



# THE FUTURE OF INDUS TRY

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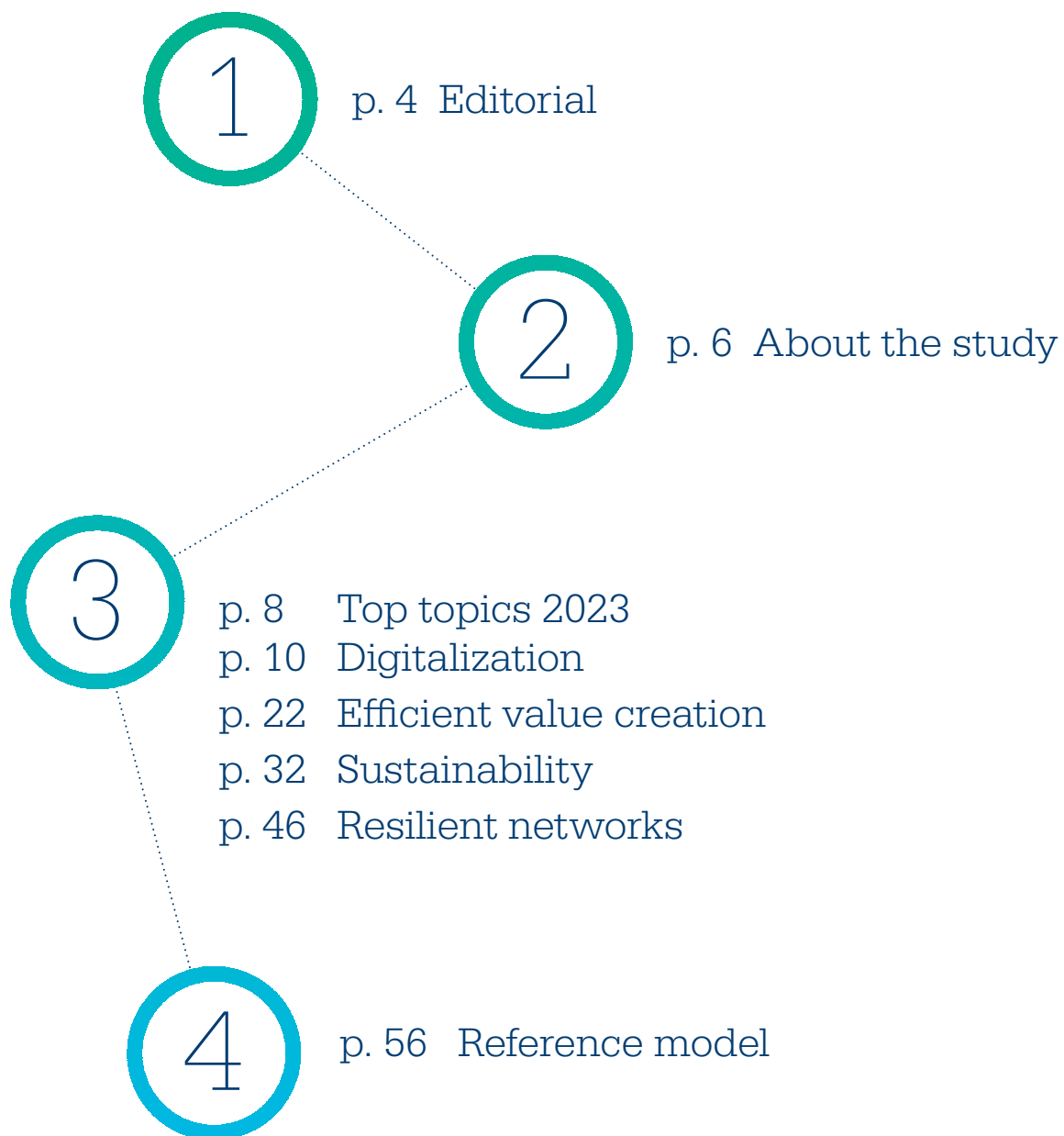
**THE FOUR DIMENSIONS  
OF COMPETITIVENESS  
2023**

A study by Staufen AG

**STAUFEN.**

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# CONTENT



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# 1. EDITORIAL



**Dear Readers,**

In the meantime, there are rankings for every industry. And if we're honest, although everyone says that they don't take these so seriously, we end up browsing and clicking our way through the ranking lists in order to find our own company – preferably placed in front of the competition.

For the consulting industry, such a ranking is the "Best corporate consultants" study conducted each year by brand eins and Statista. And yes, once again this year, we combed through the tables for our company name – and happily, found it right away in twelve categories. In addition to the pleasure of placing very well, however, we are especially taken by a statement in the preface to the study. "Consultants in this new era do not have to know better – but rather create knowledge," writes Chief Editor Susanne Risch.



Staufen AG and Staufen.Inova AG have long since arrived in this new era. For not only has our consulting approach been oriented toward working with customers to formulate new knowledge and then installing it permanently for a while already, with the Staufen Academy and our network of BestPractice partners, we have established several successful platforms for the communication and exchange of knowledge.

The present study, in which more than 400 industrial companies from all over German-speaking Europe participated, is also part of this Staufen knowledge culture. Our thanks this year not just to those who participated in the study, but also to the companies that have provided us with insight into their answer to the question how they assess and approach today's top topics, from digital and operative excellence to the green transformation, on through to the construction of resilient networks.



We hope that you will find the results of the study and insights from the companies as exciting as we do, and we look forward to the upcoming knowledge sharing with you that builds on these.

Wilhelm Goschy  
CEO, STAUFEN.AG

Urs Hirt  
Co-Managing Director, Staufen.Inova AG



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# 2. ABOUT THE STUDY

For the present study, the corporate consulting company Staufen AG **surveyed a total of 401 industrial companies in Germany, Austria, and Switzerland.**

The survey was conducted in February 2023.



We are required to work on many strategic topics in order to set ourselves up better for the future.

Frank Kullik, Leiter Qualität / Head of Quality,  
HARTAL Hans Holzauer GmbH & Co. KG



Since 2008, one crisis has followed the next. Everything is in constant flux and will be examined. My lesson from this: Everything changes, but much slower than it seems.

Jan Ammermann, Director of Human Resources,  
HG COMMERCIALE



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# 3. TOP TOPICS OF 2023

## **From multi-challenge to multi-opportunity**

To become simultaneously digital, efficient, sustainable, and resilient, many companies are facing big challenges today.

The Staufen study "The future of industry 2023" demonstrates that the executive boards and managing directors in industry have clearly set their strategic compass.

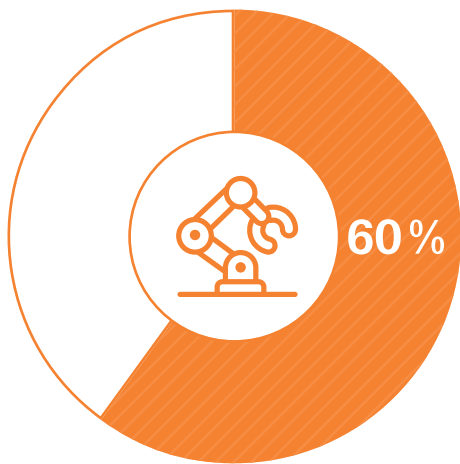
The basis for such sustainable and transformation-capable, resilient companies is and remains operative and digital excellence. Set up this way, a multi-challenge becomes a multi-opportunity and can adopt entirely new business models.



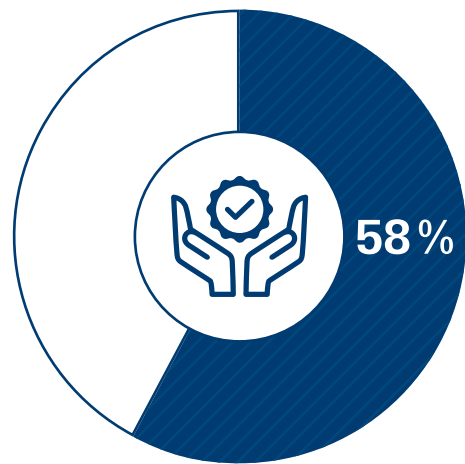


**On which two topics have you focused especially this year?**

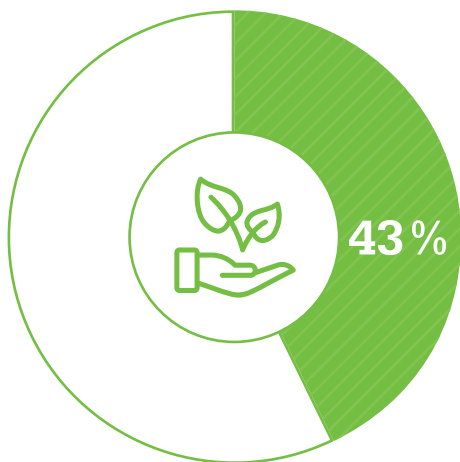
**DIGITALIZATION**



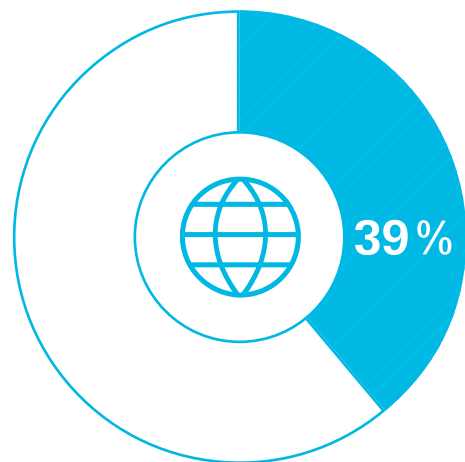
**EFFICIENT VALUE CREATION**



**SUSTAINABILITY**



**RESILIENT NETWORKS**



3.1 TOP TOPIC



# DIGI TALIZ ATION

## There's still room for more

When it comes to the topic of digitalization, the question has long since not been whether, but how.

The majority of companies still answer this question for themselves with measures to increase efficiency. In the medium- to long term, there is no way to escape new business models if the question is how to make one's own company fit for the future.



There has always been transformation, but the speed has increased due to globalization and digitalization. Even if there is still improvement potential, recent years have shown that we are well set-up for this.

**Tobias Gerfin, CEO,  
KUHN RIKON AG**



Interview with Dr. Ralf Eisenbrandt, Head Global Operations Consumables, Roche Diagnostics International AG

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## "We can't yet estimate what kind of a revolution is taking place now."

From personalized medicine to AI-supported image evaluation – at Roche Diagnostic International AG, digitalization is already a permanent component of the business model. Nevertheless, Dr. Ralf Eisenbrandt, Head Global Operations Consumables, is convinced that caution should still come before speed in the digital transformation.



**The study also shows that most digitalization projects are about improving efficiency. Only one in three companies is thinking about new business models. Is this enough?**

**Eisenbrandt:** Not all departments at a company focus on new business models. It depends entirely on the area you're looking at. In production, for which I'm responsible, we use our data first and foremost for more efficient processes in manufacturing. In other areas, Roche relied very early on the application of new data models. Thus, for example, the company has invested in the area of personalized medicine.

**The term Industry 4.0 first appeared in 2011 at the Hannover Messe. And yet – also the result of the Staufen study – the potential of digitalization in production is not even close to being exhausted. In your opinion, far along is the economy on the path to the smart factory?**

**Eisenbrandt:** For products with narrow margins, we already see the progress of digitalization very clearly. Thanks to the digitalization of factories, for example in the automobile industry or in the food sector, throughput and cycle times are shorter. In MedTech and pharma, we aren't quite so far along; we haven't yet started to generate optimization potential from the large quantities of data.

**According to the latest Staufen study, almost every second company has initiated new digitalization projects despite the slowing economy. How do things look in your industry?**

**Eisenbrandt:** Even if other industries have certainly been advancing the topic of digitalization for a while already, the MedTech sector is lagging a bit. With regard to Roche, I can say that large parts of the business model are already attuned to a digital future.

### How might it be possible to speed up this topic?

**Eisenbrandt:** Instead of pushing for speed, we believe it's better to exploit the potential of digitalization by approaching it step by step. First we need to see what we want to have at the end of the day. This results in more stable, effective, and higher-quality production. Digitalization makes it possible for us to make this jump.

### It almost seems as if there is a dichotomy in the economy when it comes to digitalization. Half is very committed, while the other half is stuck with testing and individual projects. Is that true?

**Eisenbrandt:** Here you can't forget that digitalization means investment. Companies have to provide capacities in order to finance progress. That's why many people ask themselves whether it will pay off for them. This is especially the case if current factories have a residual life of 10 to 20 years and have not yet been written down. Each company must therefore decide for itself what is the right time for a business case. On the other hand, companies miss out on an opportunity if they set themselves strategic goals because they're

not interested in digitalization. For digitalization will come; the question is only how quickly a company will join up.

### One final question. No other digitalization technology has generated as much excitement in recent months as artificial intelligence. In your view, how will things proceed here?

**Eisenbrandt:** ChatGPT is showing us for the first time what the consequences of AI can be. In industry, we can't yet estimate what kind of a revolution is taking place now. It's an extreme jump to how we will access data in the future and how it will be made available to us.

## About the interviewee



Dr. Ralf Eisenbrandt is Vice President and Head Global Operations Consumables at Roche Diagnostics International AG. This engineer, who received his doctorate in biotechnology at the Max Planck Institute for Molecular Cell Biology and Genetics, has worked for Roche for nearly 20 years. He has held numerous leadership positions within the company in Switzerland, Germany, and Brazil.

## About the company

Roche Diagnostics International AG is a subsidiary of Roche Holding and is headquartered in Rotkreuz (Canton of Zug). The company is one of the global leading suppliers of diagnostic systems for hospitals, laboratories, and doctors' practices. In addition to the main location in Switzerland, there are branch offices in Mannheim, Penzberg, and Ludwigsburg. There are other branch offices with R&D activities in the USA.

Interview with Jens Kohlhaas, Business Process Consultant  
WIEPROconsulting – Process management und  
Gero Bockelmann, Manager System Planning - MAXOLUTION®,  
SEW-EURODRIVE GmbH & Co KG

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## "Digitalization is not a project, but a process"

SEW-EURODRIVE is a true pioneer in Industry 4.0. The drive specialist has not only been digitalizing its own 17 plants for many years, but also helps its customers worldwide with factory automation. Jens Kohlhaas, lean in-house consultant at SEW, and Gero Bockelmann, smart factory expert at the family-owned company in Bruchsal, Germany, explain in an interview why digitalization is more than just an efficiency tool.



These flat logistics assistants supply the assembly stations with the necessary materials just in time. Source: <https://www.sew-eurodrive.de>

**According to the latest Stufen study, almost every second company has initiated new digitalization projects despite the slowing economy. Your company too?**

**Kohlhaas:** As in the entire industry, many things have happened at SEW-EURODRIVE in the past three years. Value chains were disrupted. Nevertheless, we have invested a great deal of effort and energy in advancing digitalization projects. The spectrum ranges from the company-wide project "Smart for SEW", the core of which is the conversion to SAP S/4 Hana, to

numerous product developments and optimizations in value-adding processes.

**The study also shows that most digitalization projects are about improving efficiency. Only one in three companies is thinking about new business models. Is this enough to not only survive the crisis, but to remain viable beyond it?**

**Bockelmann:** Digitalization projects are often a feeling-out process. You know you have to do something, but you do not know how to get the best out of it. That is why many are embarking on efficiency improvement projects. As a result, employees are beginning to "think more and more digitally." This change in mind set, in turn, has implications for the development of the entire organization. However, it is important to realize that this is only the first step; after all, increasing efficiency in your plant is nice, but the real benefits of digitalization come from alternative business models.

**Kohlhaas:** In addition to the technology, the pioneers of Industry 4.0 always have a business model in mind. In our case, our own plants are a fantastic "playground" for testing new technologies and approaches. Always thinking about how to use them to create new prod-

ucts later on. So we use digitalization to improve our own efficiency, but we always see the potential to take our solutions to market. I think it is similar for other companies that are intensively involved in digitalization.

**It almost seems as if there is a dichotomy in the economy when it comes to digitalization. Half is very committed, while the other half is stuck with testing and individual projects. Is that true?**

**Kohlhaas:** I would not draw such a hard line. A company like SEW-EURODRIVE, whose core business is strongly influenced by digitalization, is naturally concerned with this topic. An example: In the past, drives were needed for traditional conveyor belts, but the trend toward automation and flexibility in intralogistics now requires completely different products with greater functional scopes in terms of control and networking. Companies whose core business is not so directly affected are likely to be even more reluctant.

**No other digitalization technology has generated as much excitement in recent months as artificial intelligence. How does SEW-EURODRIVE deal with this?**

**Bockelmann:** We have AI projects in purchasing and sales, where various tools are already being tested as part of the digitalization strategy. AI is also already a topic in the development areas – this is where the first ideas for new business models and products are emerging. The intensive study of the subject is the first important step in order to be able to operate on the market in the future..

**Many companies now publish annual figures on when they plan to become carbon neutral. Do you have a target date for when you would like to go fully digital?**

**Bockelmann:** To quote our Digital Transformation Officer: “Digitalization is not a project, but a process that will continue to accompany the company in the future.” There are already many technologies, but they will continue to evolve.

## About the interviewees



**Jens Kohlhaas**  
Business Process Consultant  
WIEPROconsulting – Process  
management  
SEW-EURODRIVE GmbH  
& Co KG



**Gero Bockelmann**  
Manager System Planning –  
MAXOLUTION®  
SEW-EURODRIVE GmbH  
& Co KG

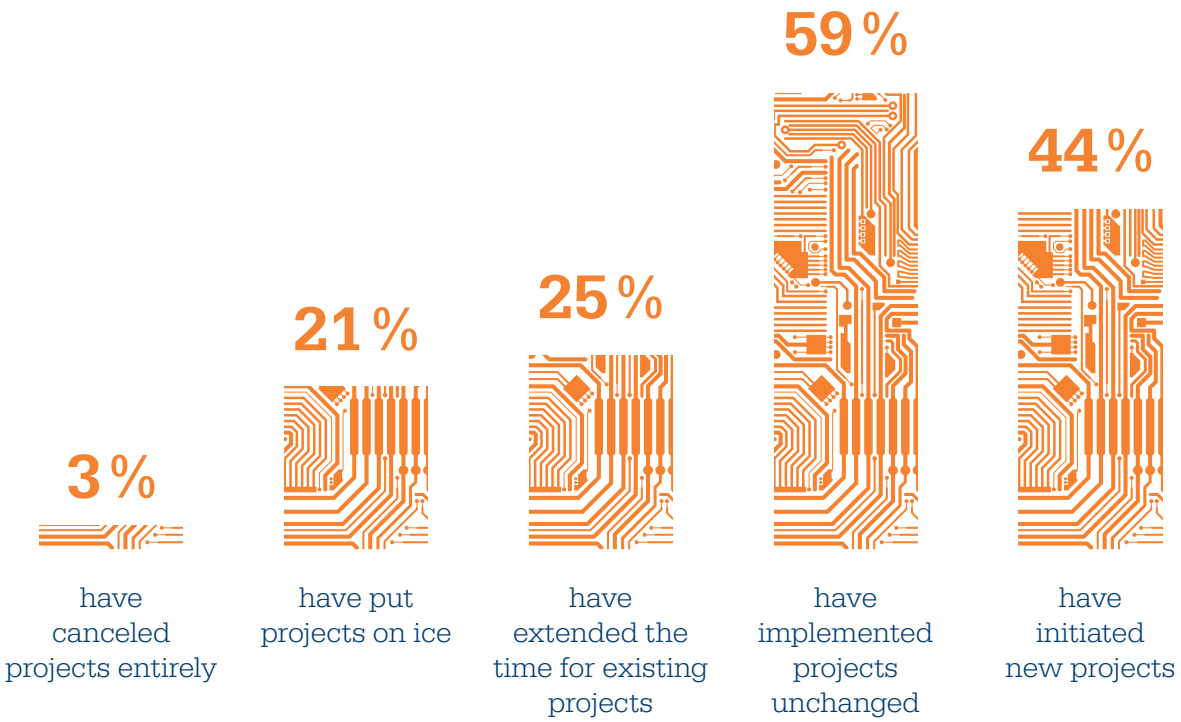
## About the company



With sales of 3.6 billion euros and around 20,000 employees, SEW-EURODRIVE is one of the international market leaders in the field of drive technology and drive automation. Headquartered in Bruchsal, Germany, the owner-managed, family-owned company is rooted in the region while maintaining a presence in 54 countries around the world. SEW-EURODRIVE's claim to technological leadership is underscored by the fact that more than 800 employees work in research and development.



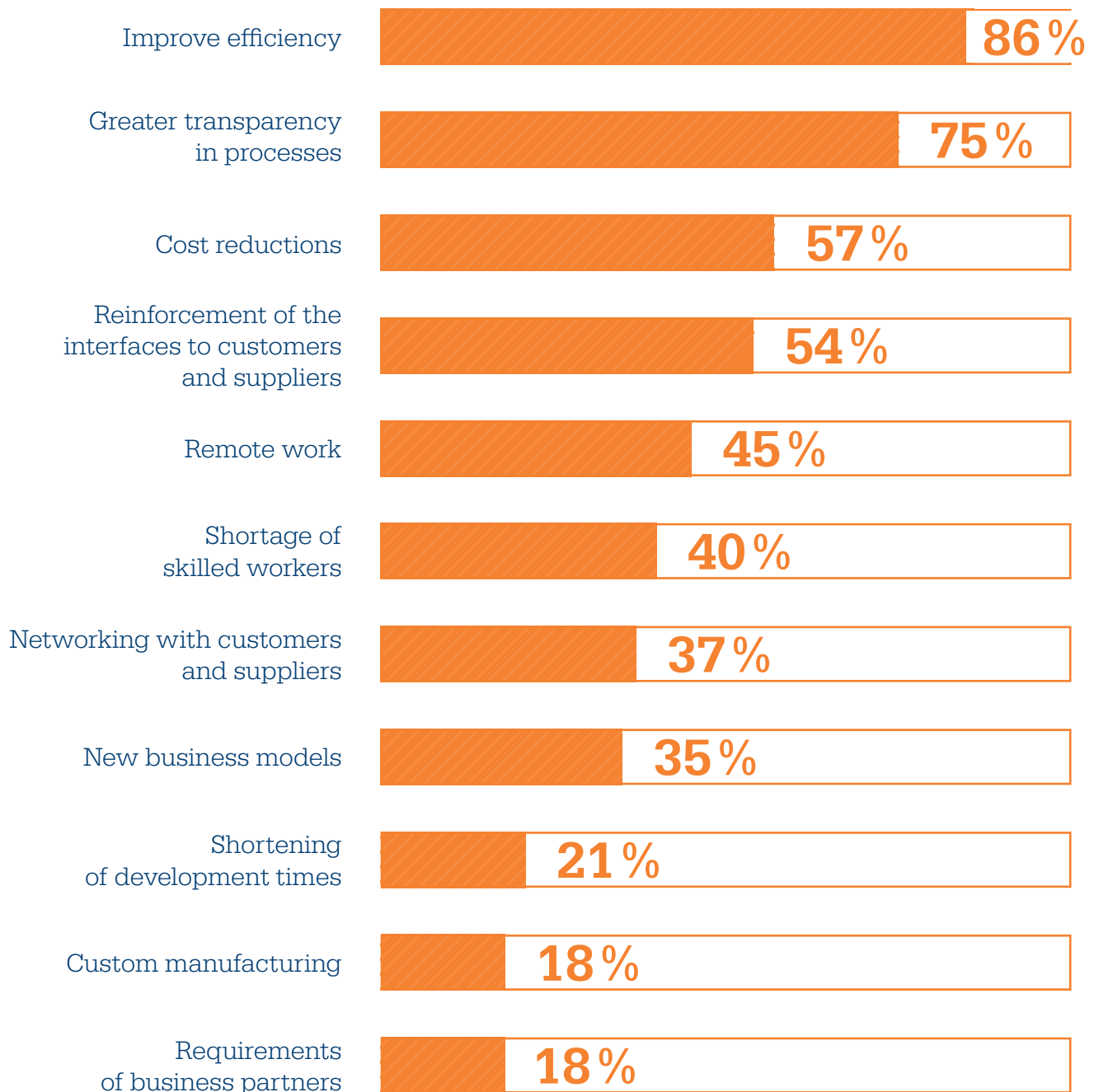
Due to the slower economy, have you stopped digitalization projects or, in contrast, started new ones?



Economy and digitalization:  
Current economic development  
continues to advance digitalization.



## Which current challenges are you trying to approach with digitalization?



## Digitalization in the company:

Industry continues to rely on efficiency increases.

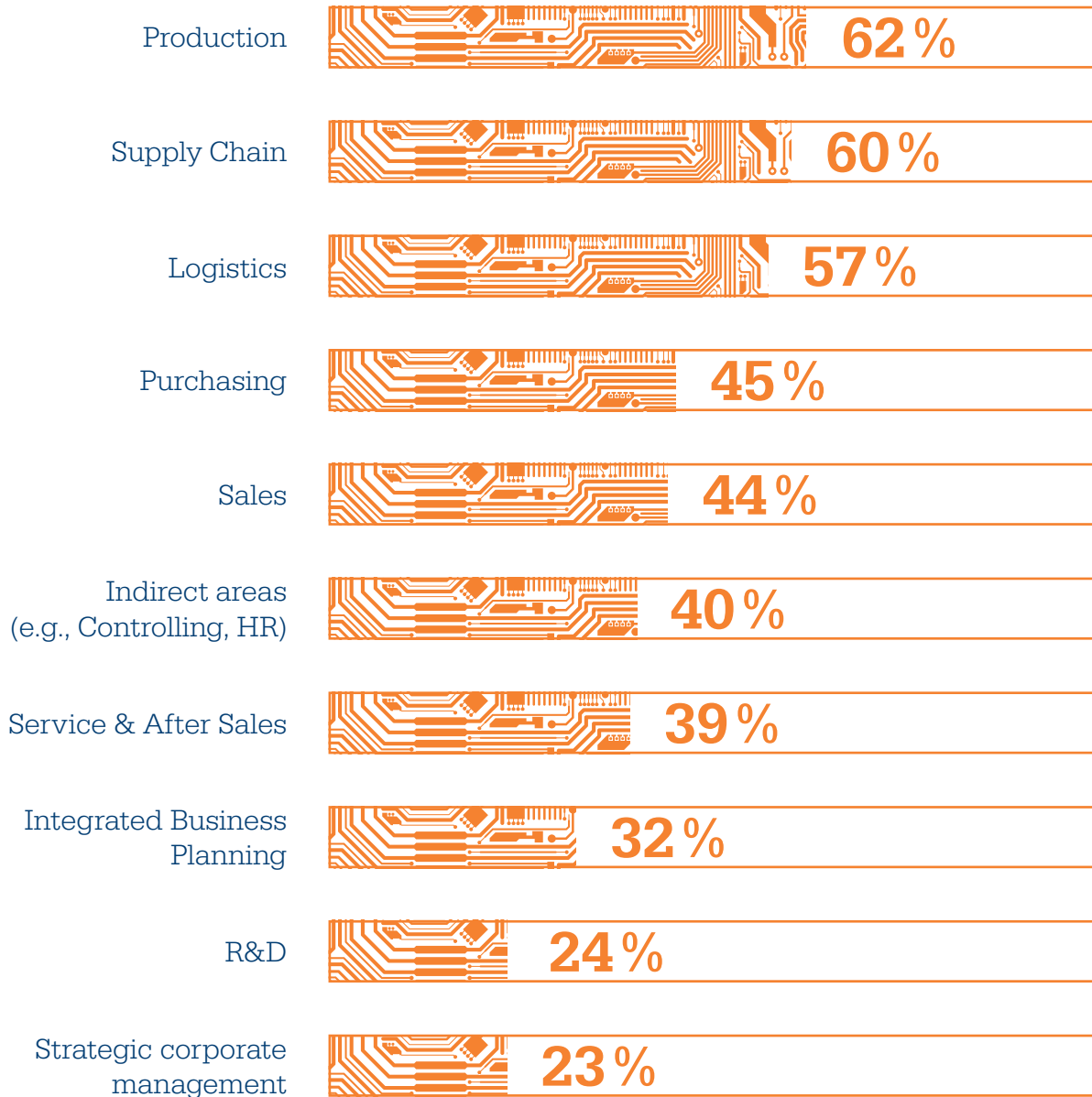


Especially when it comes to digitalization, it appears that the world is developing too quickly to be able to keep up with all requirements. Just think about ChatGPT, Blockchain, Metaverse, Cybersecurity & Co.



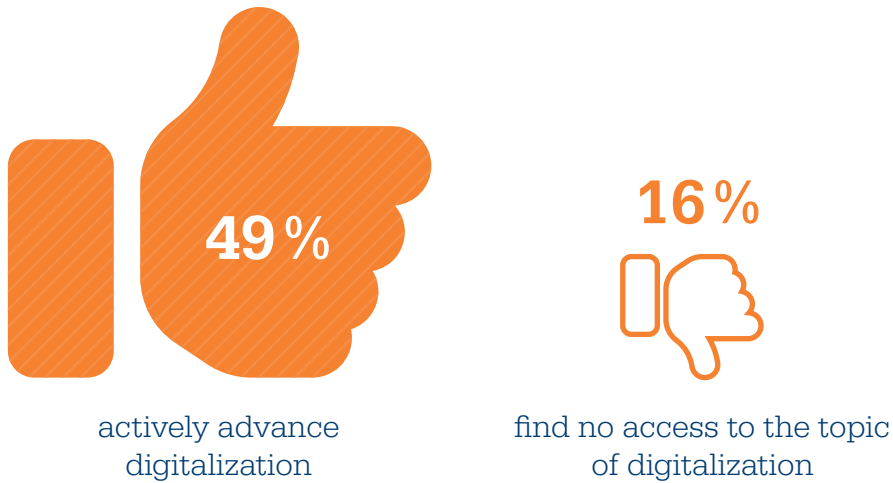
**Norbert Ludwig, VP Operational Excellence and Services,  
Dätwyler IT Infra AG**

## In which areas do companies see the greatest digitalization potential?



Three main areas for digitalization:  
the greatest potential lies in production, in the supply chain network, and in logistics.

How do companies approach the top topic of digitalization?



Digital two-class society:  
Only every other company is actively advancing this topic.

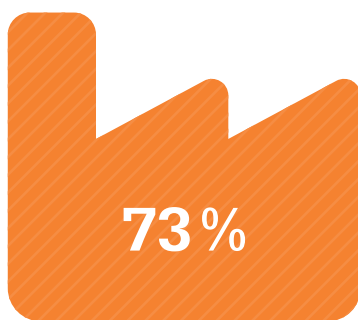


Digitalization is a big topic for us. However, change management is also very important here. It's important to train people how to use new tools and to test them in advance.

Andreas Wunderlin, Division Manager Product Management Water+,  
Belimo Automation AG



How far along are companies with the digitalization of their products and services?



already offer products  
and/or services with 4.0  
qualities



also offer completely new  
business models  
based on 4.0

### Industry 4.0:

Smart products and services yes,  
digital business models sooner no



## 3.2 TOP TOPIC

# EFFICIENT VALUE CREATION

## Pushing the lean lever all the way

Lean Management is a very effective lever for companies to reduce costs, achieve their own growth goals, and improve their competitive capability for the long run. A cooperative leadership style and goal-oriented communication are indispensable here. However, many companies are leaving a lot of lean potential unexploited on the path to efficient value creation.

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In these crises, we have learned that taking a long look back is not successful enough. Instead, transformation should be advanced with quick adaptation. However, leaders may not march alone here. They must take the team along.

**Michael Glieden, Vice President, Production & Supply Chain,  
SCHOTTEL GmbH**



## "Asking the right questions from the start"

Böllhoff is the competence leader in fastening technology. Marcel Rupprecht, Managing Director responsible for the Group's European retail business, explains in an interview how Lean Management is practiced at the company and what role managers play in it.



**94% of companies surveyed for the Stufen study see Lean Management as a solution to today's challenges. Do you agree with this assessment?**

**Rupprecht:** Yes, because when applied correctly, Lean Management helps companies work more efficiently and position themselves for the future. Customer focus is at the heart of everything we think and do. At the same time, the aim is to implement efficiency improvements at all levels of the company. As a management tool, Lean Management is adaptable and, most importantly, it creates value.

**Is Lean Management used throughout your company?**

**Rupprecht:** At Böllhoff, we have been working with Lean Management methods in the production areas for a long time and also use them in accordance with our corporate strategy. What is new for us is the use in the administrative area. This is how we break down the silo thinking of individual departments. We replace it with a holistic, end-to-end process. The result of this new way of thinking about processes: more involvement in the big picture, fewer complaints, greater satisfaction for all involved, and lower costs.

**Where does Böllhoff stand today in terms of lean maturity?**

**Rupprecht:** Overall, we consider our maturity level to be high. But we are not resting on our laurels, we are constantly working to improve. The goal is to optimally coordinate all activities necessary to create value and eliminate waste. We do this by reviewing and improving the existing system from two perspectives: the customer's perspective and the company's perspective. For customers, we work to optimize availability, quality, individuality and pricing. From a business perspective, it is about sustainability and continuously improving competitiveness.

**What does this mean for day-to-day operations?**

**Rupprecht:** Lean makes our lives easier. We no longer sit in meetings and set new agendas, but work in



a goal-oriented manner. In the 30-minute regular communications we introduced across all teams, we focus on the three topics important to us: deviation management, incident management, and information and task management.

### Does this also work across departments?

**Rupprecht:** Absolutely. A practical example from our service and retail business: In the past, our many, many customer requests were passed from department to department and processed with too little filtering. In line with our Lean principles of "focused, excellent, value-creating," we are now very careful not to get lost in the details, but to examine inquiries much earlier to see whether they really are optimally suited for quotation in terms of application technology, logistics, and business. This is how we avoid long - and often useless - internal and external process loops. As a result, we have increased the success rate by better qualifying inquiries while improving effectiveness. In short, by asking the right questions from the start, we reduce effort and increase quality - for the ultimate perfect connection for and with our customers.

### The Staufen study shows: Value creation efficiency and leadership excellence are closely linked. Where do leaders still need the most training?

**Rupprecht:** Leadership excellence and employee empowerment remain the most important issues. This includes a collaborative leadership style with empathy, courtesy and respect for each individual, active ownership and passion - in everything we do. We have always made sure that our managers in the teams have a hands-on mentality. In order to recognize and develop potential, it is important to qualify and guide employees. Last but not least: Training in targeted communication! Without targeted communication, no one knows where the journey is going.

## About the interviewee



Marcel Rupprecht is Managing Director of Böllhoff GmbH in Bielefeld and CEO of Böllhoff Fastener Service Supply Europe. After studying business administration, he held various national and international management positions at Böllhoff. His responsibilities included the automotive distribution business and medium-size industry. Today, Marcel Rupprecht leads Böllhoff's European retail and service business as CEO.

## About the company

### **BÖLLHOFF**

Böllhoff is a global partner for 360° fastening technology with assembly and logistics solutions. Family-run since 1877, the company stands for long-term success through innovative strength and customer proximity. As a fastening specialist, Böllhoff knows the specific requirements of its customers from all industries and assists them in creating successful connections. More than 3,300 employees at the headquarters in Bielefeld and in global corporate group are shaping the future of fastening technology. In 2022, Böllhoff achieved sales of approximately 783 million euros.



Does Lean Management help manage current challenges?

94%



Lean Management is more important today than ever

Lean is smart:  
Lean Management makes companies efficient and fit for the future.

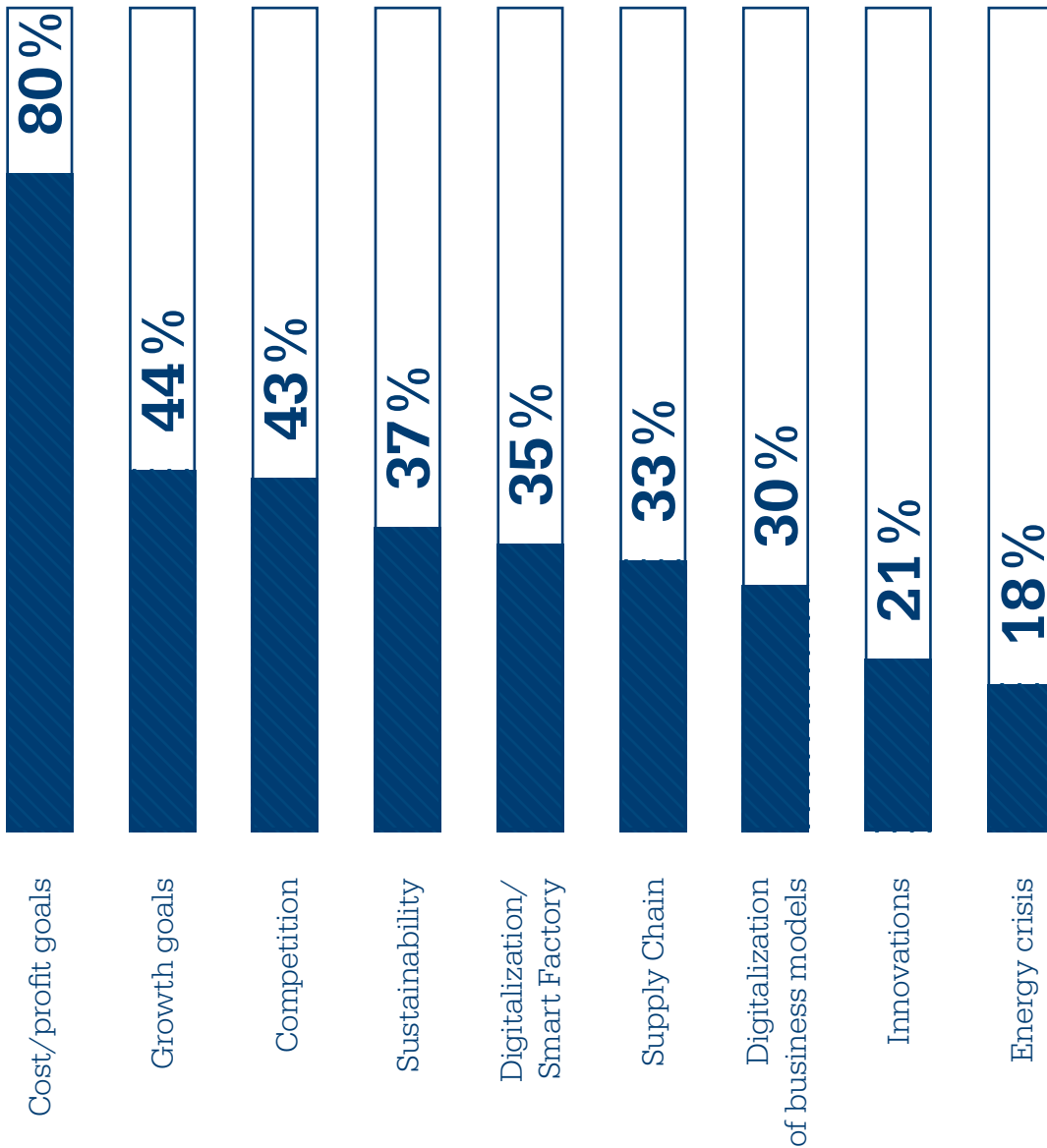


Many companies are lacking resources and capacities to perform their tasks radically and faster.

Karlheinz Tröndle, General Manager,  
TROKAMED GmbH



## What are the current drivers for the deployment of Lean Management?



Lean instead of red pencil:

Reduce costs and increase competitive capability  
at the same time



### How "lean" are industrial companies?

Strategy and organization implement the lean philosophy comprehensively



Our indirect areas also follow lean principles



Our value creation is aligned with the main lean principles



We have established a continuous improvement process



Thus far, we have not introduced Lean Management measures



**Lean companies:**  
**More than 50% rely in their value creation on Lean Management.**

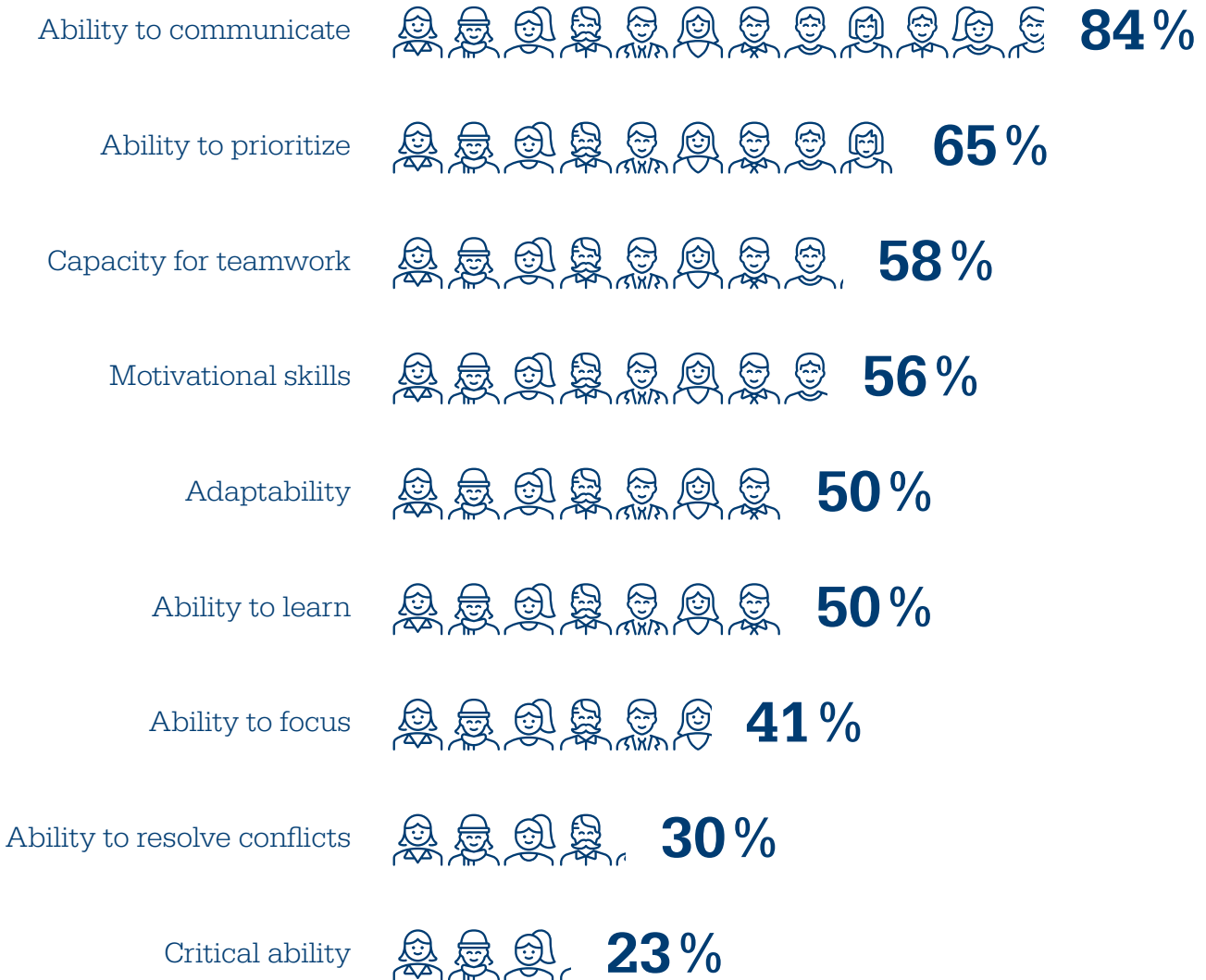


As leaders, we have to try and overcome resistance to change when people say "that's the way we've always done things." What's actually behind this? Fears or a lack of imagination about the changed state? Only when we know this can we initiate long-term change successfully.

**Jens Kretschmar, Director Assembly,  
Rommelag ENGINEERING, Kocher-Plastik Maschinenbau GmbH**

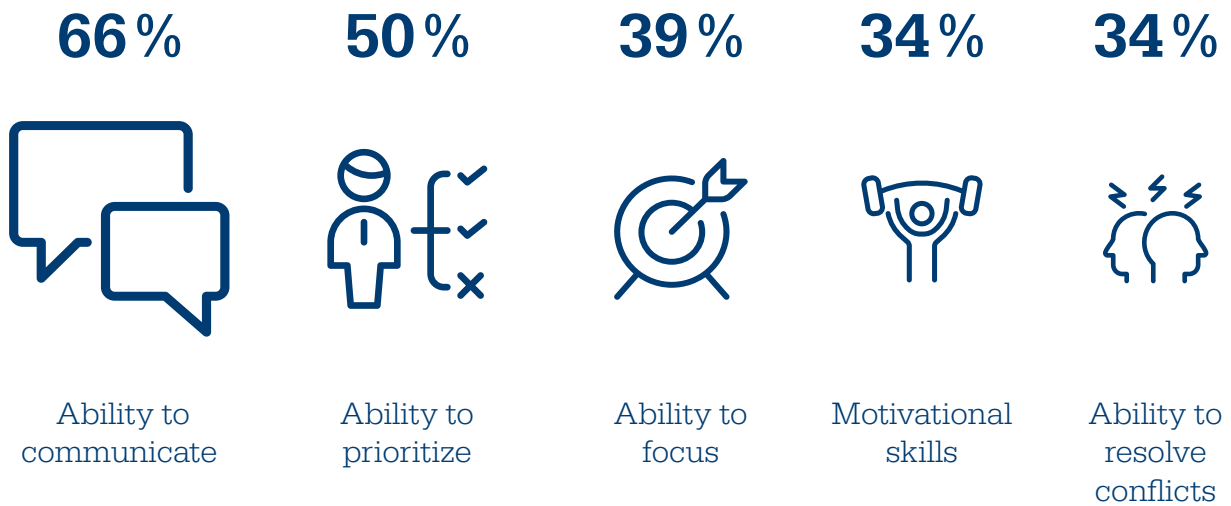


What qualities do leaders need especially in these times?



Communicative team player:  
These capabilities distinguish a state-of-the-art leader.

For which qualities do the leaders at your company requires the most training?



We have to talk:  
Many leaders must still work on their communicative abilities.

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3.3 TOP TOPIC




# SUS TAIN ABILITY



## **Lean & Green**

The opinion in business is clear: sustainability is the key to business success! Lean Management – which prevents waste from the beginning – provides the right toolbox for pulling the "green lever".



Interview with Dr.-Ing. Christian Hinsel,  
Vice President and Global Head of Sustainability Management  
(ESG) and Production Systems, Hirschvogel Holding GmbH

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## "By 2030, we want to halve emissions in Scope 1 and 2."

Hirschvogel, an automotive supplier, consumes a lot of energy to transform steel and aluminum. Dr.-Ing. Christian Hinsel, Global Head of Sustainability Management and Production Systems at Hirschvogel, explains in an interview why this energy is increasingly coming from renewable energy sources and why the change to becoming a "green" company is also well received by banks.



**More than three-quarters of the companies surveyed for the current Staufen study still see a great deal of ecological potential. How green is Hirschvogel already?**

**Hinsel:** Hirschvogel has been deeply involved in environmental and social issues for years. We comply with the relevant ISO standards for occupational safety, health, environment and energy management at all our sites. However, we still have some way to go before we are carbon neutral.

**How is sustainability organized at Hirschvogel?**

**Hinsel:** As of April 2022, there is a separate Executive Board department for Corporate ESG. This has given the whole issue another decent boost. We have now embedded sustainability in our strategy and are working hard to implement it.

**What are Hirschvogel's goals for decarbonizing its production processes?**

**Hinsel:** This year, for the first time, we worked with senior executives to agree on breakthrough decarbonization targets. With the support of the global lean team for our production systems, all sites are now implementing decarbonization using the Hoshin Kanri method. The goal is to halve our Scope 1 and 2 emissions by 2030.

**Can you provide us with an example of an emission reduction measure?**

**Hinsel:** We currently see the greatest potential for internal emissions in the heating processes, which still require a lot of natural gas. The first step was the purchase of an electrically heated heat treatment system.

**In other words, electricity instead of natural gas: What role do renewable energy sources play?**

**Hinsel:** To date, Hirschvogel has purchased all energy sources, i.e., (green) electricity and gas, on the market. Now we are focusing on an energy mix that includes our own and local renewable energy sources. For example, a 5.5-acre solar farm around our company parking lot is in the procurement phase. We are gradually implementing similar measures in all our other locations, including India, China, and Mexico. In addition to photovoltaics, we are in negotiations with promising wind power projects.

**Does your commitment to sustainability have an impact on financing?**

**Hinsel:** Yes, we have just successfully negotiated a bank loan that incorporates ESG indicators into the interest rate mechanisms. If we significantly improve certain environmental and social indicators over the next few years, this will be reflected in the credit margin.

**As the Staufen study shows, sustainability assessment is already a criterion in the selection of suppliers for about one in two automotive companies. How does Hirschvogel convince its customers to become "green" suppliers?**

**Hinsel:** Our customers are also increasingly asking about our carbon footprint. We are able to track it and report it on various platforms. As an automotive supplier, we know that decarbonization is currently the number one issue, and we want to ensure that we, together with our customers and business partners, will become sustainable along the entire value chain.

## About the interviewee



Christian Hinsel is Vice President and Global Head of Sustainability Management (ESG) and Production System at automotive supplier Hirschvogel. With a Ph.D. in Mechanical Engineering and Manufacturing Technology, he focuses on how to continuously improve a company's competitiveness through strategic alignment, vertical and horizontal implementation of strategic goals (Hoshin Kanri), and consistent pursuit of sustainability (ESG) and operational excellence (Lean & Smart).

## About the company



The Hirschvogel Group, headquartered in Denklingen, Germany, is one of the world's largest automotive suppliers specializing in the forging and machining of steel and aluminum. Customers include all major automotive manufacturers and their suppliers worldwide. With approximately 6,000 employees at locations in Germany, Poland, China, India, Mexico, and the USA, Hirschvogel most recently generated annual sales of 1.2 billion euros.



As a result of the slowing economy, there is more of a focus on costs. This is not without influence on sustainability activities at many companies.



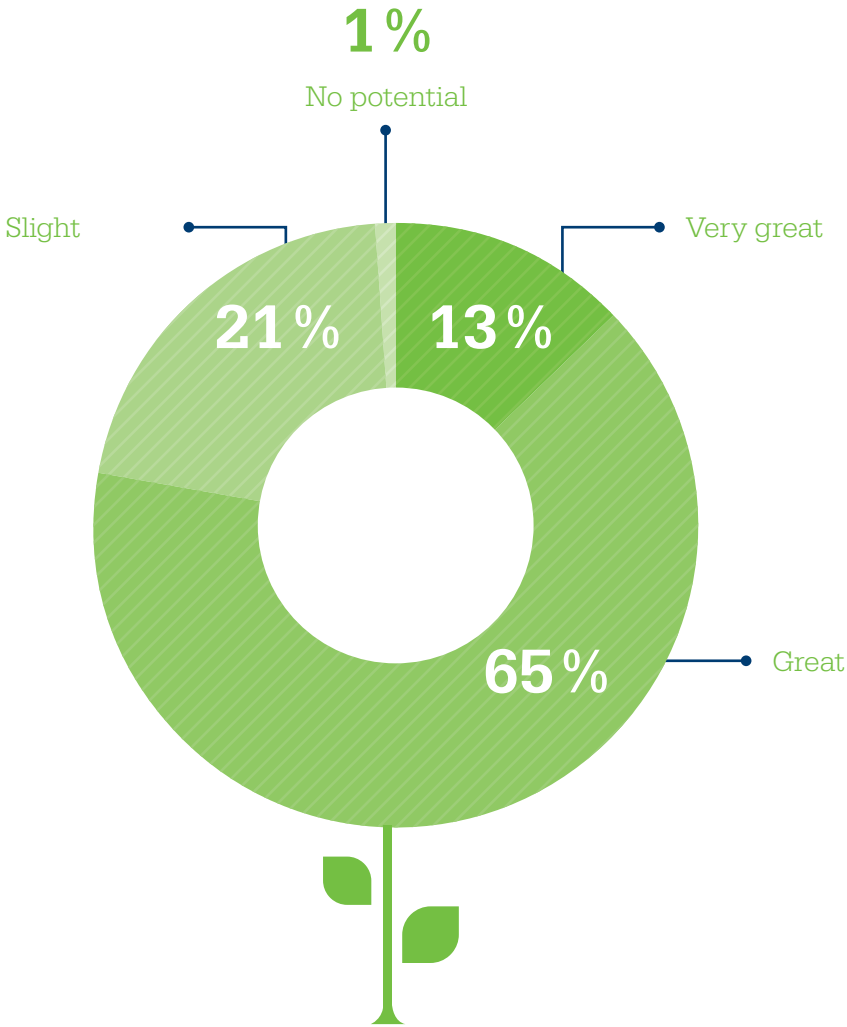
Sustainable business is the basis for future economic success.



We have put sustainability projects on ice or canceled them.

Cost factor sustainability:  
Not every company can currently afford "green."

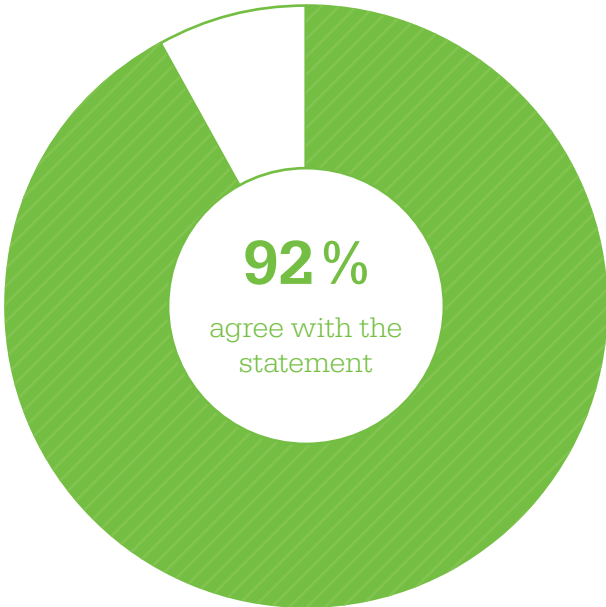
How great is your company's potential to do more sustainable business?



There's still room to improve:  
Companies have by no means exploited their ecological potential.

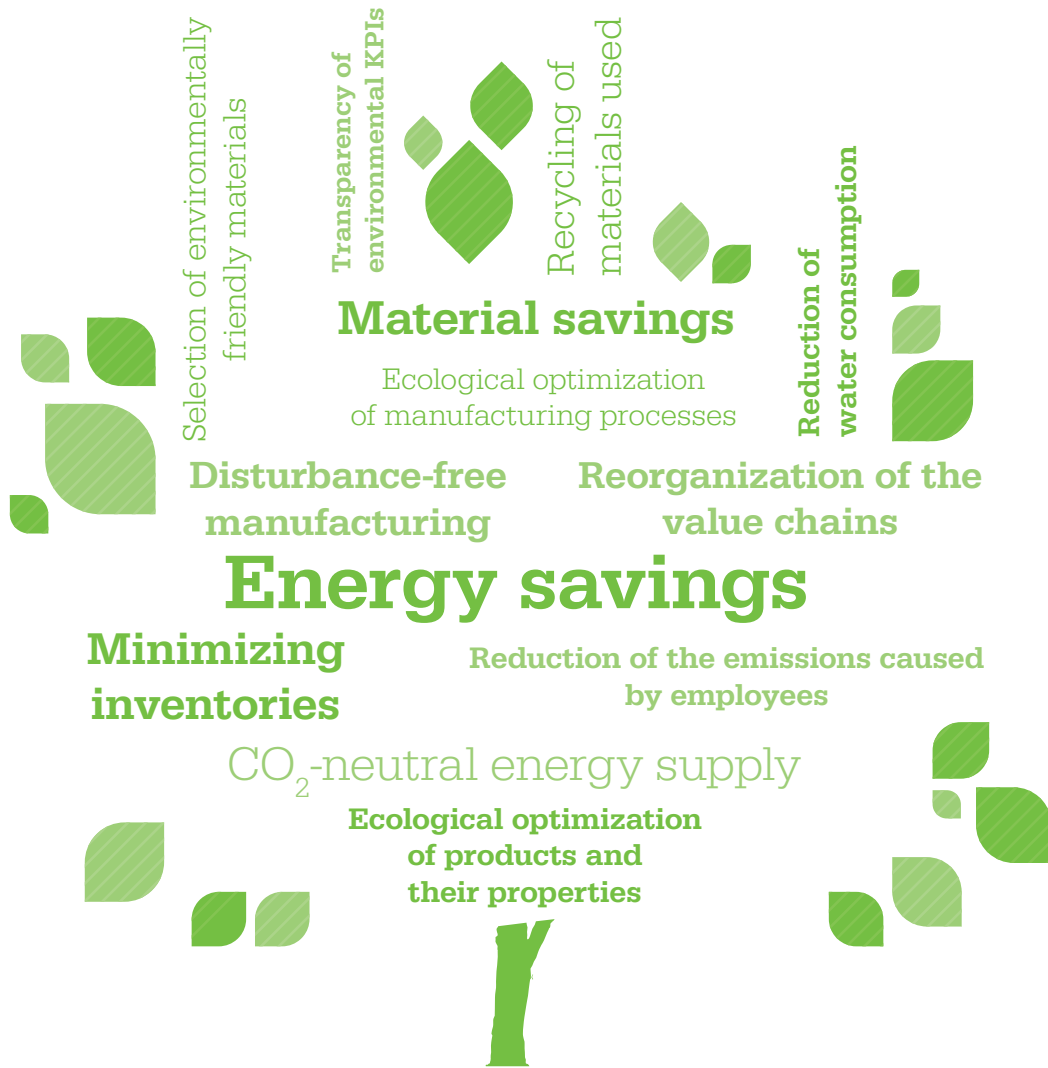


Is Lean Management also the basis for sustainable action?



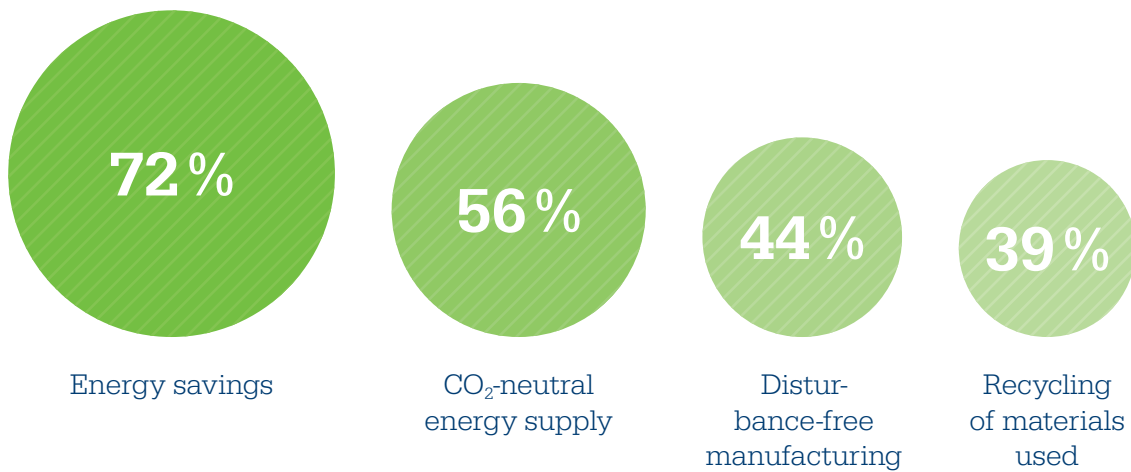
Conserving resources:  
Lean Management and sustainability have a common goal.

Where does the potential lie on the path to sustainable business?



Sustainable potential:  
At companies, there are a lot of "green levers."

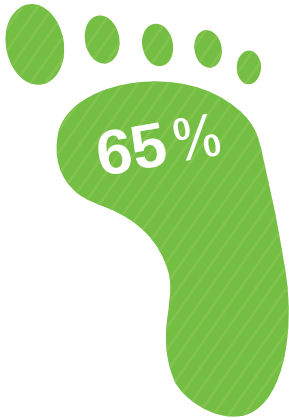
In which areas do companies see the greatest potential for greater sustainability?



More than just saving energy:  
Disturbance-free manufacturing is also sustainable.



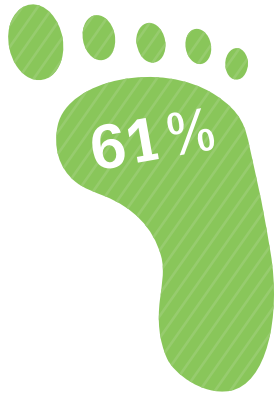
## How structured is your company's approach to sustainability?



At our company, there is a common understanding with regard to sustainable business.

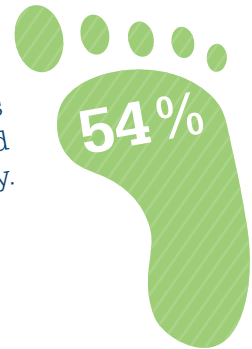


We calculate the current CO<sub>2</sub> footprint and use both our own measurement results and figures from customers, suppliers, databases, and authorities.

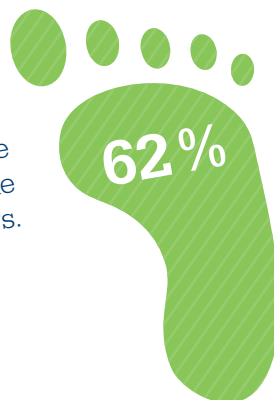


We are in a position to identify the essential influencing factors for greenhouse gas emissions and to derive measures to prevent and reduce emissions.

The progress of the measures is determined regularly and corrected if necessary.



Our goal is to become climate-neutral within the next ten years.



**Blackbox footprint:**

Every other company is still struggling with the determination.

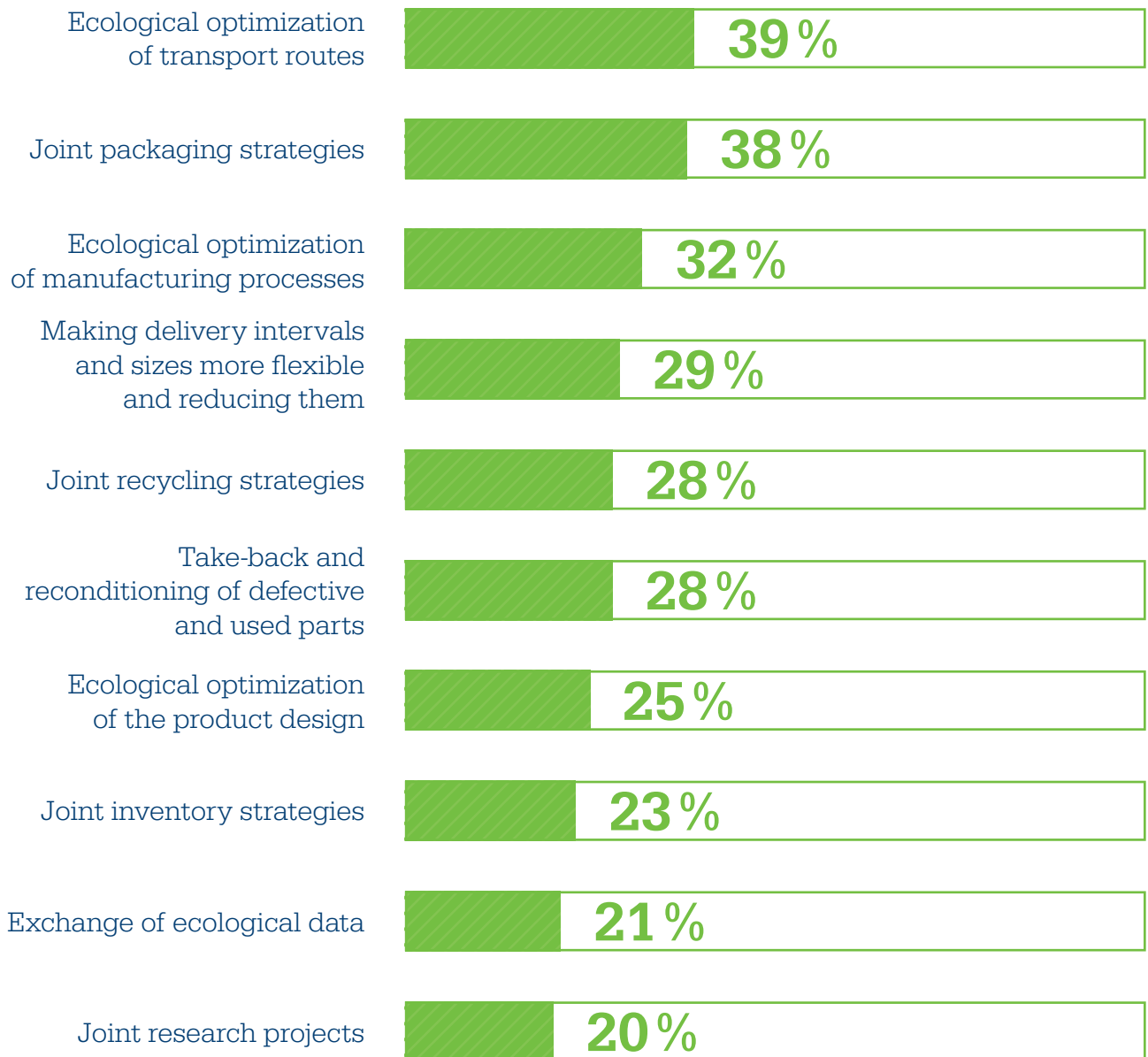


In times of energy crisis, climate change, and a shortage of raw materials, it's important for our company to examine models that will secure our competitive capability. Here, we rely on an adaptable team that is ready to learn.

**Sascha Hammer, Lean Management,  
Lindner NORIT GmbH & Co. KG**



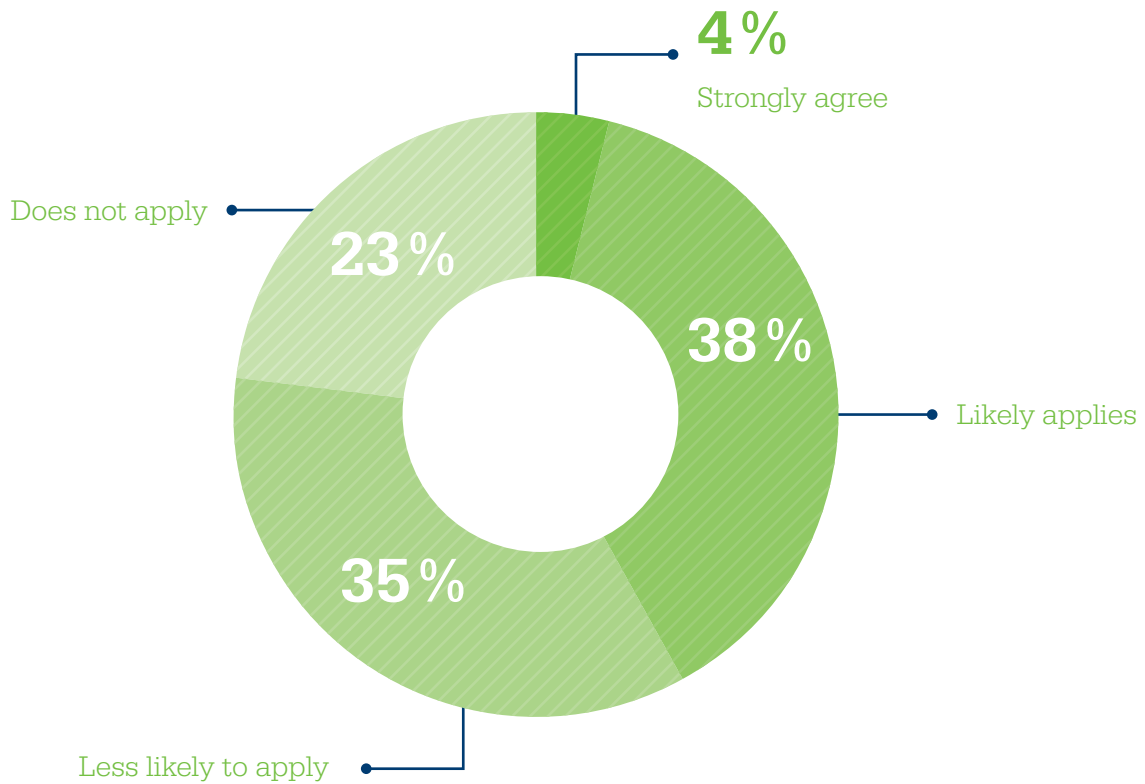
## What measures are you taking together with customer and suppliers with regard to the green transformation?



### Lone wolf versus team player

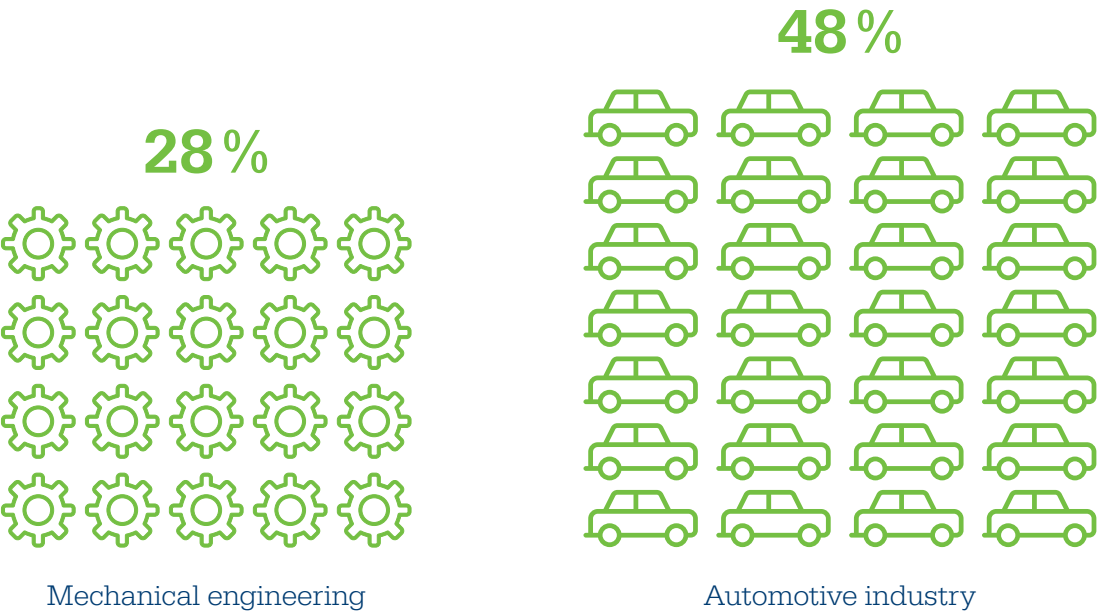
All too often, companies often approach the topic of sustainability alone.

Is sustainability assessment already an awarding criterion for selecting suppliers?



Awarding criterion sustainability:  
Four of ten companies only select primarily green suppliers.

Mechanical engineering and automotive:  
Is sustainability assessment an awarding criterion for selecting suppliers?



The advantage remains:  
When it comes to sustainability, the automobile industry  
is still leaving mechanical engineering in the dust.



**3.4 TOP TOPIC**

# **RESIL LIENT NET WORKS**

## **Talk is silver, talking to one another is gold**

At the latest since the painful experience of recent multi-crisis years, it's clear: the most efficiency potential lies in supply chain networks. To be able to compete internationally in the long term, exchange with customers and suppliers must be taken to a new level – for example with digitalization. However, the digital possibilities at many companies have yet to be exhausted.

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## "Good risk management empowers employees to make more independent decisions."

Zurich-based drone specialist Wingtra impresses with its enormous growth rates. To maintain this pace, a smoothly functioning supply chain network is essential. COO Marco Schicker explains in an interview how Wingtra interacts with customers and suppliers and why risk management does not restrict but creates freedom.



**How do you push integration with your suppliers at Wingtra?**

**Schicker:** The extension of the value stream design beyond the company's own boundaries is crucial. When it comes to material flow, it's a balance between flow and security of supply. Currently, such considerations must be made for computer chips, for example. When it comes to information flow, it is important that everyone in the supply chain network is working from the same set of assumptions. Staying with the chip example, lead times for orders are well over a year. So we have to start our sales and operations planning with this in mind and involve our key suppliers very closely.

**Mr. Schicker, more than two-thirds of the companies surveyed for this study still see significant efficiency potential in their supply chain network. How can this potential be realized?**

**Schicker:** In a nutshell, this means that they have to drive the integration of their processes with suppliers and learn to understand their customers better.

**And how do you learn to understand the customer better?**

**Schicker:** Indem das Unternehmen herausfindet, was diesem wirklich wichtig ist. It is not enough to just look at the product, but also at the service and handling processes. Depending on how important issues such as re-procurement, transportation services, pricing structure and packaging are to the customer, Wingtra can align and optimize the value stream accordingly.



**As COO you are responsible for purchasing at Wingtra. Where do you see the department currently positioned within your organization?**

**Schicker:** Purchasing is a central point of contact in our company, both for operations and for development. With the first generation of our drones, we learned that the stage is set very early in the process to determine whether efficiency potential can be realized later in the product lifecycle. That's why our purchasing department is involved in product development from the very beginning.

**What is the role of your purchasing department?**

**Schicker:** Purchasing also has the task of developing us operationally. This is done, for example, through the standardization of contracts and clear re-procurement rules. Purchasing is also responsible for maintaining relationships with suppliers. We send buyers to key suppliers to better integrate their processes with ours.

**How important is electronic data interchange to supply chain network integration?**

**Schicker:** Electronic data interchange can automate, accelerate, and standardize processes. This makes work more efficient by improving the flow of information. However, it is not a cure-all. If the data is incorrect or the supply chain is disrupted, even electronic data interchange won't help: Suppliers won't be able to deliver goods, even if we send them automated orders.

**38% of the companies we surveyed have a dedicated data strategy for their supply chain network, and 43% use a platform to share data with partners. Is Wingtra one of them?**

**Schicker:** We don't have a separate platform for our suppliers. We use our ERP to trigger orders and define framework conditions. We are currently in the standardization phase. Our supplier network strategy is closely linked to our internal processes. To further develop this, we are driving forward the topic of enterprise architecture.

**Political, technological, environmental and social factors will continue to impact supply chain networks. In this context, how important is the implementation of risk management?**

**Schicker:** For me, risk management is essential. This is not about avoiding every possible risk. Instead, the company must match the effort to the risk. It is important to understand which risks are most critical to a company. It is then possible to decide whether and with what measures to respond to individual risk factors.

In addition, good risk management creates the transparency needed to make decisions. This helps both leaders and employees. With a better understanding of key business risks, they can make much more independent decisions on a day-to-day basis.

## About the interviewee



Marco Schicker is COO at Wingtra AG. An industrial engineer by training, he began his career at Hilti AG in various supply chain roles before becoming a successful management consultant and founder of several start-ups.

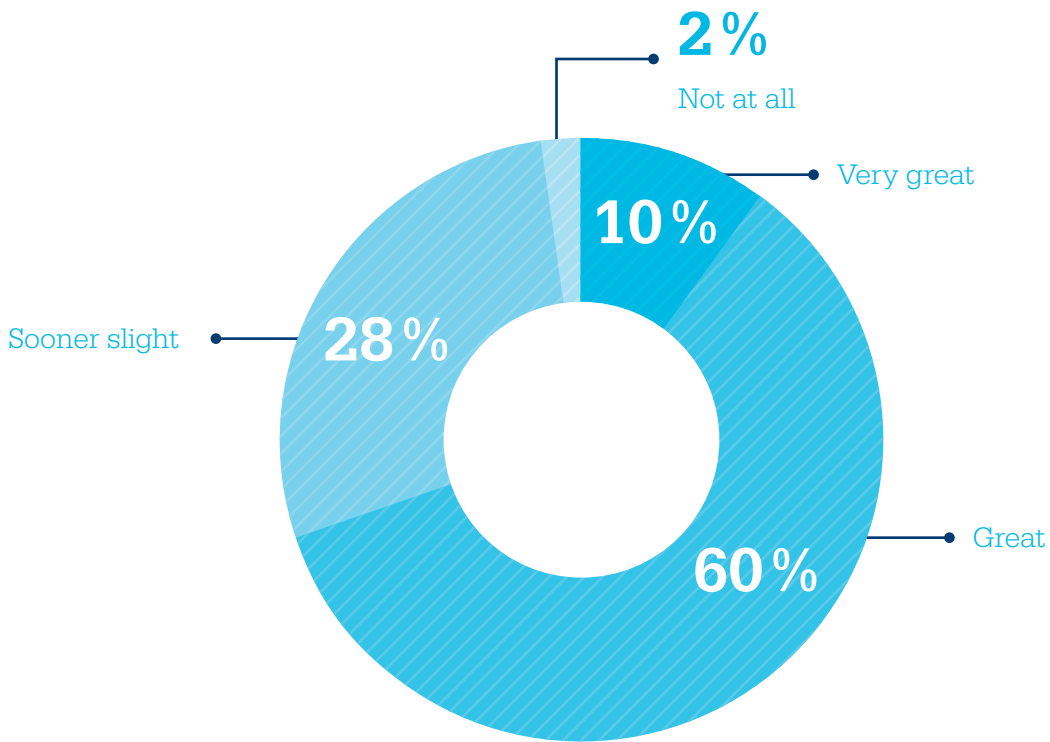
## About the company



Wingtra is a leading global provider of commercial drones, specifically for the aerial survey and surveillance market. The company was founded in 2017. Meanwhile, Wingtra has launched the second generation of its drones.

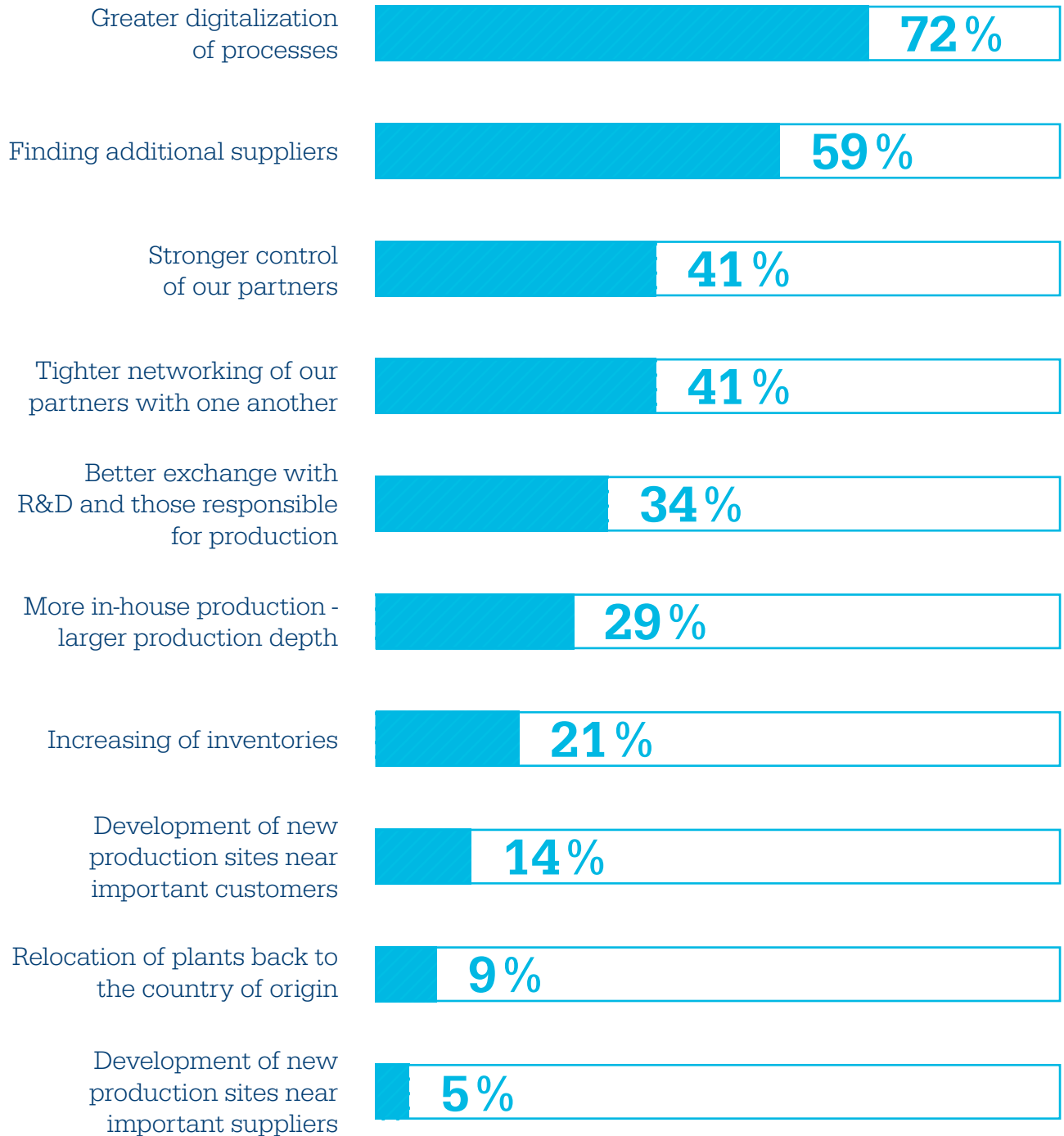


How much potential does your company have to make the supply chain network more efficient?



There's still room to improve:  
Seven of ten companies still see significant efficiency potential in their supply chain network.

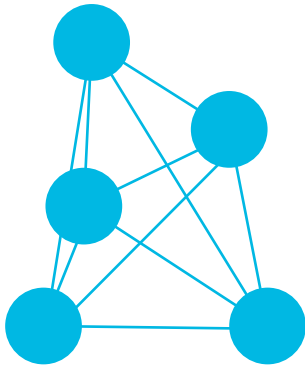
## Which measures have the greatest potential to make your supply chain network more resilient?



**Resilient supply chain network:  
The digitalization of processes takes priority.**

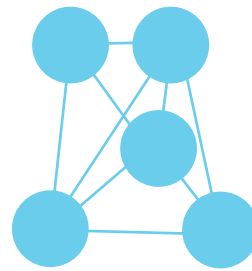
How would you describe the cooperation with your partners in the supply chain network?

80%



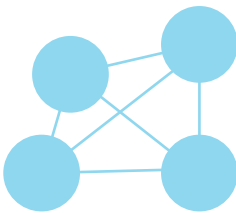
We approach our customers actively in order to network more closely with them

55%



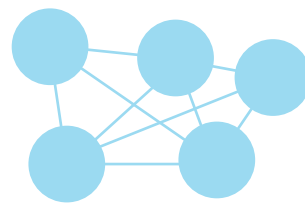
Our customers and suppliers are frequently shy when it comes to the idea of exchanging more with us

46%



We encourage exchange of our partners with one another – including sub-suppliers

43%

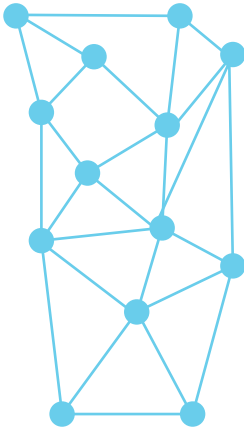


We use a digital platform for exchange with our partners

**Network with broad reach:  
There is still considerable potential in cooperation.**

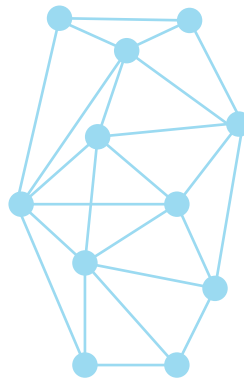
## How do companies handle crises in the supply chain network?

66%



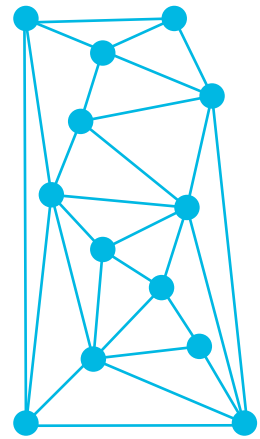
Such crises as we are experiencing now cannot be detected in advance

58%



We have implemented professional risk management to detect unexpected threats in timely fashion

67%

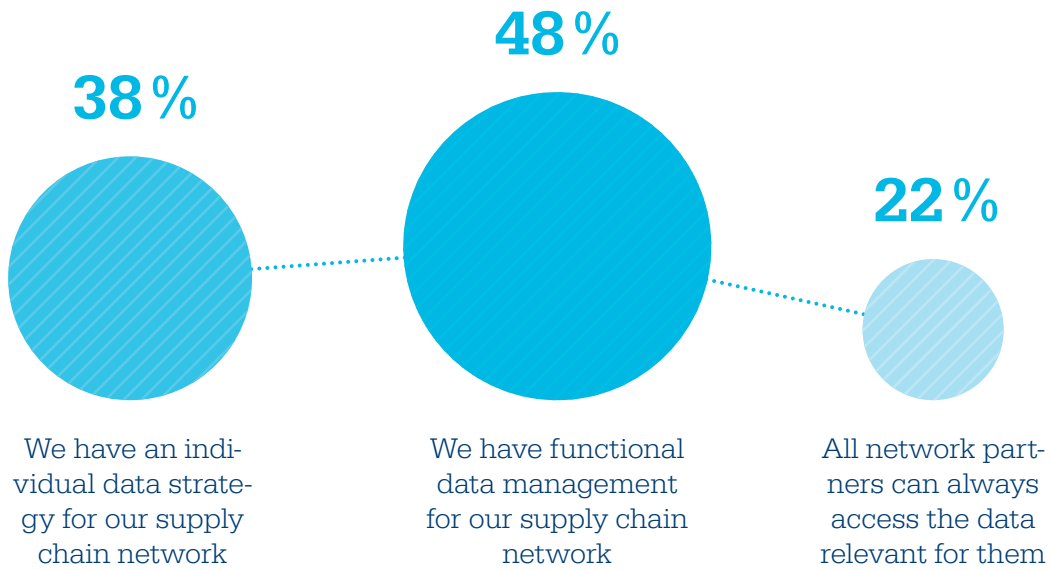


We are aware of our weak points and we have appropriate alternative scenarios ready if necessary

**Blind spots: only every other company identifies its risks systematically.**



### How do companies handle data in the supply chain network?



**Guessing instead of data:  
With access to information, good partnership ceases  
for many companies.**



Along our path to operative excellence, we are profiting from the close interplay of Lean and Industry 4.0. Along our path to sustainability, by contrast, we rely on proven lean methods such as structured problem-solving and visual management. This way, we can become more sustainable, purposefully and in ways we can measure. We increase our resilience with our transformation program, which is oriented according to the change of markets and products.

**Dr.-Ing. Christian Hinsel, Vice President /  
Head of Sustainability Management (ESG) and Production System,  
Hirschvogel Holding GmbH**



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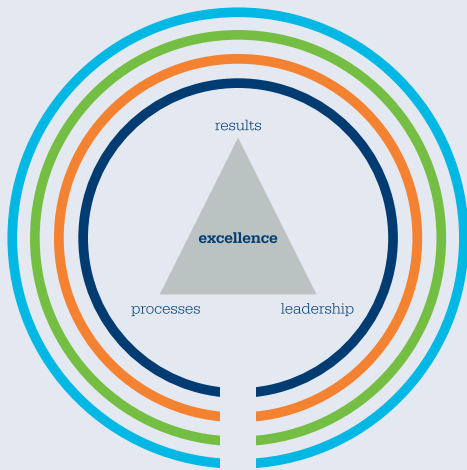
# 4. REFERENCE MODEL

The background features a series of thin, dark, wavy lines that create a sense of depth and movement, resembling a stylized tunnel or a complex data visualization. The lines are set against a dark teal background.



# "Organize the buzzwords of the hour strategically despite the hectic atmosphere."

**Lean, Digital, Green, Resilient** – no company can evade these challenges. But how do these top topics relate to one another and what must be considered during implementation? The Staufen consultants Dr. Michael Feldmeth and Christian Sprenger explain in an interview why the structure and sequence decide the success or lack of success of a transformation.



## What characterizes the individual elements lean, digital, green, and resilient?

**Feldmeth:** The four overarching topics and consulting fields build on one another. Lean Management in the first round forms the basis for state-of-the-art end-to-end processes. Basic topics such as the reduction of waste, focus on customer benefit, and the reduction of lead times remain current in the industrial environment, precisely in this era of digitalization. Using digital tools and building on lean, we can achieve additional process improvements and performance leaps. Increasingly important today is to be green, to focus on resource-sparing and sustainable production, and also on core elements of Lean Management and the area of resilience. This is where the focus is on adaptability and company-spanning production networks. With regard to optimized end-to-end processes, we concentrate on the entire value stream and optimize the various flows at the company. Here, in addition to the flow of material and information, we examine the monetary consequences of individual activities on the result and liquidity, as well as the emissions and management of scarce resources.

## Can you please explain the current Staufen in brief?

**Feldmeth:** The figure shows our holistic consulting approach and indicates the broad spectrum of topics with which we can assist our customers. The focus is on our mission: excellent processes, excellent leadership, and as a result, excellent results. We pursue this ideal and this is also our customers' goal. Along the way, the four elements lean, digital, green, and resilient play a central role, both as drivers and tools for optimally-configured end-to-end processes.

## Should the consulting fields always be run through in a particular order?

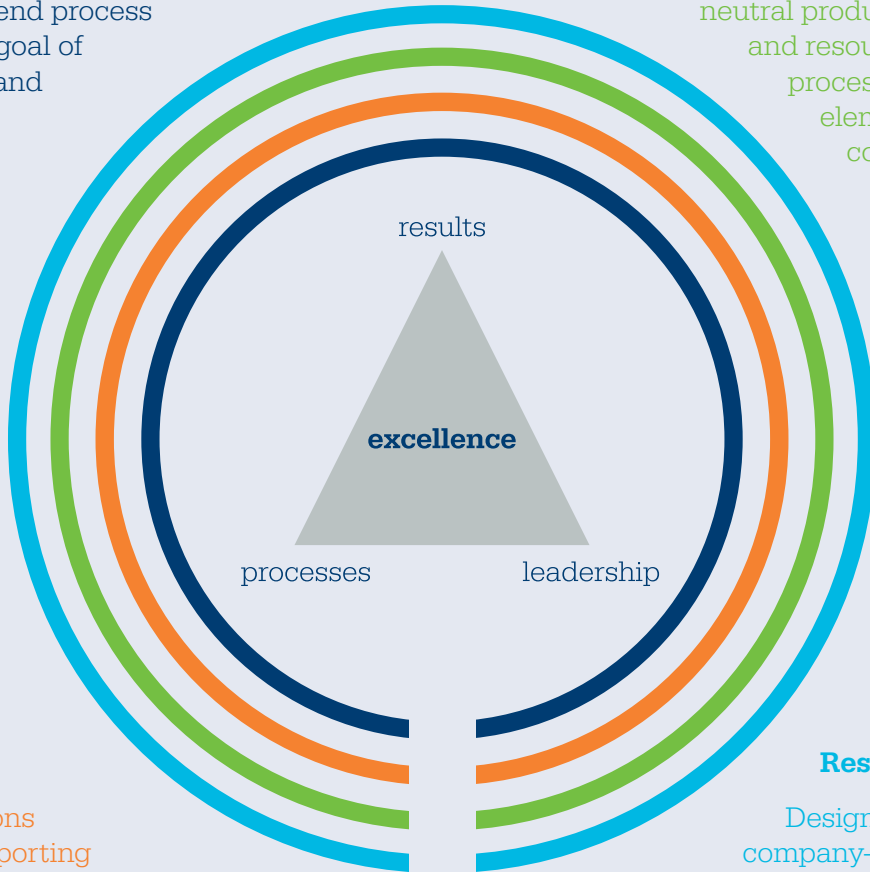
**Sprenger:** The consulting approach must be selected individually for each customer, but our framework provides a sensible order. That is to say that we generally begin with lean and optimize the processes. For only lean processes can produce lean digitalized processes. If the company is digitalized efficiently and effective-

**Lean**

Lean as the basis of customer-centered end-to-end process design with the goal of reducing waste and lead time

**Green**

Design of environmentally-neutral product life cycles and resource-conserving processes are core elements of future companies

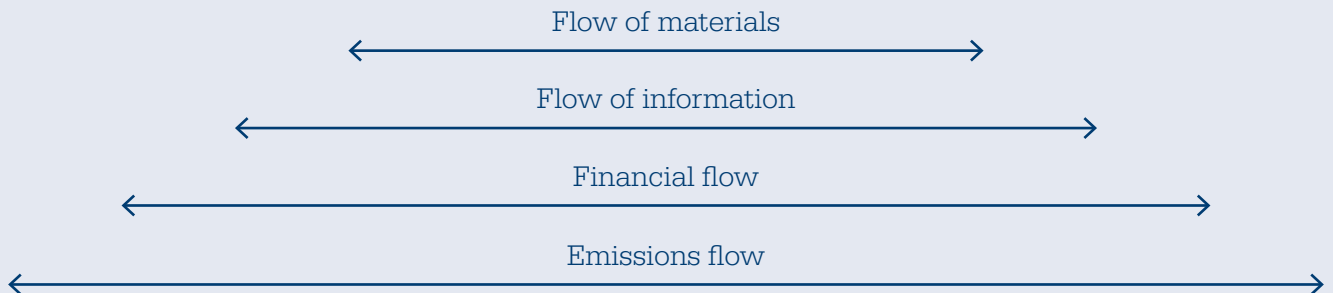


**Digital**

Digital applications and process-supporting technologies create new space to increase performance and efficiency

**Resilient**

Design of company-wide adaptability provides the answer to the intensity and dynamics of changing market and environmental conditions



ly, the journey toward green and/or resilience can continue. The first two elements form the basis and rely in their implementation heavily on the other topic areas green and resilience. Given the topics with which they are confronted, many CEOs don't care whether the issue is compliance with reporting duties with regard to sustainability or the still-fragile supply chain networks. But without lean and digitalized processes, there is no good solution for these topics.

**So you think that companies should proceed step by step instead of jumping feet-first into the individual topics green and resilient?**

**Feldmeth:** Precisely, and with this order and framework, we have created a structure that can help companies organize the buzzwords of the hour strategically despite the hectic atmosphere. What's important, what can wait a while? This way, we help companies assess themselves realistically and to see which fields of action should take priority in the current situation.

**For current topics such as the supply chain act and sustainability reporting, companies have to act fast, however. What procedures do you recommend in such cases?**

**Sprenger:** Regardless of whether or not a company has already implemented efficient and digitalized value creation according to lean principles, there are duties that may not be put off. Compliance with legal requirements does not automatically mean that a company is already really sustainable or resilient. That's why I advise companies that are not yet digital or lean to set priorities. The clear advice: first ensure that the base is solid and then prioritize the topic areas green and resilient. With this structured process, companies will be able to succeed must faster and more efficiently.

Here's a simplified example: if you slim down your S&OP processes across the boards using lean criteria and then digitalize, you will automatically be more resilient since you can synchronize your demand and supply curve better. At the same time, you will be more sustainable since you significantly reduce inventory levels and therefore can produce with fewer resources.

**So such a procedure brings only benefits?**

**Sprenger:** Yes, the biggest qualitative and quantitative optimization can be achieved with a consistent examination of these topic areas across the order framework. Essential here is the strategic orientation provided by the management, which orients the existing capacities uniformly and prioritizes the topic areas. Otherwise, you'll have a patchwork quilt that solves problems here and there, however cannot exploit any interface-spanning synergy effects since there is no focus on end-to-end processes or customer-centered action.

## Authors



Dr. Michael Feldmeth  
Principal  
STAUFEN.AG



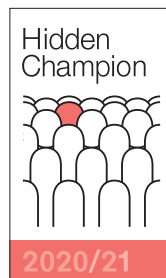
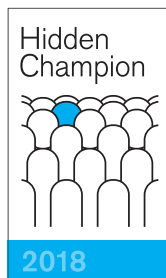
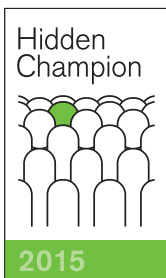
Christian Sprenger  
Partner  
STAUFEN.AG

# ABOUT US

We believe that inside every company, there is an even better one.

Staufen AG is a Lean Management consulting firm and academy. We have been advising and qualifying companies and employees worldwide for over 25 years.

Our goal is to make every business better and move our customers forward. Our special approach focuses on quickly setting the right changes in motion and establishing a sustainable culture of change.



# Figures. Data. Facts.

> 25

Years of experience

200

Projects per year

> 60

Different seminars and trainings

300

Employees

> 6,000

Seminar participants per year

17

Languages

> 110

Active trainers and coaching experts

> 65

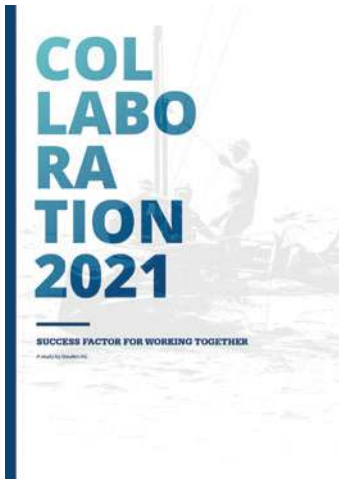
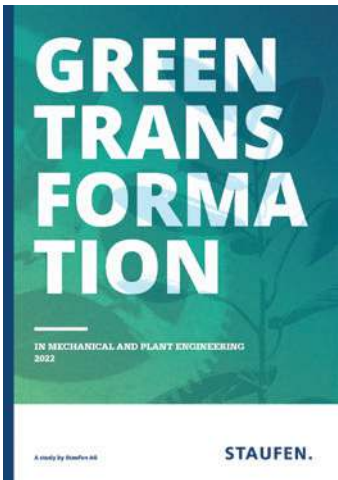
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# STUDIES AND WHITE PAPERS

All Staufen AG studies and white papers can be found online at [www.staufen.ag/studien](http://www.staufen.ag/studien).





**CONTACT PERSON  
GERMANY**



**Wilhelm Goschy**  
CEO  
w.goschy@staufen.ag  
] +49 7024 8056 0

**CONTACT  
SWITZERLAND**



**Urs Hirt**  
Co-Managing Director  
urs.hirt@staufen-inova.ch  
] +41 44 786 33 11

**CONTACT PERSON  
FOR MEDIA**



**Stephanie König**  
Marketing Manager  
s.koenig@staufen.ag  
] +49 7024 8056 152

**PUBLISHER**

**STAUFEN.AG**  
Consulting.Academy.Investment  
Blumenstrasse 5  
73257 Köngen, Germany  
] +49 7024 8056 0  
www.staufen.ag  
kontakt@staufen.ag

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