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**SALARY
GUIDE 2012**
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Shop Talk

Devadas Nair, Head Supply Chain, Shoppers Stop, is in the thick of a retail revolution, shaping the supply chain of one of its prime catalysts.

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An update on talent management in supply chain.



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Not So Far Away

Guess what? Not too far in the distant future, warehouses could become a thing of the past. How did I arrive at this epiphany? Well, the signs are there. A technology called 3D printing could make it possible I am told. Until recently, 3D modeling and printing were processes only used by engineers of big companies like Boeing, which uses the technology to make certain air ducts for its planes. And now the technology has crossed over into the realm of tech enthusiasts.

As you know, 3D printing is the process in which you can create objects from a 3D design, using a printer with cartridges that contain glass, plastic, even metal in the form of powder or gel.

What it means is that, one day, end-consumers can make all sorts of products sitting anywhere with this technology—be it a toy, an accessory for your car (no precision components, yet) or simple industrial parts. It has only been a couple of years since this technology has been introduced to end-consumers, and they have lapped it up with gusto.

According to the US-based research and consulting firm, Wohlers Associates, sales of 3D printing products and services touched an estimated figure of \$1.6 billion in 2011. And they are set to grow by 20 percent and more in the coming years.

Currently, the technology is in the early-adaptor phase and as and when it becomes ubiquitous, it will have a huge impact on supply chain costs. In other words, warehousing and transportation costs will never be the same again. Sounds like science fiction? Well, new technologies have a way of impacting us sooner than we think.

It will beat the implementation of GST, for sure, going by the speed at which GST is moving. In other words, we may not need GST at all by the time it finally comes through. No, I am joking about this one. And I hope this remains a joke.

On a serious note, be it futuristic technology like 3D printing, or existing ones like RFID and speech recognition, new ideas influence global supply chain at all levels all the time, because of the pan-industry nature of the function. This is the reason a supply chain manager is (or needs to be) the most future-savvy professional around.

When we had to think of a central theme for our upcoming March 15 event, 'Supply Chain 2.0' seemed a natural choice. As clichéd as the topic sounds, we thought we could do justice to the subject by learning from the best minds in the business. Fortunately, we have been able to get nods from some respected experts in our field. I know I am plugging our event here, but I feel quite proud looking at the names and experiences of people who will share their views with us. Let me offer you a glimpse or two: Professor N Viswanadham of Indian Institute of Science will speak on India's food security goals and how India's supply-chain infrastructure can be used to attain those goals. Then, Mr Darryl Judd of Logistics Executive will be unveiling India's first logistics salary survey report (the results are published in this issue) and give a presentation on the subject.

Need I say more?



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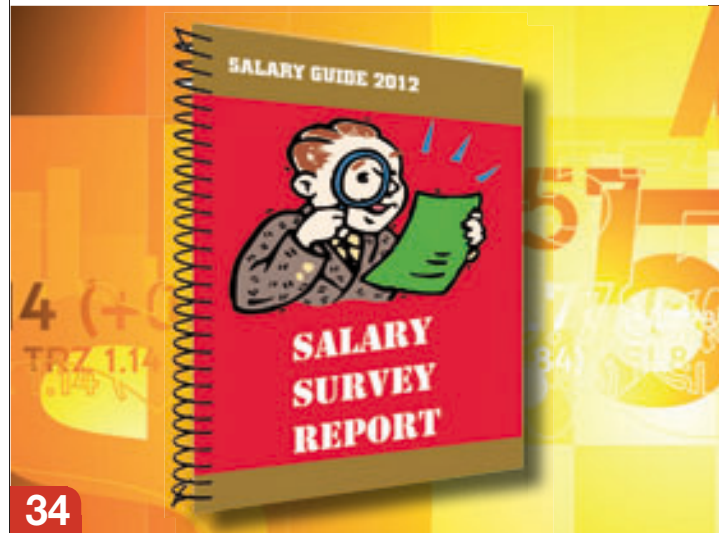
Devadas Nair, Head Supply Chain and Mission Control of Shoppers Stop has perfected the back-end to make shopping a delight for customers.



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Salary Survey Report 2012

Logistics Executive has brought out a Salary Survey Report that highlights the salary structures for the supply chain in India.



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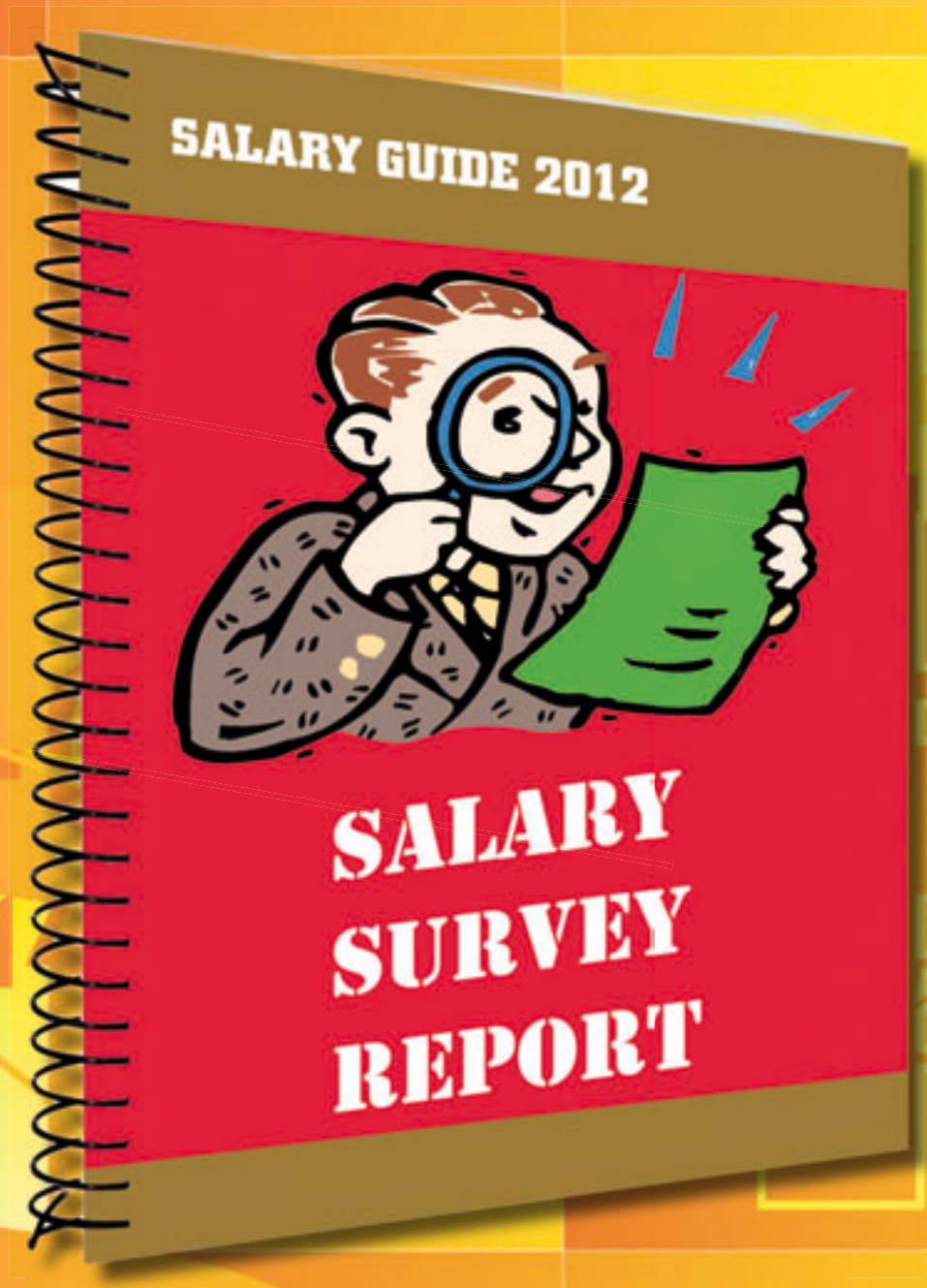
Sensitizing male colleagues, work flexibility and security will help create a perfect environment for women to unleash their fullest potential.

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Salary Survey Report 2012

In an exclusive to LOG.India, Logistics Executive shares its compilation of Salary Survey Report 2012 that covers the entire spectrum of salary bands and geographical territories in India. The analysis has been drawn from the Logistics Executive Global Survey.

METHODOLOGY

The research and information contained within this report has been compiled by Logistics Executive from research undertaken and intelligence gathered in the course of its everyday business activities. Logistics Executive was founded in 1999 and has offices in Australia, Singapore, Hong Kong, China, India and Dubai. Specialising in Logistics & Supply Chain, the company has an active database in excess of 90,000 logistics and supply chain professionals.

Information contained within this report is compiled from data contained with our extensive database, business acquired intelligence and regular research surveys, which includes the Global Employment Market Report (now in its 6th year). The Global Employment Market Report is an online survey of approximately 10-15 minute duration and was emailed to more than 45,000 people within the Supply Chain & Logistics Industry in late 2011. About 3,550 respondents completed the survey. NB: The results are purely indicative in terms of overall trends within the industry.

Further to this, Logistics Executive undertook a series of interviews with HRD's and HR Personnel validating this data and this information has been incorporated into the final document produced. Sources for this particular research includes:

- Human Resource Director Interviews
- Business briefing provided by CEO's of leading 3PL companies
- Logistics Executive's Employment Market Report data from late 2011
- Logistics Executive's business intelligence database
- Candidate and Client interviews (conducted by Logistics Executive)

Whodunit

Logistics Executive is a global Human Resources and Recruitment Consultancy which opened its India office in March 2010. In the two successful years since, the company has established its place in the Indian market with a professional reputation and commitment to providing a valued service and expertise in talent management and acquisition strategies for both local and international clients.

To mark this two-year milestone Logistics Executive, in conjunction with LOG India have released the first salary guide report for the Indian Supply Chain and Logistics market. Moving forward this Salary Report will be compiled as an annual contribution. We thank our clients and the market place as this report has been compiled with their goodwill, covering a breadth of salary bands and geographical territories in India with a focus on Supply Chain and Logistics. The analysis in this report comes from the Logistics Executive Global Survey, released in December 2012, in-depth interviews with our clients and statistical reference to our candidate database.



DARRYL JUDD,
Chief Operating Officer,
Global Operations,
Logistics Executive

As an emerging economy India has proudly met challenges. Whilst continued growth seems a given, growth at the same rate will persist only if there is substantial focus on the roles played by the Logistics and Supply Chain sectors as critical support systems. Recent studies show that economic growth is increasingly supported by robust industrial growth and a strong logistics and supply chain.

To keep pace with this trend there has been an increase in demand for skilled talent in this sector. The Indian market generally is slated to grow in excess of \$120 billion by 2014 (according to a Frost & Sullivan report). Manufacturing alone has grown at 8 percent annually over the past decade and since 2010 has started to contribute a substantial share to India's GDP rather than agriculture, according to a Goldman Sachs Global Economic Paper 2011 report.

There have been countless articles written, describing the critical nexus between the need for reform in the supply chain sectors and the success of the Indian economy.

The Talent Challenge

There is nothing new in touting these three elements: attraction, development and retention when discussing talent. However, there has never been a more tangible connection between the supply of a talented supply chain workforce and the continuing rate of India's success.

Attracting Professionals

According to the Logistics Executive Salary Report for India, despite a mild slowdown in the rate of economic growth, there has been a rapid increase in salary inflation. This is supported in a recent article published in The Economic Times (Feb.2,2012), which states that "Employees in India have been getting double digit (sic salary) increments past two years, which will continue in 2012 as well". The huge demand for talented and skilled professionals has manifested in an unsustainable salary war. Outside of basic salary, organizations are increasingly moving towards Pay for Performance compensation structures and linking huge percentage of variable pay component directly with performance. In several cases, organizations are increasingly taking company performance as one of the qualifiers to decide on the variable compensation payout to employees.

This manifests in companies battling for skilled candidates to keep up with the rapid expansion of local companies and multinationals.

There are a number of factors that lie behind the talent shortage in India. In real terms, the Indian market has had to deal with an unprecedented growth in infla-

tion and emerging industries, replacing the demand for traditional skill-sets. Staff turnover continues to rise as employees try to keep up with these pressures and move jobs to improve their remuneration.

Most of the respondents at the executive level approached by Logistics Executive indicated that the ongoing salary war will have a negative impact on business. Due to talent shortage, employers are forced to take in young graduates with little experience and offer them much higher salaries and promises of rapid promotion. Employees who are lured by higher salaries are not developing the skills and experience that comes with reasonable tenure in a given role and may not be as capable as their overseas counterparts. This will perpetuate the need to import executive level talent from overseas to fill these shortages. At some point salaries will level out due to market forces. The fallout will be an inadequately skilled workforce.

This artificial salary war can be detrimental for India's long-term growth, as overinflated salaries will price the country out of the global market. This is being faced in China where salaries are no longer as modest or competitive as they used to be. Multinationals are turning to other less developed countries such as Vietnam and the Philippines to establish their industries with lower workforce costs and other attractive incentives. According to an EBN Online article (Differences & Similarities in Asian Supply Chain Wages - 27 Dec 2010), salaries for supply chain professionals are no longer markedly different between Asia and the US. According to Marc Herman from EBN, "Though it is common to hear that manufacturing has moved to Asia to save labor costs, getting components and finished goods back from across the Pacific is costly and complicated". As a result, there is a trend for the US, in particular, to move their manufacturing closer to home.

Geographic Break Up

An interesting finding in the Logistics Executive Salary Report is that the salary structure across the four metros, for similar roles and responsibility, varies. Mumbai commands the highest salaries (mid-to senior-tier). The biggest factor contributing to the salary inflation is the high cost of living in Mumbai as compared to other key cities. Delhi, Bangalore, Chennai and Kolkata also see this trend. From a corporate perspective, this highlights the need to appreciate local disparities and have a certain amount of decision-making in local markets, backed by a uniform top-down approach. Moving job roles or industries geographically may also be another strategy to address the issue of rising salaries and workforce expectations. In this respect, companies with a wider footprint have an advantage as they have



more capacity to move their employees around with the incentive of offering them opportunities.

The Leadership Gap

The salary gap narrows as we move up the ladder. Mumbai and Delhi lead the pack in C-Suite compensation, followed closely by Bangalore and Chennai. The connectivity of these cities to the rest of the country and ease of carrying out business, are some factors that make them favorable as corporate centers. This is due to a gap in the market for people with broad management abilities. This is particularly true of the supply chain industry where, since the global financial crisis, there have been ever-increasing skill demands placed on these professions to take on a higher degree of leadership within organizations. About 86 percent of respondents believe that leadership skills and the ability to think strategically will be critical to their organizations' ongoing success. The high salaries for executives across the different Indian provinces demonstrates how much in demand this leadership expertise is and how universally difficult it is to source.

Tackling employment satisfaction from the angle of salary alone is not the answer. According to our survey, counter offers don't work in more than 68 percent of cases and those who accept it, tend to leave the company in next 12 months in most cases. This figure could vary depending on the level of role, responsibilities and geography. For those with skills that are high in demand, employers try to retain them although it may not be very successful in the long-term. The common method of retaining talent is by paying extra dollars, but in most cases the core issues are not completely addressed and that leads to resignations.

Widening The Net

Another way of countering the skill shortage would be for companies to expand their talent pool to non-traditional sources. This may involve setting up schemes that offer more roles to women and education programs for unskilled workers. Collaboration, with universities and other community organizations, will facilitate this training to ensure that the correct skill gaps are being addressed and companies are getting the skills they need out of their new graduates. Otherwise, they may need to continue to source their key skill-gaps from overseas in areas such as leadership and technical disciplines.

Beyond The Salary War

It is no surprise that salary is a key issue. Overwhelmingly, more than 88 percent of respondents indicated that they were seeking a salary increase way beyond India's present annual inflation rate of 8 percent. Furthermore,

employee expectations are some of the highest in the world, with the vast majority of respondents seeking salary increases that exceed global averages for emerging countries – 51 percent are seeking an increase greater than 20 percent.

Remuneration is a necessary ingredient not only to keep up with market conditions but also to acknowledge market parity and the increased responsibilities being placed on supply chain professionals. It is, however, only part of the solution.

Talent Development

It was noted in the Logistics Executive 2011-2012 Global Employment Market Report that career development topped the career satisfaction list. About 23 percent of the respondents indicated that career development is a key reason for them to change. This is only topped by salary as a main motivator by a short number at 27 percent.



The common method of retaining talent is by paying extra dollars but in most cases the core issues are not completely addressed.

In terms of development opportunities, the Logistics Executive 2011-12 Global Employment Market Report found that 76 percent of business leaders in India perceived they offered a satisfactory level of training. However, on the employee side there was an increase in workplace movement to other organizations, stating their main reason was lack of development opportunity.

Perhaps there is a need for the Human Resources function to shift their focus from traditional means of engagement towards a broader approach? According to Kim Winter, Logistics Executive's Global CEO, the answer lies somewhere in the middle. With Executives and HR focusing on retention and attraction, they are missing the middle piece here – developing existing talent. "It could be argued that if companies developed their own people, they would end up with more talent than they could handle," adds Mr. Winter.

< EMPLOYMENT SPECIAL

Survey Findings

Position	Mumbai	Chennai	Delhi	Bangalore	Pune	Hyderabad
MD / GM Logistics	75 - 1.5(Cr)	75 - 1.0(Cr)	75 - 2.0(Cr)	75 - 1.0(Cr)	75 - 1.5(Cr)	50 - 1.0(Cr)
Supply Chain VP / Director	45 - 75	30 - 50	40 - 75	25 - 39	36 - 40	24 - 45
Logistics Director	35 - 75	25 - 45	25 - 75	25 - 45	25 - 50	25 - 35
Operation / Warehousing						
Regional Logistics Manager	15 - 20	7 - 15	15 - 20	10 - 15	7 - 20	7 - 16
Warehouse / DC Manager	6 - 9	5 - 8	5 - 7	5 - 7	3 - 8	6 - 8
Warehouse/Operations Executive	2 - 6	2 - 5	2 - 5	2 - 5	2 - 5	1 - 4
Lean / Quality / Six Sigma Manager	8 - 20	8 - 15	9 - 15	8 - 15	9 - 12	8 - 12
Logistics Specialist	5 - 7	2 - 6	4 - 7	2 - 6	3 - 6	2 - 7
Procurement / Purchasing						
Procurement VP / Director	35 - 75	30 - 45	30 - 70	25 - 50	25 - 50	25 - 35
Senior Procurement Manager	12 - 20	7 - 15	10 - 15	9 - 12	10 - 14	6 - 12
Senior Quality Manager	8 - 15	8 - 11	8 - 15	7 - 14	7 - 13	8 - 13
Sourcing Manager	8 - 15	4 - 7	8 - 15	7 - 11	5 - 9	5 - 9
Purchasing Manager	4 - 7	5 - 7	5 - 9	5 - 9	5 - 7	5 - 7
Purchasing Officer	2 - 5	2 - 4	2 - 5	2 - 5	1 - 4	2 - 4
Inventory, Planning & Demand						
Supply Chain Manager	12 - 18	12 - 16	12 - 16	8 - 17	8 - 15	7 - 11
Planning / Forecast Manager	7 - 10	5 - 6	5 - 9	6 - 9	5 - 7	7 - 9
Planner	5 - 7	3 - 4	3 - 5	2 - 4	2 - 5	4 - 9
Commodity Manager	8 - 12	6 - 9	3 - 6	8 - 17	9 - 10	4 - 7
Inventory Manager	5 - 7	3 - 5	2 - 5	3 - 5	5 - 7	4 - 7
Inventory Controller	3 - 7	1 - 5	2 - 3	2 - 6	2 - 5	3 - 7
Consulting & Project Management						
Supply Chain Consultant	12 - 35	8 - 15	15 - 35	15 - 25	8 - 11	10 - 12
Project Implementation Manager	9 - 17	11 - 16	10 - 14	13 - 15	9 - 11	10 - 12
Project Manager	9 - 20	10 - 12	13 - 19	12 - 15	10 - 12	9 - 13
Transport						
General Manager Transport	20 - 30	18 - 20	20 - 30	20 - 30	15 - 20	15 - 20
National Distribution Head	25 - 50	22 - 24	23 - 30	18 - 26	15 - 20	25 - 34
Zonal Distribution Manager	12 - 16	6 - 11	10 - 14	9 - 13	7 - 14	11 - 14
Transport Controller	5 - 7	5 - 7	5 - 7	4 - 6	2 - 4	2 - 4
Sales & Marketing						
Sales Director	30 - 75	30 - 45	30 - 75	30 - 45	25 - 40	25 - 40
Area Sales Manager	12 - 15	9 - 12	12 - 16	12 - 16	9 - 11	7 - 10
Regional Brand Director	15 - 35	15 - 20	15 - 30	15 - 22	13 - 22	13 - 22
Regional Brand Manager	15 - 25	7 - 12	8 - 15	10 - 16	13 - 15	7 - 11
Territory Sales Manager	7 - 12	6 - 10	5 - 10	5 - 9	6 - 9	3 - 8

Salary data is shown as a range from low – high and is displayed as an Annual Base Salary in Lakhs Per Annum. Additional benefits such as annual bonus, company vehicles or travel allowances may apply. (Cr) = Crores.

Position	Mumbai	Chennai	Delhi	Bangalore	Pune	Hyderabad
CEO / MD / Country Manager	75 - 4.0 (Cr)	50 - 2.0 (Cr)	75 - 4.0 (Cr)	50 - 2.5 (Cr)	50 - 1.5 (Cr)	50 - 1.5 (Cr)
General Manager	24 - 35	22 - 30	20 - 35	24 - 30	20 - 30	20 - 30
Regional Manager	20 - 25	14 - 20	14 - 20	9 - 14	8 - 16	7 - 10
Branch Manager	6 - 10	4 - 7	4 - 8	6 - 8	6 - 8	5 - 7
Sales & BD						
VP / GM / Sales Director	41 - 50	30 - 40	30 - 45	35 - 45	18 - 23	25 - 28
National Sales Manager	25 - 35	17 - 24	25 - 35	17 - 35	18 - 23	25 - 28
Regional Sales Manager / Territory Manager	12 - 17	12 - 15	15 - 24	11 - 15	13 - 15	9 - 13
BD Manager (3PL)	8 - 15	8 - 15	12 - 15	8 - 12	8 - 12	8 - 10
BD Manager (Freight)	7 - 15	6 - 15	8 - 15	8 - 12	7 - 12	6 - 11
Key Account Manager	10 - 16	8 - 16	9 - 12	8 - 12	9 - 11	3 - 7
Sales Executive	3 - 7	3 - 7	3 - 5	4 - 5	2 - 5	3 - 5
Marketing Manager	4 - 7	4 - 7	3 - 5	4 - 7	2 - 5	3 - 5
Operations						
3PL Contract Manager	30 - 45	28 - 35	30 - 40	28 - 35	20 - 30	20 - 30
Warehouse/Operations/DC Site Manager	13 - 15	8 - 10	8 - 12	8 - 10	8 - 10	5 - 8
Warehouse/Operations Executive	5 - 10	6 - 8	5 - 8	5 - 10	5 - 7	5 - 8
Import/Export Manager	2 - 5	3 - 5	2 - 5	2 - 4	2 - 4	2 - 4
Air Freight / Sea Freight Manager	10 - 17	5 - 8	9 - 12	6 - 10	6 - 9	5 - 8
Shipping Clerk	3 - 5	2 - 4	3 - 5	2 - 4	2 - 4	2 - 4
Project Manager						
Project Implementation Manager	10 - 16	10 - 12	10 - 16	10 - 14	10 - 14	8 - 12
Project Manager – WMS/TMS	10 - 22	14 - 22	11 - 14	12 - 17	10 - 12	12 - 14
Transport						
General Manager Transport	20 - 45	20 - 30	20 - 40	20 - 30	20 - 30	20 - 30
National Transport Manager	20 - 45	20 - 30	20 - 40	20 - 30	20 - 30	20 - 30
Line-haul Manager	18 - 25	15 - 20	18 - 24	15 - 20	15 - 20	12 - 18
National Compliance Manager	6 - 12	6 - 10	5 - 10	5 - 8	5 - 8	5 - 8
Site Manager	9 - 15	8 - 12	10 - 15	8 - 12	8 - 12	8 - 12
Fleet Manager	5 - 10	6 - 8	5 - 8	5 - 10	5 - 7	5 - 8
Workshop Manager	4 - 6	3 - 5	3 - 6	3 - 5	3 - 5	2 - 5

Salary data is shown as a range from low – high and is displayed as an Annual Base Salary in Lakhs Per Annum. Additional benefits such as annual bonus, company vehicles or travel allowances may apply. (Cr) = Crores.

Disclaimer:

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Here we are referring to structuring the whole employee experience. This would start with the first impression of the company through employment branding. This could be followed with attraction strategy. It could then be overlaid with a social element. A flexible training program and conditions of employment could be interwoven in this model. Mr. Winter explains that talent development could encompass a range of options, including “a real Talent Retention strategy to include structured career development, meaningful assessments, relevant KPI’s linked to bonus schemes, career choice options, job re-structuring, and an enjoyable but challenging environment”.

By training we aren’t talking about the traditional definition of the word, such as formal courses, but to on-the-job learning. This could be offered not just to a select group of “high performers,” but across all employees. It

companies like Proctor & Gamble and Google. Rotation policies, offered by companies such as Maersk Logistics ,offer employees opportunities to gain skills and experience through overseas assignments.

The expansions of online companies such as Flipkart.com, Snapdeal.com, Yebhi.com and, very recently ,Junglee.com have attracted talented employees with an entrepreneurial bent. They provide a sense of job satisfaction by a sense of creating something or setting something up.

A way of fostering this culture is to give people in the workplace opportunities to seek out new challenges that will provide them with opportunities to test themselves to new levels of performance and ways to connect with others in the workplace. This will attract other likeminded individuals to your organization and enhance employer brand. Mr. Winter adds, “As organizations get flatter, offering career developments can be a challenge, but this can be tackled in many ways such as offering inter-office transfers, job rotation and greater delegation of decision-making down the line. Allowing employees to be involved in “continuous improvement teams” offers both job satisfaction and better results –“a win-win”.

More employees are moving from 3PL to shipping or consumer sectors. This has been attributed to improved employment conditions.

is also treating everyone in the business collectively as “the talent”. It will expose them to new areas, which would allow personal growth on the job, but not necessarily directly related to their current roles. In this way it would be possible to retain a large pool of staff simply by offering them exposure to new on-the-job skills. Employees, in turn, would take on responsibility for their own development. This would lead to a culture that is capable of dealing with the high amount of change as employees are constantly encouraged.

The approach of treating change as an opportunity and not a threat at the micro level is critical as the capacity to keep up with changing markets is paramount for a company’s survival and competitive edge. It is imperative that there is a workforce mentality that isn’t afraid of change, but sees this as an opportunity.

Work Balance

The Logistics Executive Salary Guide discovered another trend. More employees are moving from 3PL to shipping or consumer sectors. This has been attributed to improved employment conditions. Companies are using initiatives such as flexible work arrangements, and working from home, which has proven popular in

Conclusion

The employment outlook for 2012 looks positive. The salary outlook remains positive, with an above-average incremental increase of 15-25 percent across all levels. On the flipside, this signifies an intense struggle in the war for talent. In the long term, a salary inflation war is unsustainable and poses a threat to this employment growth.

It will be interesting to observe if the year ahead sees the HR function take up the challenge of redefining company culture as a way of improving the total employee experience. In partnering with their Human Resources teams, executives will recognize the broader role these teams can play in achieving commercial success. Through these measures the focus is all about changing the mindset, so that employees are forward thinking and aren’t just ready for change, but will embrace it at all levels. A change-ready company will not only have the competitive edge, but will create a self-perpetuating cycle of achievement. 🌅

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