Widely adopted
a. Sharing risks across a network, rather than concentrating them in a single enterprise.			
b. Rapid response to changes in market conditions.			
c. Maximizing variable supply chain costs to be aligned with revenues.			
d. "Real-time" information transparency inside and outside the enterprise.			

190.0360 To what extent has your business entity implemented each of the following customer practices? *(Select one in each row.)*

Customer Practices	Not implemented electronically	Implemented via conventional electronic data interchange (EDI)	Implemented via Web/Internet-enabled technologies including Web-enabled EDI
a. Sharing visibility on inventory and demand with customers			
b. Sharing visibility on inventory and demand with suppliers			
c. Continuous replenishment with customers			
d. Continuous replenishment with suppliers			
e. Collaborative planning with customers			
f. Collaborative planning with suppliers			

Sustainability

190.0370 To what extent are the following statements true concerning your company's sustainability, or green supply chain strategies and practices?

Statements	To no extent	To little extent	To some extent	To a significant extent	To a very great extent
a. Supply chain strategies include plans and initiatives for carbon management, water management, energy usage and waste management.					
b. Supplier selection criteria and contracting reflect suppliers' carbon capabilities.					
c. Product design & packaging includes environmental considerations (recycling, after-life disposal, carbon footprint)					
d. Manufacturing targets (where applicable) include carbon management goals, such as annual reduction of carbon emissions and waste reduction across the manufacturing operation.					
e. Outsourcing policies seek to minimize carbon impacts such as increased emissions.					
f. There is an ongoing program for low carbon design for distribution (late customization, picking, packing, reusable and recyclable packaging, reverse logistics).					
g. Contract with warehouse and distribution service providers (e.g. fleet providers, haulers, buffer warehouses) favors those with low direct and indirect CO_2 emissions.					
h. Transportation companies are evaluated for carbon emissions, energy consumption, and strategy or approach to carbon management.					

You have reached the end of the survey. You can use the **Previous** button to review your answers for accuracy and reasonableness. After pressing the **Submit** button, you will no longer be able to directly edit your data in this survey form.

In order to obtain a printed version of your completed survey, you will need to print each page **before** submitting your responses. After you select "submit", you will be unable to print your completed survey.

Please direct all survey-related questions to the OSBC Helpdesk at (800) 776-9676 or e-mail osbc@apqc.org.

50% complete