

Dawson Consulting

Foresight[®] Survey Highlights

2002-2003



Latest Research on what really matters to
Australian Supply Chain Practitioners.

DAWSON CONSULTING

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Foreword: We are **UNIQUELY** **AUSTRALIAN** we need our own view

We need our own view. The issues and challenges we face as Australian Supply Chain Managers are so different, and arguably more demanding, than simply looking at Australia through the prism of yet another global study is not sufficient. Yes, it is important to compare our thinking and priorities to U.S. or European counterparts to see how we stack up against 'the best'. I am therefore, pleased to share the results of our inaugural 'Foresight Survey', which provides a strategic overview of the key concerns, strategies and actions that will shape the Australian Supply Chain industry over the next 12 months.

In a way, we really are not that different from our Northern Hemisphere colleagues. Everyday, Australian businesses are asked to deliver an ever expanding product range at service levels that are consistent with those of any affluent nation. "Why can't we get first run movies and CDs at the same time as they receive them in America? Why can't I get 200 laptops configured to my specifications and delivered to my office in Perth next week?"

Unfortunately, the challenge of meeting these increasingly complex demands continues to pressure the Australian supply chain community. Australia possesses many characteristics, which heighten this challenge. Our population is still less than a 10th of the U.S. and most of us are still choosing to live near the coast. We must provide a broader range of products in limited volumes. We must meet order accuracy and reliability standards, yet keep distribution costs from ballooning beyond our customer's reach. We must continue to make Australia an attractive market for global brands and our economy must be competitive for producers who wish to manufacture here and ship overseas. We must do all this and more with fewer people, lower population density, and a large land mass.

The survey seeks to identify the plans and priorities of supply chain managers to help them meet these challenges. We surveyed and spoke at length, with Australia's top supply chain executives covering over twenty industries of different size. We also sought the insights of functions from Marketing, Customer Service and Finance. It is our intention to conduct this survey annually, and on a greater scale each year to provide both a record of how we have developed as a nation and industry, as well as a reference point for the future.

John Dunphy
Managing Director
Dawson Consulting.

Executive summary

In the last 12 months, the global business community has been hit by some of the worst economic and political shocks in recent history. The world is becoming much less predictable and this is leading to some major challenges for business.

Over the next year, Australian supply chain executives will be working 'smarter, not harder'. These executives will improve planning and forecasting and say good-bye to unnecessary inventories and administrative costs. They won't waste time outsourcing or restructuring their organisations. They are committed to spending on new IT tools, but will also spend equal amounts on improving their existing systems. They will collaborate with trading partners on 'basic elements' and near-term opportunities for cutting costs. Why is this going to happen? Because their Chief Executive knows it is important in creating profits and is determined to make it happen.

Reducing inventory and improving fulfilment performance will dominate the supply chain agenda for the next year. A focus on improving inventory was held across the board for companies of all sizes, but was especially prominent in smaller sized firms. The **top 5** supply chain objectives over the next 12 months are:

- 1 Reducing overall inventory and inventory holding costs
- 2 Improving fulfilment efficiencies and performance accuracy
- 3 Improving responsiveness and lead times to the customer
- 4 Improving warehouse efficiencies, performance and accuracy
- 5 Reducing costs of procured items and procurement process costs

By a wide margin, supply chain executives will spend most of their attention and budgets on the challenges of improving their ability to plan and forecast demand for inventory and logistics resources. The most

significant challenges that executives will tackle in supply chain improvement.

While certain efficiencies, or one-off savings were achieved through outsourcing in previous years, many of the efficiencies expected from these early moves have not yet been realised. This failure correlates with survey findings which suggest that the goal of inventory reduction will be pursued neither through the use of outsiders like 3PL's nor by changing the physical elements of the supply chain network.

The most surprising result of the survey are the projected increases in IT spending. Asked about where new capital, budgeted for improving the supply chain, is likely to be spent, over 50% of the spending will be IT related. A majority of respondents are planning to increase their supply chain IT budgets:

- ▶ 62% reported a higher level of spend
- ▶ 28% reported the same
- ▶ 10% reported lower spend

Capital budgets for Supply Chain Improvements will be allocated across:

- ▶ Enhancements to existing IT systems (28%)
- ▶ Implementation of new IT systems (24%)
- ▶ Purchasing capital equipment (17%)
- ▶ Physical network enhancements (15%)
- ▶ Supply chain consulting (10%)
- ▶ Outsourcing functions (5%)

In line with the key goals, companies are determined most to completely change or enhance their planning and forecasting systems. The second most active area will be warehouse systems, with a specific view towards extracting more value and visibility from warehouse operations. In third place will be activities, which improve procurement processes and connect trading partners like EDI and other forms of electronic or web-based communications. A finding likely to disappoint many holdovers from

WHAT'S HOT

- ▶ Improving planning and forecasting capabilities
- ▶ Improving warehousing management capabilities
- ▶ Creating supply chain collaboration opportunities
- ▶ Improving sourcing and procurement processes

WHAT'S NOT

- ▶ Outsourcing logistics capabilities
- ▶ Creating a logistics entity/profit centre
- ▶ Restructuring the supply chain organisation

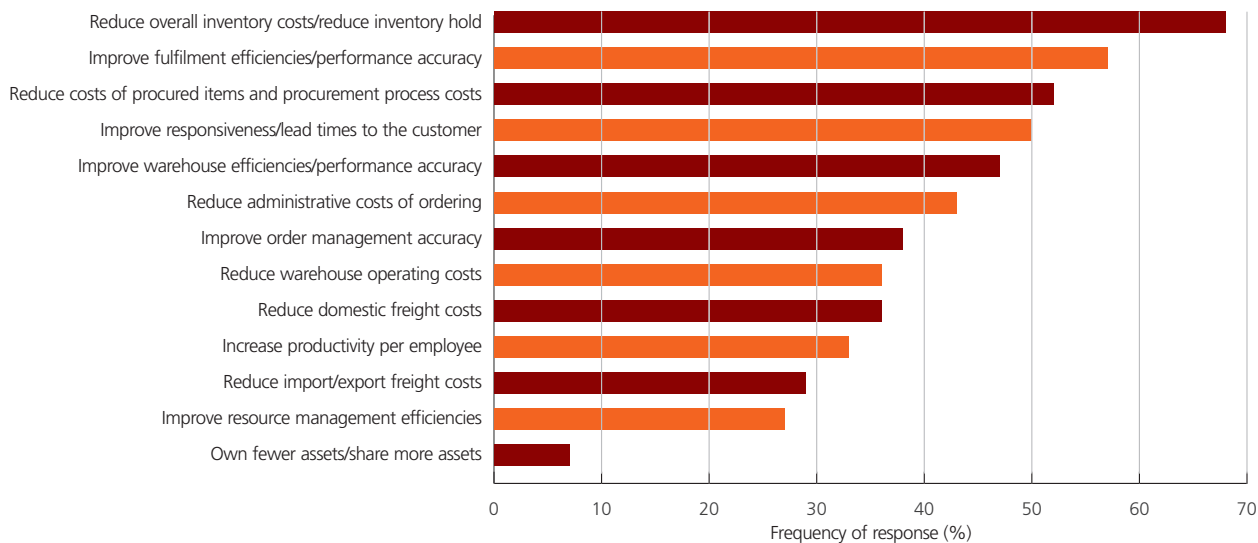
the dot.com era, is that Event Management will receive the least amount of IT dollars in the coming year.

Collaboration will continue to be practiced as a key source of benefit amongst survey participants and will continue to be a key focus of senior management. These activities will centre on:

- ▶ connecting IT systems
- ▶ reducing supply chain administrative costs
- ▶ reducing inventory

The survey results re-confirm that the supply chain continues to be a key source of competitive advantage and one that consistently ranks amongst the top 5 strategic issues of the CEO. Today's organisational structures reflect this point as positions responsible for the entire supply chain are already reporting directly to the CEO in over 60% of responding companies.

Figure 1. What key outcomes are you targeting for your supply chain next year?



SUCCESSING IN THE AGE OF UNCERTAINTY

As businesses look back over the last 12 months and project how the markets will behave in the next year, managers are more likely to be faced with an age of uncertainty.

Dot-com busts, September the Eleventh, airline collapses, WorldCom, double-dip recessions... what's next? How will Australia be affected by these impacts? If the global recovery takes longer than expected, will there be any let up on the current pressure to produce margins and cash flow?

Despite the strengthening of our ties to the global economy, it is fair to say that during some of the worst global shocks seen in recent years, Australia's economy has done pretty well. It would be easy to suggest that in fact Australian businesses should simply use the last ten years of roughly 3-4% economic growth rate as a predictable base for extrapolation into their forecasts. Or even better to suggest that Australian firms take a breather since most other major economies will likely take longer to recover. However, this is not the message that our survey respondents are delivering.

The theme of our survey responses suggest that while the world is getting less predictable and customers are

getting more demanding, the ambition of Australian firms is to step up and manage supply chains more intelligently than ever before. With the immediate pressure to improve cash-flow and margins, Australian companies will use factors which they can control or heavily influence, like inventory, demand planning, and fulfilment operations, to make great strides in performance. In an Age of Uncertainty, this makes perfect sense.

A FOCUS ON INVENTORY

Reducing overall inventory and associated costs will be the primary objective of most Australian supply chain managers over the next 12 months. This ambition combined with the complimentary objectives of improving fulfilment and customer lead times will dominate their agenda (Figure 1).

The Operations Director for a major publishing company explains;

“We see inventory management as a major competitive differentiator for our business. Improving how we manage stock turns, out-of-stock and in-stocks has a major impact on the success

of our retail customers.

That said, I also need to hit some pretty aggressive cost reduction targets across my warehouse and distribution network over the next 24 months.”

Australian customers are becoming more sophisticated in their approach towards supply chain management and in defining service levels. Rising expectations include a wider breadth of product range, higher product availability and shorter distribution cycles (lead times).

The Supply Chain Director of a major apparel manufacturer explains;

“Our business has become a lot more complex in the last few years due to Australia's heightened sense of fashion. Our sku levels have just exploded, so we can't keep the kind of depth across all sizes that we used to. At the same time, our customers won't succeed with empty shelves”

Who holds the inventory risks will always be an issue of relative strength and leverage between trading partners. Often it is the larger trading partner (which may be a manufacturer, wholesaler or retailer depending on the industry and market) placing demands on smaller counterparts to hold or even own inventory until it is ready for use. This consignment-based practice is considered 'world-class' and used by a number of leading companies including Dell and many automotive organisations. We can see how this creates a heightened sense of concern for managing inventory and costs amongst smaller sized firms (Figure 2).

Generally, the more sophisticated the firm is at managing inventory, the better risk/reward available. There are diminishing returns however, to even the most sophisticated players that push inventory risk onto their partners.

The challenge is for the trading partners to operate as a truly

interdependent group, building platforms that lower inventory and associated costs across the entire group and not just reducing the days inventory held for themselves. Our research indicates 15-20% inventory improvement and 20-25% cost reductions are possible when trading partners synchronise inventory requirements from the end-customer back to the original manufacturers, and act collaboratively to share infrastructure, adopt standards and other mutually beneficial improvements.

In April 2001, Cisco, shocked the business community when it announced that forward visibility of demand had vanished. Cisco held over a year's supply in some components and was required to write-off \$5 billion or almost two-thirds of total inventory. There are few stories of Australian firms being surprised with the lack of visibility to match Cisco and if our survey respondents have their way, the chance

of such an occurrence will be even less. The key, according to many of our survey respondents is visibility.

The Supply Chain Manager of a large international electronics manufacturer said;

“The length and breadth of the Australian supply chain means that there is a high penalty paid for ‘getting it wrong’. We see visibility and control of inventory as a prime enabler to reduce the frequency and cost of wrong decisions.”



Figure 2. Common 'Top 5' objectives over the next 12 months

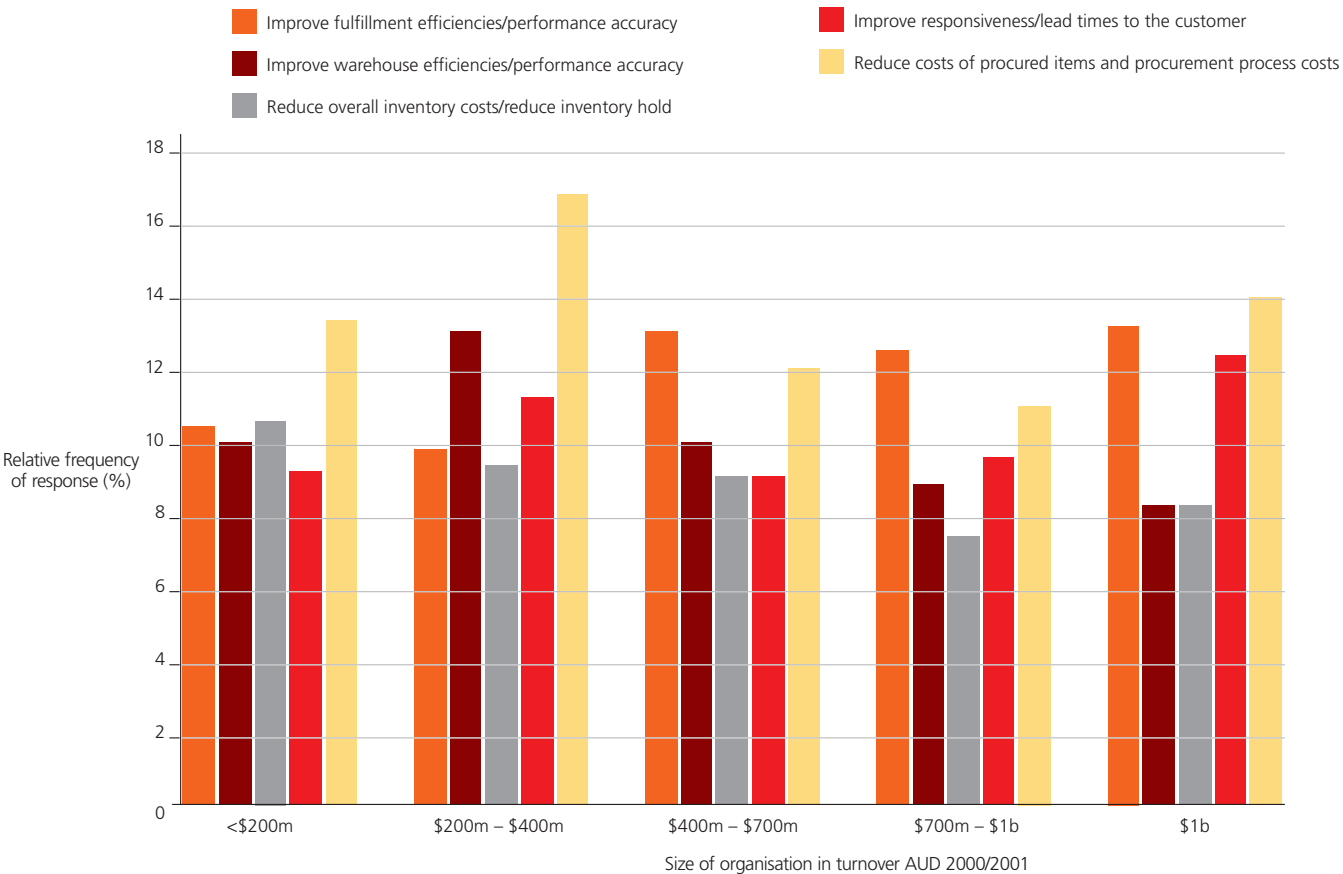
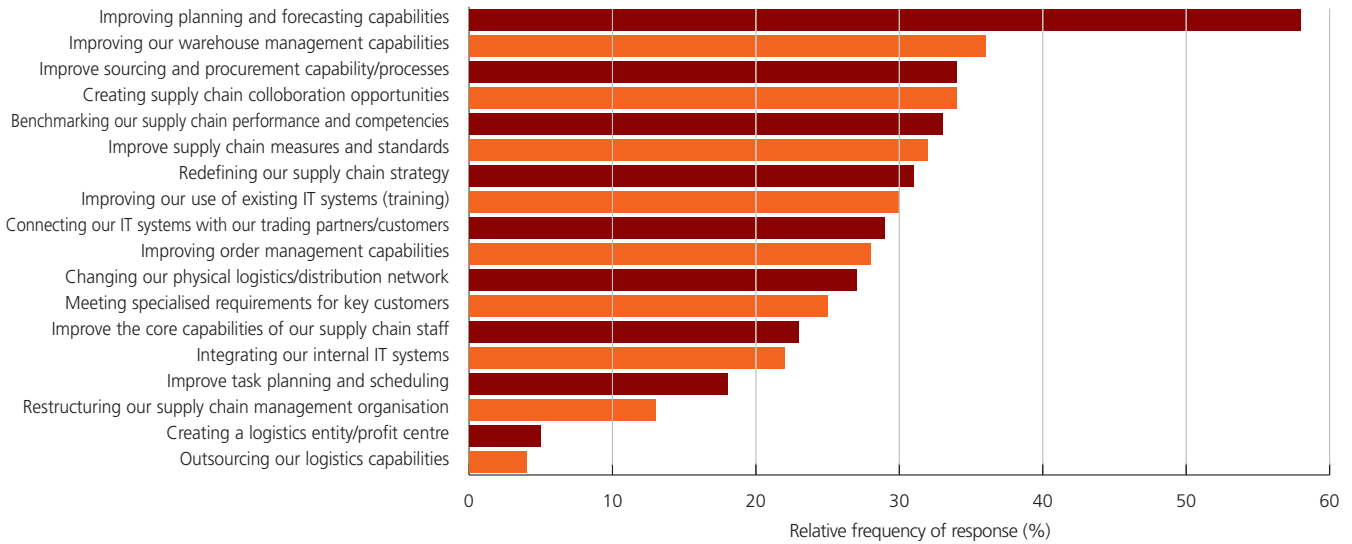


Figure 3. Challenges that executives will be focused on meeting in the next year.



IMPROVED FORECASTING CAPABILITY

In alignment with the primary objectives to reduce inventory and associated costs, survey respondents also indicated a concentration on improving their abilities in planning and forecasting. Underlying these efforts will be initiatives to improve warehouse management and visibility (Figure 3).

While still in the early stages, companies have already begun the work of designing new forecasting procedures and acquiring planning tools to manage the massive amounts of information within the company.

Looking toward the next 12 months, most effort will be focused on getting these procedures and systems implemented and leveraging the benefits into improved inventory and distribution performance.

The Managing Director of a beverage producer explains;

“Forecasting performance is a significant driver for our supply chain costs. In fact, the majority of our costs are driven by our attempts to fulfil what we didn’t think would happen. That is why Sales and Operations planning must form the foundation of all that we do... we have a lot of work ahead of us in getting it right.”

Some would argue that such an emphasis on forecasting and planning tools is all wrong, and that forecasts should be eliminated altogether and

instead replaced with full visibility on end-customer orders, and a ‘build-to-order’ supply chain with sophisticated event management processes.

‘Build-to-order’ models certainly have merits and the Japanese auto manufacturers made great progress with Kanban and JIT, but too often discussions and examples surrounding these models fail to view the upstream and downstream operations and the level of great forecasting required.

Perhaps the better answer lies in having a solid forecasting process coupled with the ability to manage or at least influence demand. By solid forecasting, we mean:

- ▶ Includes central and local view points on key market futures such as competitor’s promotions
- ▶ Measures and holds participants accountable to the accuracy of the forecast

Figure 4. What specific forecasting and planning improvements have you undertaken in the last 12 months.

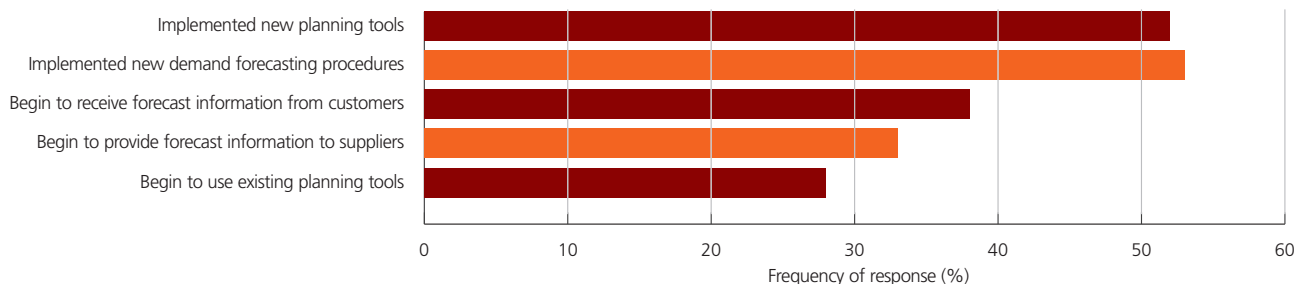
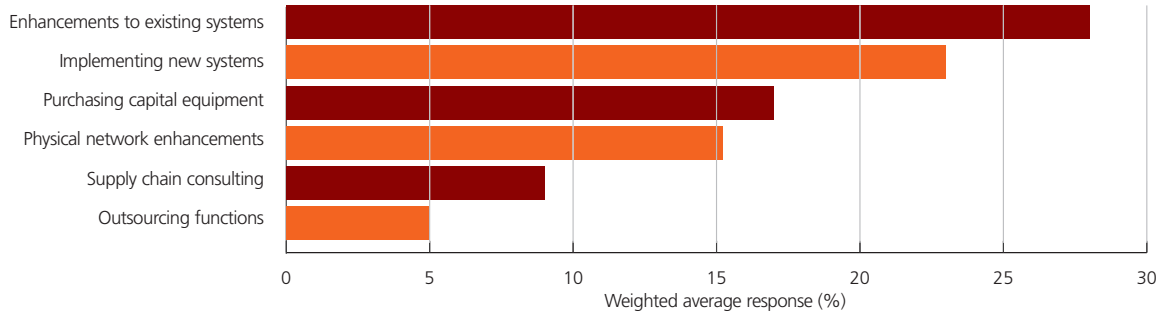


Figure 5. How supply chain capital budgets will be allocated



IT tools that provide segmentation, robust algorithms, exception highlighting and forecast accuracy measurements

A management team who apply clear business rules across the inventory including safety stock, stock segmentation, and the customer service promise.

Demand Based Management (DBM)¹ has recently been identified by Professor Hau L. Lee of Stanford University in California as the next competitive battleground in the supply chain area. DBM is a set of tools and processes that are used by market and supply chain staff to influence demand but in a way that considers all supply chain costs and uses these factors to maximise margins. According to Dr. Lee, early examples of businesses coupling demand based management with solid forecasting processes and a responsive supply chain, have seen results ranging between 50% and 100% in net profit improvement

Some managers in Australia are already adopting this approach.

As one manager from a large international apparel producer explained;

“The Australian market for us is entirely an issue of generating demand and efficient fulfilment. We think about this in terms of a demand chain rather than a supply chain. This requires our marketing people to be attached at the hip to our distribution staff.”

A final point of interest is where Australian companies will not focus their energy in contrast to their North American and European counterparts. Only a very small, (4%), portion of our respondents will be launching initiatives to *outsource* all, or parts of their supply chains. This is quite different to the results of a recent North American study, indicating over 50% were considering outsourcing supply chain processes. North American managers are not only looking to outsource additional non-core functions, such as transportation and logistics, but upstream supply chain activities such as procurement.

This difference can be partly attributed to the intense focus that supply chain managers will place this year on inventory management, which can potentially yield more *immediate* fiscal benefits. Recent research into the current market for Logistics Outsourcing² also indicates that it is also difficult for customers to find where outsourcing providers can add value beyond simple asset management.

IT IS BACK

Supply chain reengineering projects will receive increased funding over the next twelve months, relative to previous years according to the majority of our survey respondents. This comes as no surprise as the leverage for productivity improvement available through supply chain initiatives is now widely recognised by senior management.

The Managing Director of a large food manufacturing company said;

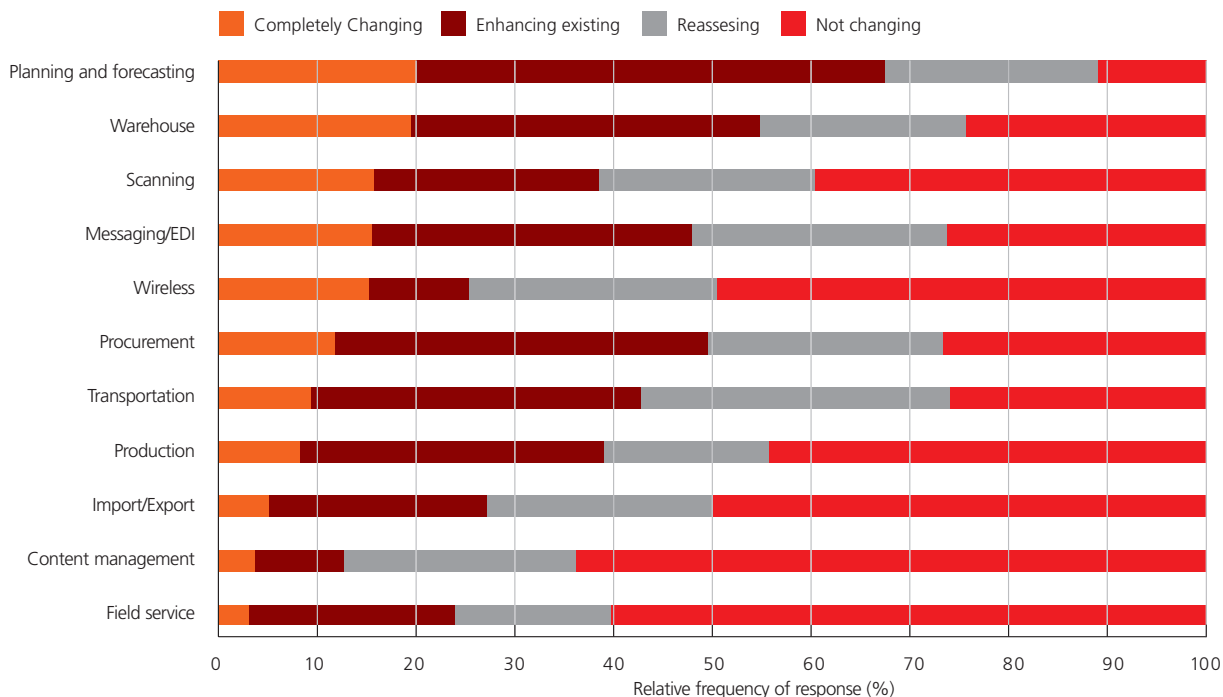
“From a cost perspective, our outbound supply chain activities represent approximately 8% of our sales or 40% of our profits. There is no question that even small gains here can have powerful implications for us. From a service perspective, the supply chain gives us a platform to differentiate ourselves from the rest of the industry.”

What is surprising however, is where the capital allocated for changing the supply chains will be spent. Asked about where budgeted new capital for supply chain improvements is likely to be spent, the responses indicated that over 50% of the spending will be IT related as seen in Figure 5.

A little more than one-half of IT budgets will be dedicated to getting more from existing systems and the remainder going to implement new applications.

Contrary to several recent reports predicting a continued tightening of IT spending³, a majority of respondents are planning to increase their IT budgets allocated to supply chain issues. In response to the question: What is the planned change (increase/decrease) in your IT spend on your supply chain for the next 12 months, over 60% of our respondents, across all industry size groups, indicated an increase. How will these IT dollars be distributed across

Figure 6. Activities in specific IT application areas



projects? The most active area again is aligned with inventory management, demand planning and forecasting (Figure 6).

As the Operations Director of a major food producer explained;

“We have thousands of sku’s but like other companies, only a few hundred make up 90% of our sales. Without the right tools, we have to spend our time each week reviewing sales and forecasts for the entire lot. This keeps us from focusing on improving order accuracy on the fast selling items.”

Beyond planning and forecasting tools, Australian firms will be looking at warehouse management and procurement tools as another area of IT spend, largely focused on filling the information gaps in providing specialised processing needs that are industry dependent.

Given the collapse of auction and net marketplaces, it is not surprising to see

that e-procurement received the least amount of usage over the net. Users remain skeptical about adopting these technologies and integrating them into their core procurement practices. Whether it is purchasing direct or indirect goods, less than 15% of respondents are seeking to implement specific eprocurement technology and less than 8% joined some form of eprocurement marketplace or exchange. Instead, we see companies remaining focused on further consolidation of suppliers and on re-engineering internal purchasing processes, then looking toward e-procurement once their own processes are operating properly. Speaking on e-procurement tools, one CEO from a major dairy producer remarked;

“There is plenty of smart technology out there. We just need to get the fundamentals in place to use it.”

Finally, messaging and connectivity will receive funding this year as firms look to streamline their interactions

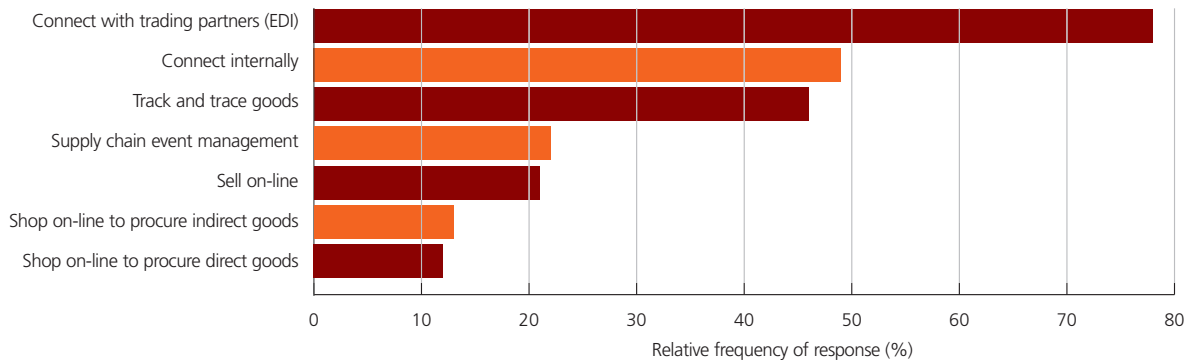
through more efficient communication of both information and transactions. Our research indicates that many of these projects will be small and very focused on immediate cost savings using tried and tested service providers.

THE INTERNET IS DEAD... LONG LIVE THE INTERNET

The good news is that in relation to the supply chain, the net is very much alive, and spreading. From the survey, we can see a clear focus over the next 12 months towards the practical, day-to-day exchange of key transactional data (Figure 7). This represents a further ‘opening up’ to external trading partners and puts the use of the Internet beyond the arms length electronic handshakes made via email.

Security and reliability issues made it rare to see many trading partners using the net for any more than a small portion of core transactional processes. With the risks of doing real business on-line now considered less of an issue, using the net for live transactions will spread. As one Director from a Building Materials firm remarked;

Figure 7. Plans for using the Internet in supply chain activities



“Our people have been comfortable getting information off the net for a while. Who sells this product? Where is my order? We are just now edging into the easier parts of the transactional processes, like order receipt, invoicing, purchasing and payments. But, we won’t be going as far as letting customers peer into our inventory status or other mission critical data.”

According to our respondents, about 80% will use the net for connecting with trading partners to exchange transactional data. Many EDI users will be moving from these relatively more expensive services, to cheaper Internet based methods. Recent research published by Dawson Consulting⁴, indicates that eliminating delays in getting actual demand data to manufacturing plants and purchasing departments will be a focus of internal communications with the aim of reducing shortages or excess and obsolete inventories.

Australian companies will also aim toward higher internal visibility of forecasts, inventory status, shipping status and product availability to ensure better synchronisation and management. As one major agricultural machine equipment company expressed;

“Visibility is critical. You cannot control what you cannot see.”

Finally, an emerging application, Event Management (sometimes referred to as Supply Chain process management), will cover about what 25% of respondents say will occupy web time. Dawson Consulting have identified this category as the ‘one to watch’ before making any investment. Certainly our survey shows that most companies will wait this one out and re-assess Event Management at a later date. Less than 15% of respondents have indicated that this area will receive the any IT funding over the next 12 months.

As one supply chain IT analyst from Bear Stearns, a Wall Street investment banking firm, remarked;

“Event Management has become somewhat of a joke on the street since nobody can tell us what it is.”

START SLEEPING WITH THE ENEMY

Supply chain collaboration efforts continue to grow with 70% of respondents indicate that their company has specific projects underway to improve the supply chain with trading partners. Most of this work is evenly spread across several target areas with IT system connectivity (i.e., messaging and data exchange) receiving the most attention. This work has touched a

chord with senior management as a ‘target rich’ environment for cost and inventory reduction.

The Supply Chain Director from a leading FMCG organisation said;

“The key to any sustainable collaboration initiative, is to identify how our processes drive costs in our trading partners organisations.”

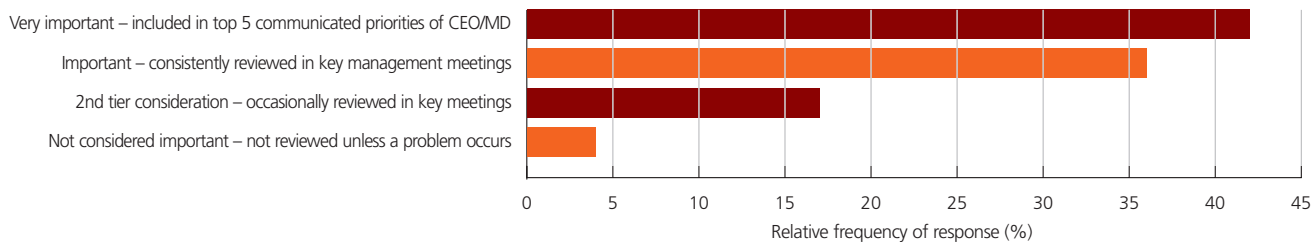
Over 80% of respondents indicate that senior managers are directly accountable for delivery results from collaborative initiatives with less than 1% assigned at the supervisor level. Our research dictates that this level of commitment will continue.

Our work with Australian firms continues to point at the fundamental supply chain process as a key source of value in collaboration projects. As in all good process change work, technology should follow process redesign.

This may seem easier than it really is. Companies, especially major trading partners, should be well aware of how to approach these efforts, as they are different than IT planning with a single organisation, for instance:

- ▶ Capital expectations must fit affordability of the lowest common denominator
- ▶ Decisions on standards can be painful, but they are like gold
- ▶ Major trading partners need to take the lead providing resources
- ▶ Contingencies must be determined as

Figure 8. How important are supply chain issues to the CEO in your company



one partner may have a crises which could stop an entire project

- Standard data quality, security, system reliability must be set and ordered

MEET YOUR NEW CHIEF SUPPLY CHAIN OFFICER (CSCO)

The survey results reconfirm that the supply chain continues to be a key source of competitive advantage and one that consistently ranks amongst the top 5 strategic issues of the CEO (Figure 8).

Part of the ‘rise to the top’ for supply chain issues is the recent boardroom focus on improving cash flow and margin through more efficient processes and cost reductions. With all the quality improvement and reengineering that occurred in the last 10 years in areas such as order management, product development, manufacturing and customer service, it is difficult to find a richer area for development than that of supply chain processes.

With the process management focus of the early 90s, many organisations assigned a process owner to the supply chain. This was a major advance as

organisations begin to measure the supply chain as a true process and at least someone was able to recognise and point out areas of inefficiency. More recently, companies have been assigning a Chief Logistics Officer (CLO) or the Chief Supply Chain Officer (CSCO) that reports to the CEO, who has the responsibility for supply chain performance and has the clout to change or influence how functions like marketing and sales make decisions.

Today’s organisational structures reflect this point as positions responsible for the entire supply chain are already reporting directly to the CEO in over 60% of responding companies.

The inclination is to keep this structure in vogue for the near future as over 75% of organisations feel that this role should report at the senior management level.

This will put pressure on supply chain executives to more closely understand the strategic issues of the business and its key customers with the aim of moulding the supply chain into a key differentiator.

CLOSING REMARKS

For our size, we have phenomenal choice. What this survey has highlighted, is the way Australian organisations utilise economies of ‘scope’ rather than scale to achieve the cost and service targets set by increasingly present global brands.

Addressing the management of scope has emphasised the importance of managing demand and the flexibility required of the fulfillment chain. The limited interest shown by survey respondents in further outsourcing components of their supply chain, indicates that more than ever before, Australian managers are looking to solve their problems directly, by themselves.

Information technology will be key to delivering the capabilities and efficiencies demanded by Australian supply chains. The fact that approximately half of this investment will be spent upon enhancing existing systems rather than ‘the next new thing’ also highlights the pragmatic nature of our managers. It also demonstrates that the massive investment in ‘ERP’ systems is yet to be fully leveraged. □

Foresight Survey Appendices

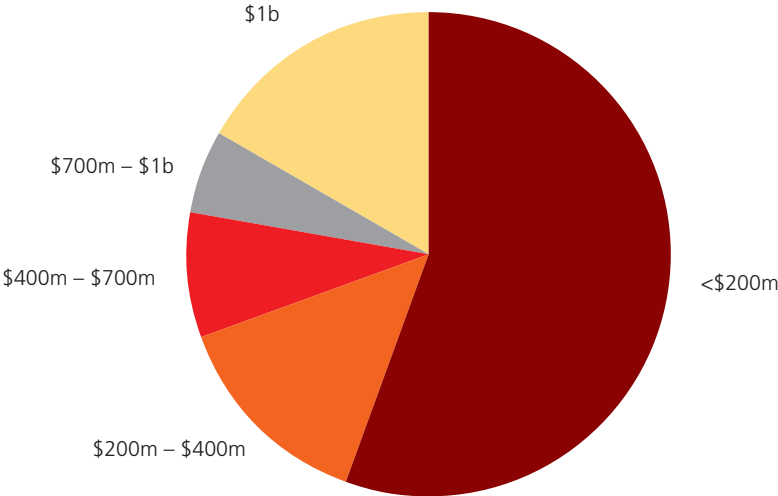
APPENDIX 1

Demographic Analysis of Survey Participants

Figure 1 –of Respondents by industry sector

Respondents industries	
Agriculture	12%
Communication	1%
Construction	2%
Government and Defence	1%
Information Technology	5%
Manufacturing – Building Materials	4%
Manufacturing – Food/Beverage	12%
Manufacturing – Machine Equipment	1%
Manufacturing – Metal Products	5%
Manufacturing – Petroleum/Chemical	5%
Manufacturing – Printing/Publishing	3%
Manufacturing – Textiles/Clothing	1%
Manufacturing – Wood/Paper	2%
Medical/Healthcare	4%
Mining	1%
Other	15%
Property and Business Services	1%
Retail Trade	4%
Services	6%
Utilities	1%
Wholesale Trade	10%
Total	100%

Figure 2. Respondents By Size of company in sales



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About

Dawson Consulting

Dawson Consulting, part of The Dawson Group of companies, is Australia's largest management consultancy specialising in Supply Chain Management, and the application of Supply Chain Technologies.

With a strong bias towards implementation, Dawson Consulting provides practical, sustainable solutions for modern supply chains. Consistently driving towards measurable outcomes, we generate a rapid return on investment for our clients.

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