

ICIS / Oliver Wyman

*Prepared by: Gurur Sarbanoglu
Research Executive
Reed Business Insight*



Segmentation

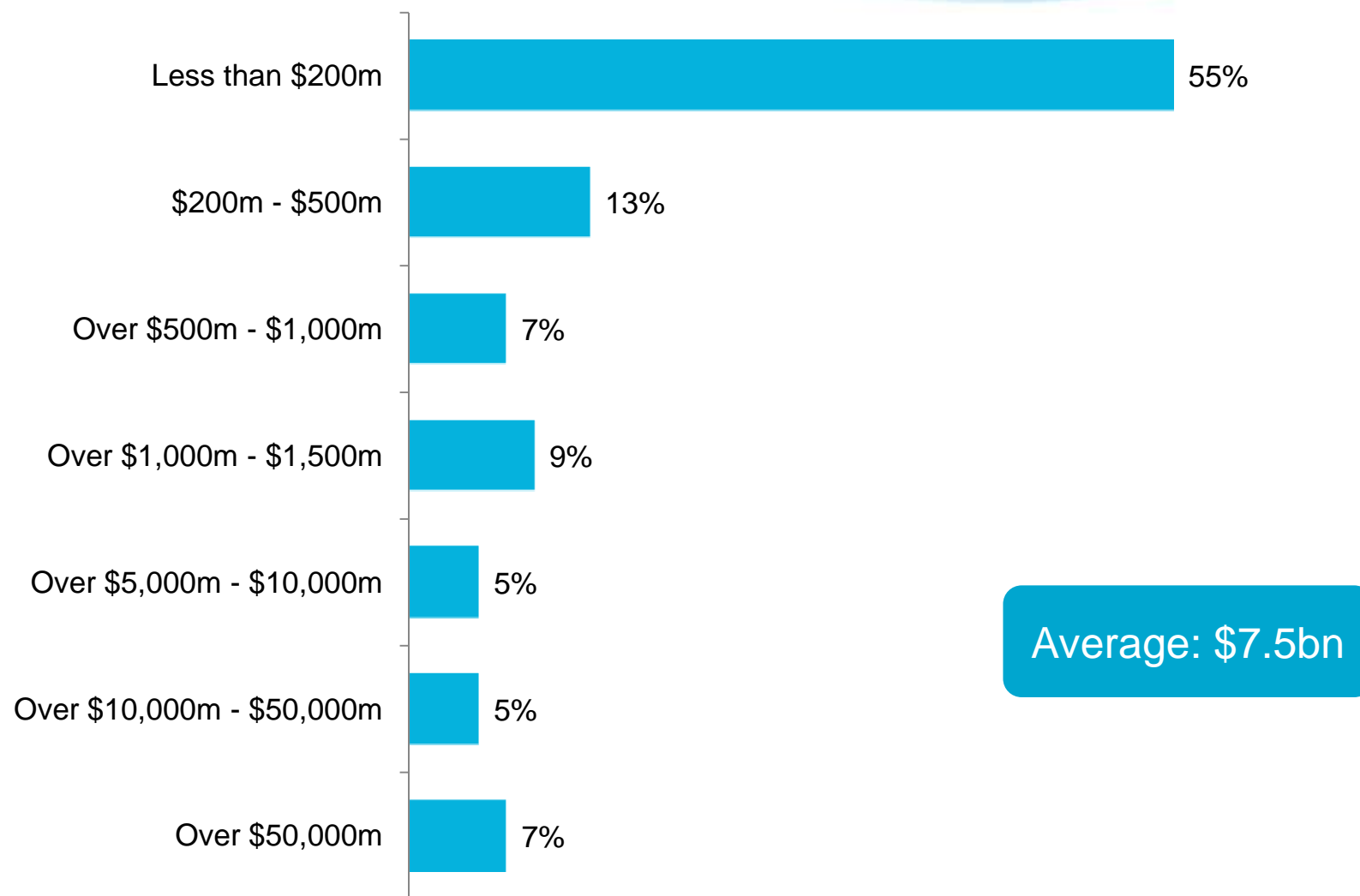
Business segmentation



Base: all responding (137)

Revenue and EBITDA

Company revenue in 2010

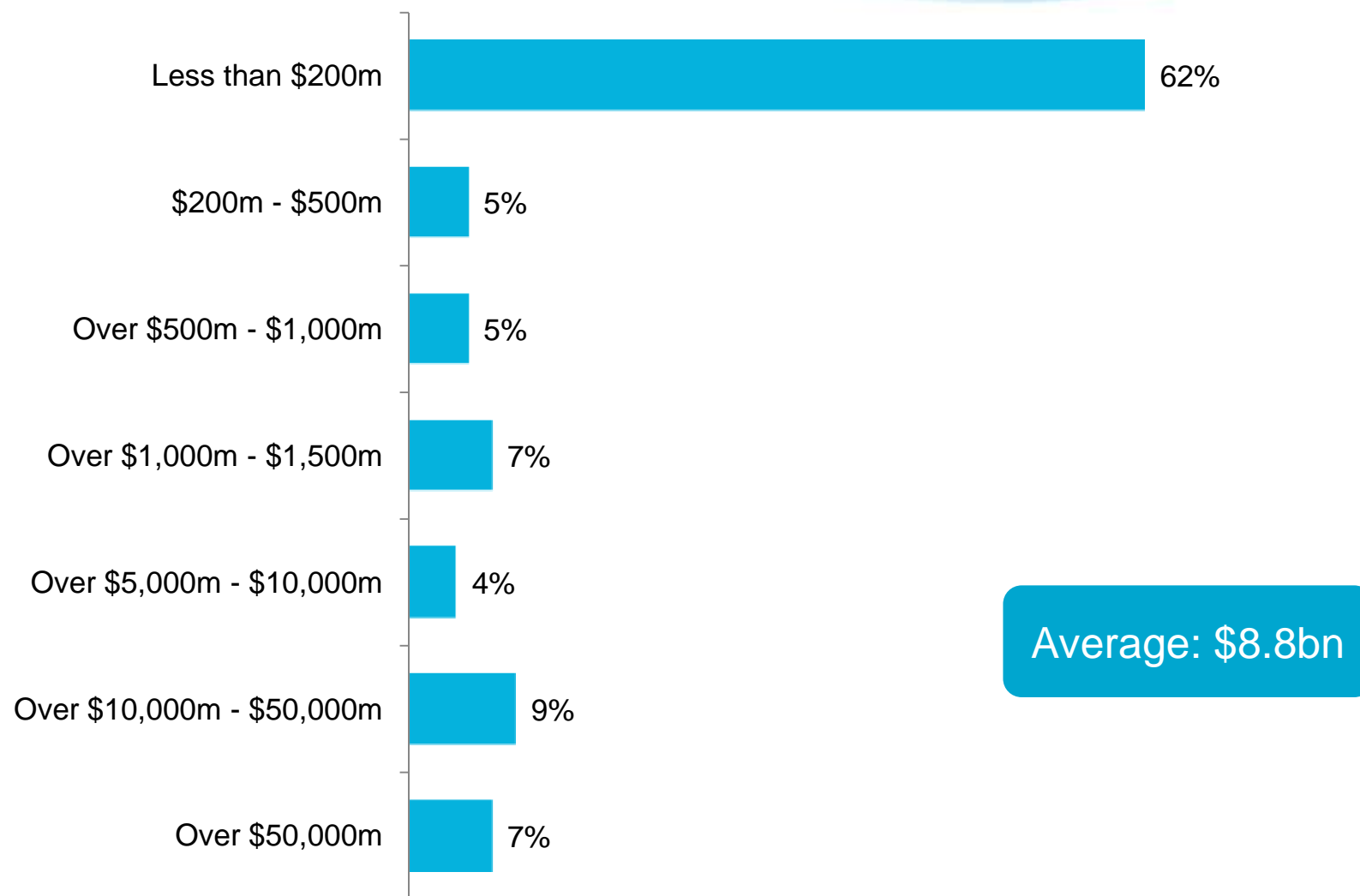


Q. What was your company's revenue in 2010?

Base: all responding (413)

5

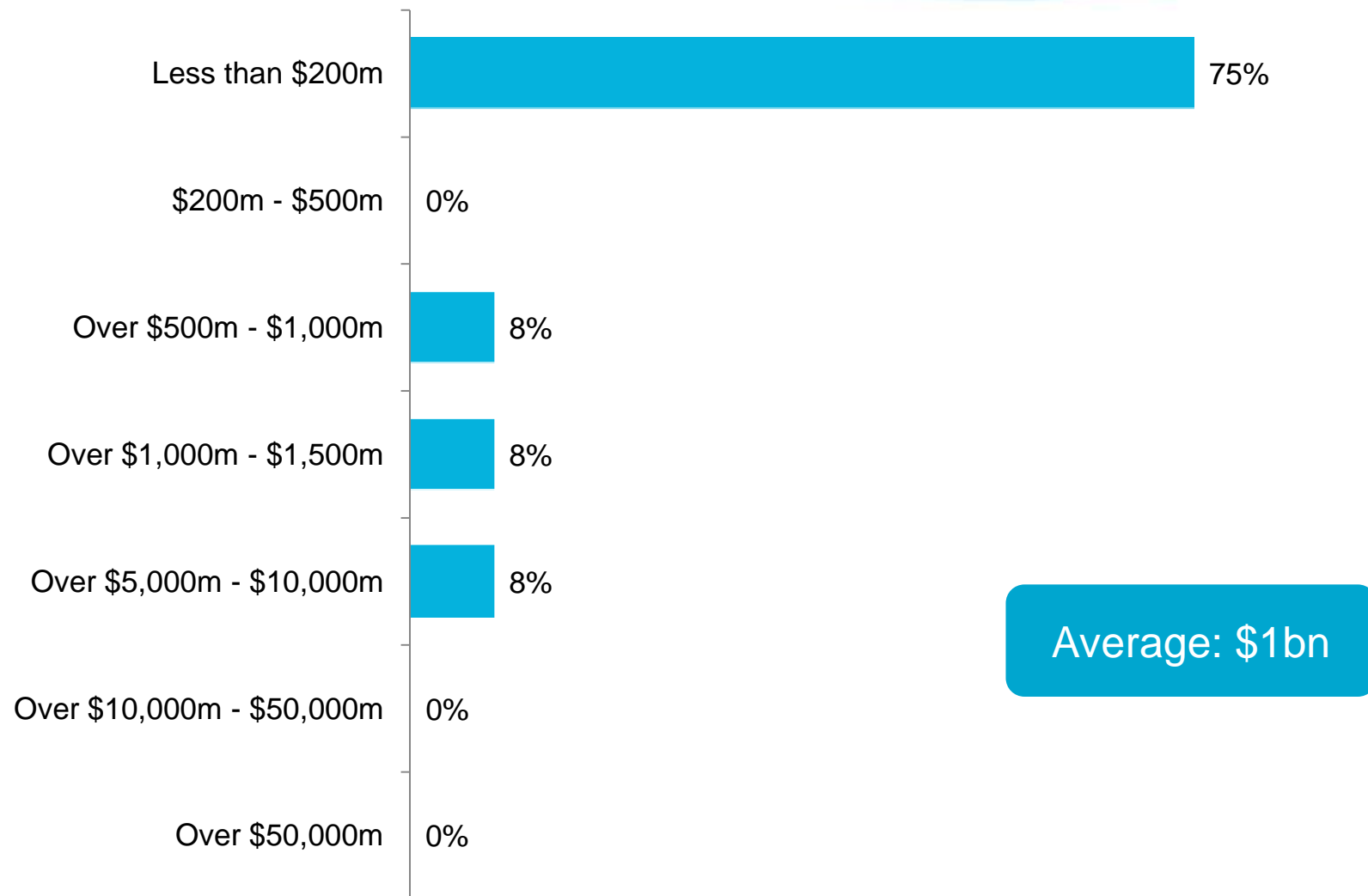
Company revenue in 2010 – falling behind



Q. What was your company's revenue in 2010?

Base: falling behind only (55)

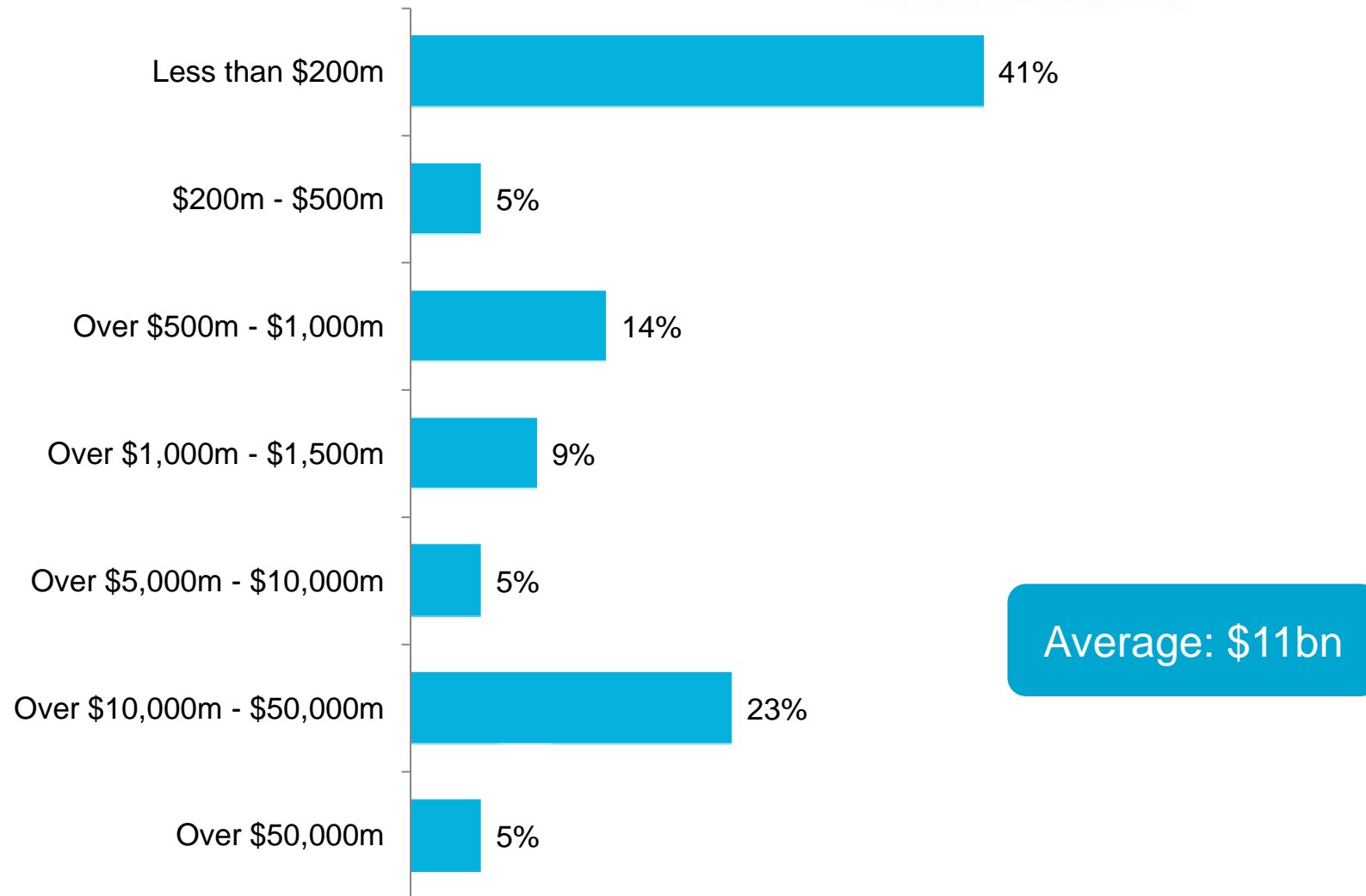
Company revenue in 2010 – less / unprofitable play



Q. What was your company's revenue in 2010?

Base: less / unprofitable play only (12)

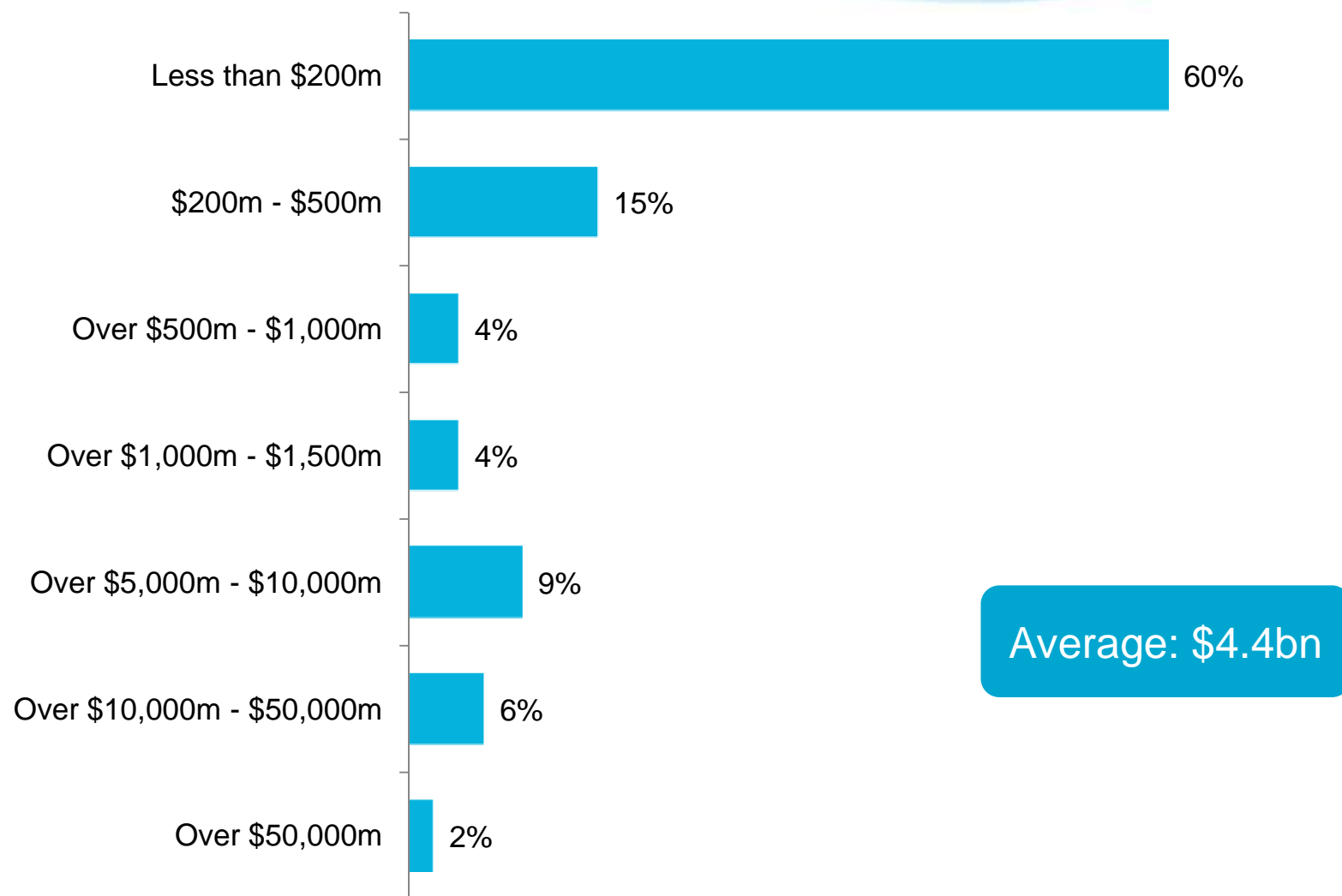
Company revenue in 2010 – efficiency play



Q. What was your company's revenue in 2010?

Base: efficiency play only (22)

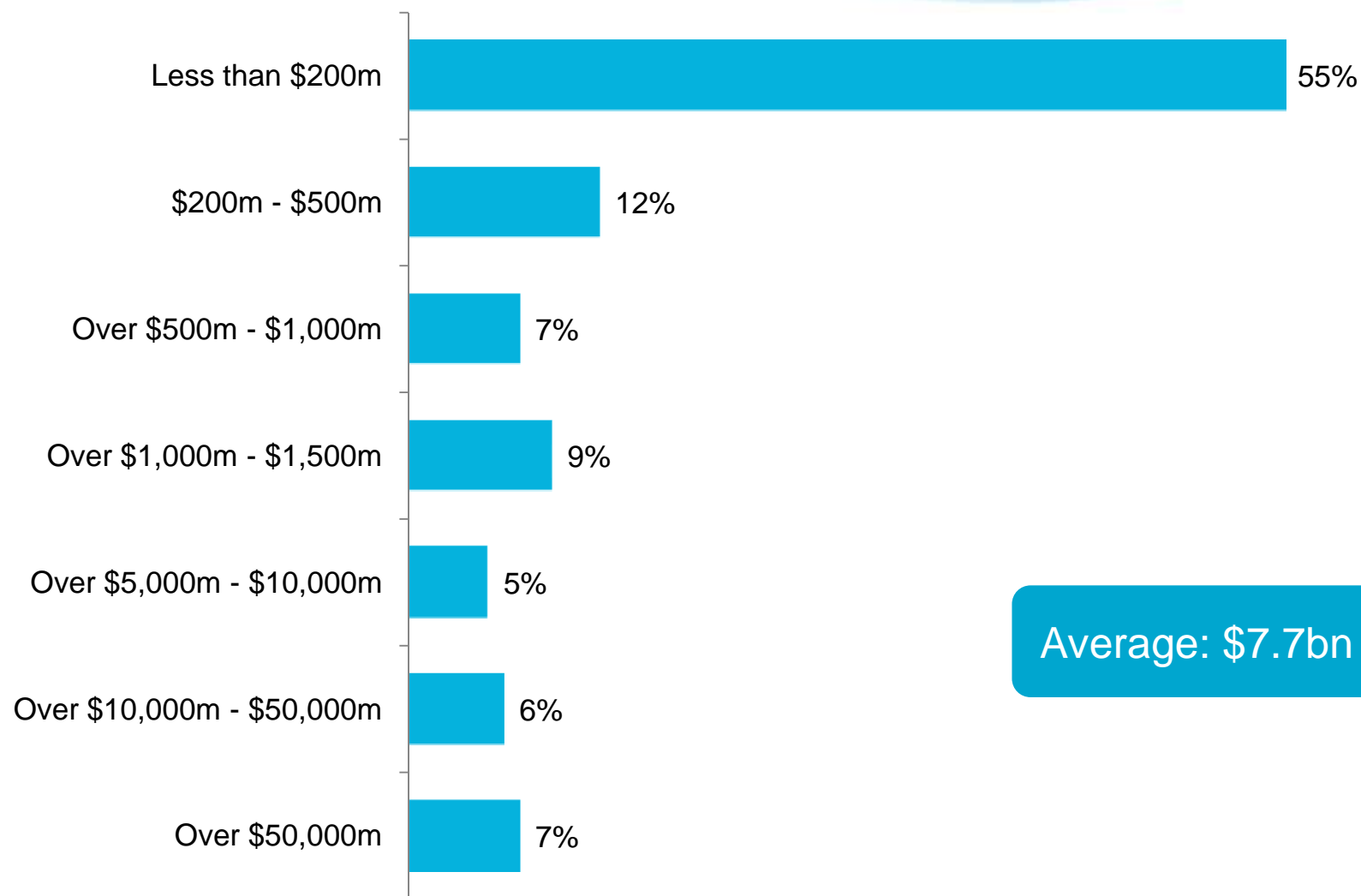
Company revenue in 2010 – highly profitable



Q. What was your company's revenue in 2010?

Base: highly profitable only (47)

Company revenue in 2011

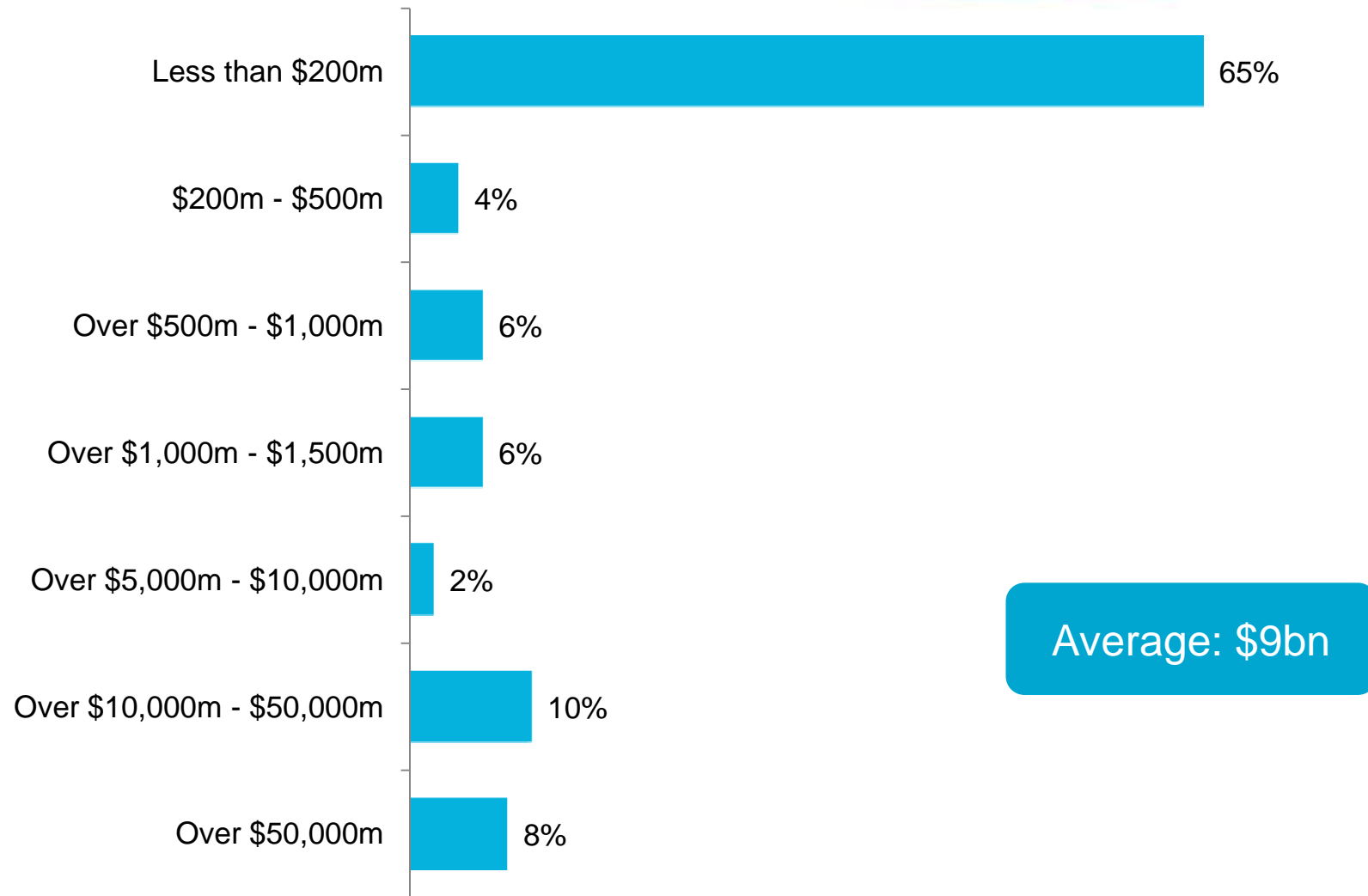


Q. What was your company's revenue in 2011?

Base: all responding (399)

10

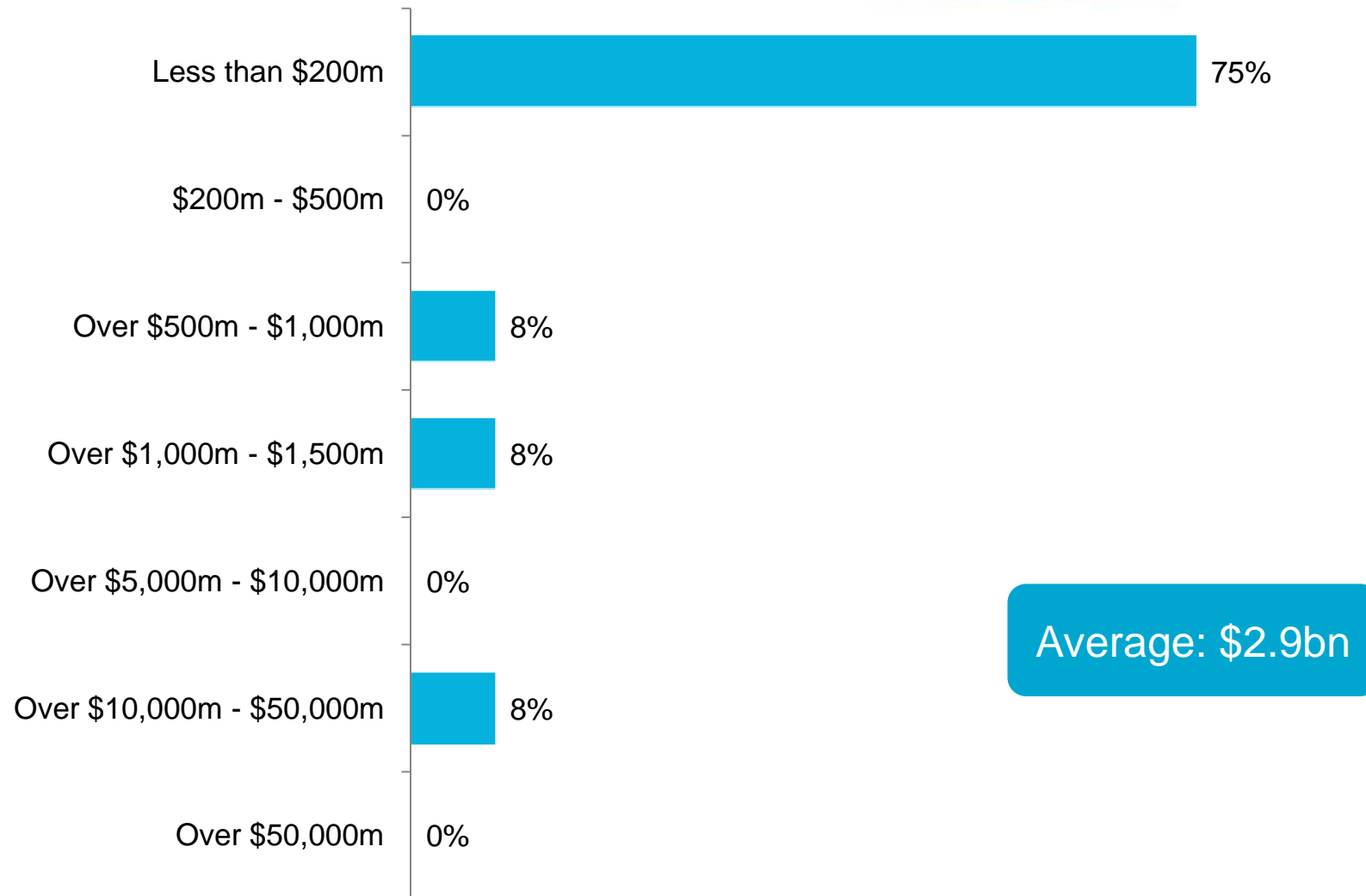
Company revenue in 2011 – falling behind



Q. What was your company's revenue in 2011?

Base: falling behind only (52)

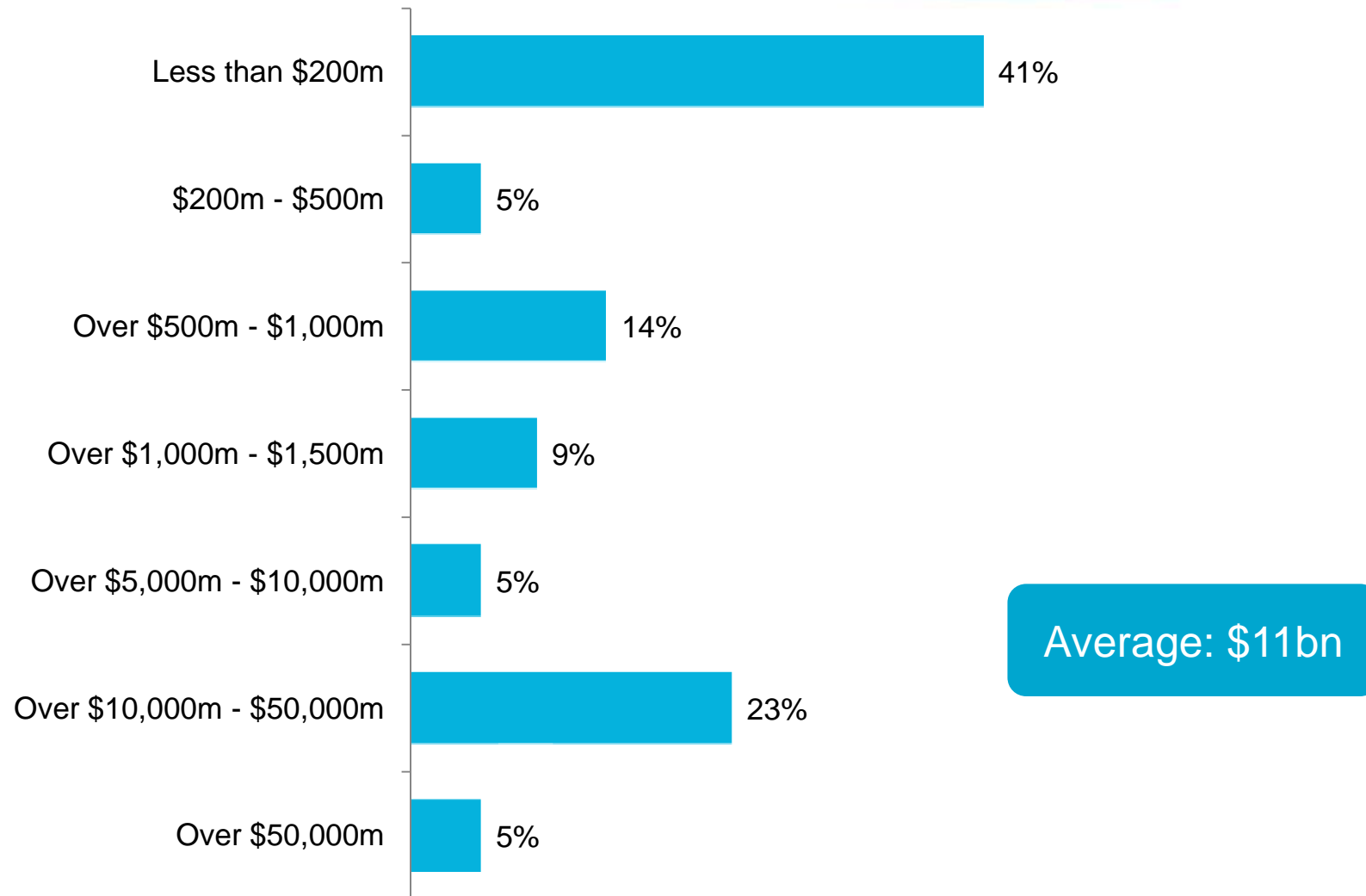
Company revenue in 2011 – less / unprofitable play



Q. What was your company's revenue in 2011?

Base: less / unprofitable play only (12)

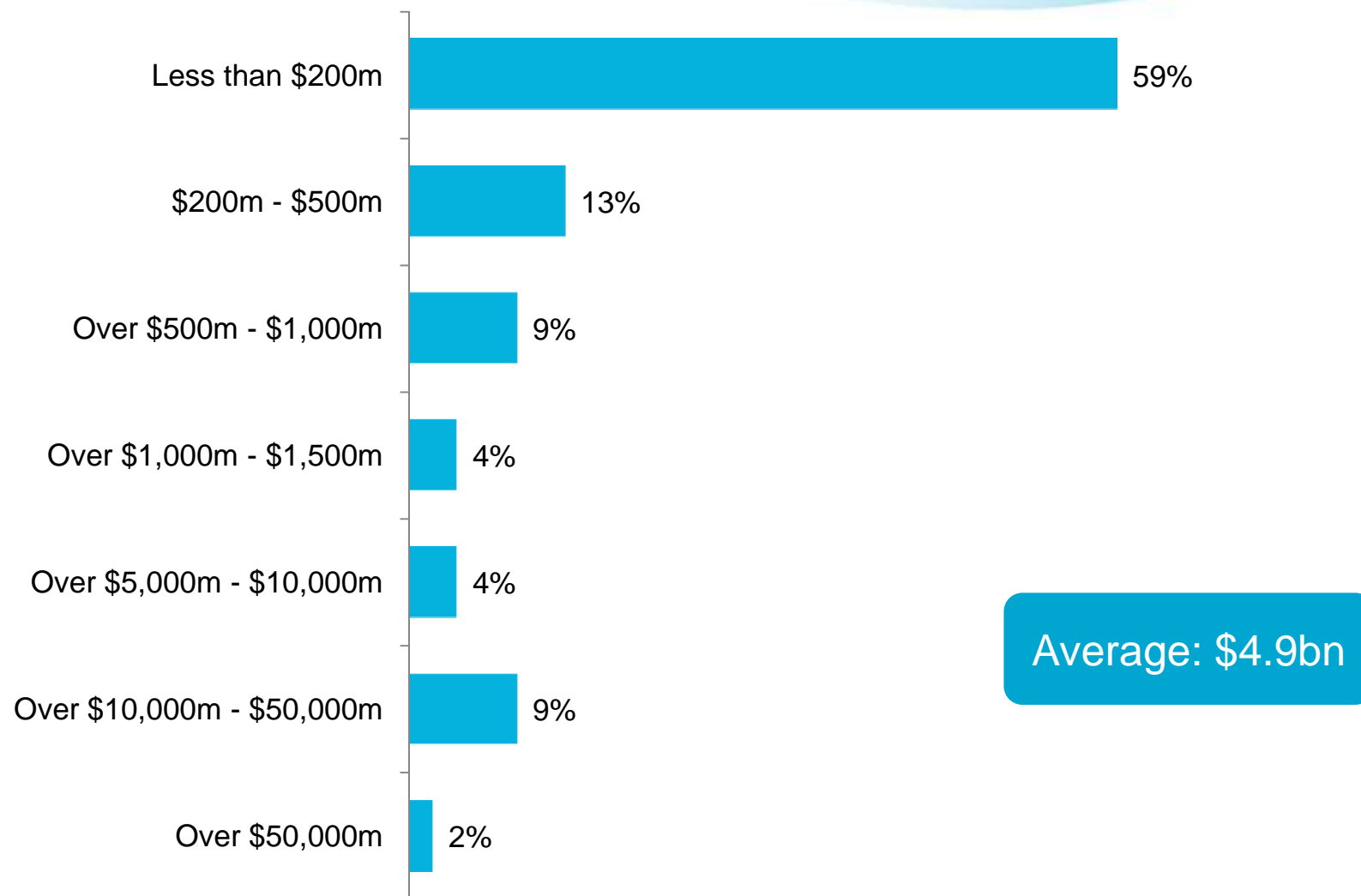
Company revenue in 2011 – efficiency play



Q. What was your company's revenue in 2011?

Base: efficiency play only (22)

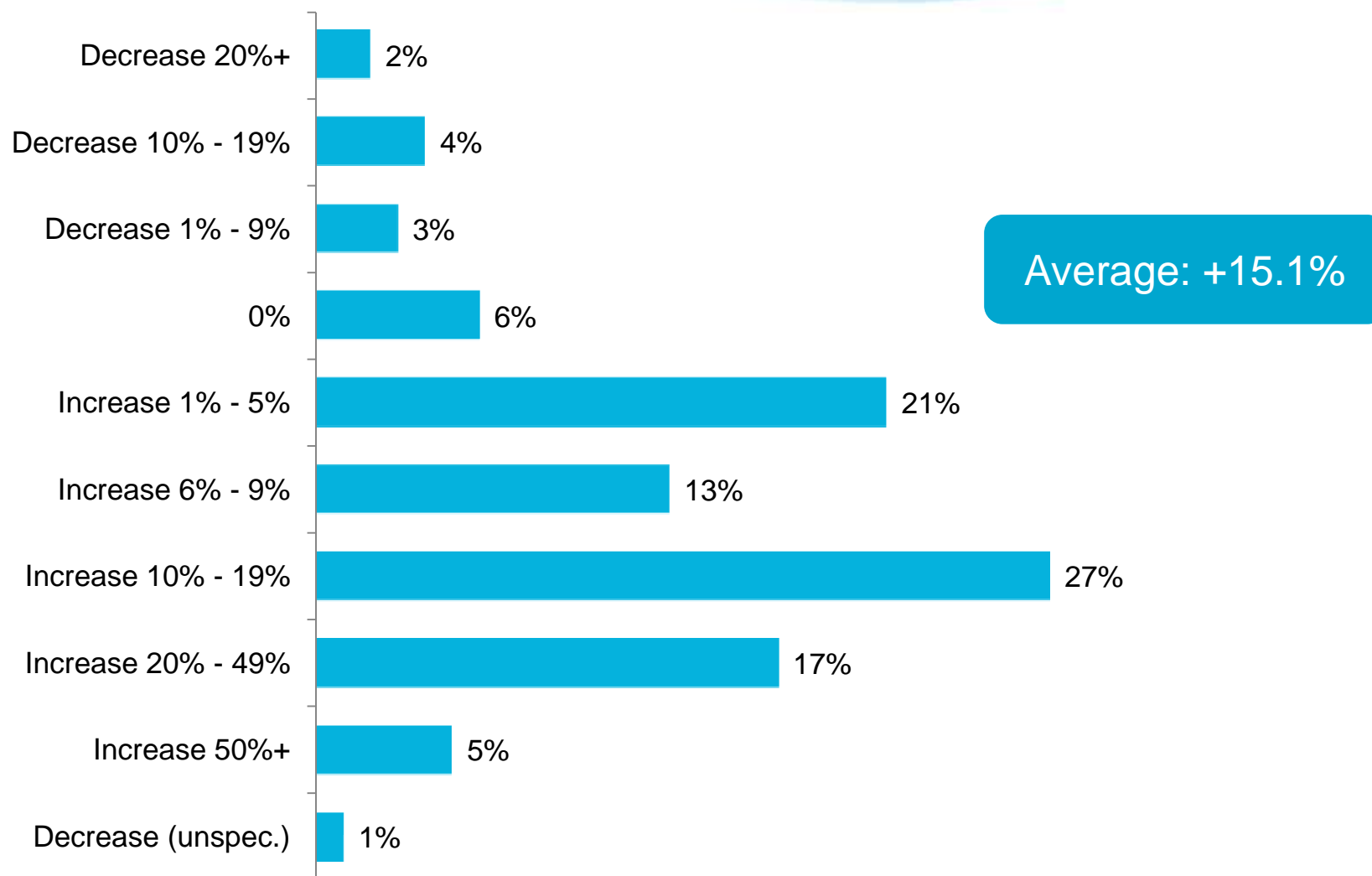
Company revenue in 2011 – highly profitable



Q. What was your company's revenue in 2011?

Base: highly profitable only (46)

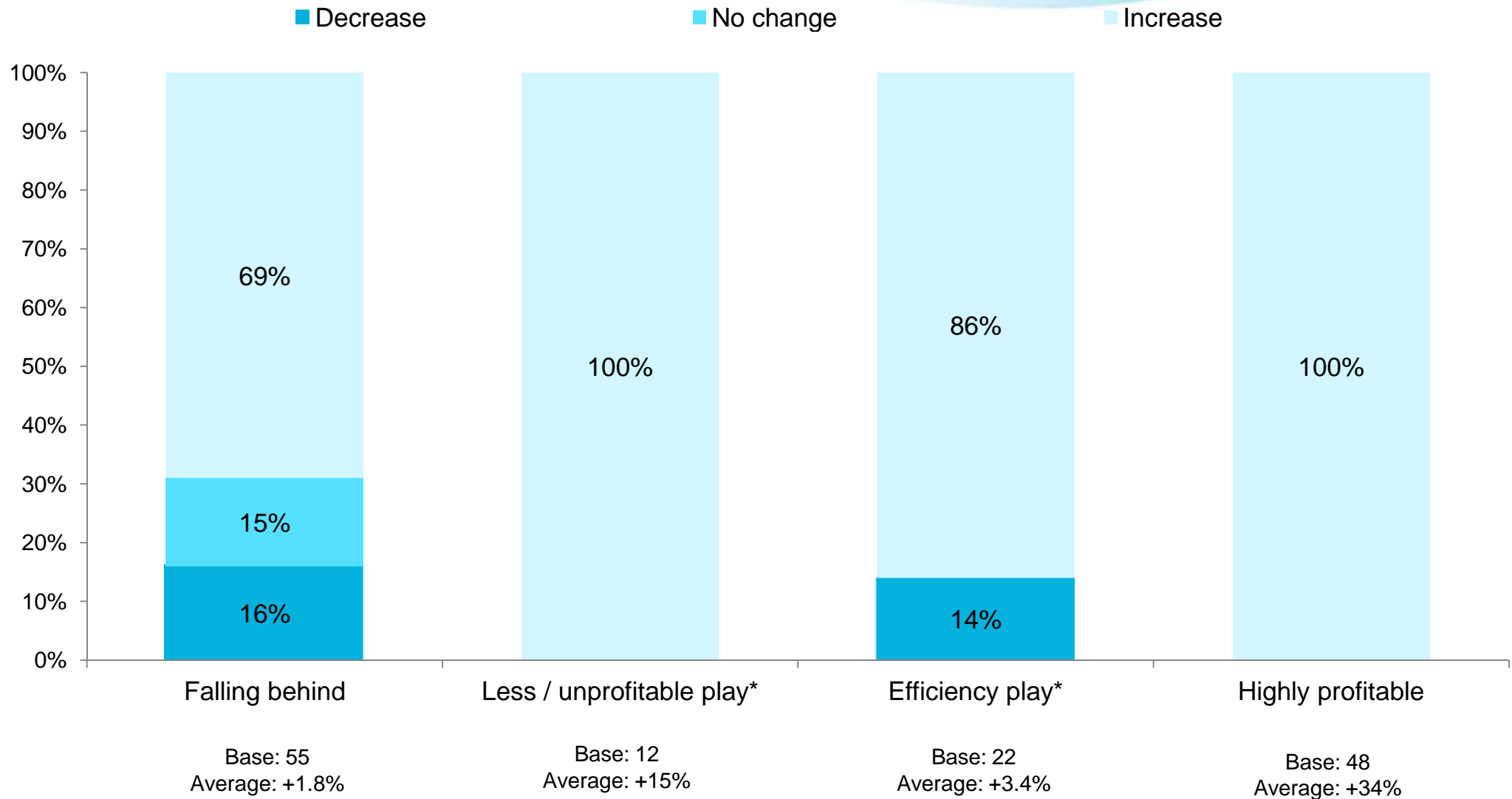
Average revenue growth over the past 3 years



Q. What has been your company's average revenue growth over the past three years?

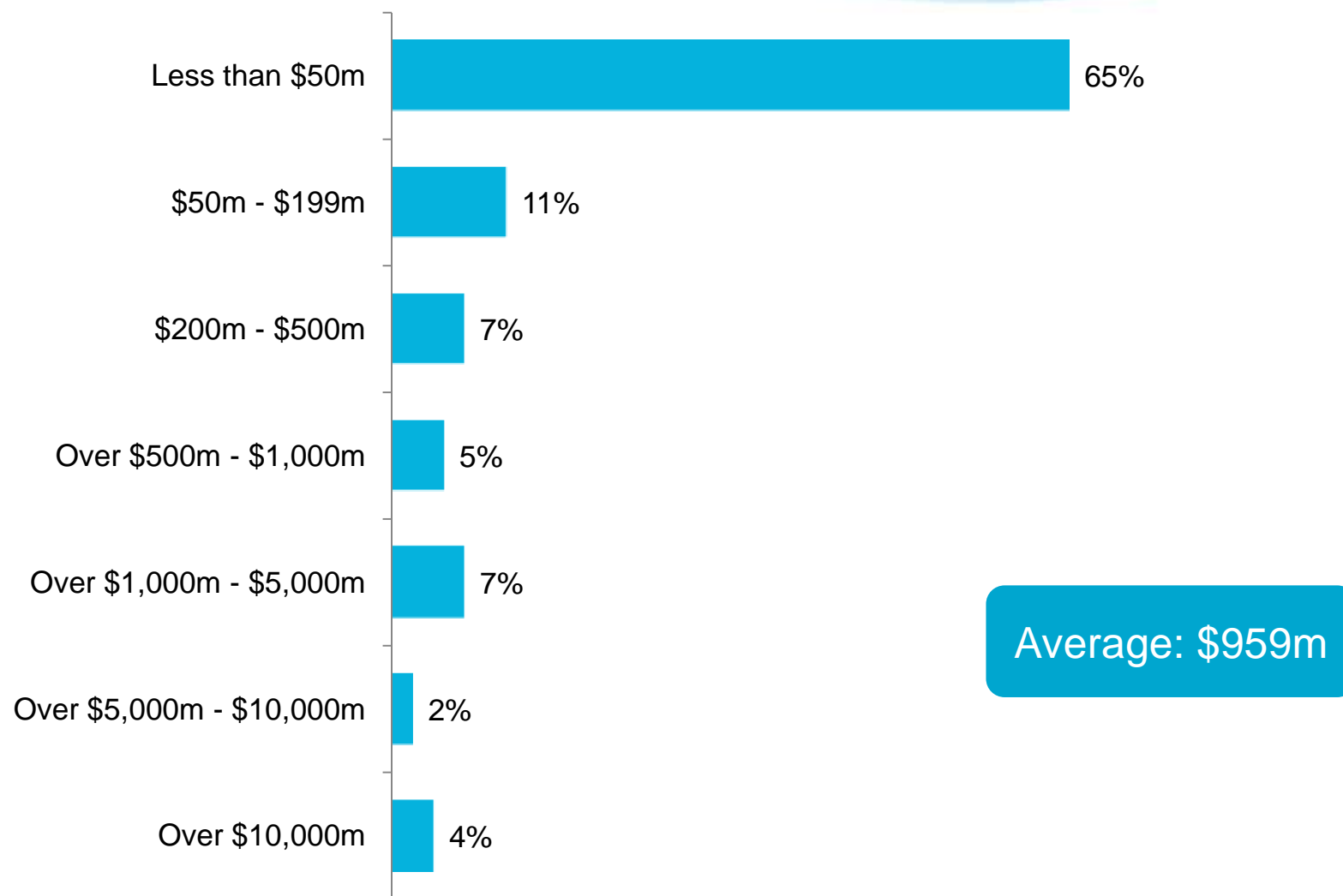
Base: all responding (193)

Average revenue growth over the past 3 years by segmentation



Q. What has been your company's average revenue growth over the past three years?

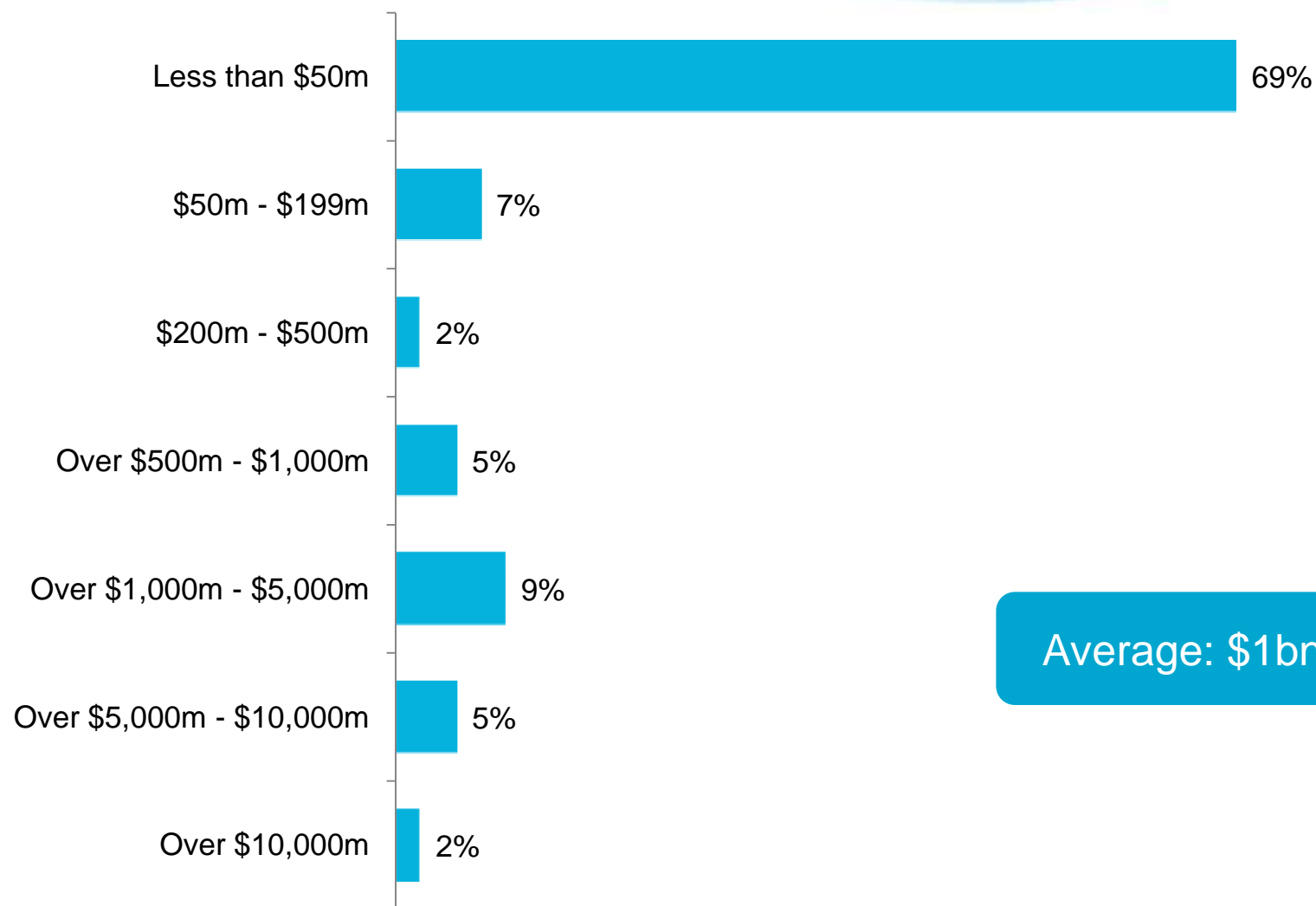
Company EBITDA in 2010



Q. What was your company's EBITDA in 2010?

Base: all responding (386)

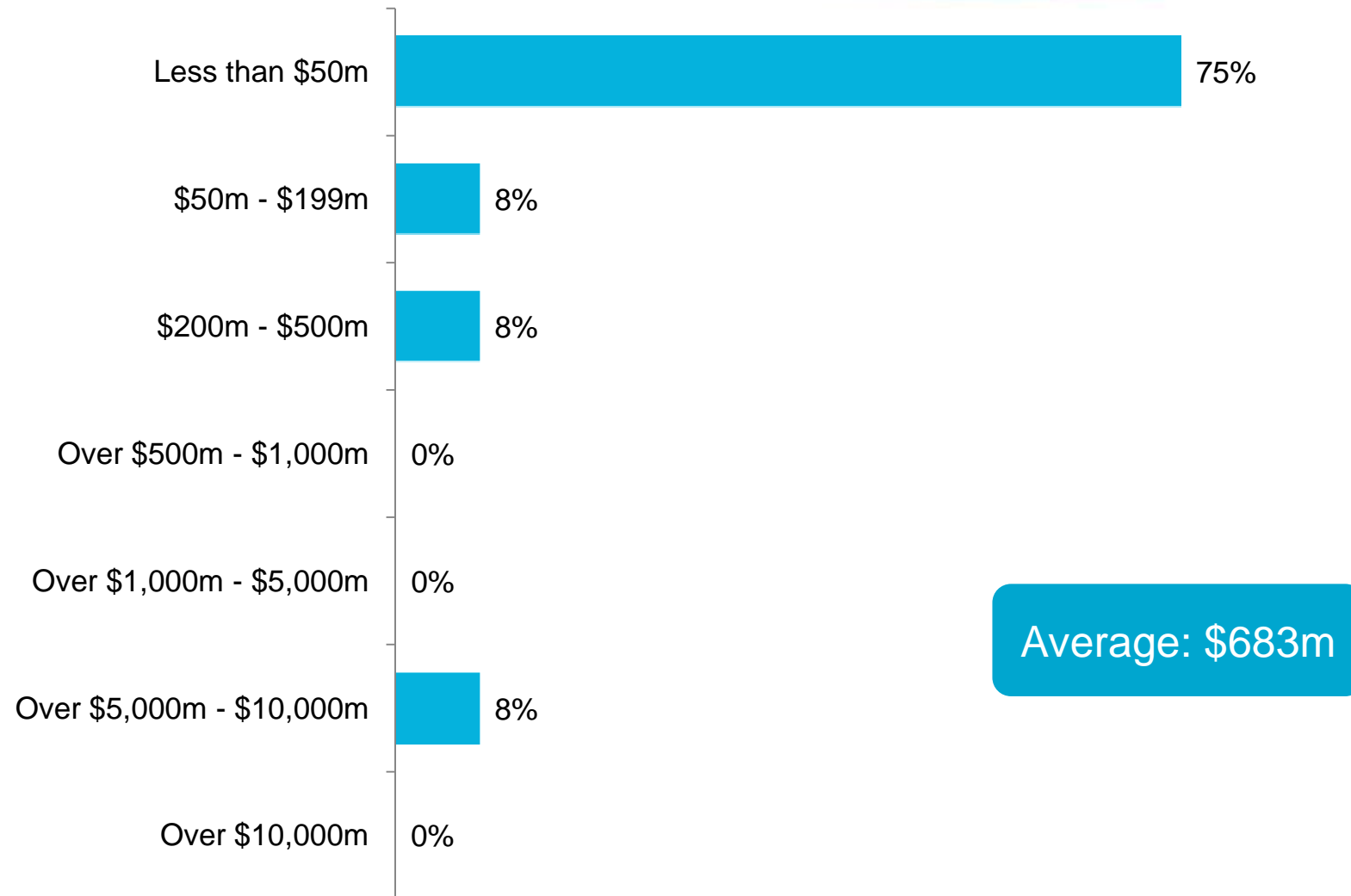
Company EBITDA in 2010 – falling behind



Q. What was your company's EBITDA in 2010?

Base: falling behind only (55)

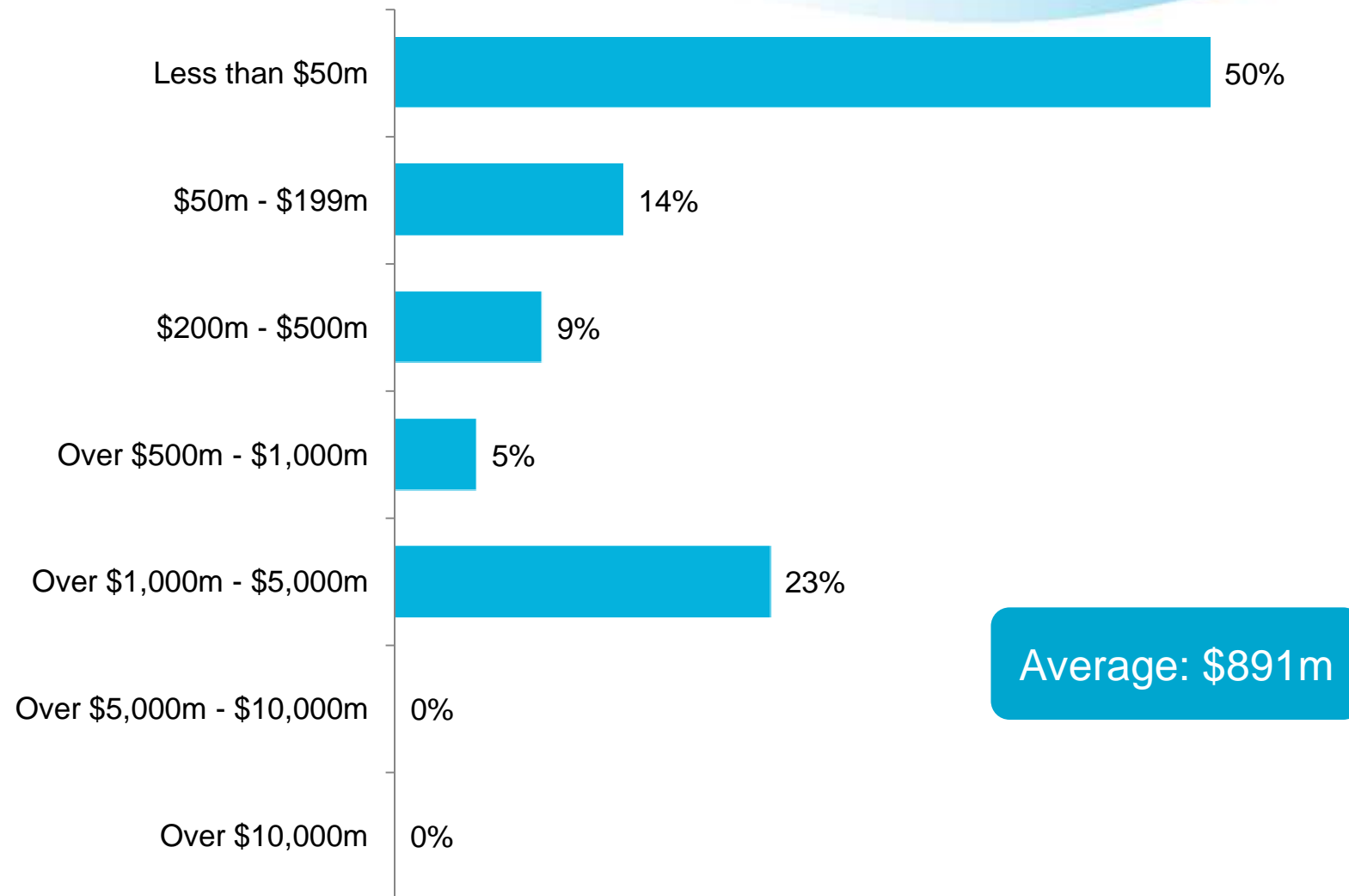
Company EBITDA in 2010 – less / unprofitable play



Q. What was your company's EBITDA in 2010?

Base: low / unprofitable play only (12)

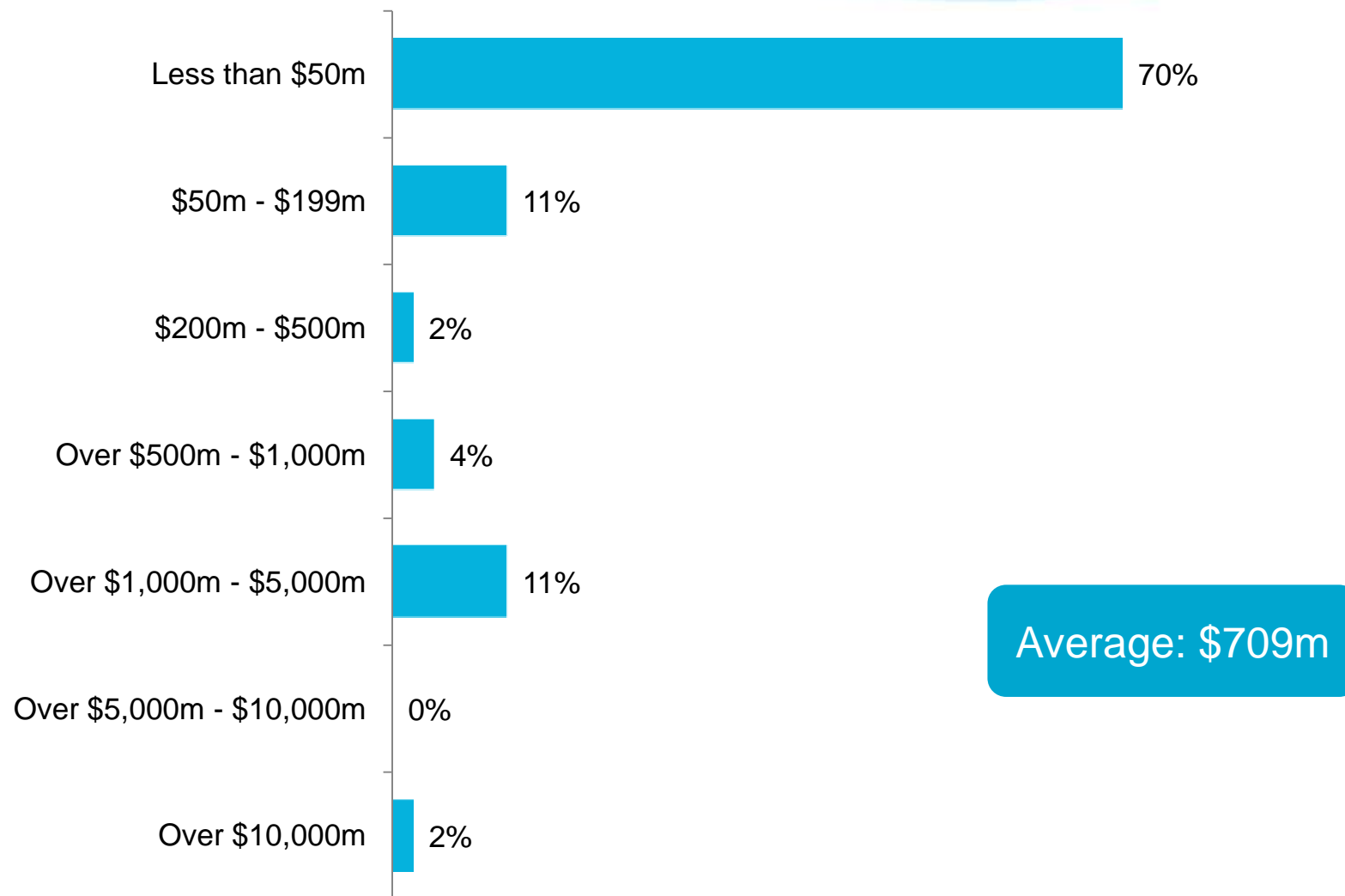
Company EBITDA in 2010 – efficiency play



Q. What was your company's EBITDA in 2010?

Base: efficiency play only (22)

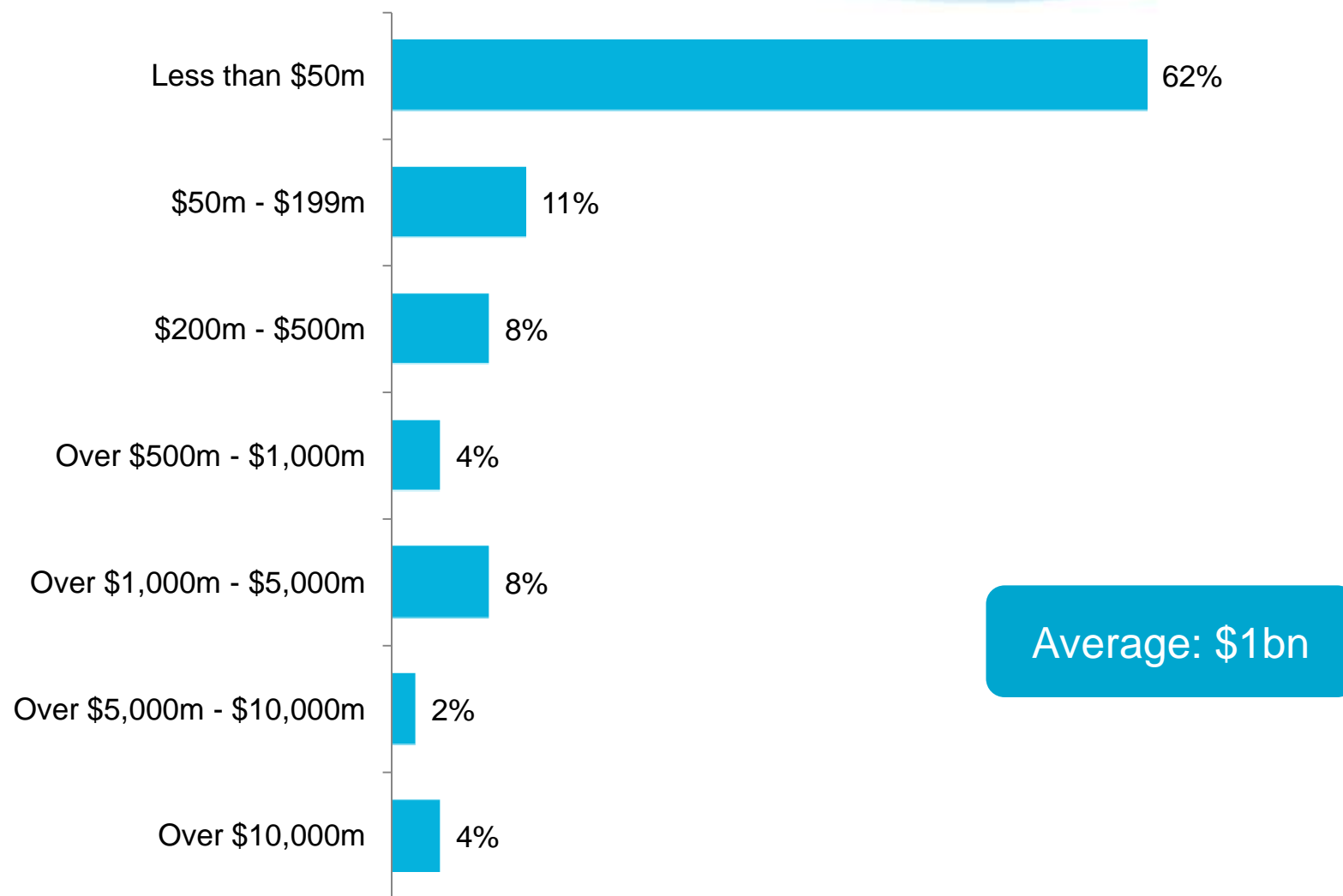
Company EBITDA in 2010 – highly profitable



Q. What was your company's EBITDA in 2010?

Base: highly profitable only (47)

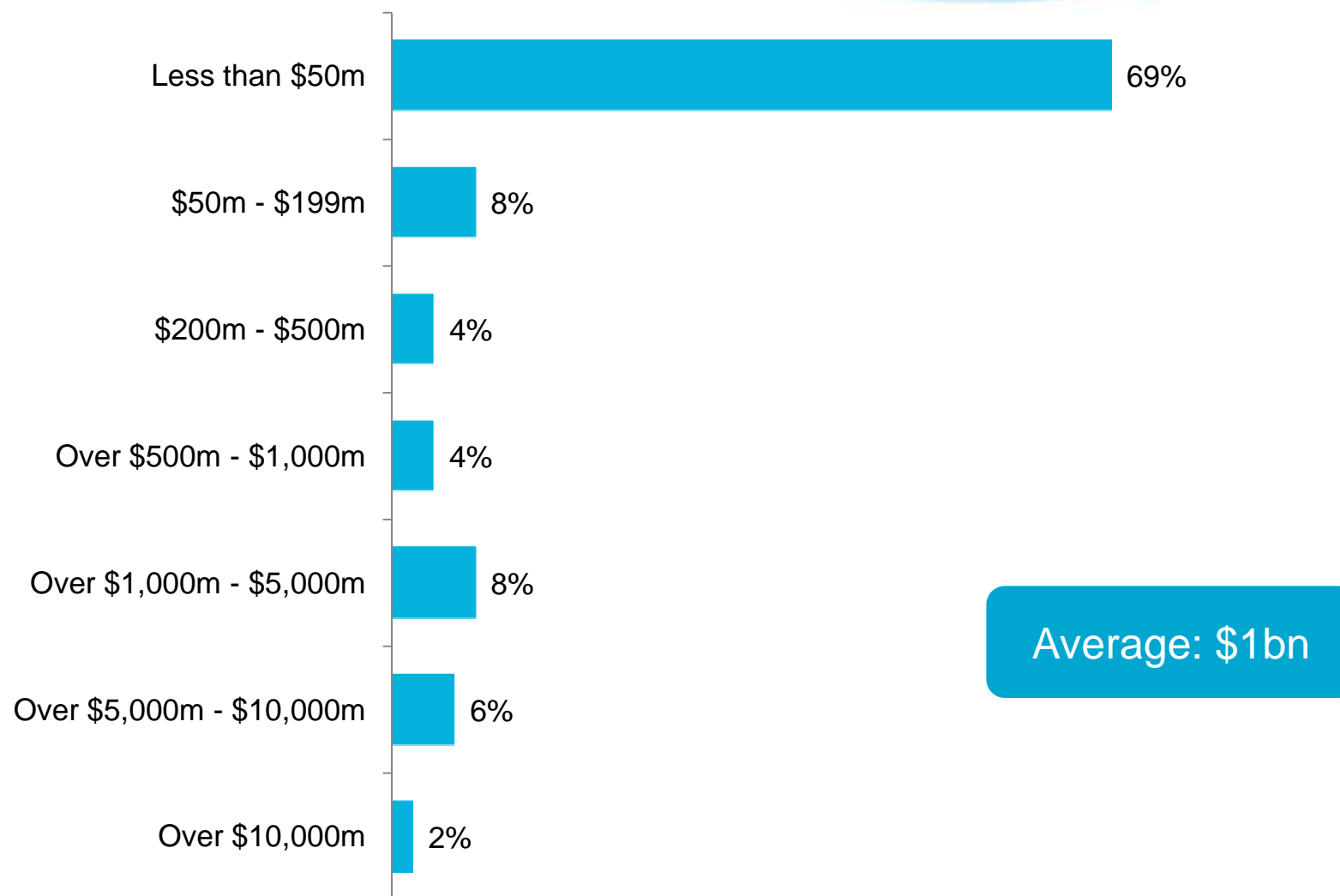
Company EBITDA in 2011



Q. What was your company's EBITDA in 2011?

Base: all responding (370)

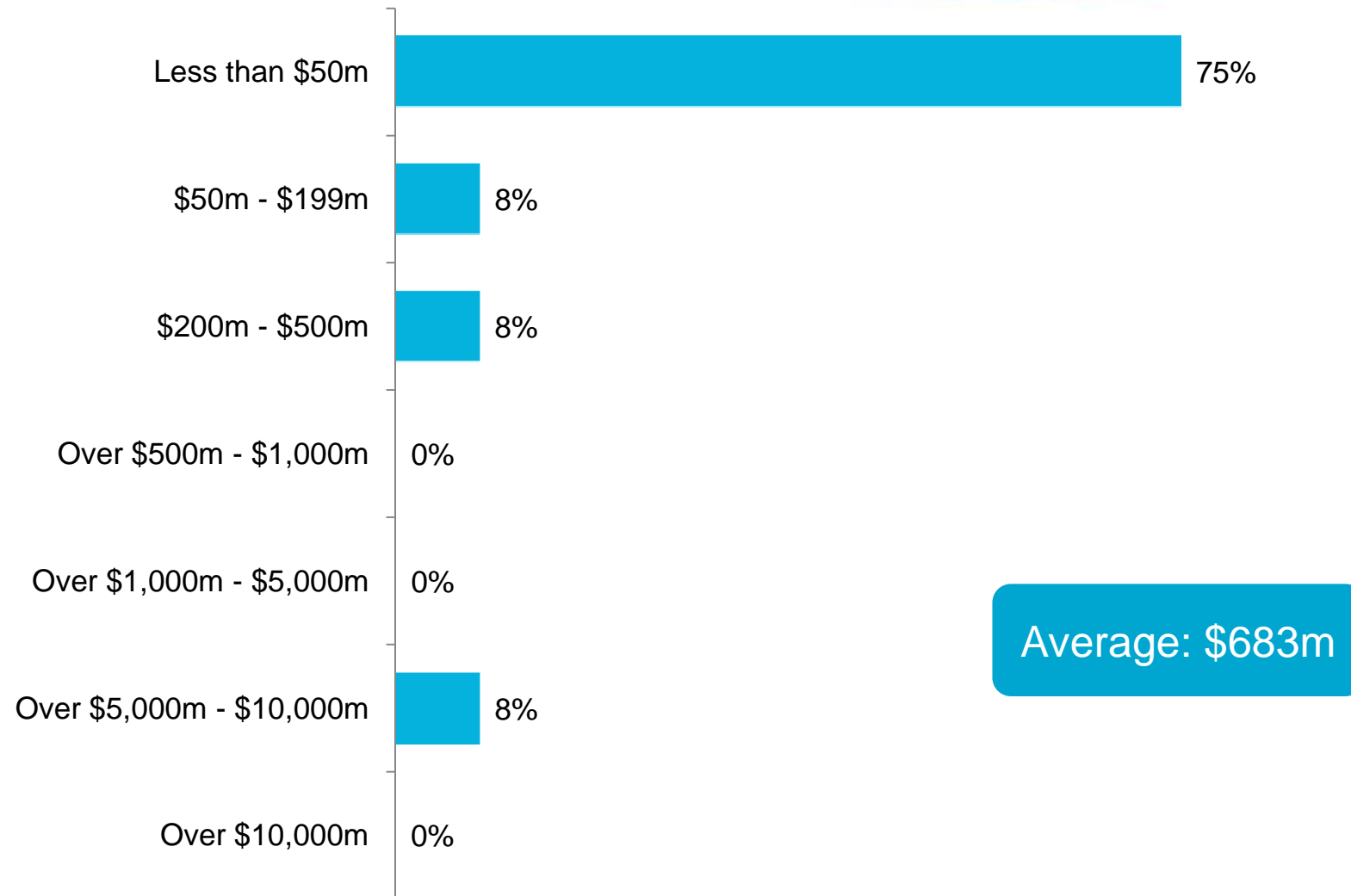
Company EBITDA in 2011 – falling behind



Q. What was your company's EBITDA in 2011?

Base: falling behind only (51)

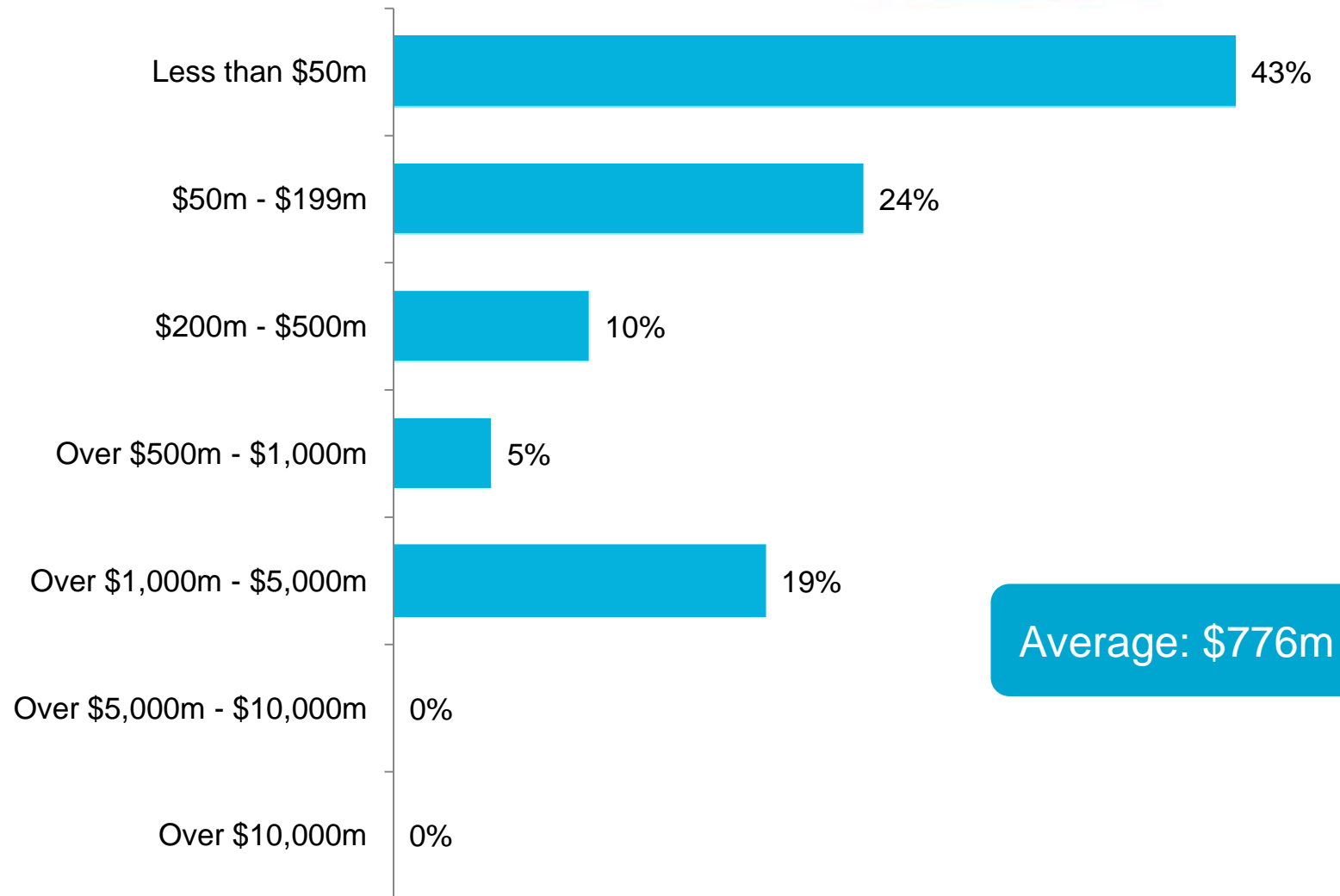
Company EBITDA in 2011 – less / unprofitable play



Q. What was your company's EBITDA in 2011?

Base: low / unprofitable play only (12)

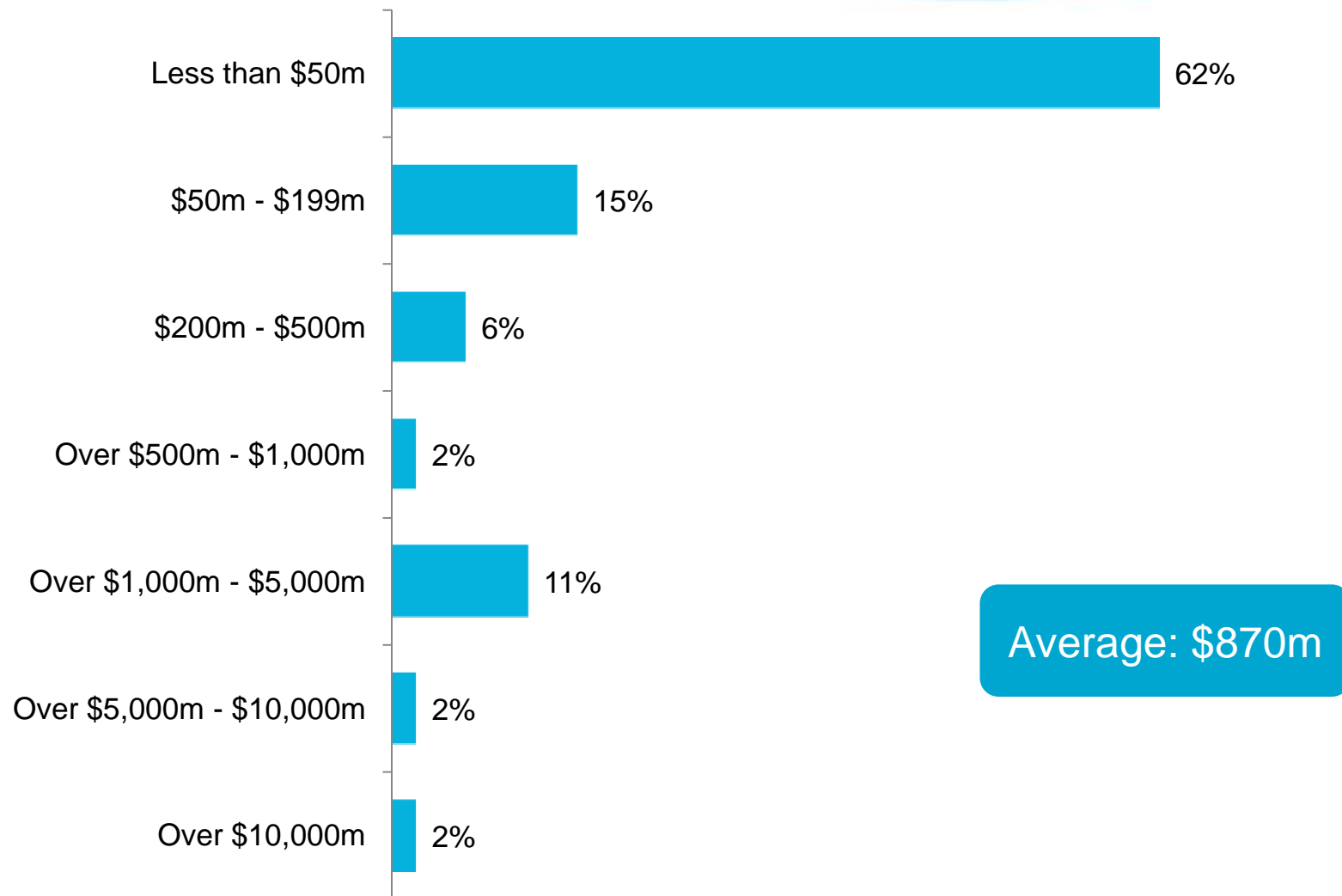
Company EBITDA in 2011 – efficiency play



Q. What was your company's EBITDA in 2011?

Base: efficiency play only (21)

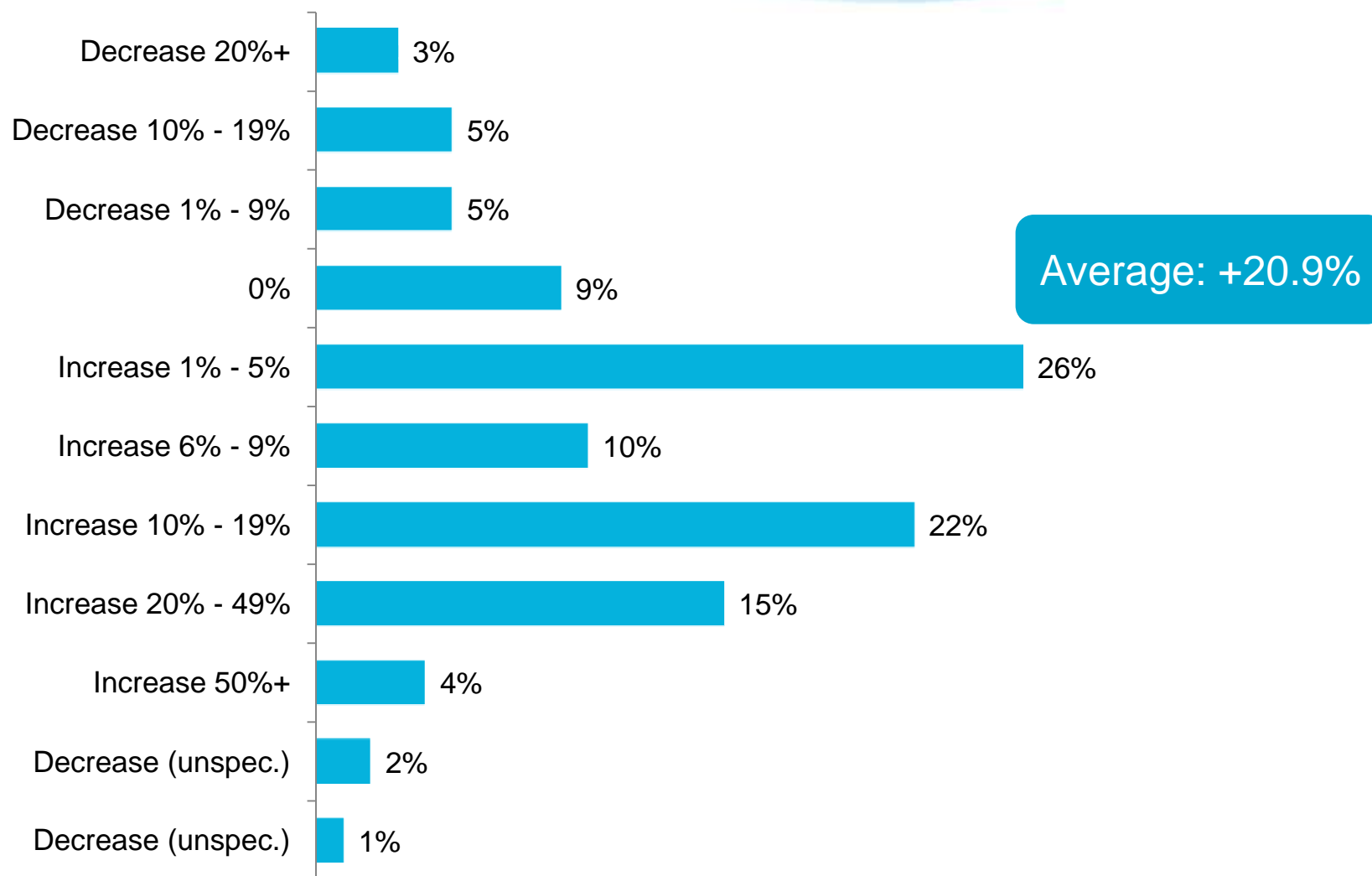
Company EBITDA in 2011 – highly profitable



Q. What was your company's EBITDA in 2011?

Base: highly profitable only (47)

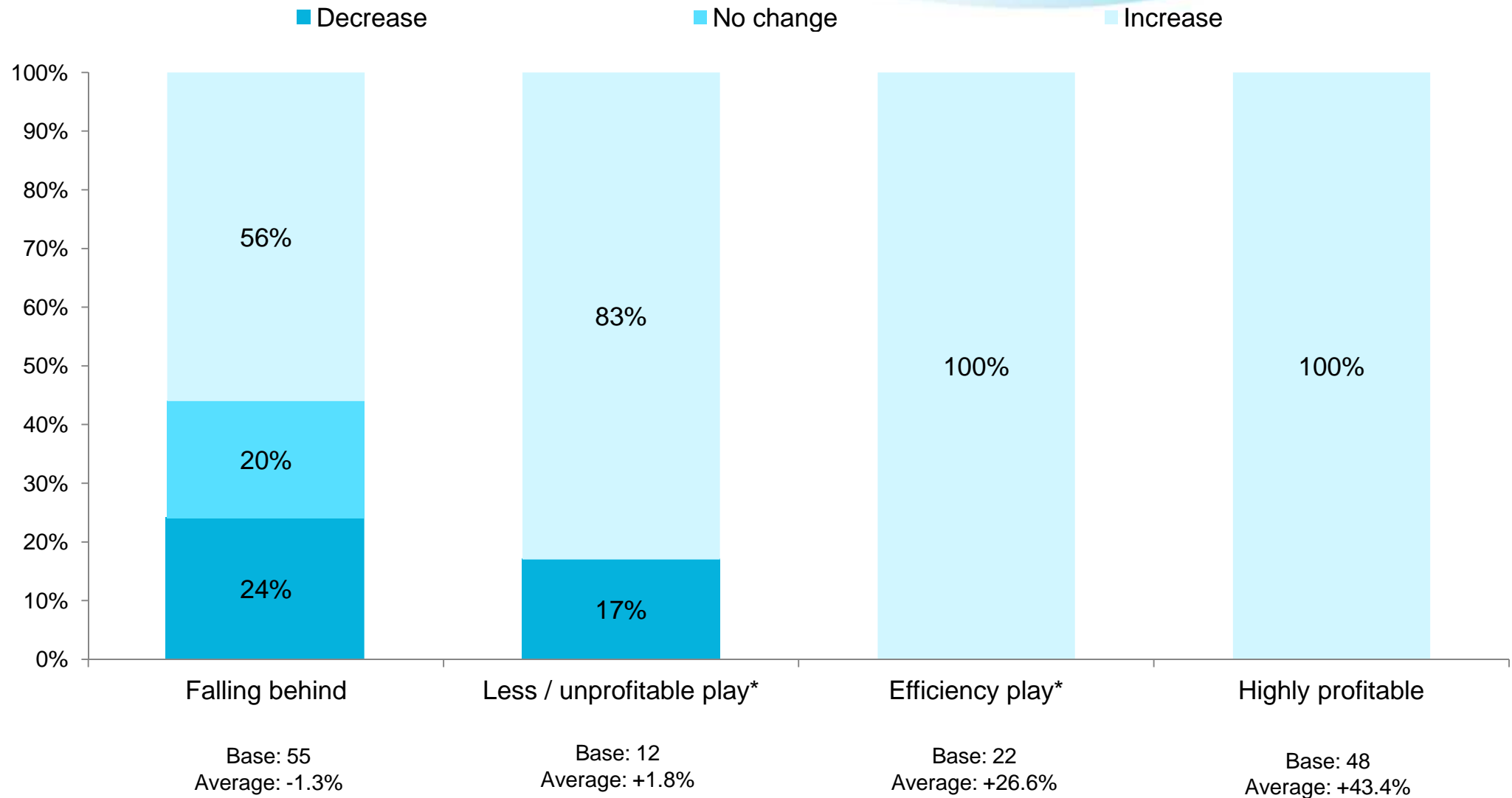
Average EBITDA growth over the past 3 years



Q. What has been your company's average EBITDA growth over the past three years?

Base: all responding (200)

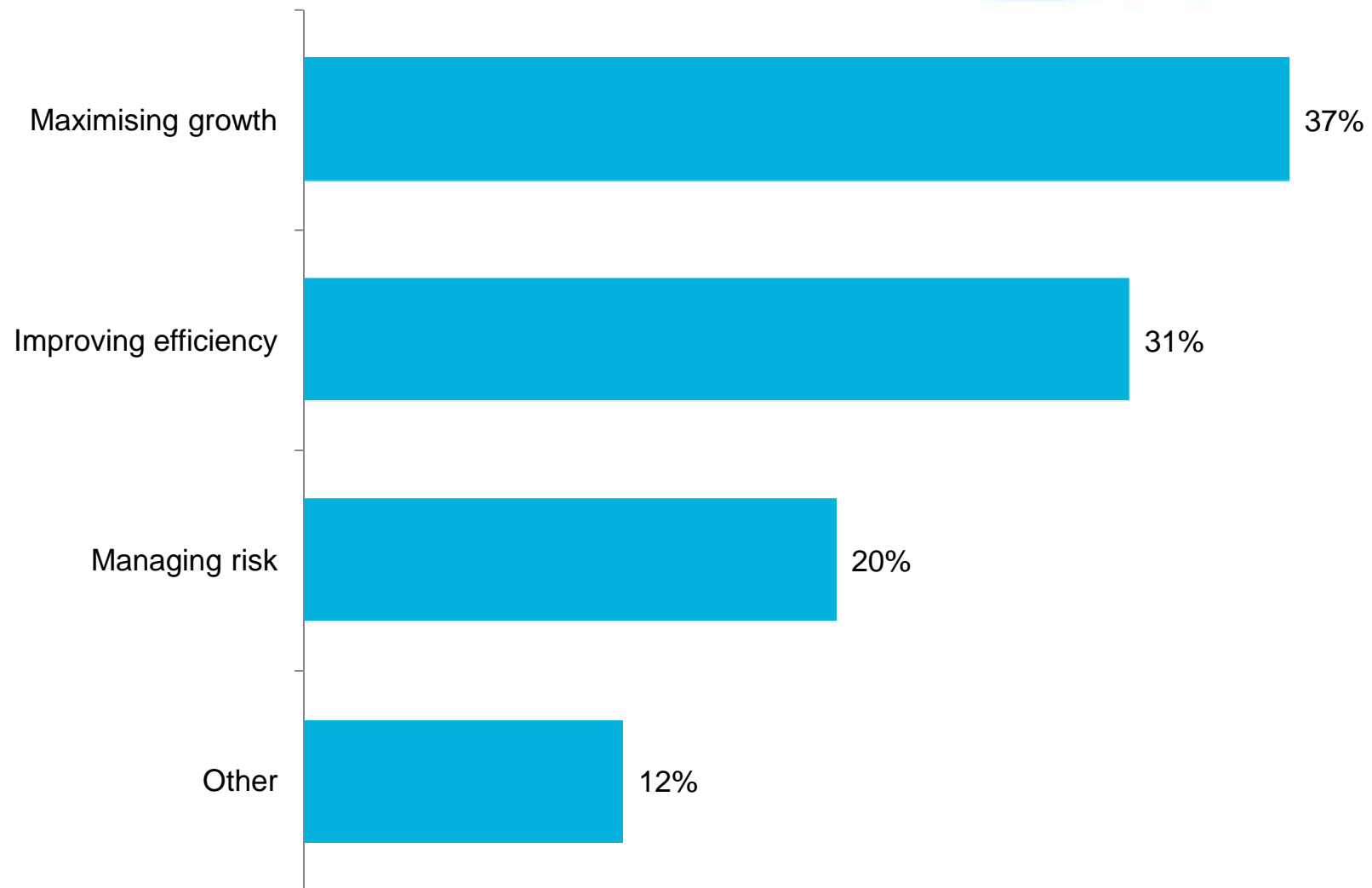
Average EBITDA growth over the past 3 years by segmentation



Q. What has been your company's average EBITDA growth over the past three years?

Strategy

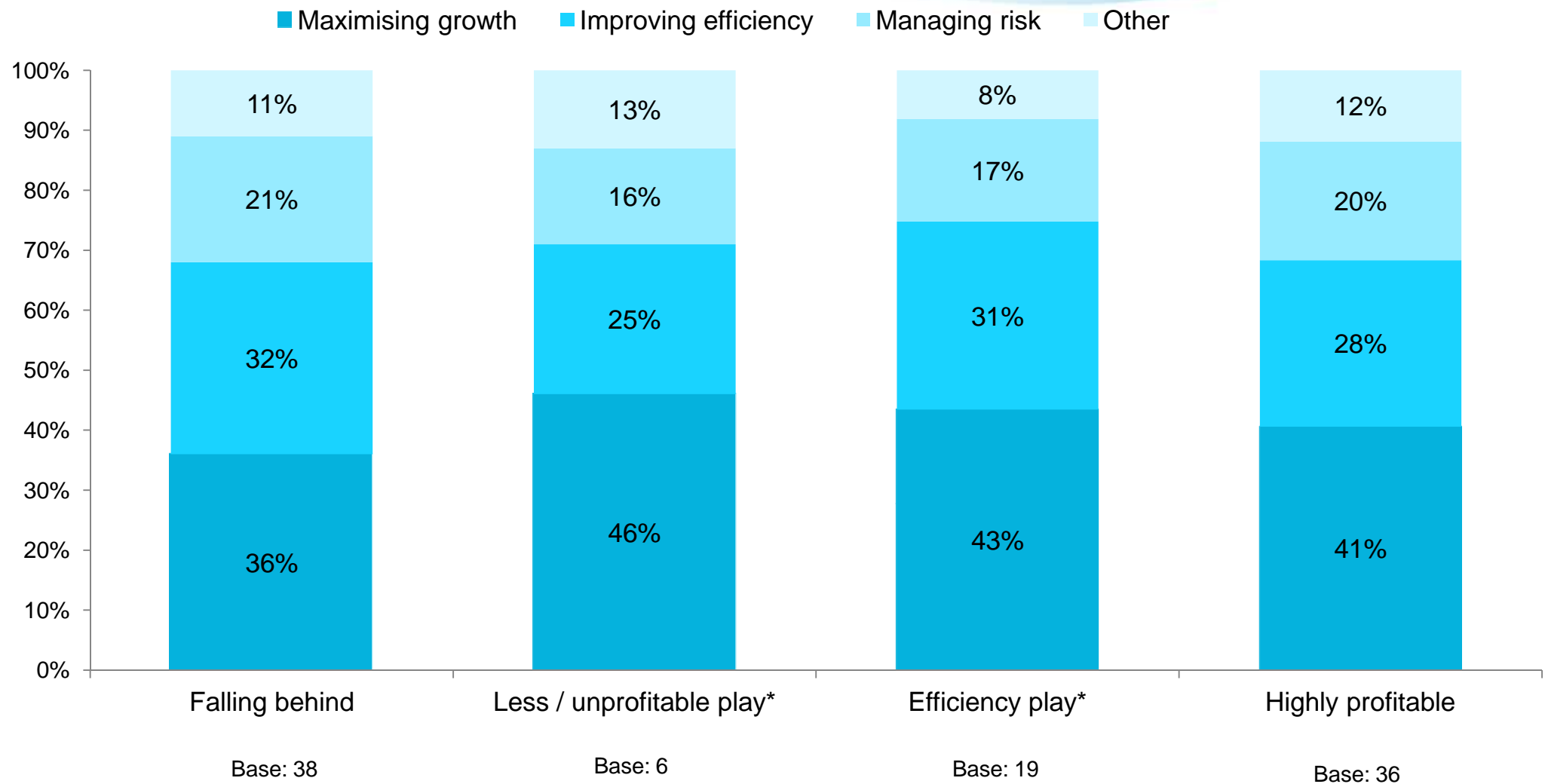
Allocation of strategic planning efforts



Q. Please indicate approximately what percentage of the company's strategic planning efforts is allocated to the following areas?

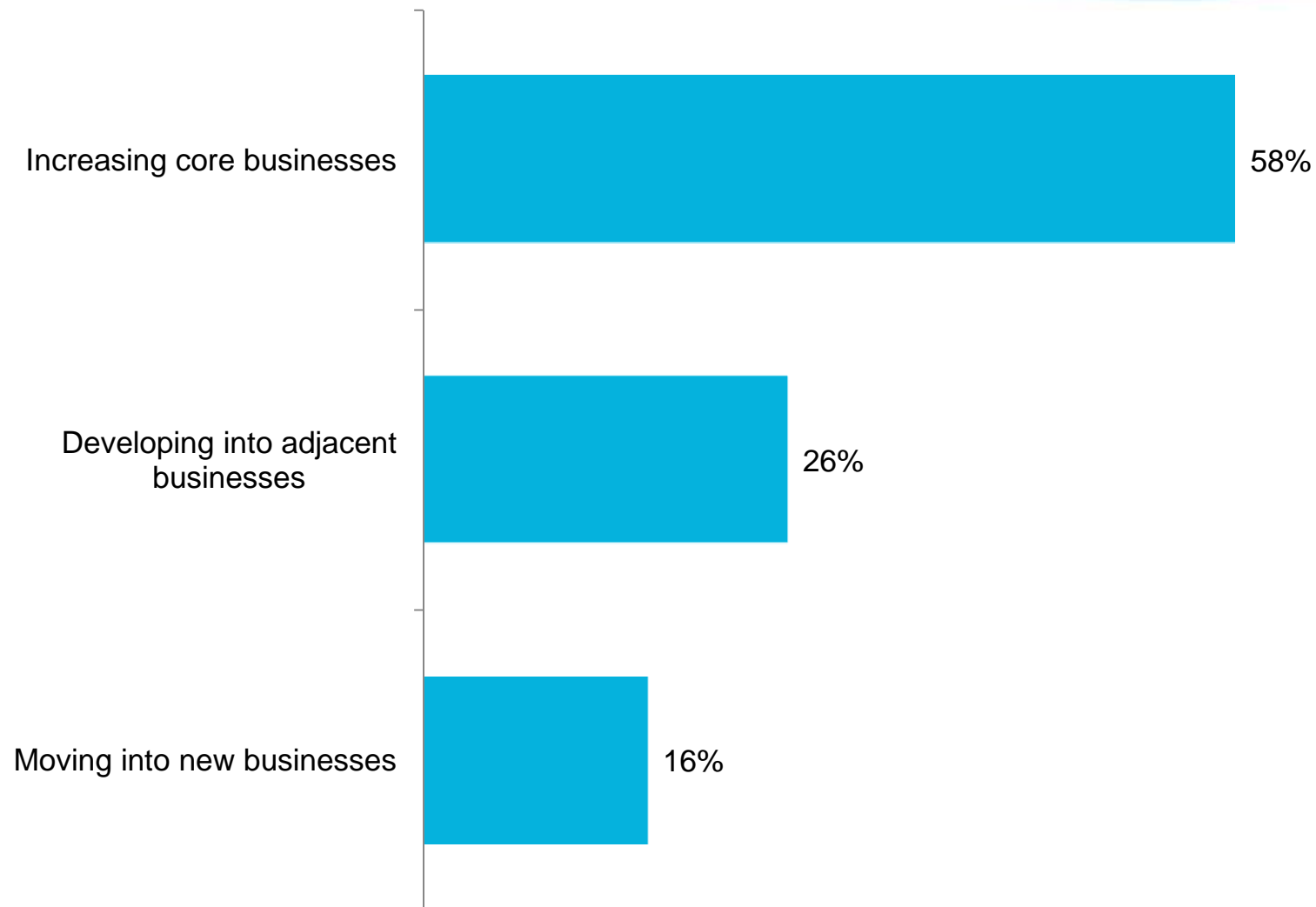
Base: all responding (242)

Allocation of strategic planning efforts by business segmentation



Q. Please indicate approximately what percentage of the company's strategic planning efforts is allocated to the following areas?

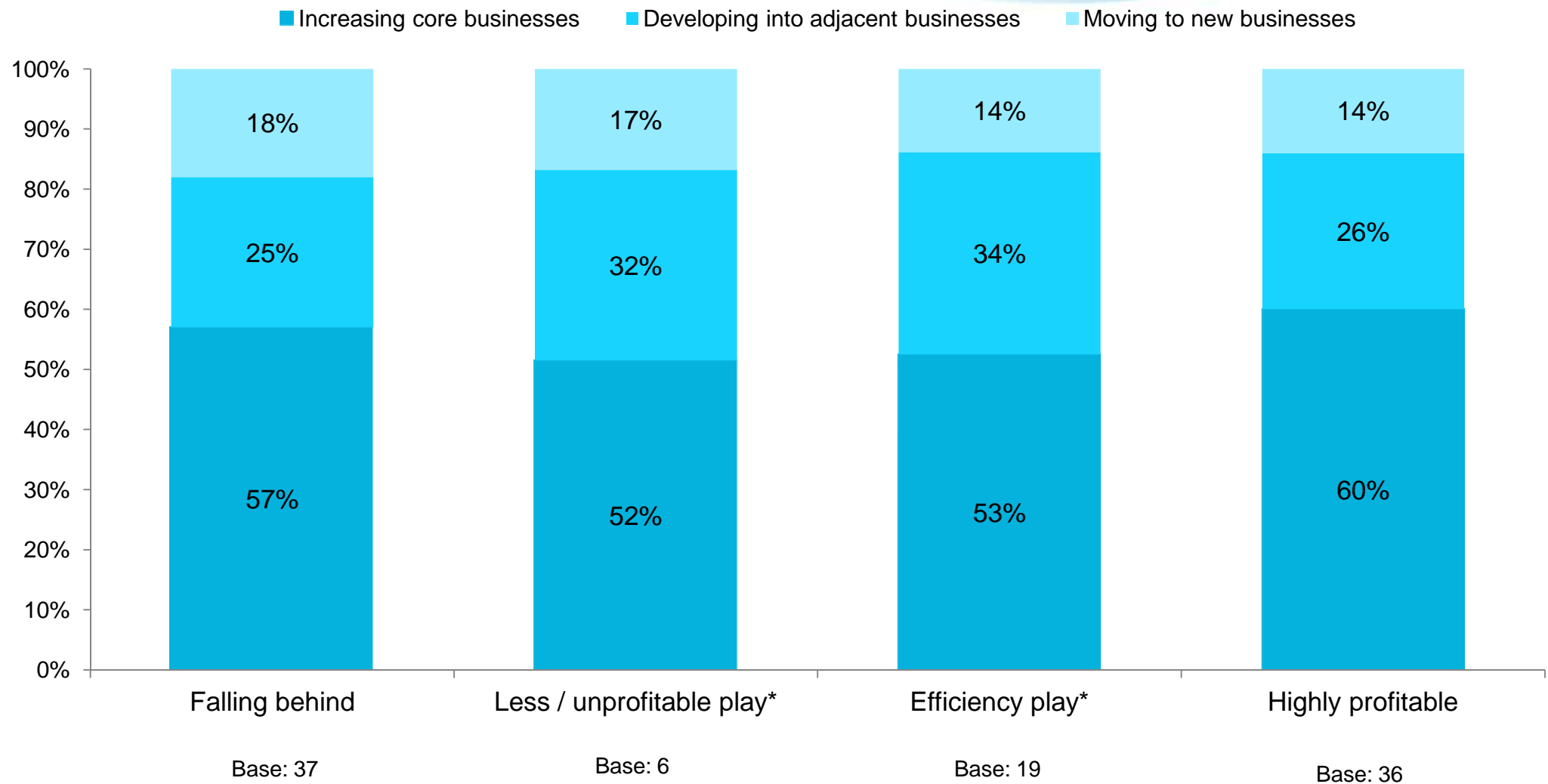
Percentage of total growth expected to come from ...



Q. Thinking about the company's approach to growth approximately what percentage of the total growth is expected to come from ...

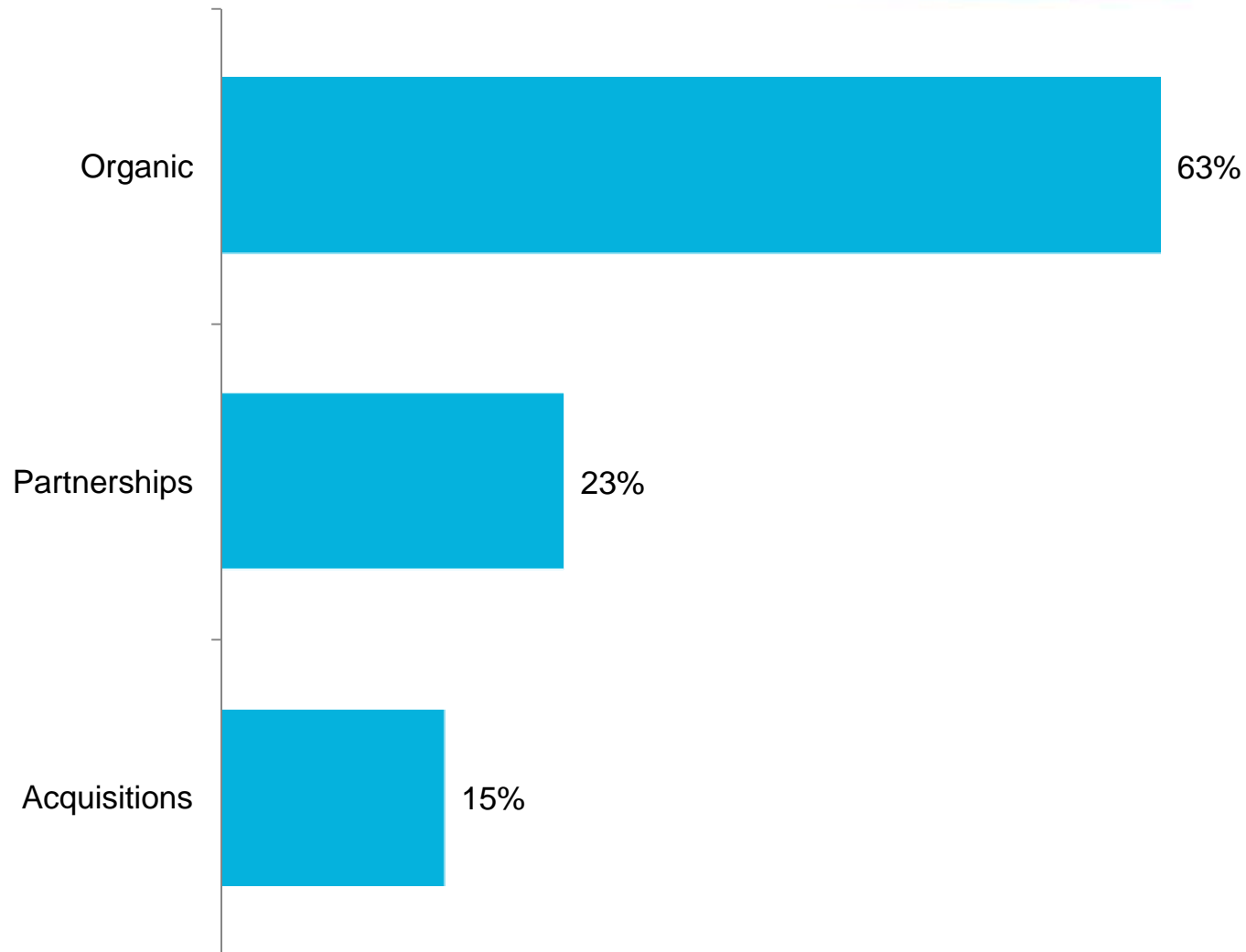
Base: all responding (236)

Percentage of total growth expected to come from ...



Q. Thinking about the company's approach to growth approximately what percentage of the total growth is expected to come from ...

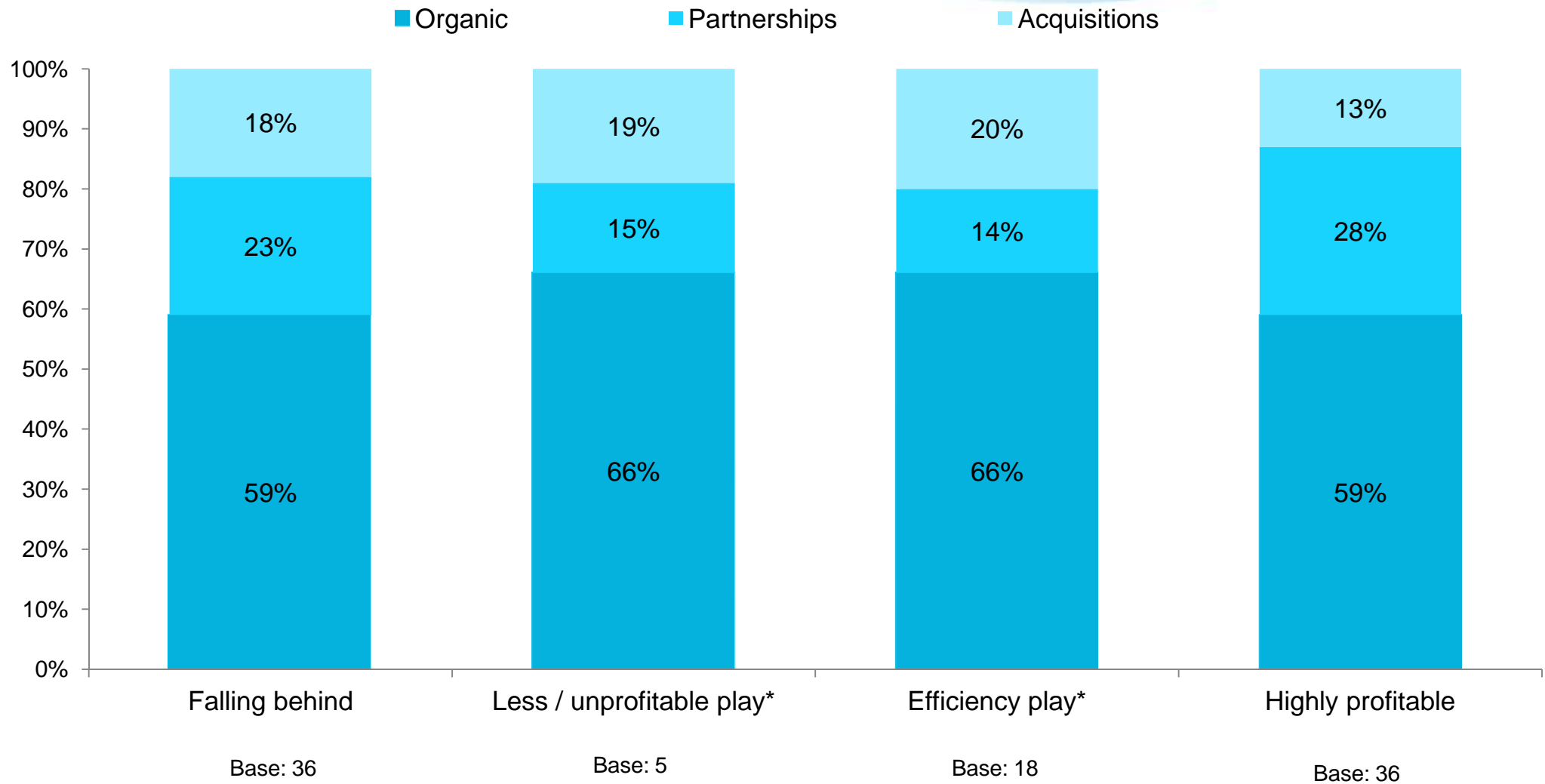
Expected methods of total growth



Q. Again, thinking about the company's approach to growth, approximately what percentage of the total growth is expected to come from the following areas?

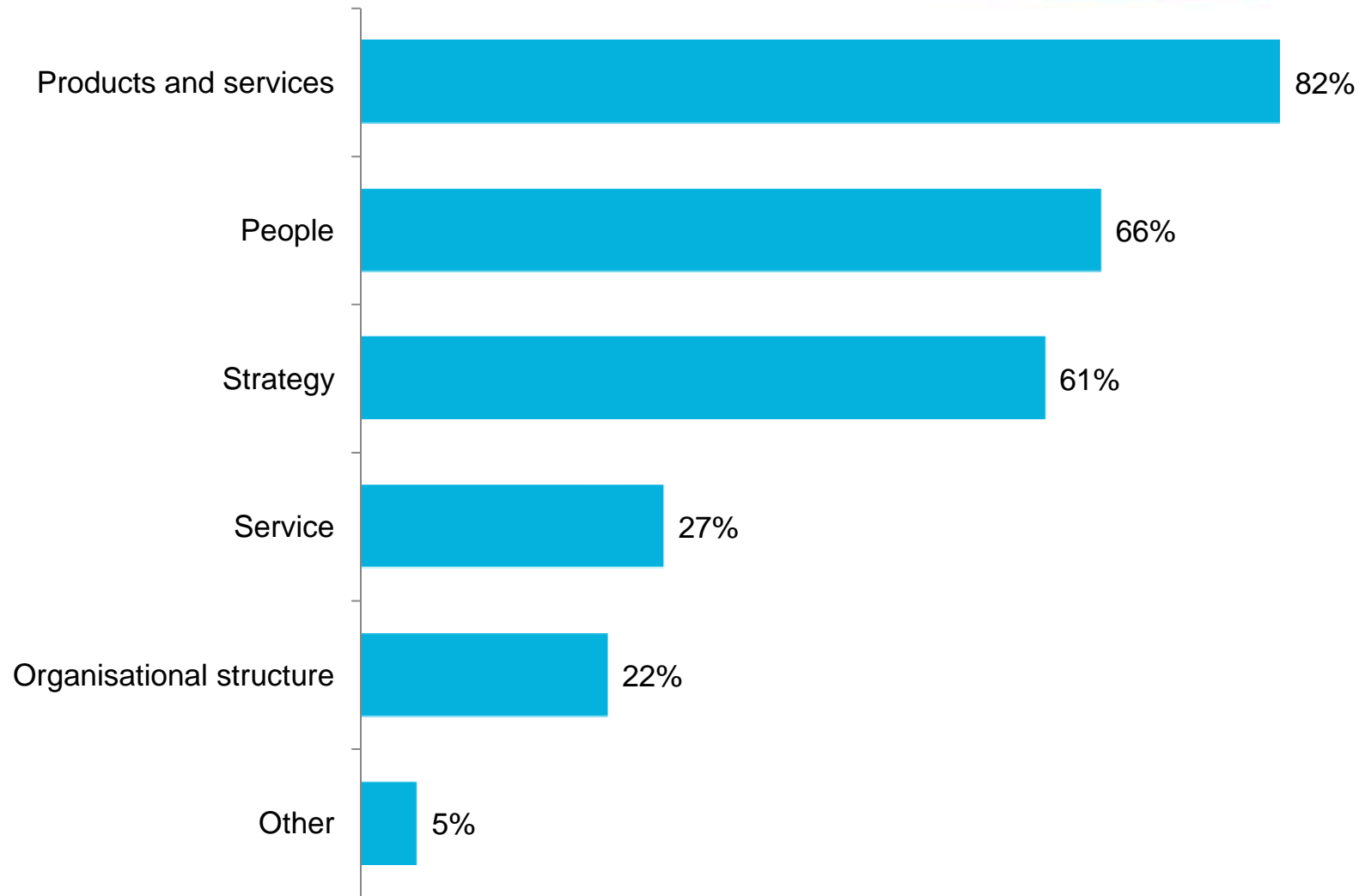
Base: all responding (233)

Areas total growth is expected to come from by business segmentation



Q. Again, thinking about the company's approach to growth, approximately what percentage of the total growth is expected to come from the following areas?

Primary internal drives of growth

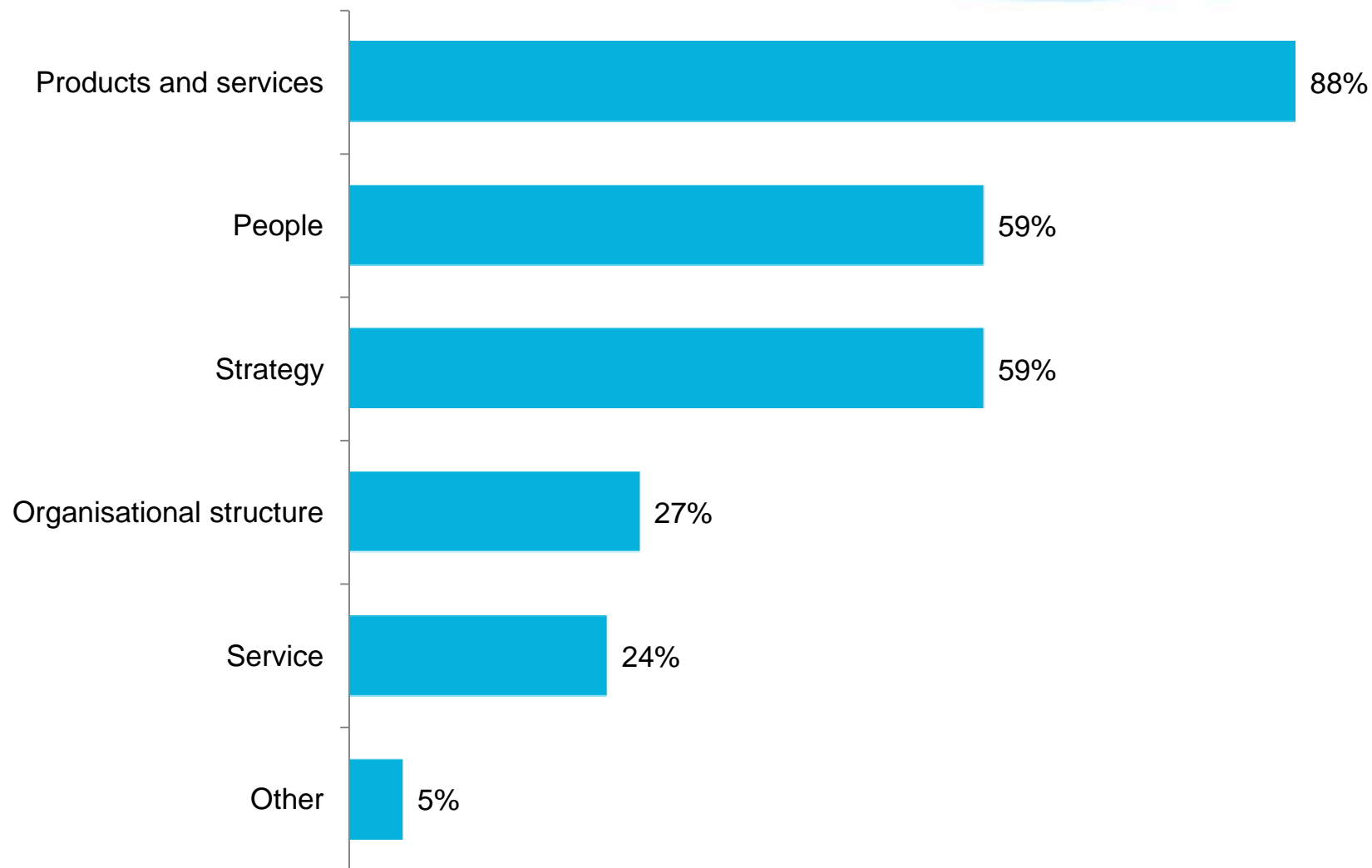


Q. Which of the following does the company see as the primary internal drivers of growth?

Base: all responding (261)

36

Primary internal drives of growth – falling behind

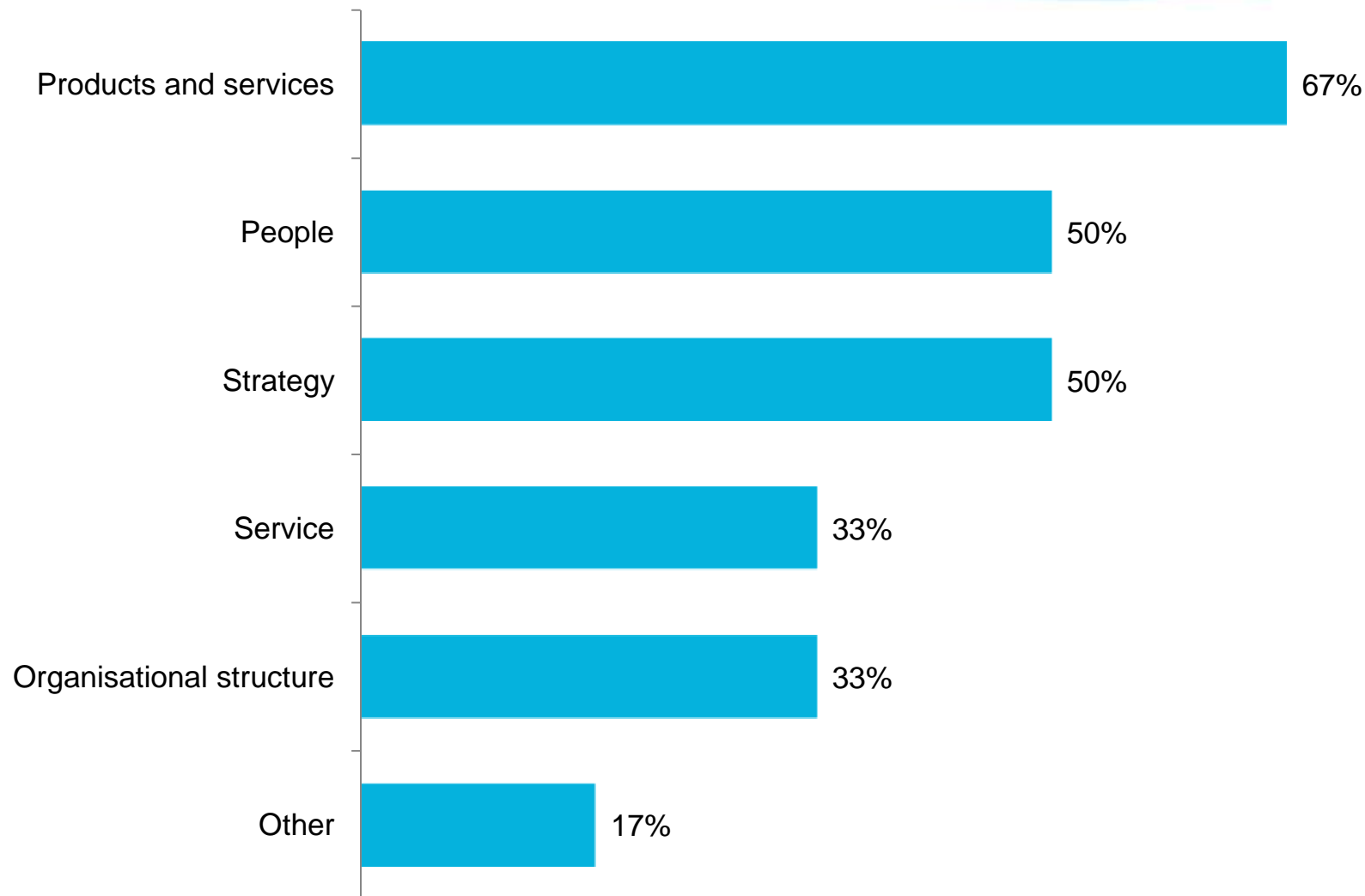


Q. Which of the following does the company see as the primary internal drivers of growth?

Base: falling behind only (41)

37

Primary internal drives of growth – less / unprofitable play

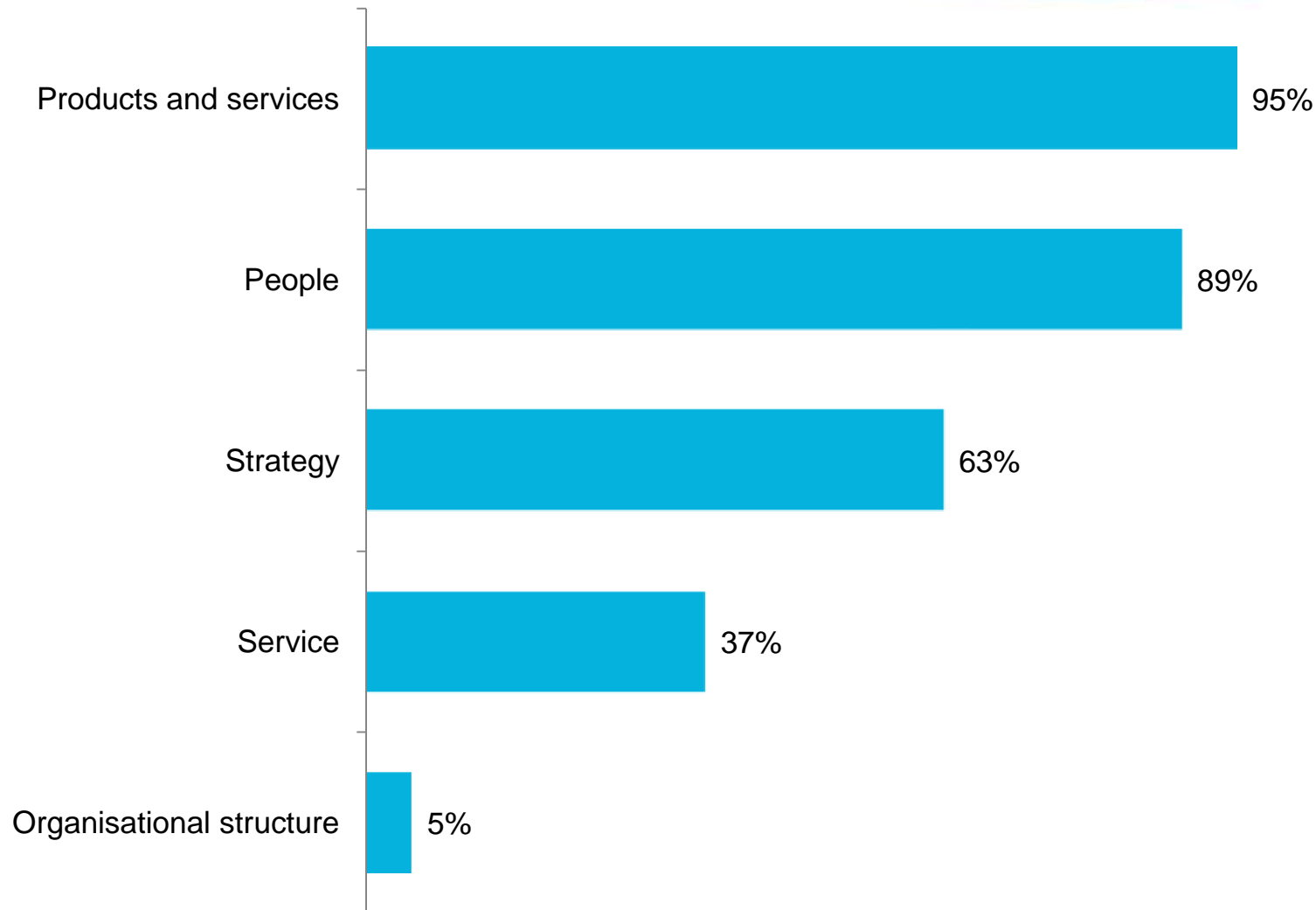


Q. Which of the following does the company see as the primary internal drivers of growth?

Base: less / unprofitable play only (6)

38

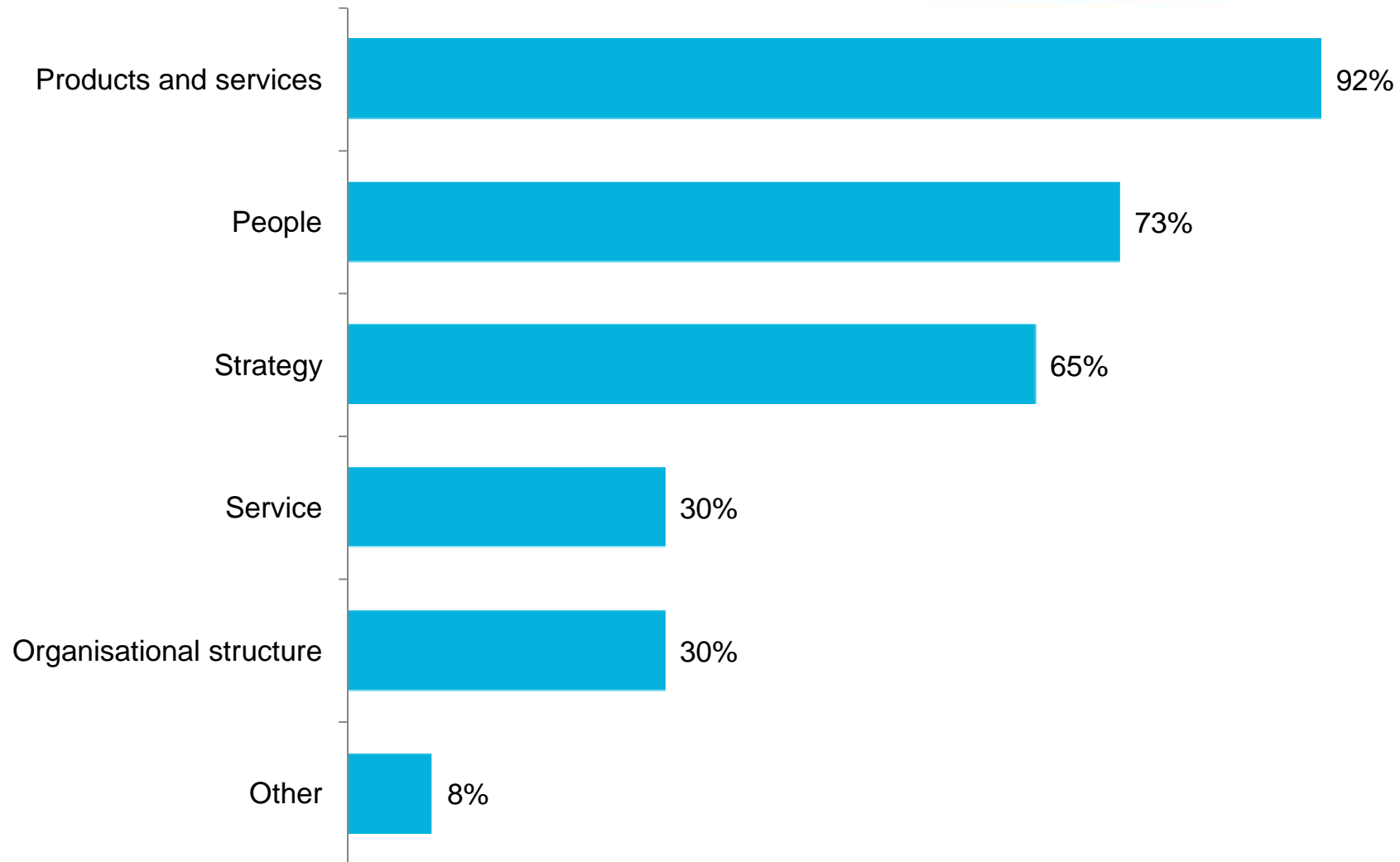
Primary internal drives of growth – efficiency play



Q. Which of the following does the company see as the primary internal drivers of growth?

Base: efficiency play only (19)

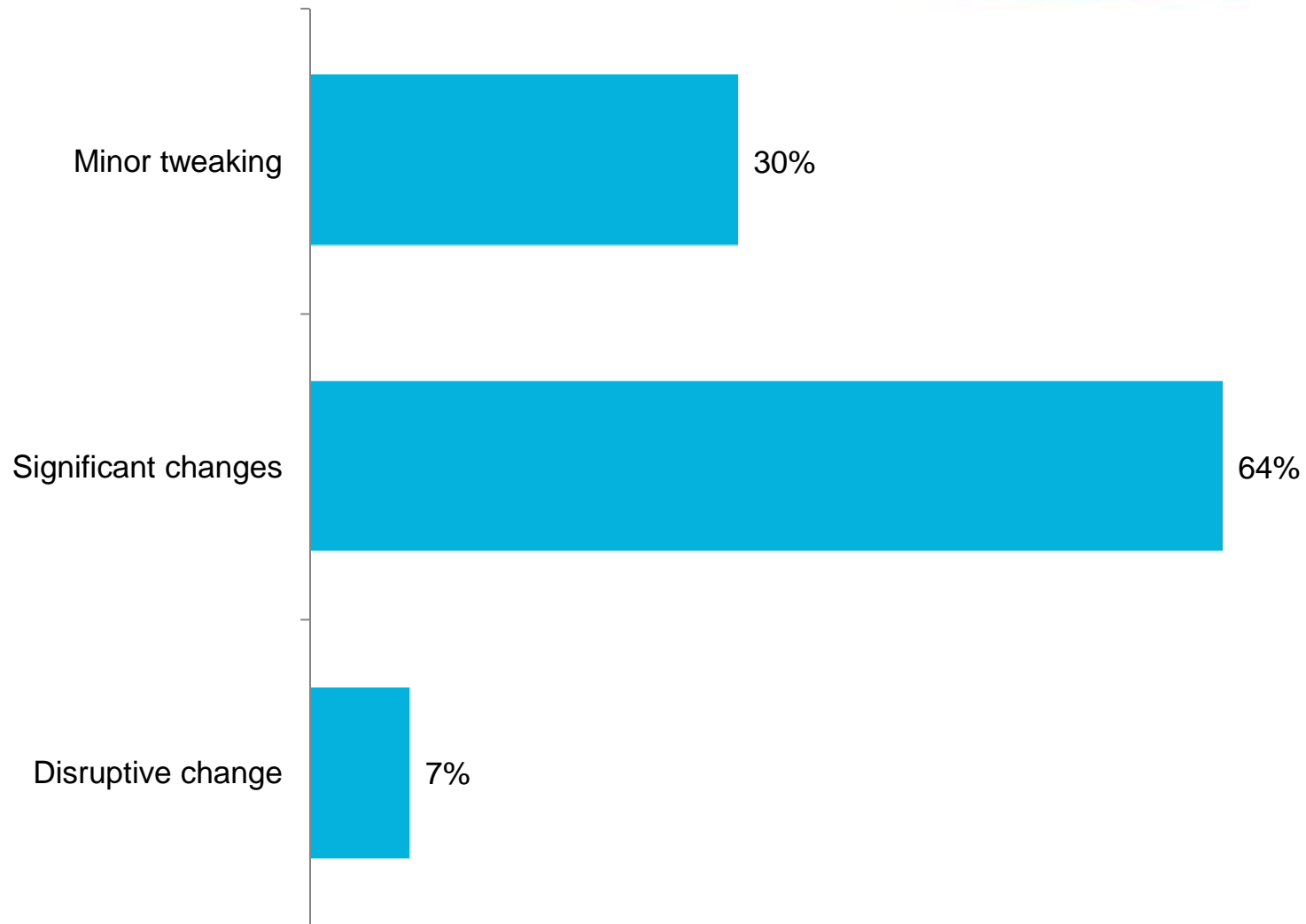
Primary internal drives of growth – highly profitable



Q. Which of the following does the company see as the primary internal drivers of growth?

Base: highly profitable only (37)

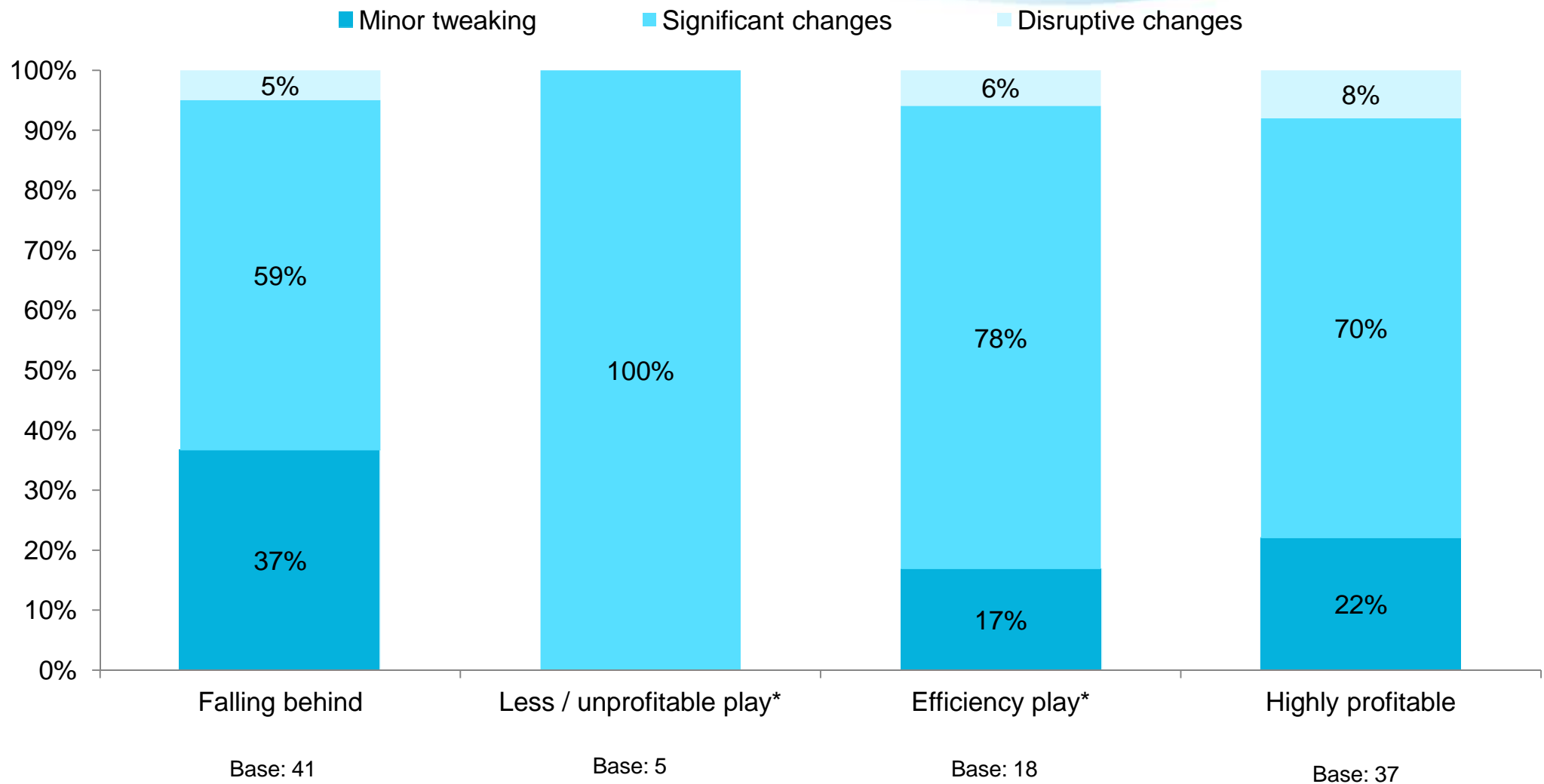
Degree of change required in company's growth strategy



Q. Generally, how would you describe the degree of change required in the company's growth strategy for the next few years?

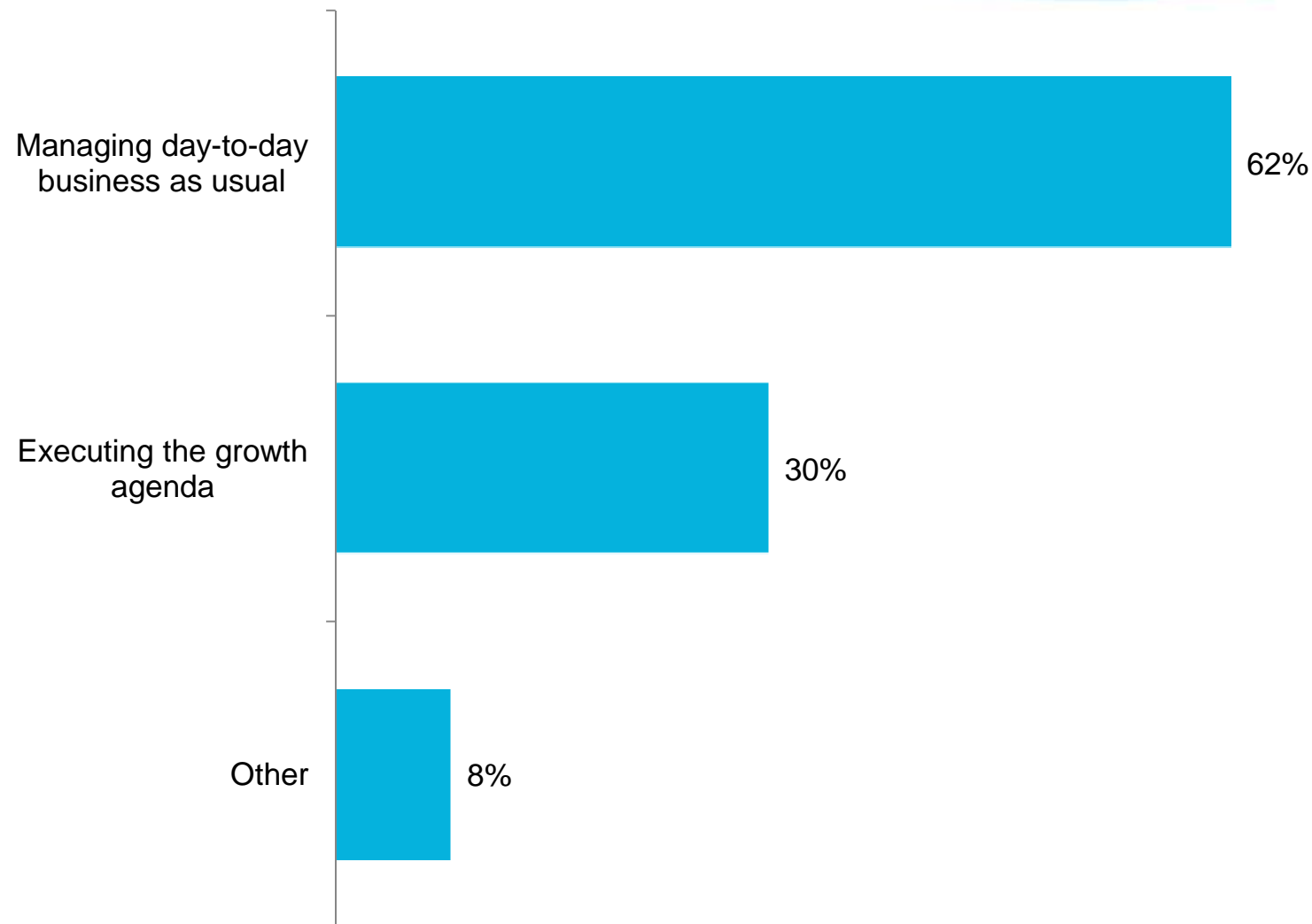
Base: all responding (254)

Degree of change required in company's growth strategy by business segmentation



Q. Generally, how would you describe the degree of change required in the company's growth strategy for the next few years?

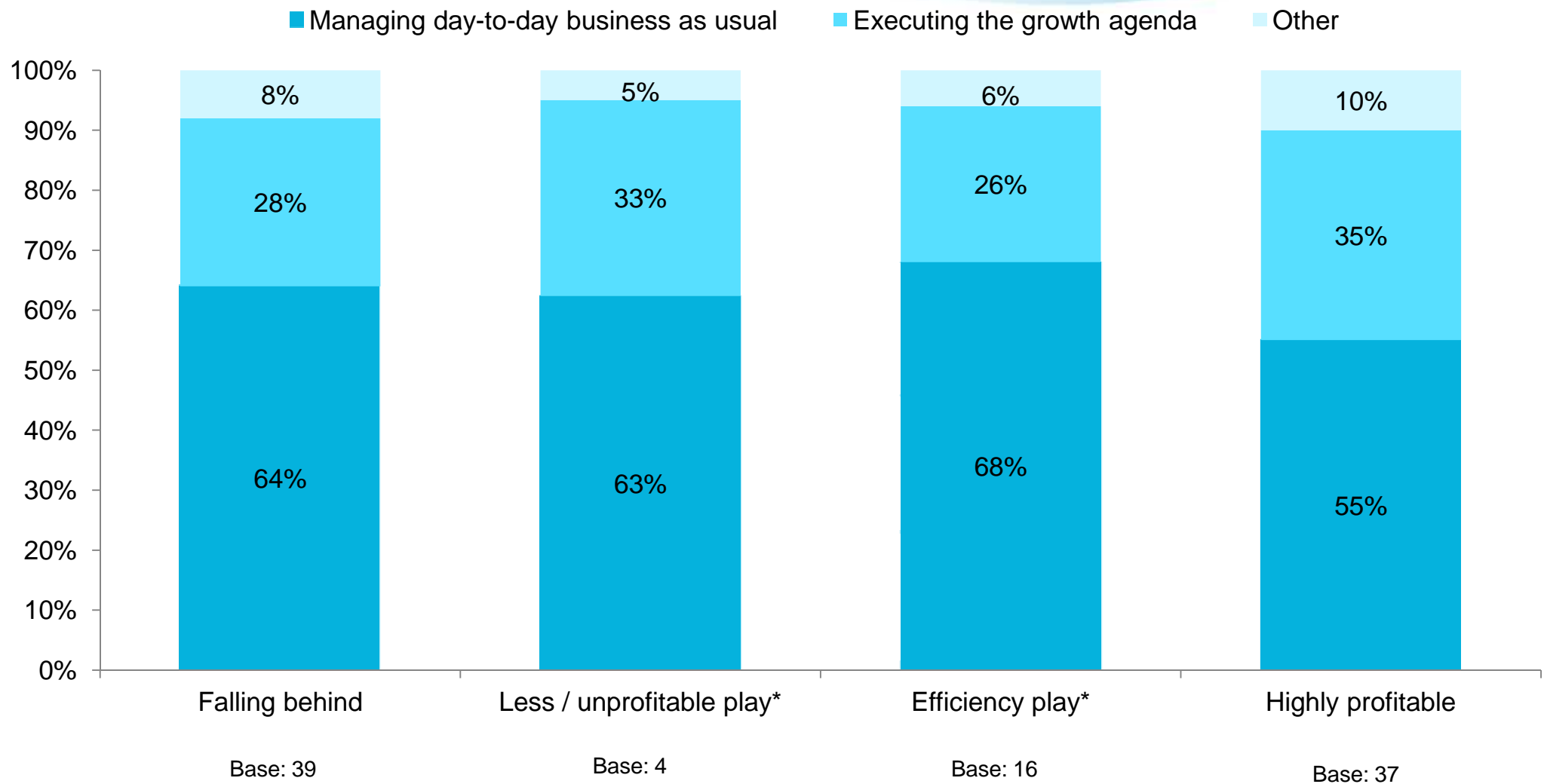
Percentage of resources allocated to the following



Q. Approximately what percentage of the company's resources are allocated to the following?

Base: all responding (254)

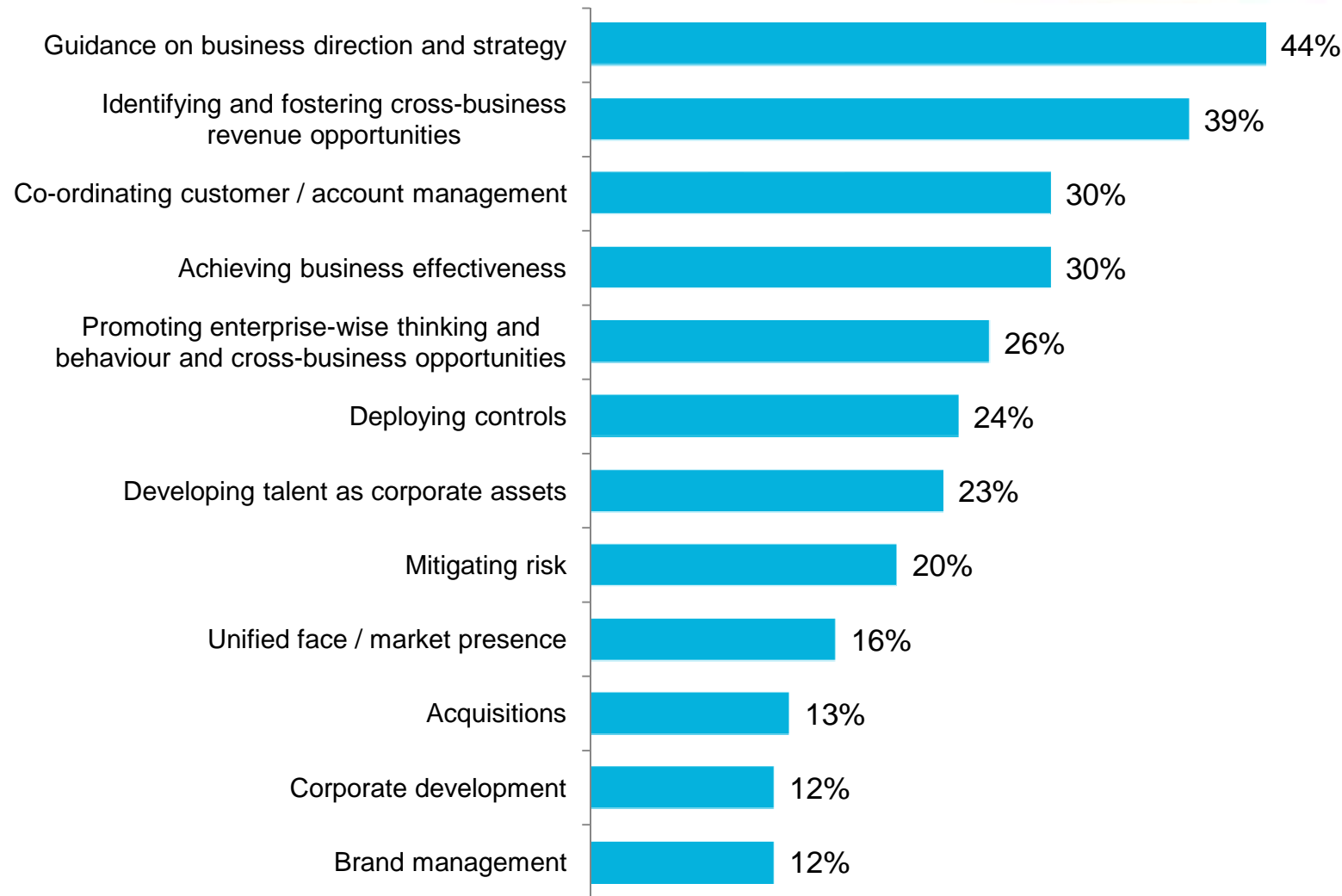
Resources allocated to the following by business segmentation



Q. Approximately what percentage of the company's resources are allocated to the following?

Organisation

Areas where the corporate centre can make the most impact on the business



Q. In which of the following areas do you believe the corporate centre can make the most impact on the business?

Base: all responding (253)

Areas where the corporate centre can make the most impact on the business – falling behind



Q. In which of the following areas do you believe the corporate centre can make the most impact on the business?

Base: falling behind only (40)

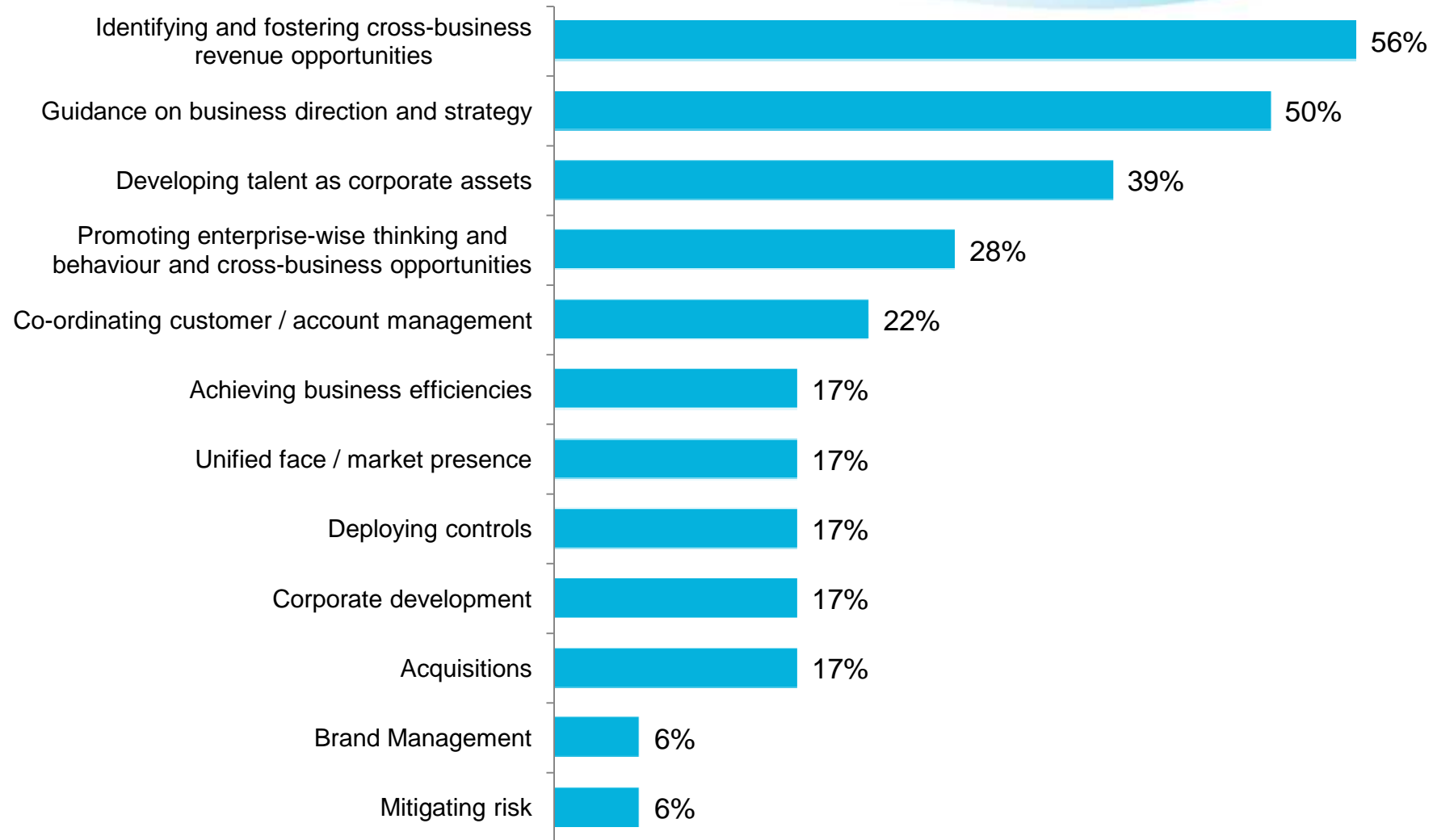
Areas where the corporate centre can make the most impact on the business – less / unprofitable play



Q. In which of the following areas do you believe the corporate centre can make the most impact on the business?

Base: less / unprofitable play only (5)

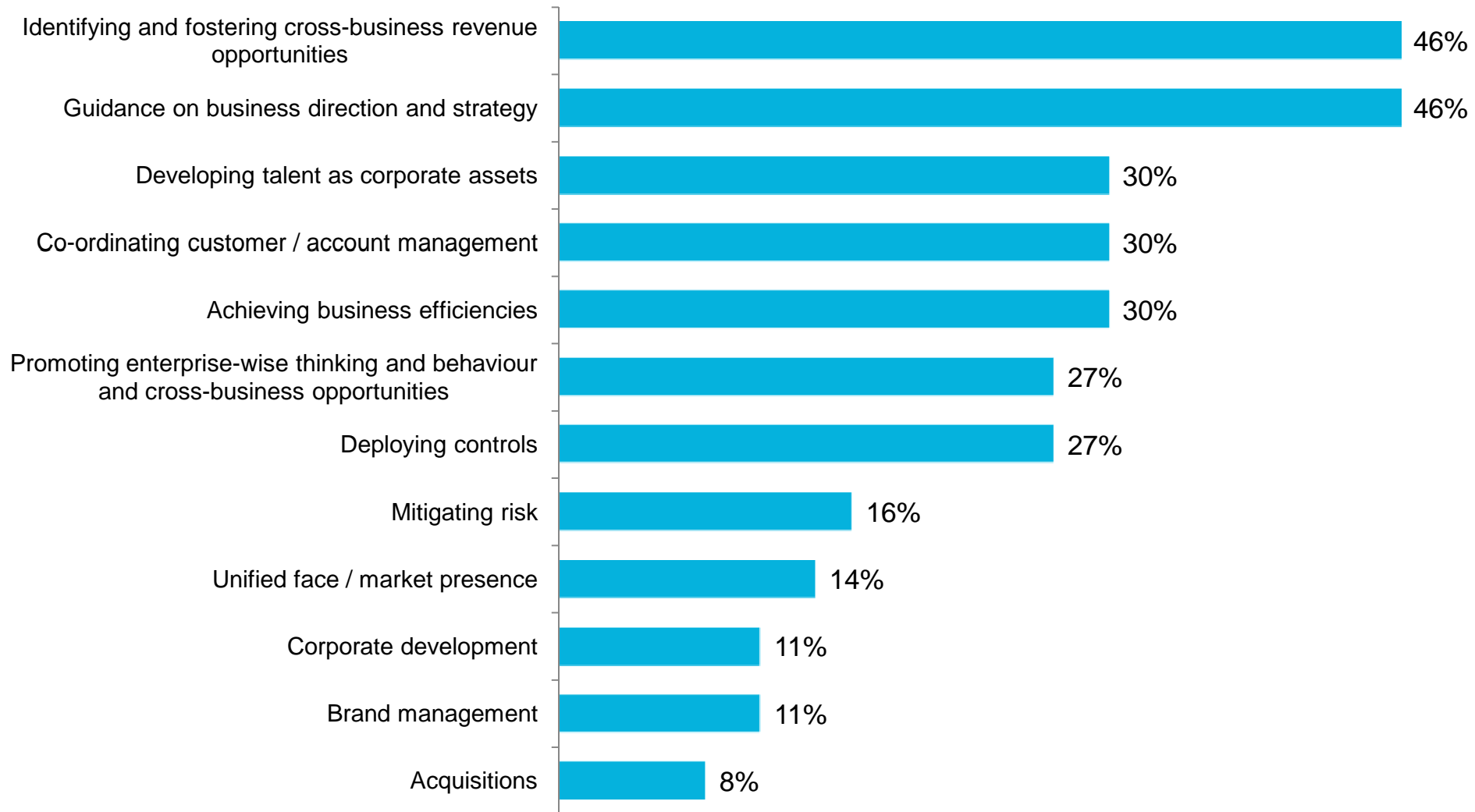
Areas where the corporate centre can make the most impact on the business – efficiency play



Q. In which of the following areas do you believe the corporate centre can make the most impact on the business?

Base: efficiency play only (18)

Areas where the corporate centre can make the most impact on the business – highly profitable

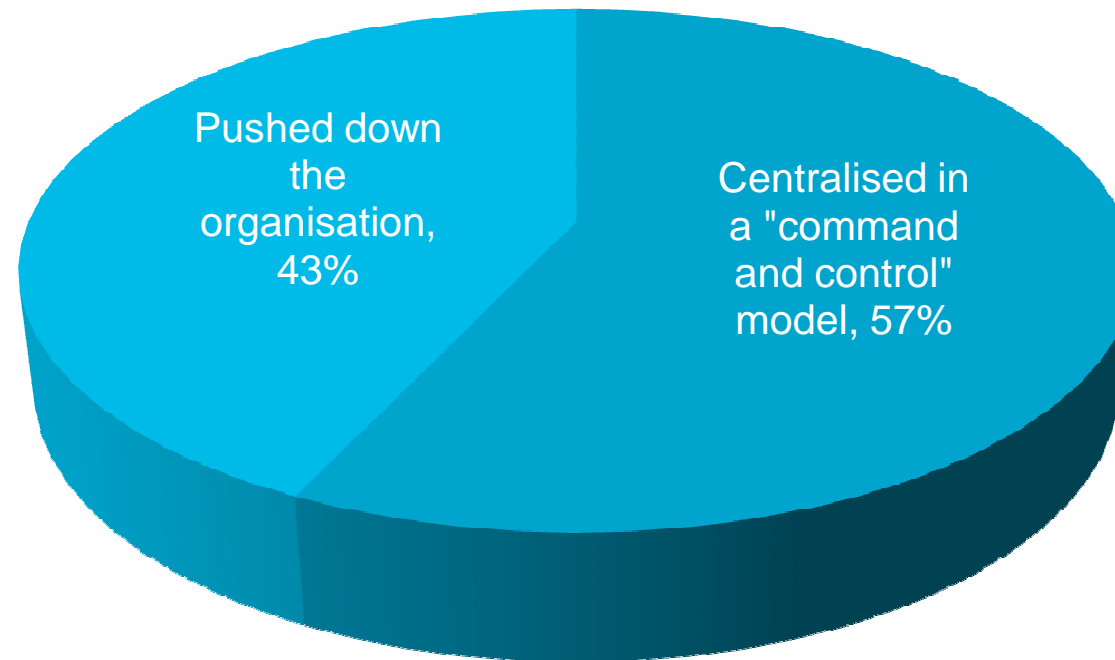


Q. In which of the following areas do you believe the corporate centre can make the most impact on the business?

Base: highly profitable only (37)

50

Accountability in company's management model

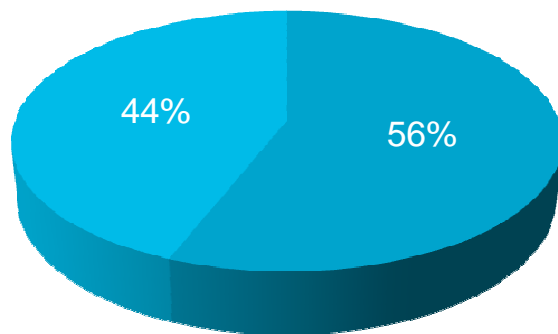


Q. Which of the following best describes accountability in your company's management model?

Base: all responding (251)

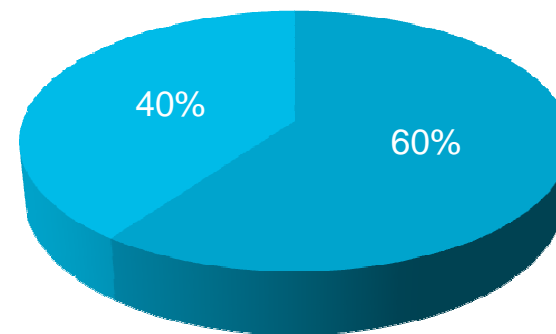
Accountability in company's management model

Falling behind



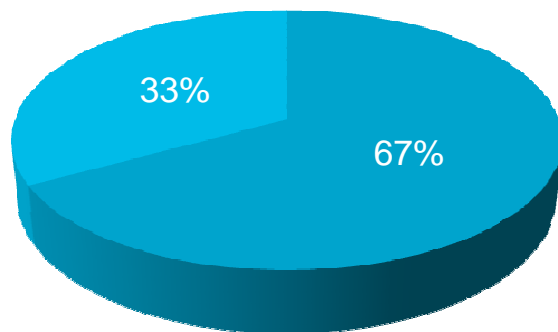
Base: falling behind only (39)

Less / unprofitable play



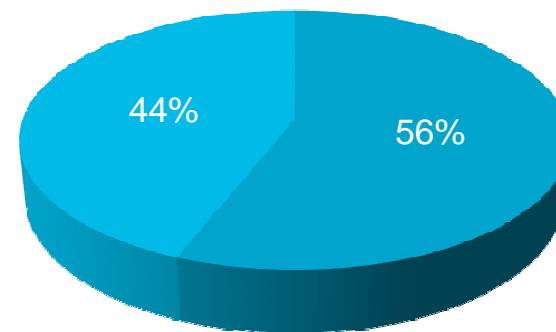
Base: less / unprofitable play only (5)

Efficiency play



Base: efficiency play only (18)

Highly profitable



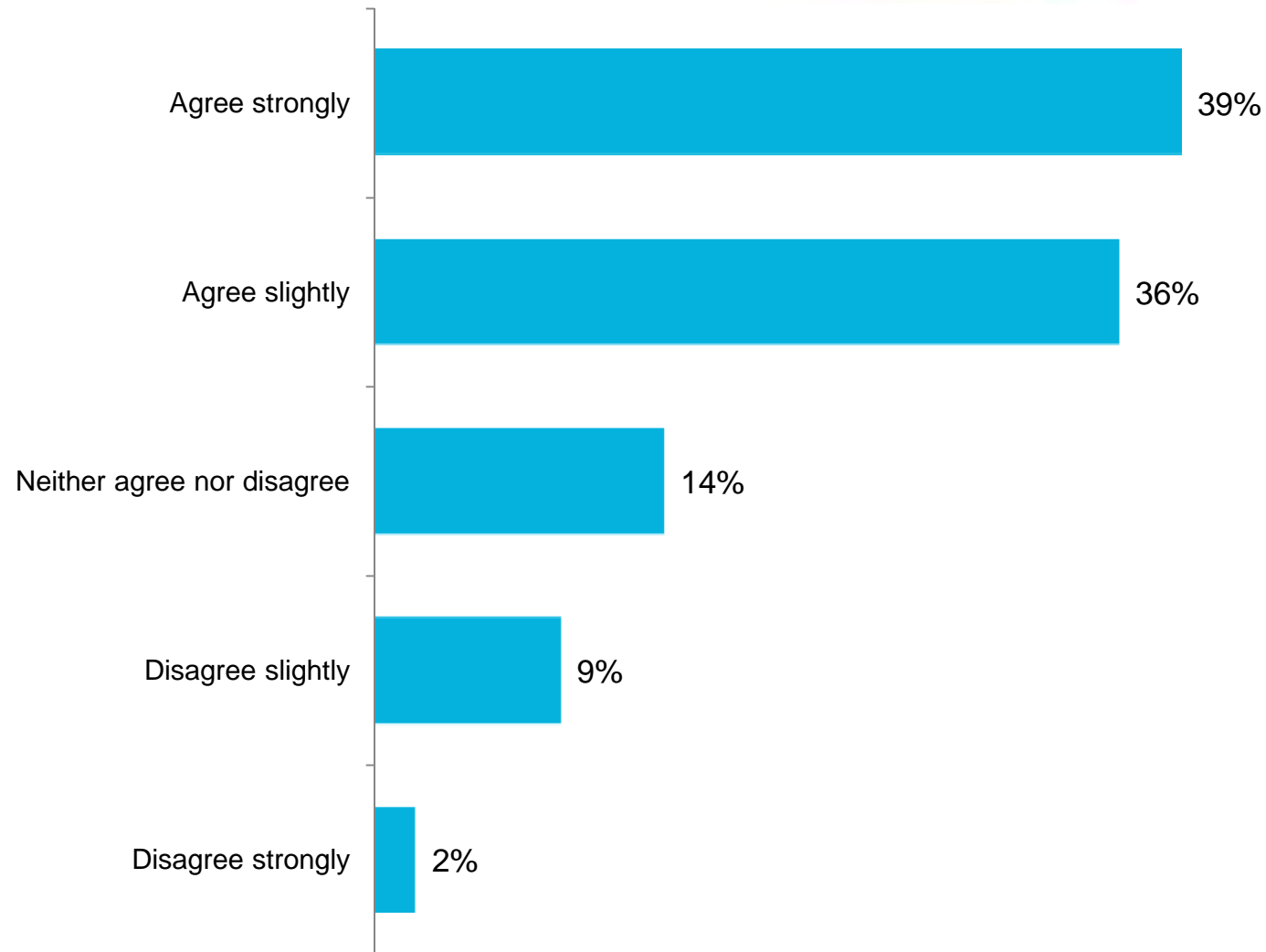
Base: highly profitable only (36)

■ Centralised in a
"command and
control" model

■ Pushed down the
organisation

Q. Which of the following best describes accountability in your company's management model?

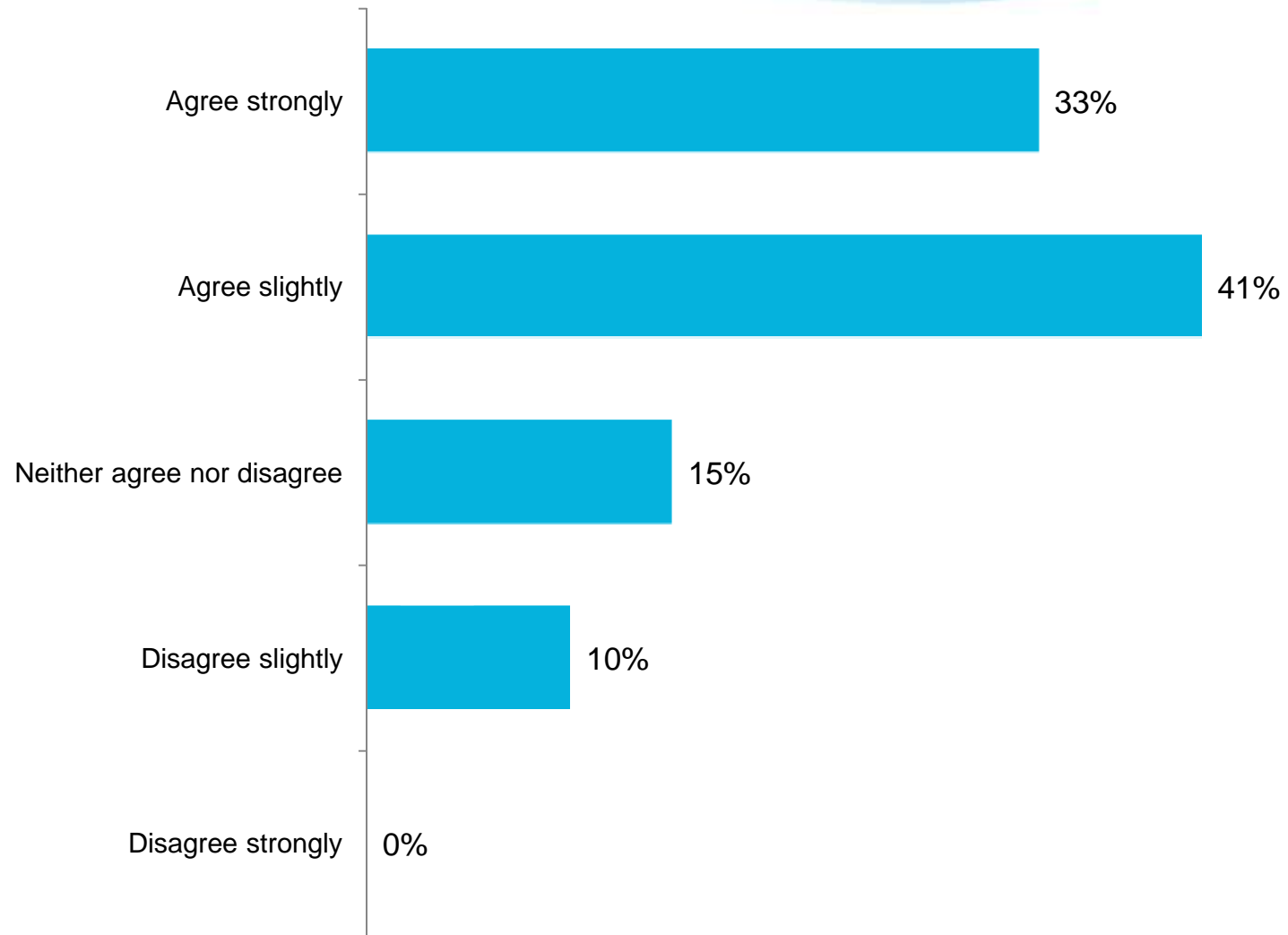
Agreement with whether accountabilities and performance measures well-defined across the company



Q. How far do you agree that accountabilities and associated performance measures, whether individual or shared, are well-defined across the company?

Base: all responding (250)

Agreement with whether accountabilities and performance measures well-defined across the company – falling behind

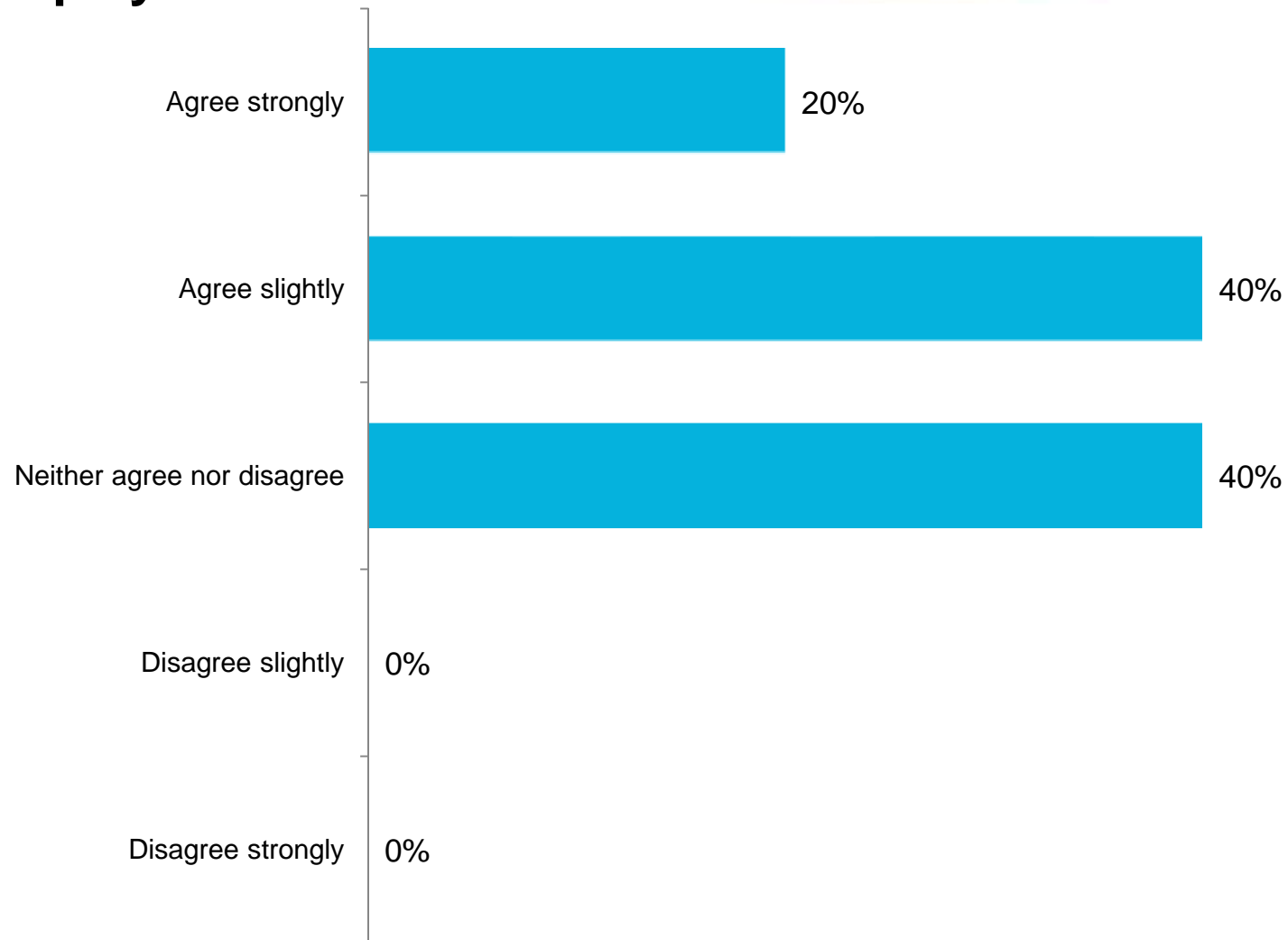


Q. How far do you agree that accountabilities and associated performance measures, whether individual or shared, are well-defined across the company?

Base: falling behind only (39)

Agreement with whether accountabilities and performance measures well-defined across the company – less / unprofitable play

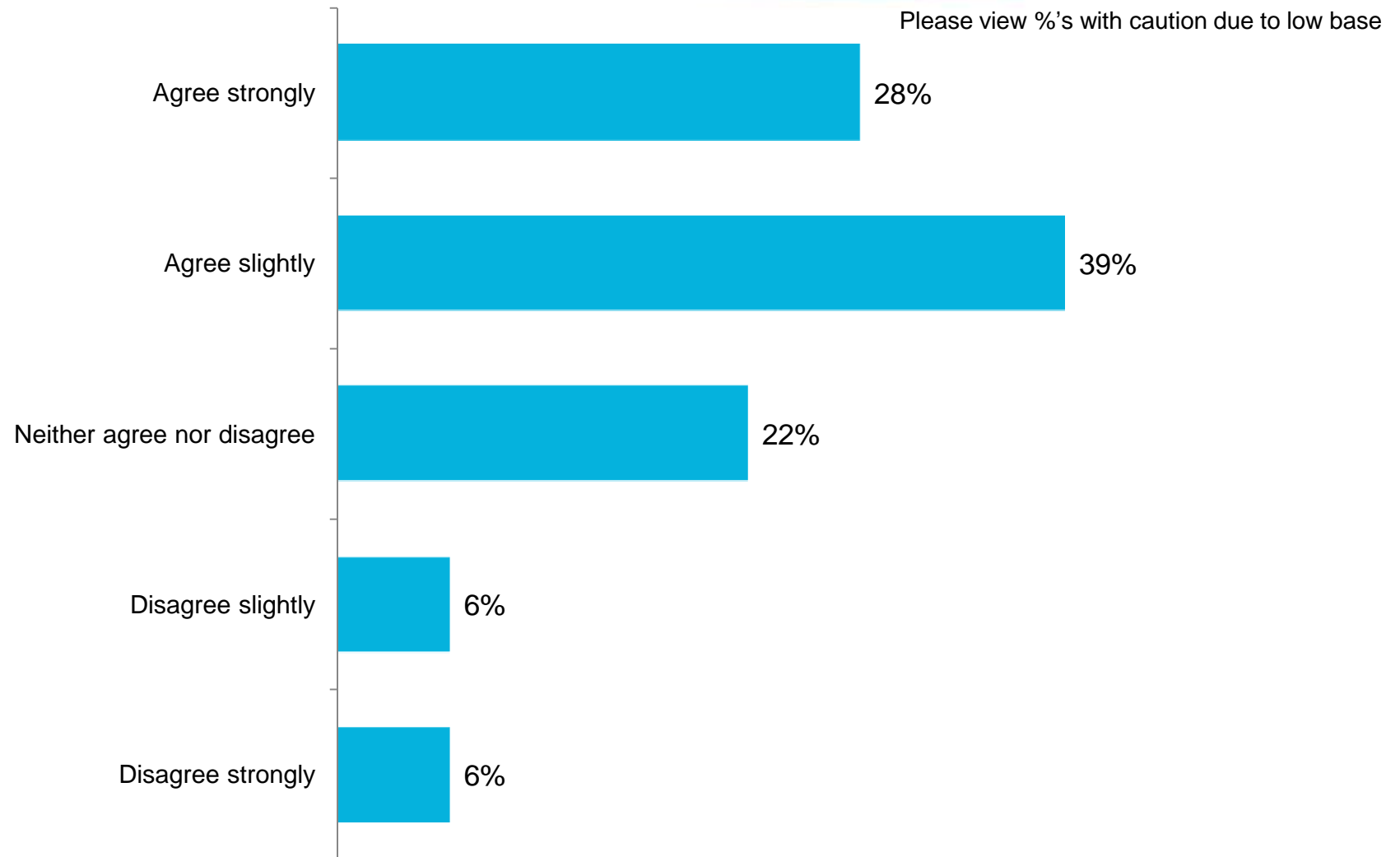
Please view %'s with caution due to low base



Q. How far do you agree that accountabilities and associated performance measures, whether individual or shared, are well-defined across the company?

Base: less / unprofitable play only (5)

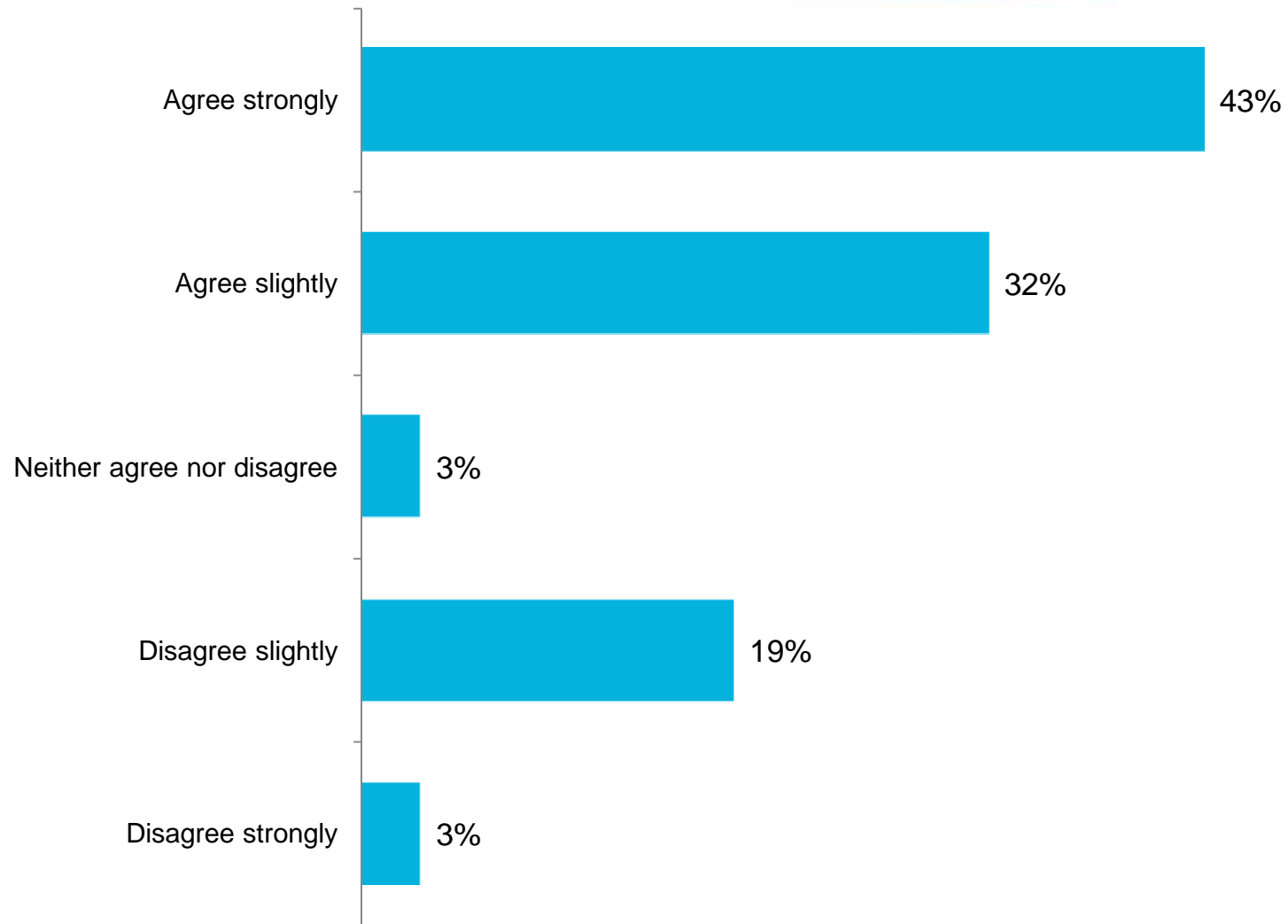
Agreement with whether accountabilities and performance measures well-defined across the company – efficiency play



Q. How far do you agree that accountabilities and associated performance measures, whether individual or shared, are well-defined across the company?

Base: efficiency play only (18)

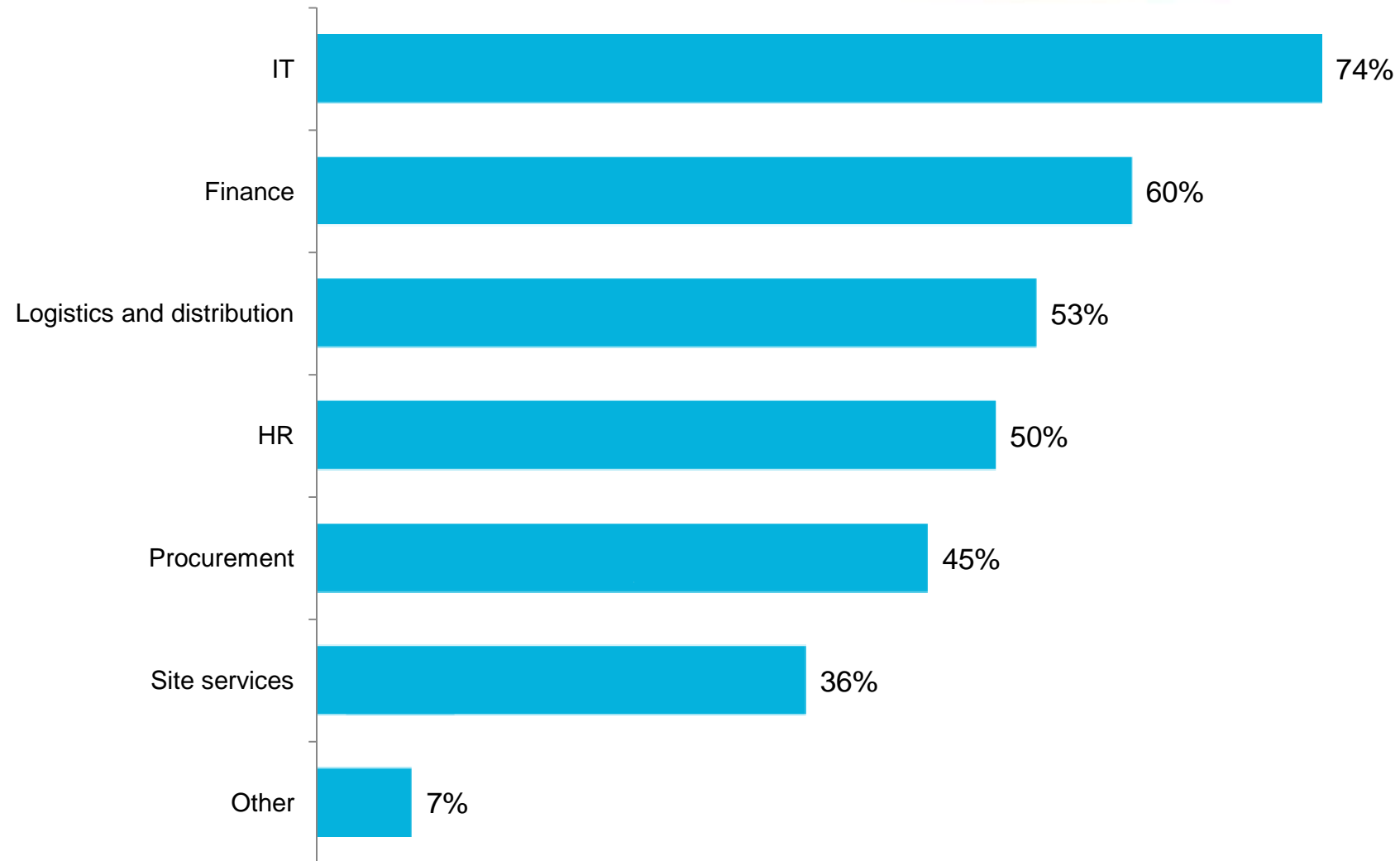
Agreement with whether accountabilities and performance measures well-defined across the company – highly profitable



Q. How far do you agree that accountabilities and associated performance measures, whether individual or shared, are well-defined across the company?

Base: highly profitable only (37)

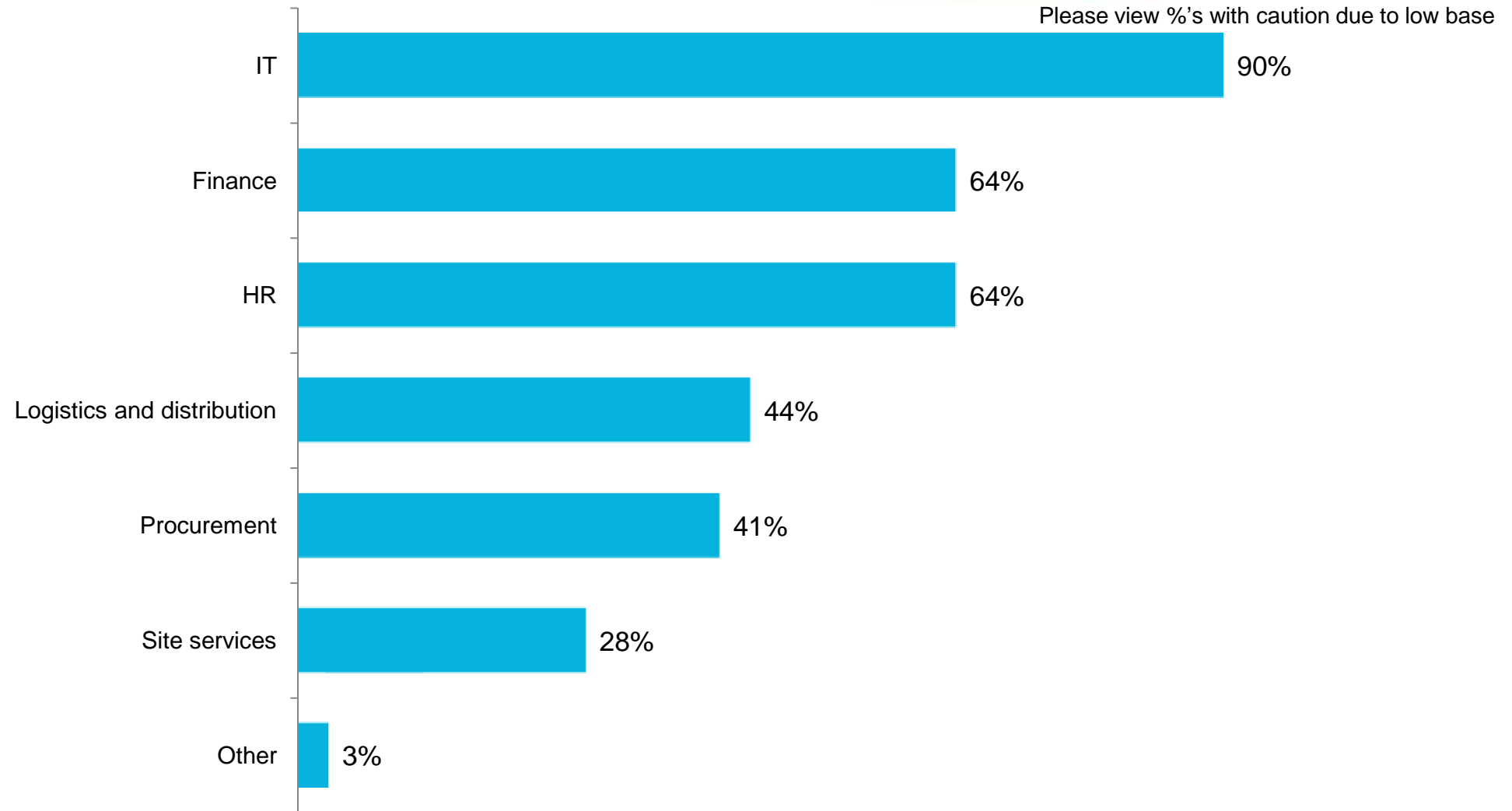
Support functions structured as “shared services”



Q. Which of the following support functions in your company are structured as “shared services”?

Base: all responding (247)

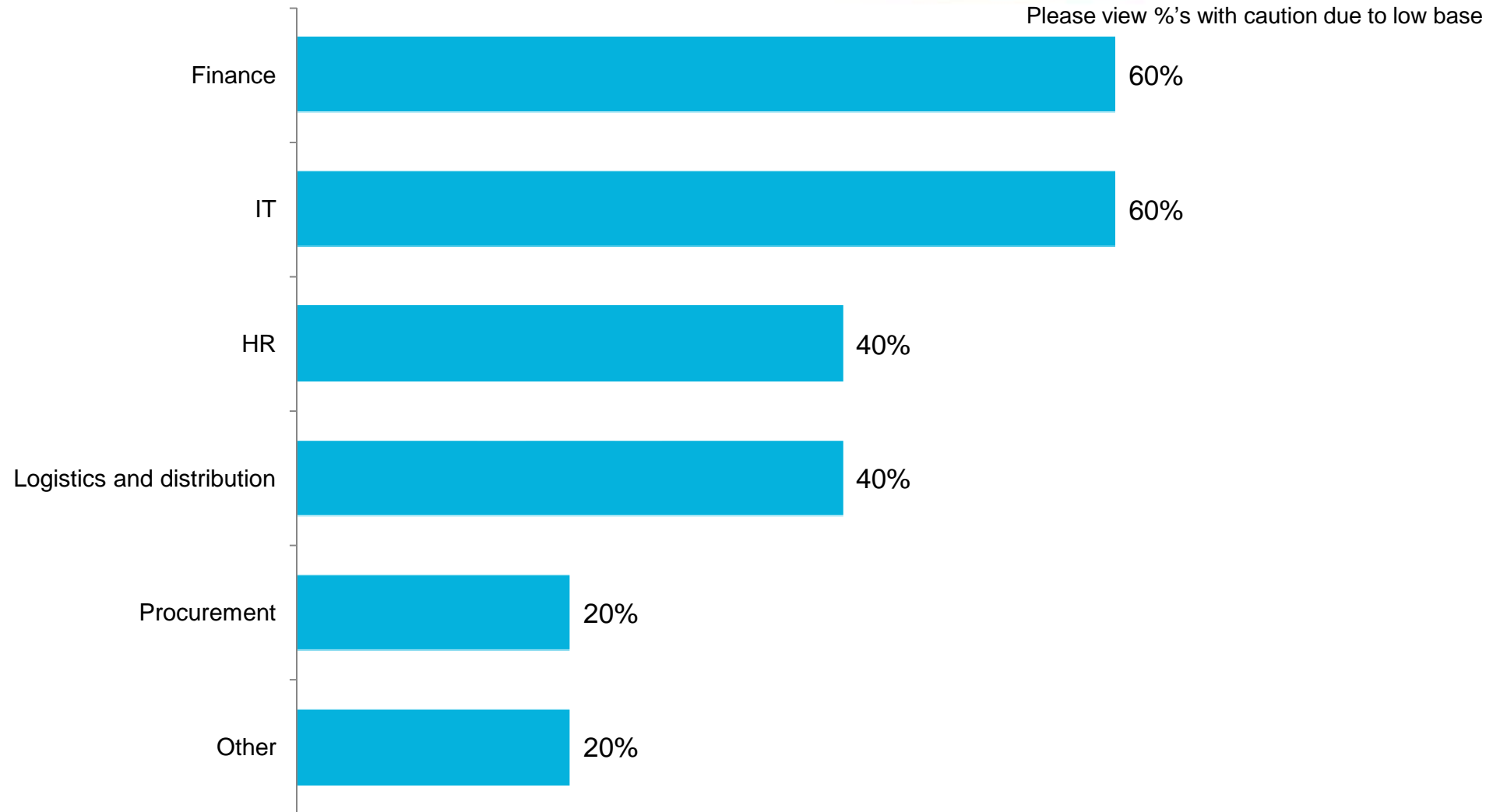
Support functions structured as “shared services” – falling behind



Q. Which of the following support functions in your company are structured as “shared services”?

Base: falling behind only (39)

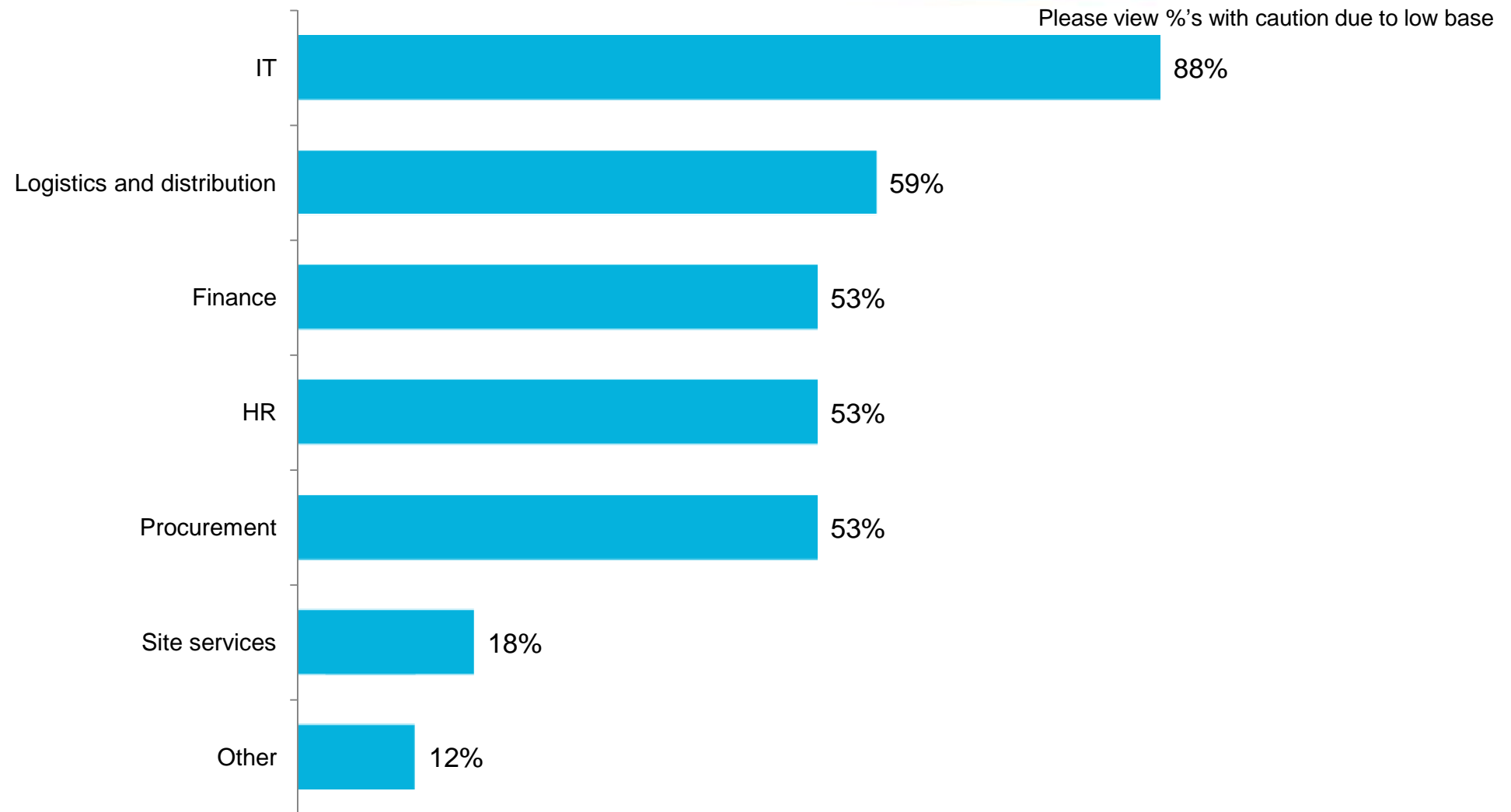
Support functions structured as “shared services” – less / unprofitable play



Q. Which of the following support functions in your company are structured as “shared services”?

Base: less / unprofitable play only (5)

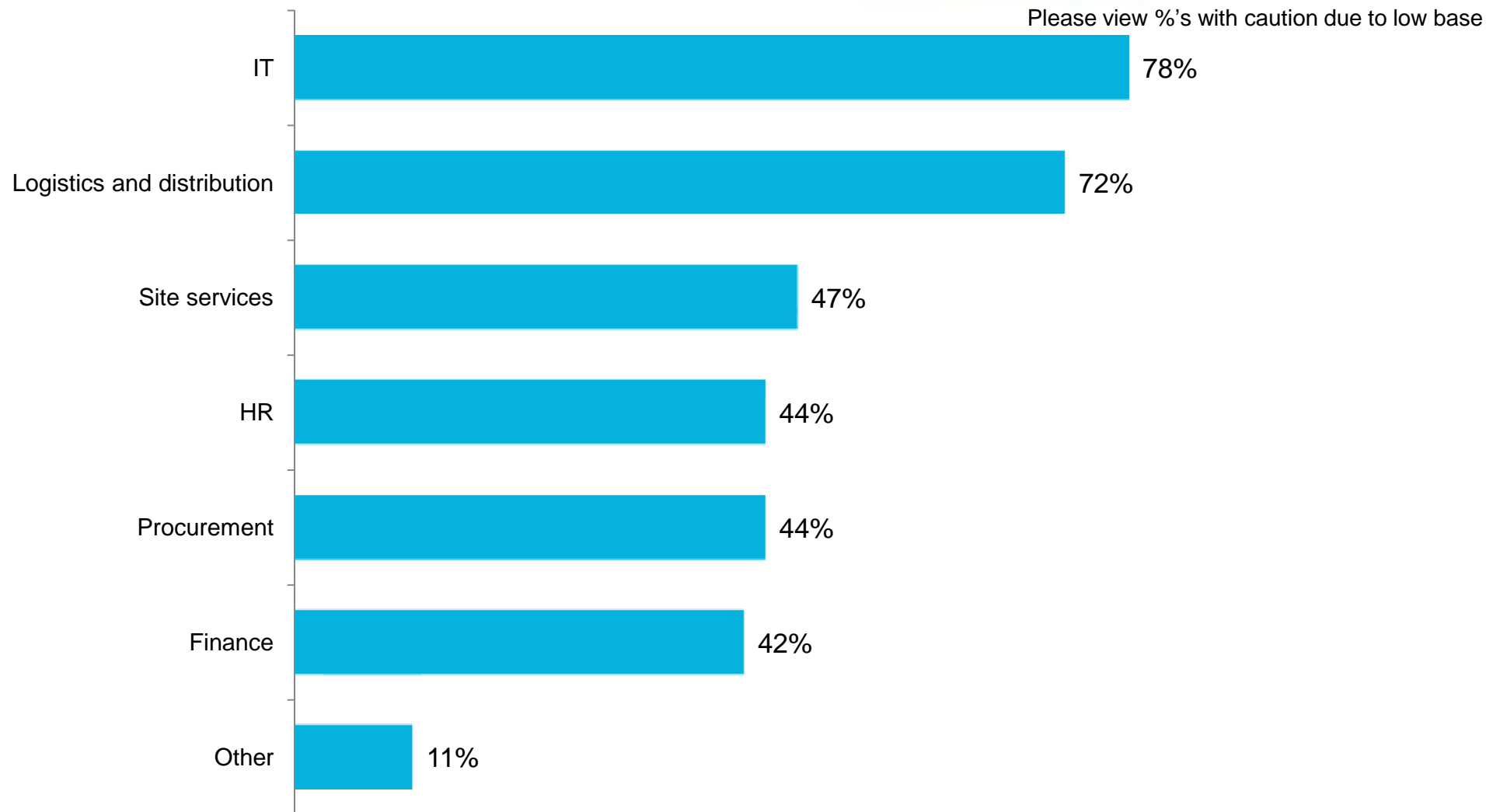
Support functions structured as “shared services” – efficiency play



Q. Which of the following support functions in your company are structured as “shared services”?

Base: efficiency play only (17)

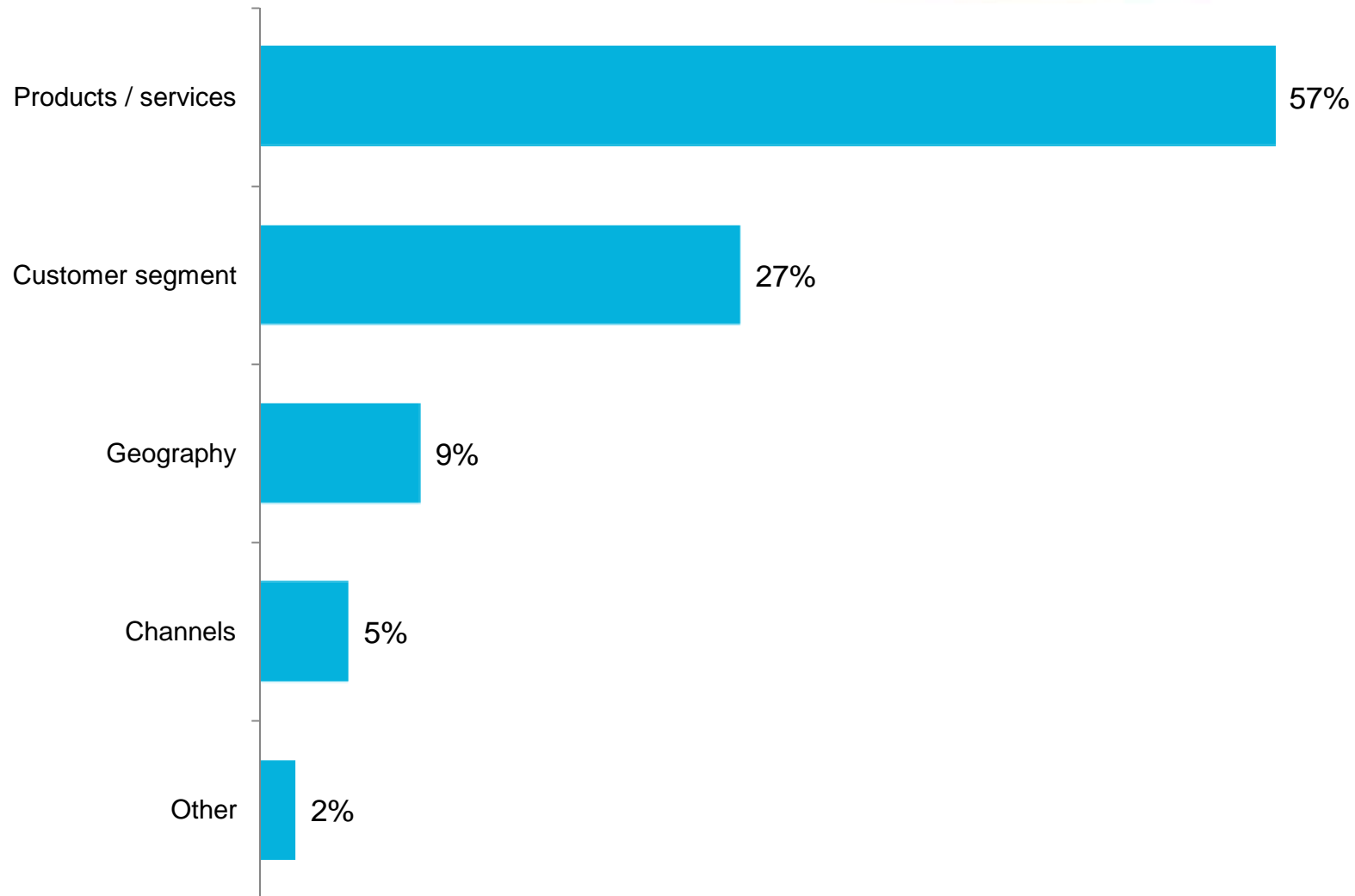
Support functions structured as “shared services” – highly profitable



Q. Which of the following support functions in your company are structured as “shared services”?

Base: highly profitable only (36)

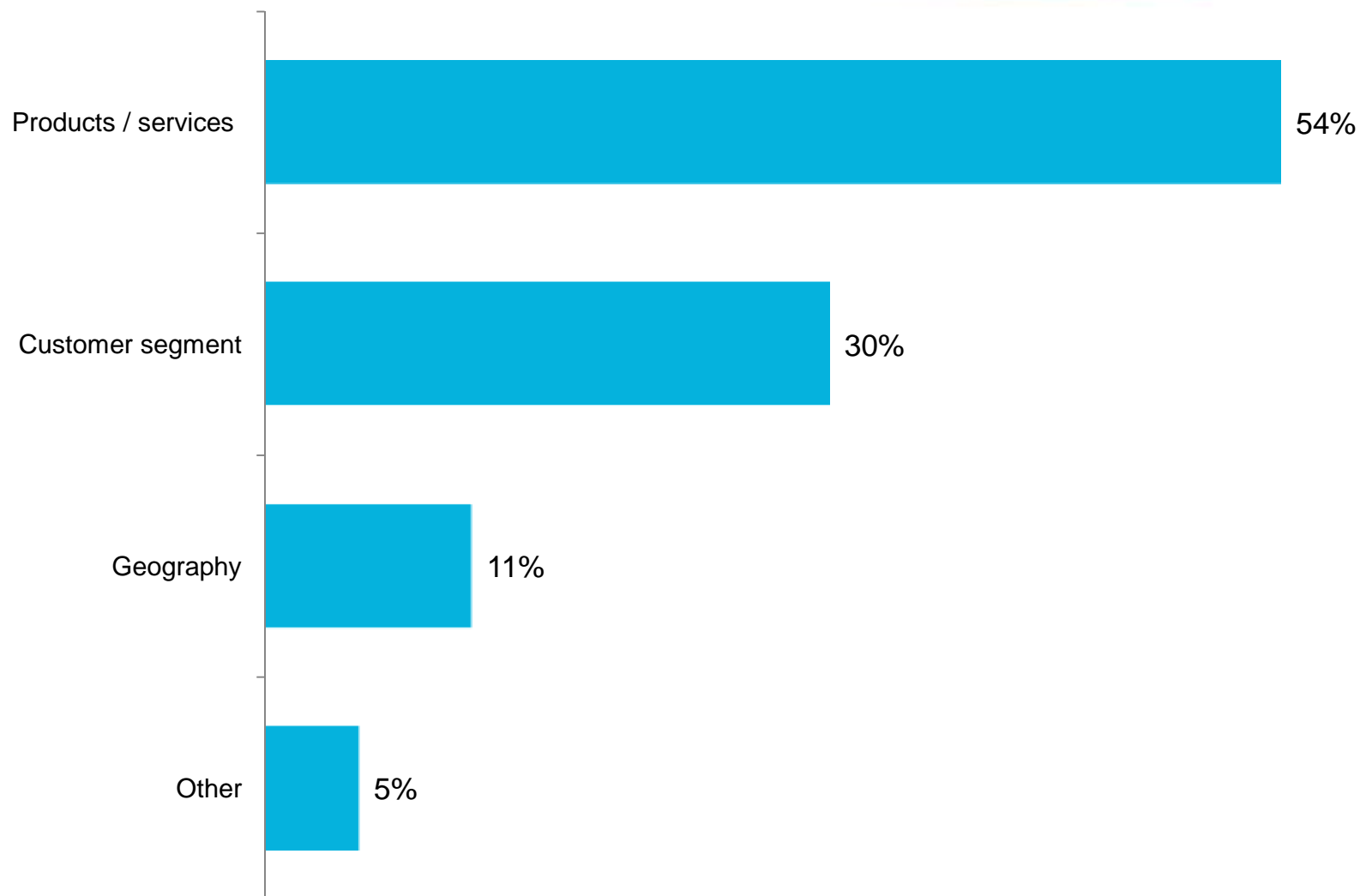
What company's business model is primarily designed around



Q. Which of the following is your company's business model primarily based around?

Base: all responding (246)

What the company's business model is primarily designed around – falling behind



Q. Which of the following is your company's business model primarily based around?

Base: falling behind only (37)

What the company's business model is primarily designed around – less / unprofitable play

Please view %'s with caution due to low base

Products / services

60%

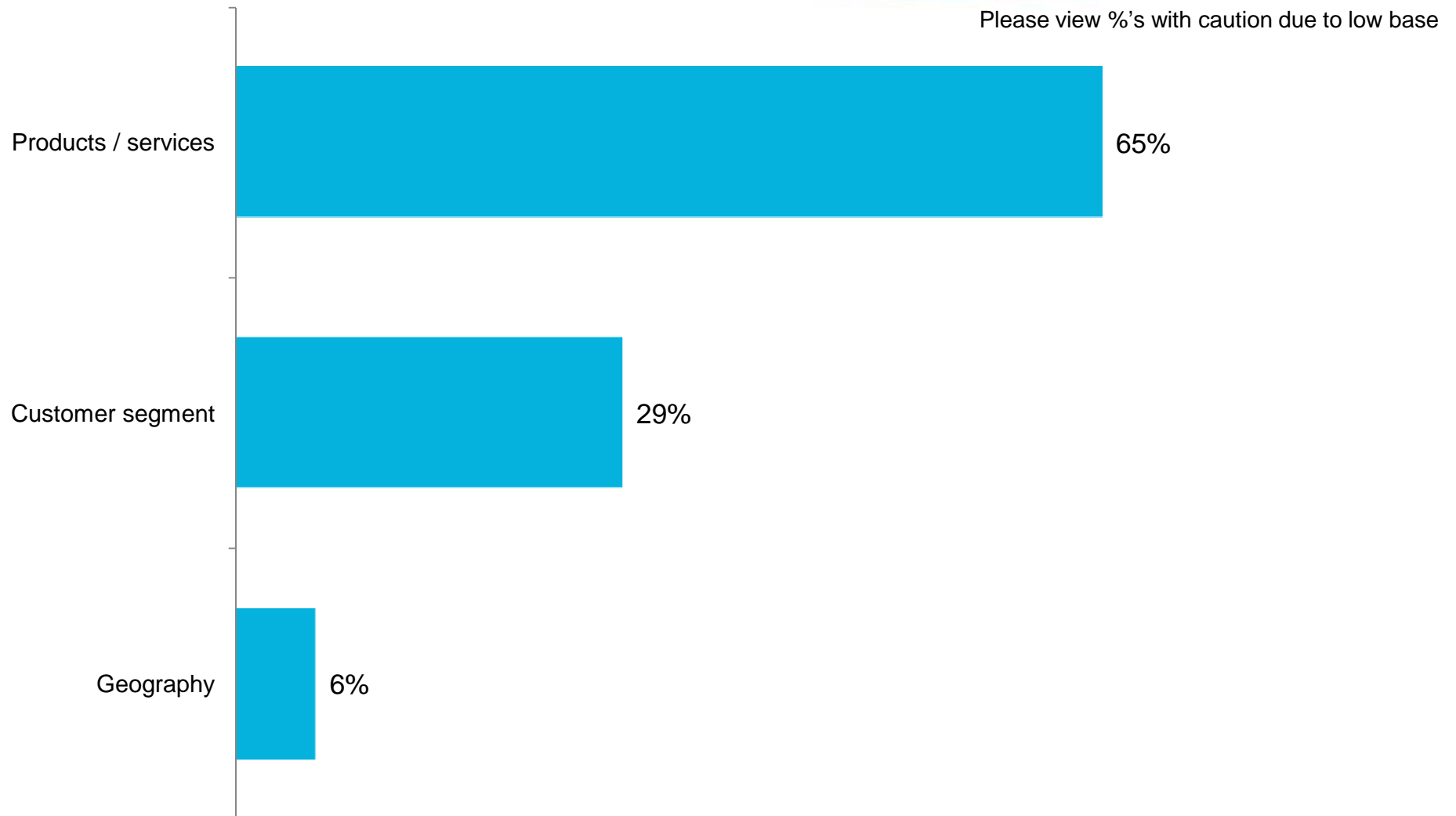
Customer segment

40%

Q. Which of the following is your company's business model primarily based around?

Base: less / unprofitable play only (5)

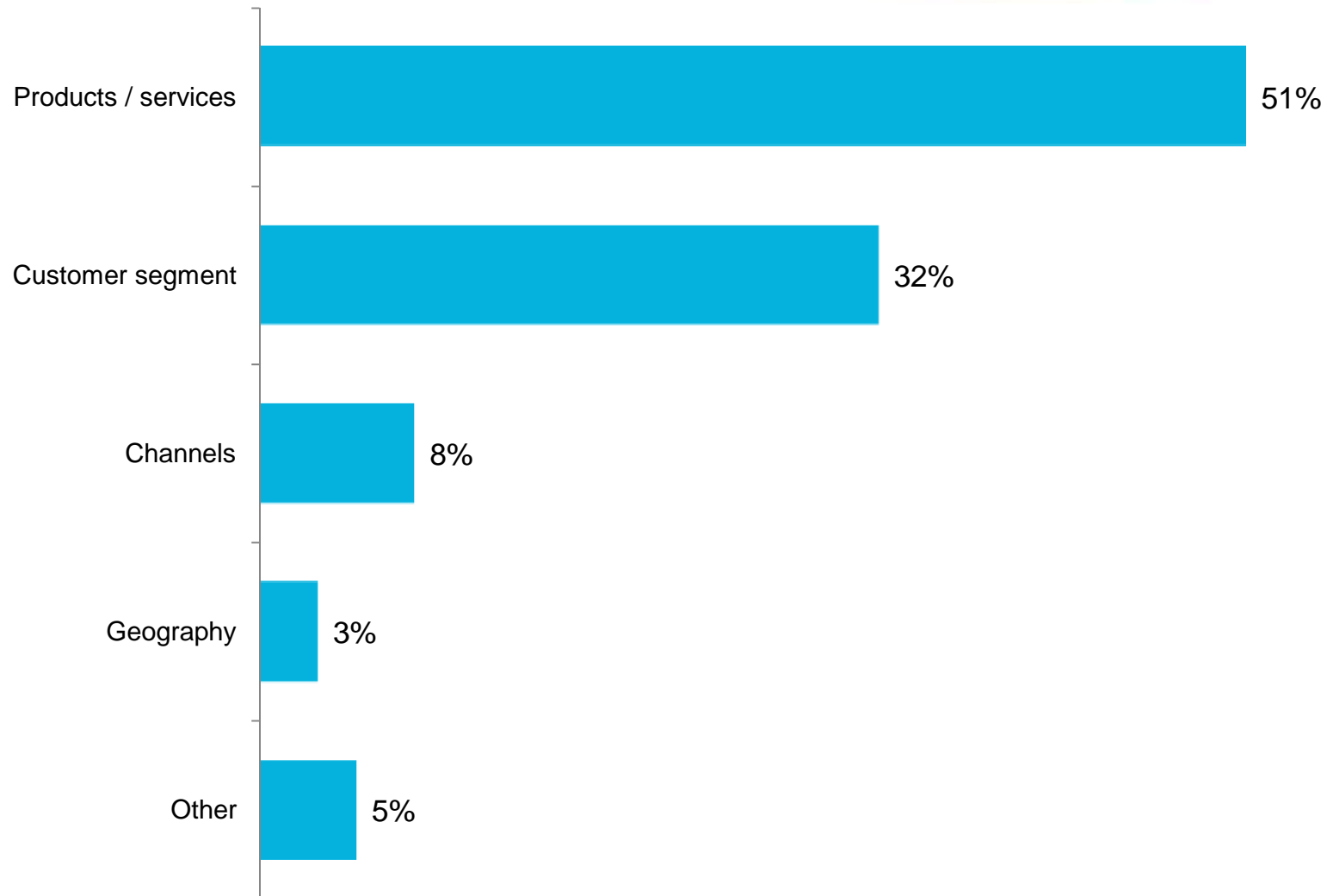
What the company's business model is primarily designed around – efficiency play



Q. Which of the following is your company's business model primarily based around?

Base: efficiency play only (17)

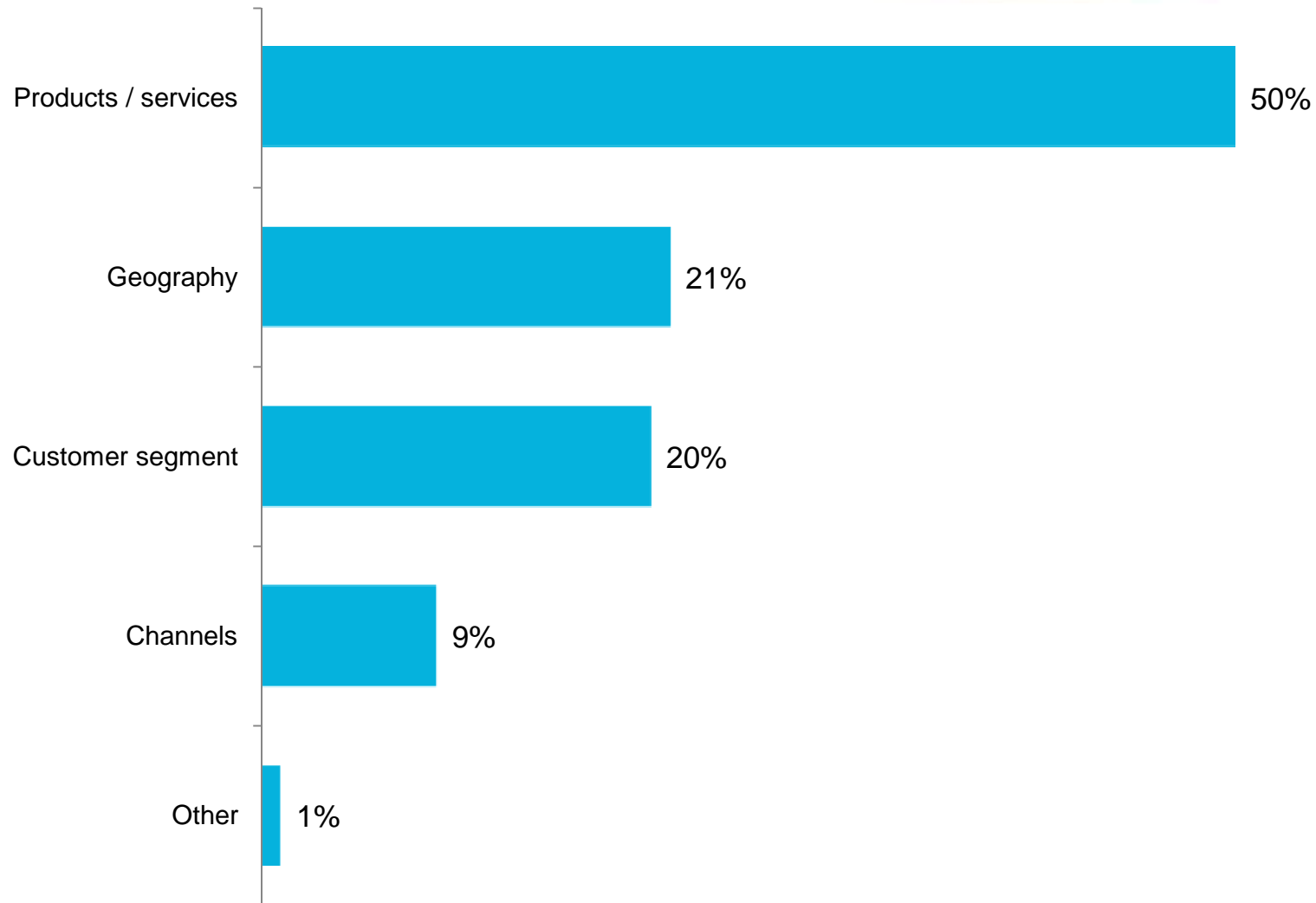
What the company's business model is primarily designed around – highly profitable



Q. Which of the following is your company's business model primarily based around?

Base: highly profitable only (37)

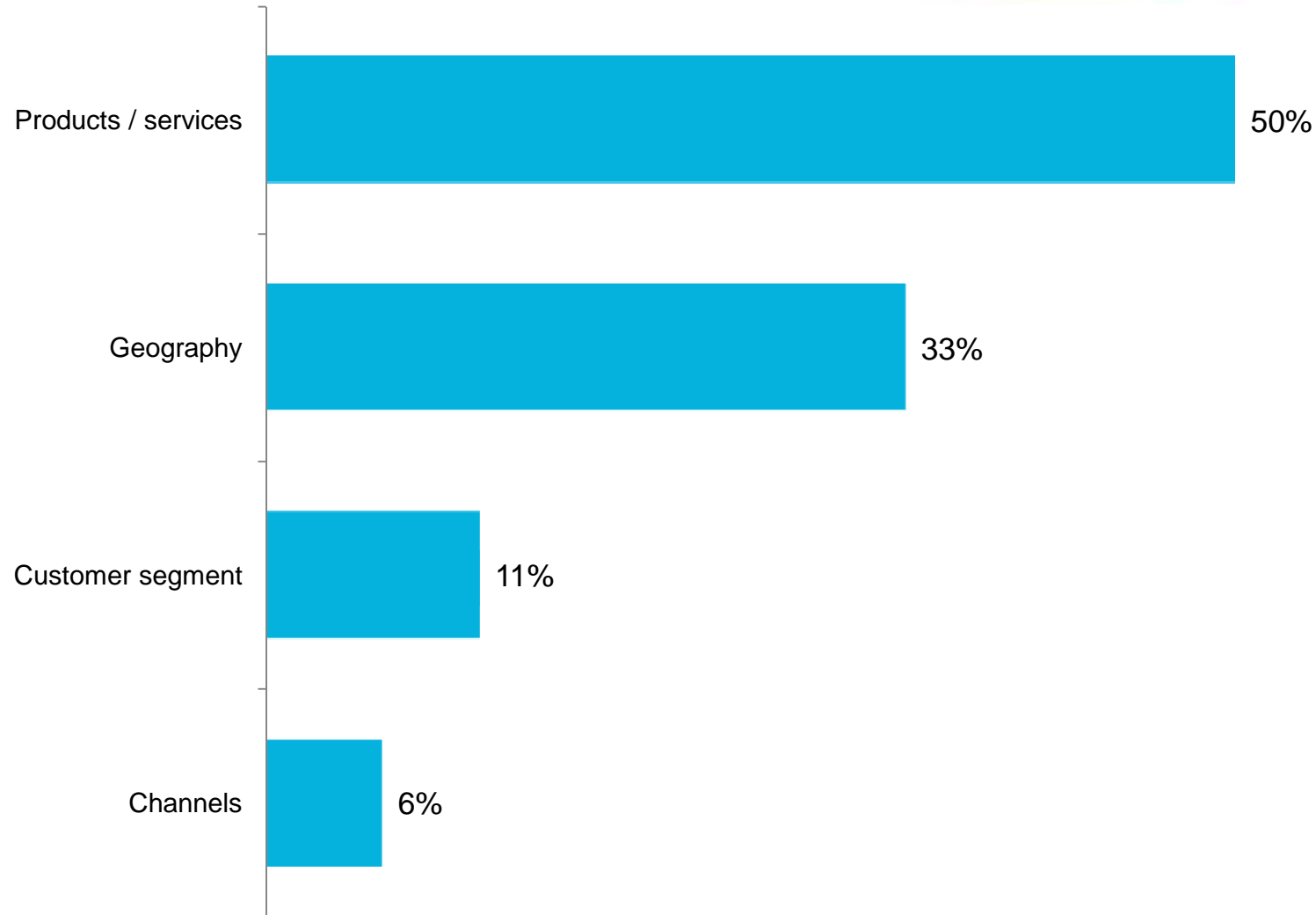
What the company's back office is primarily designed around



Q. And which of the following is your company's back office primarily designed around?

Base: all responding (241)

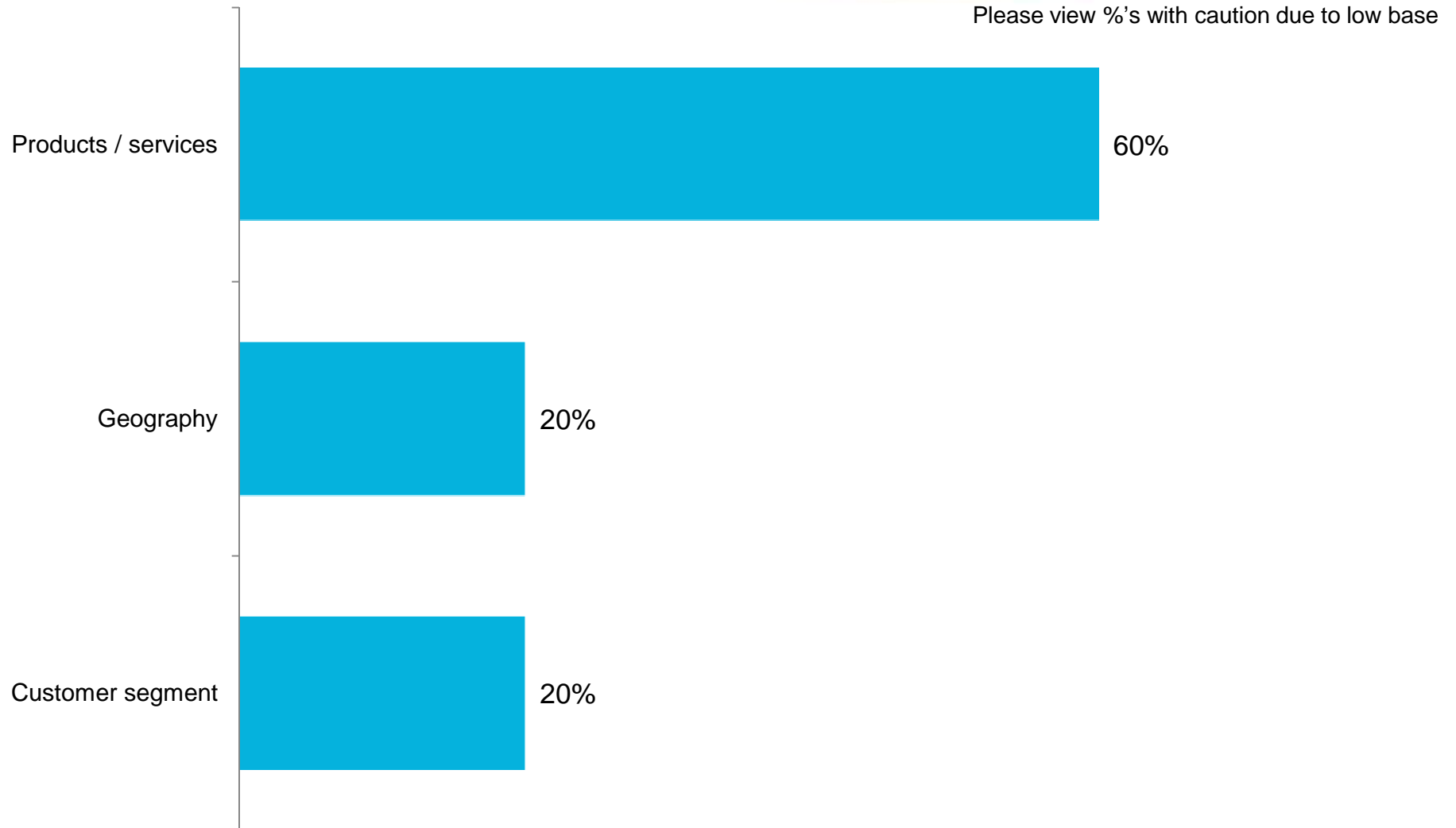
What the company's back office is primarily designed around – falling behind



Q. And which of the following is your company's back office primarily designed around?

Base: falling behind only (36)

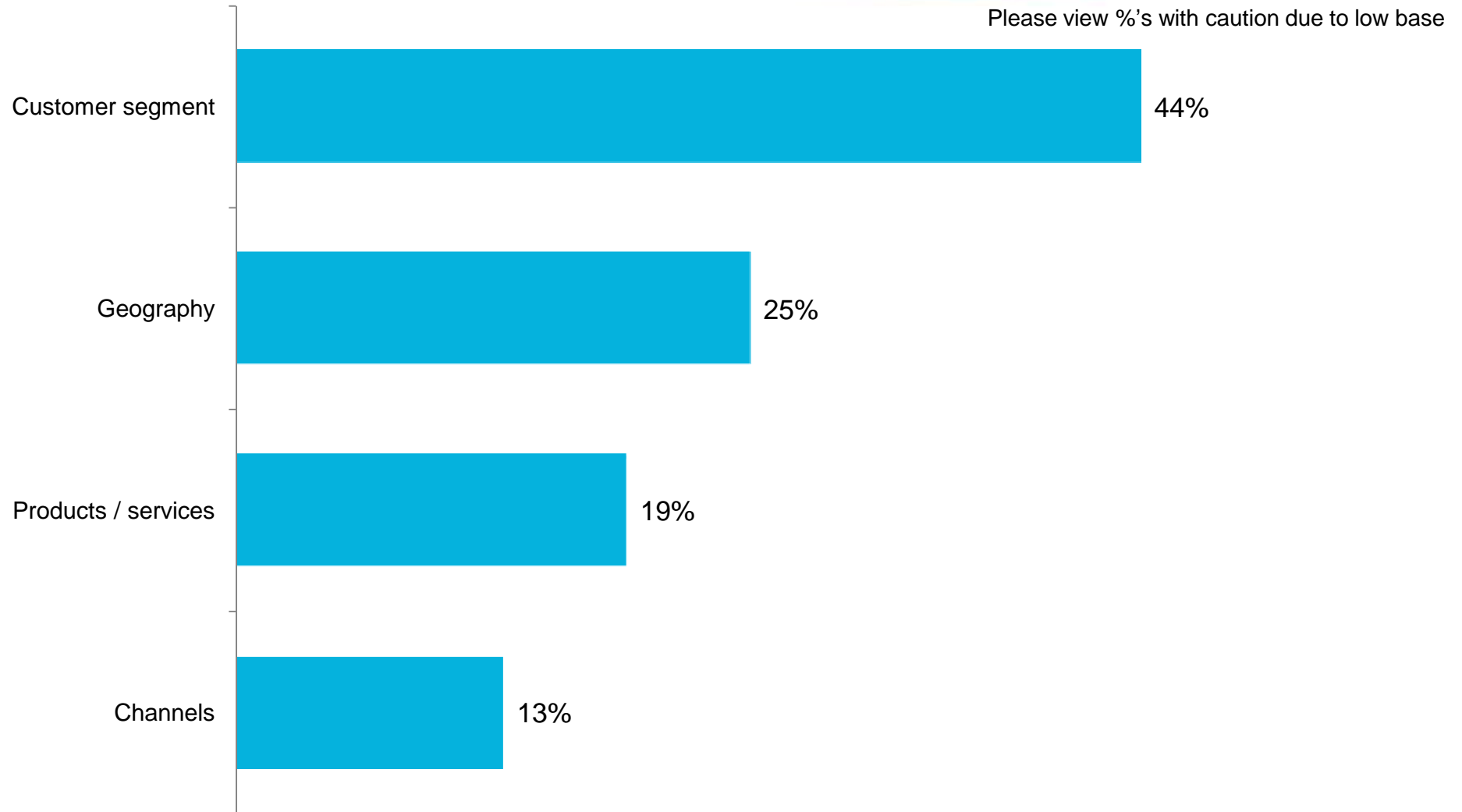
What the company's back office is primarily designed around – less / unprofitable play



Q. And which of the following is your company's back office primarily designed around?

Base: less / unprofitable play only (5)

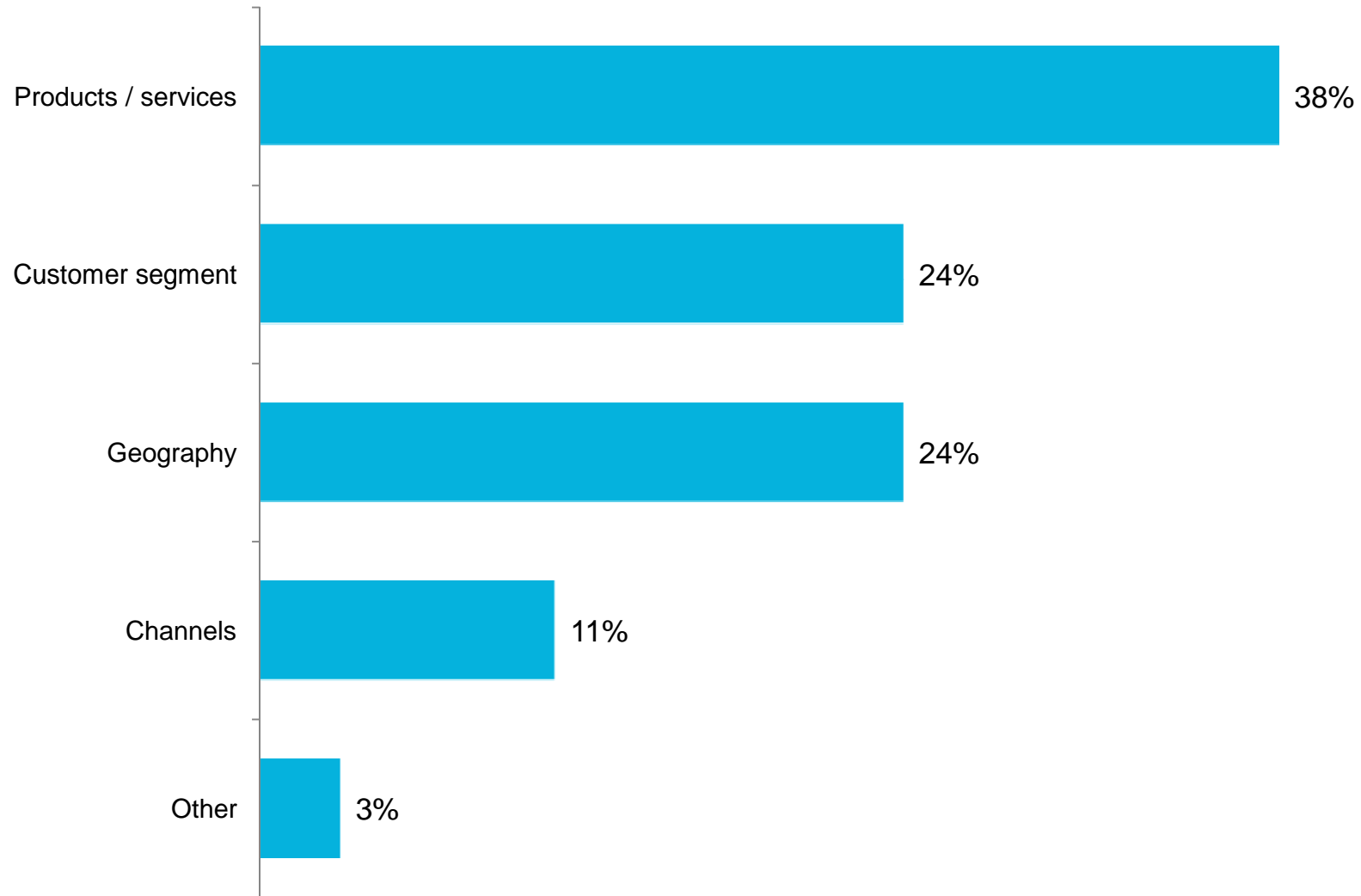
What the company's back office is primarily designed around – efficiency play



Q. And which of the following is your company's back office primarily designed around?

Base: efficiency play only (16)

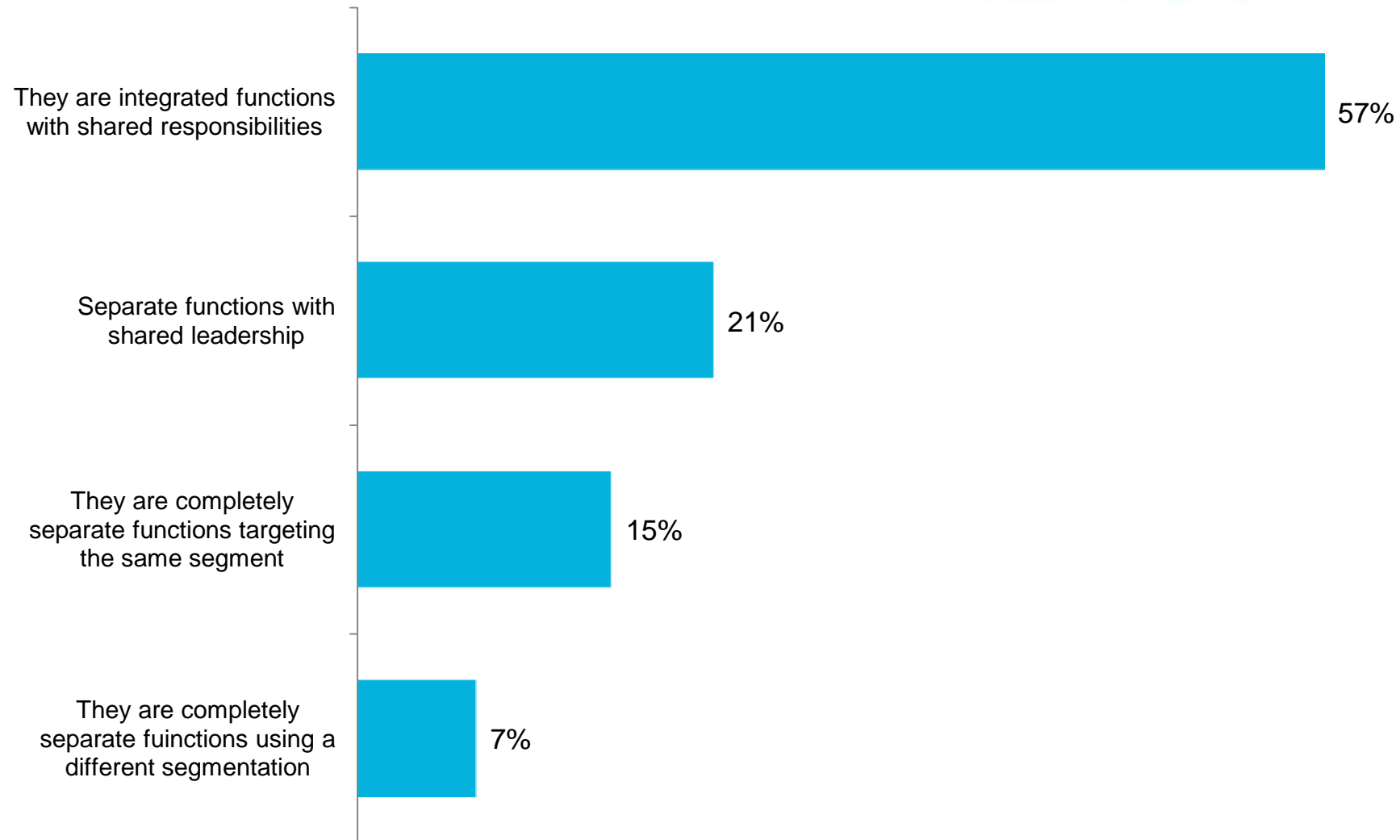
What the company's back office is primarily designed around – highly profitable



Q. And which of the following is your company's back office primarily designed around?

Base: highly profitable only (37)

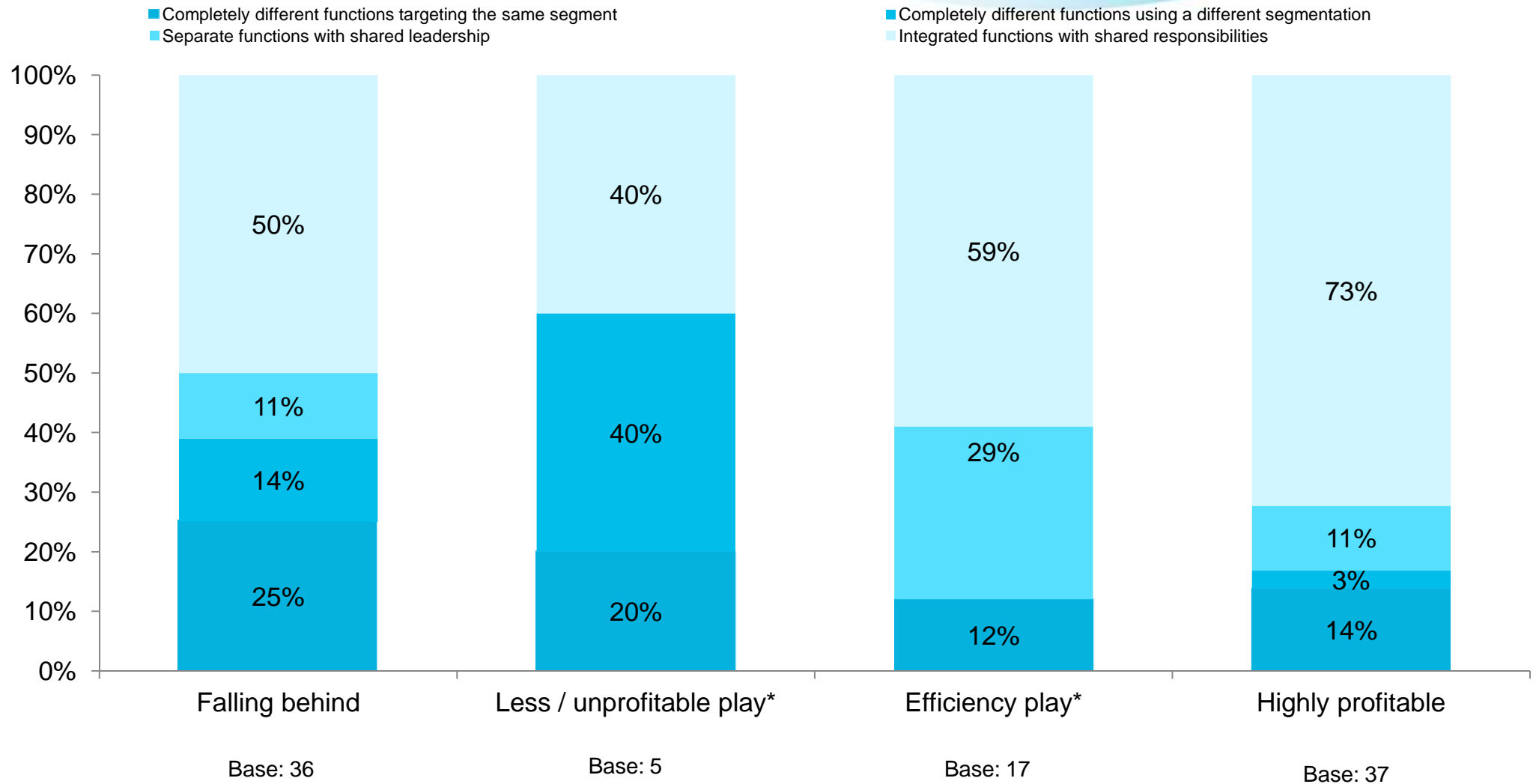
Relationship between marketing and sales



Q. Which of the following best describes the relationship between marketing and sales in the company?

Base: all responding (244)

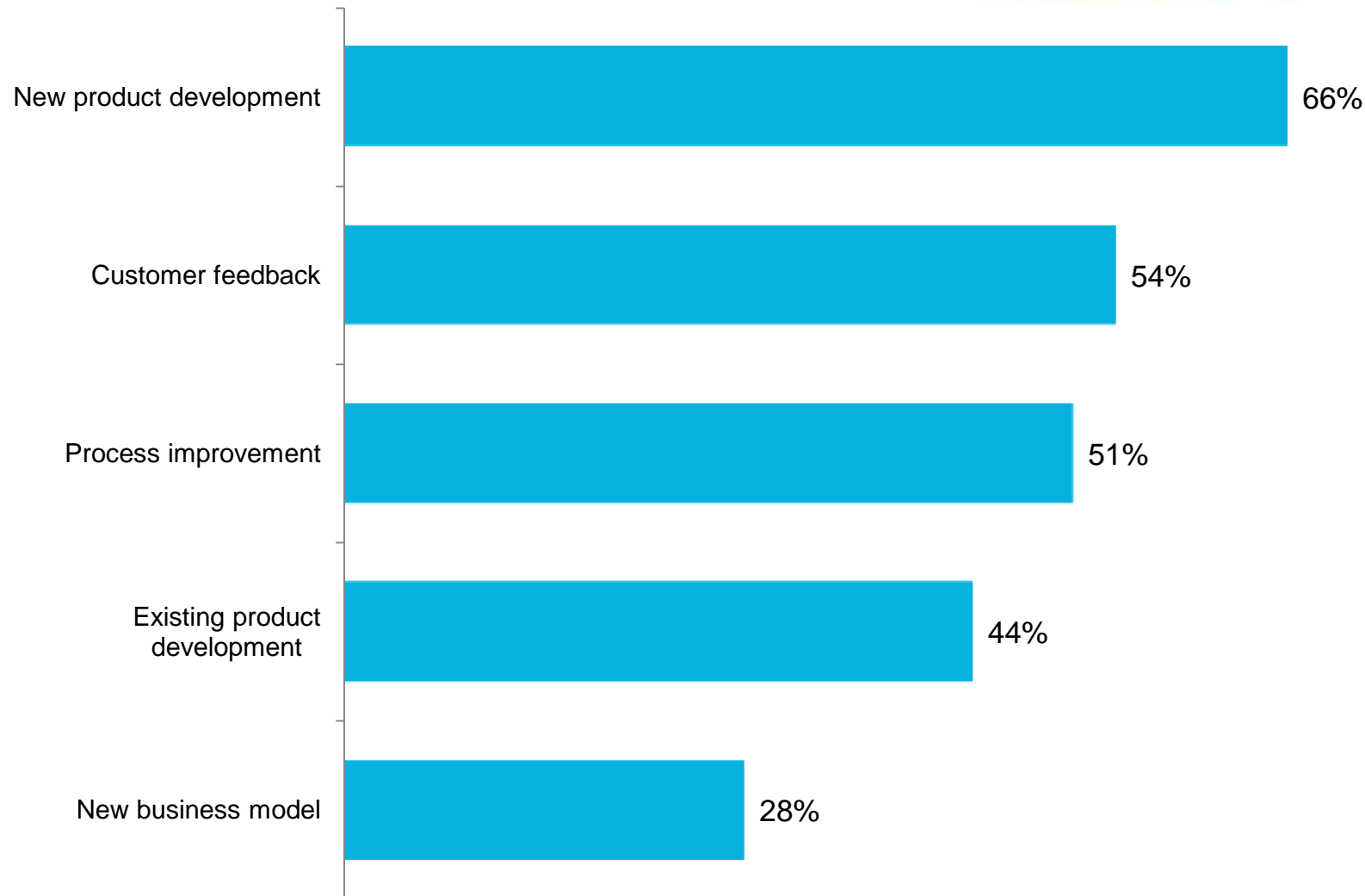
Relationship between marketing and sales by business segmentation



Q. Which of the following best describes the relationship between marketing and sales in the company?

Innovation

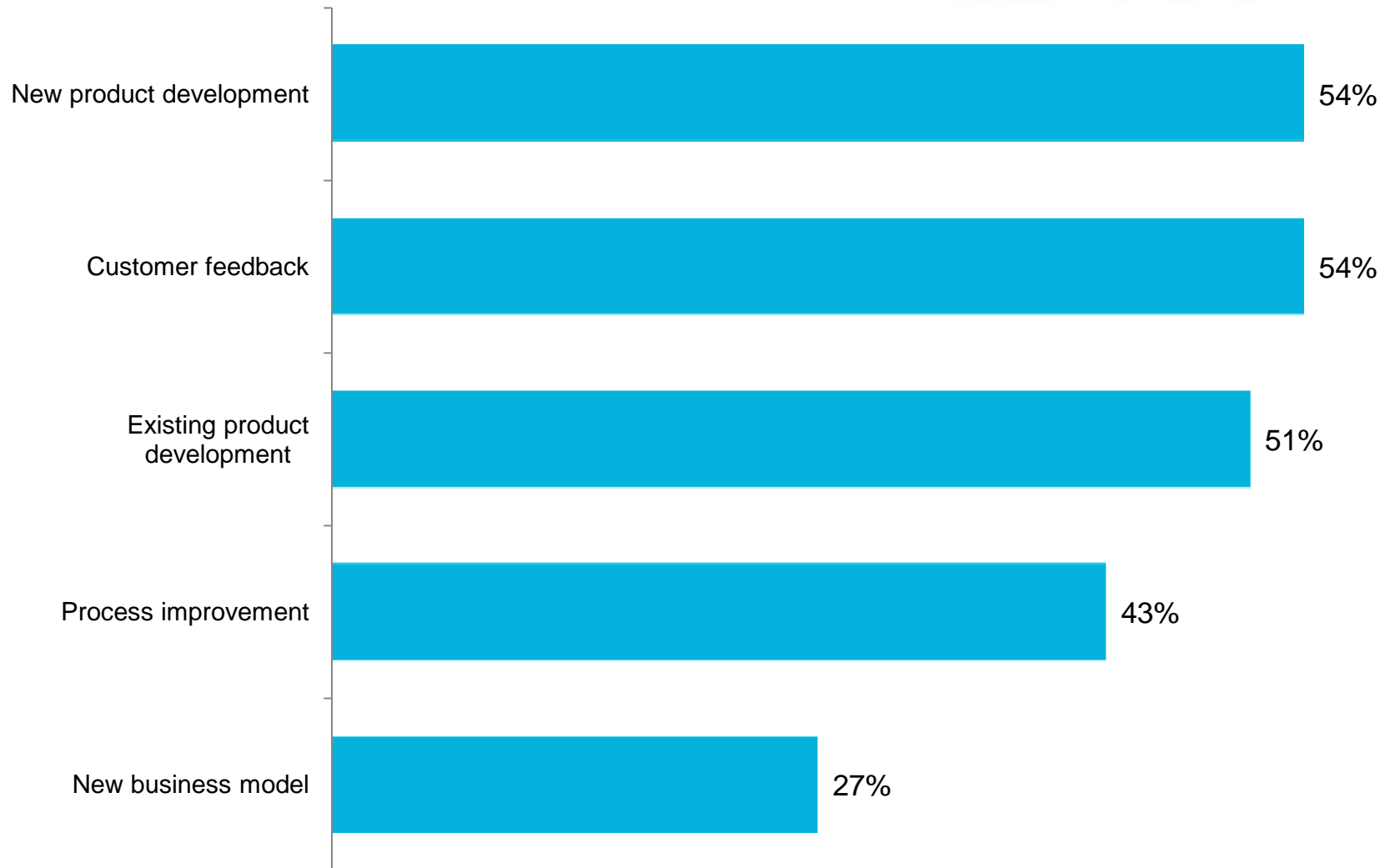
Key drivers of innovation strategy



Q. Which of the following are the key drivers of the company's innovation strategy?

Base: all responding (241)

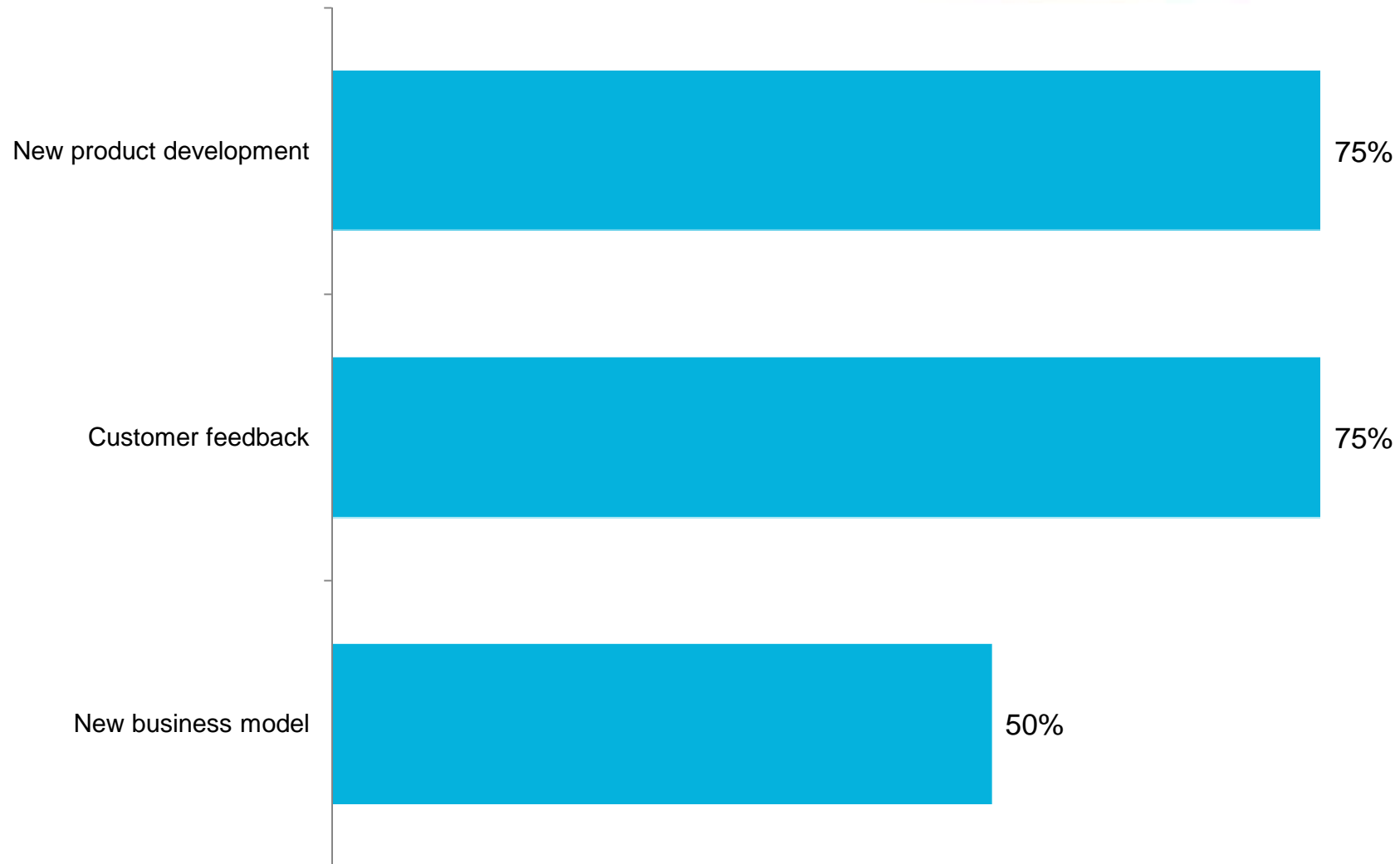
Key drivers of innovation strategy – falling behind



Q. Which of the following are the key drivers of the company's innovation strategy?

Base: falling behind only (37)

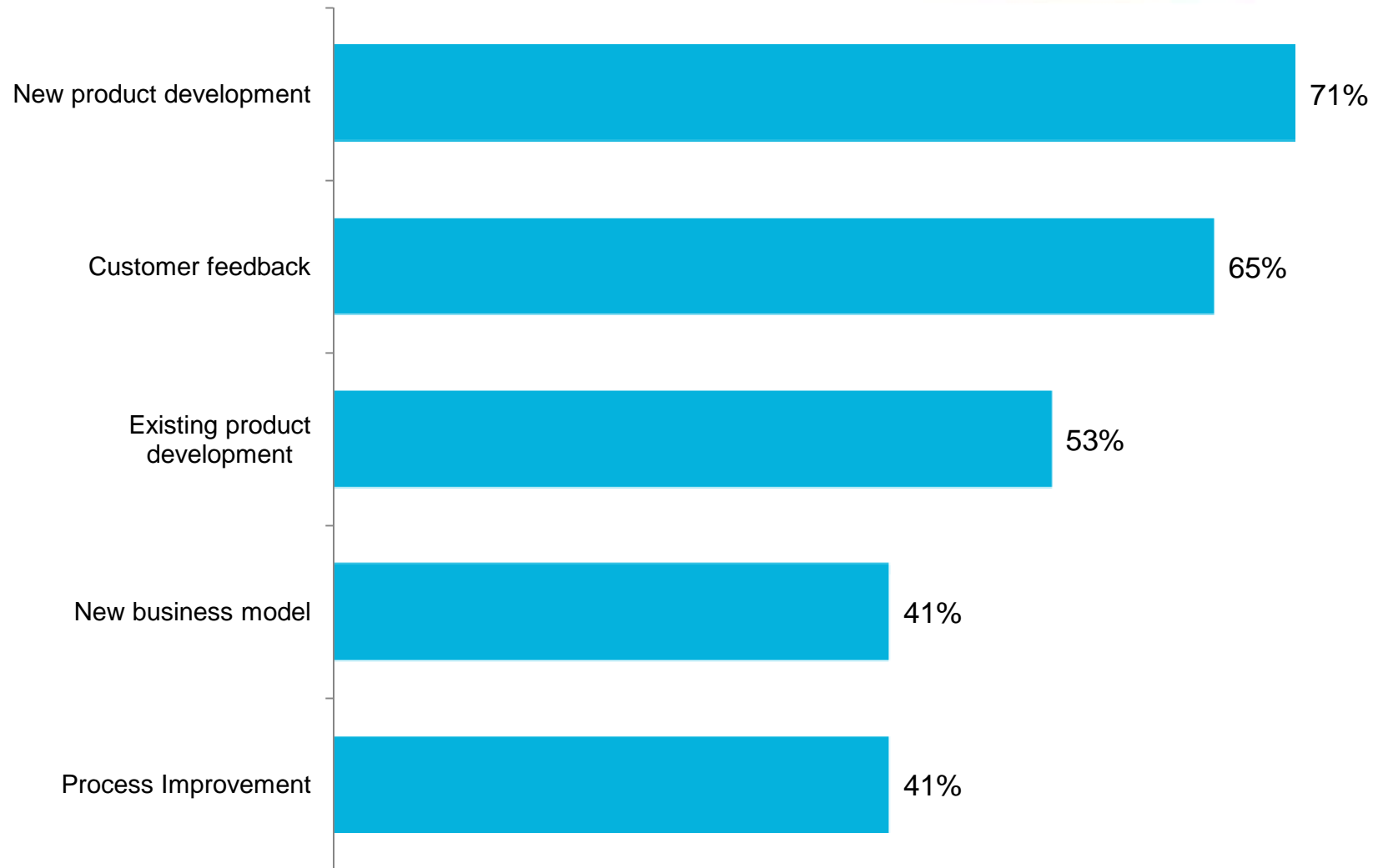
Key drivers of innovation strategy – less / unprofitable play



Q. Which of the following are the key drivers of the company's innovation strategy?

Base: less / unprofitable play only (4)

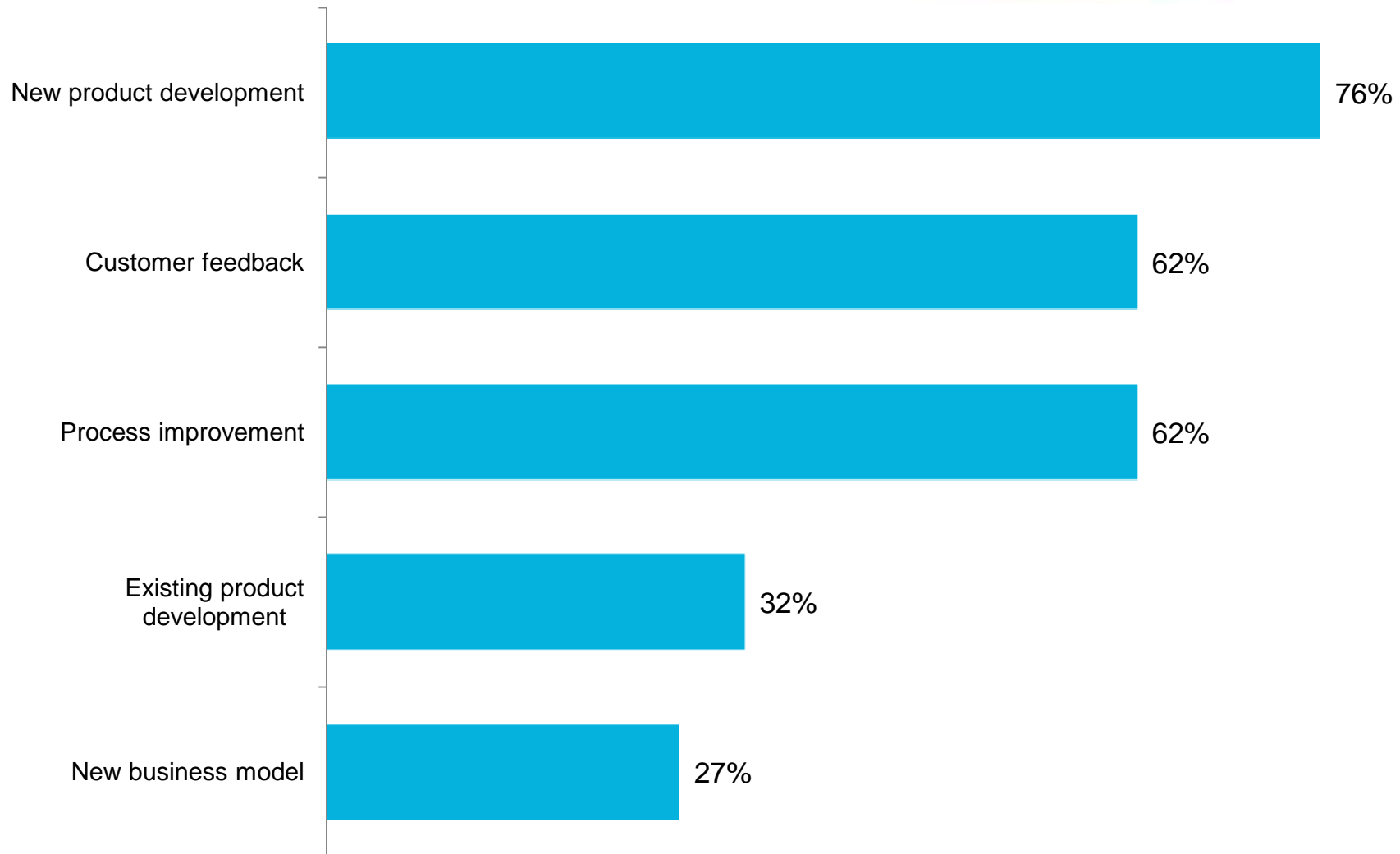
Key drivers of innovation strategy – efficiency play



Q. Which of the following are the key drivers of the company's innovation strategy?

Base: efficiency play only (17)

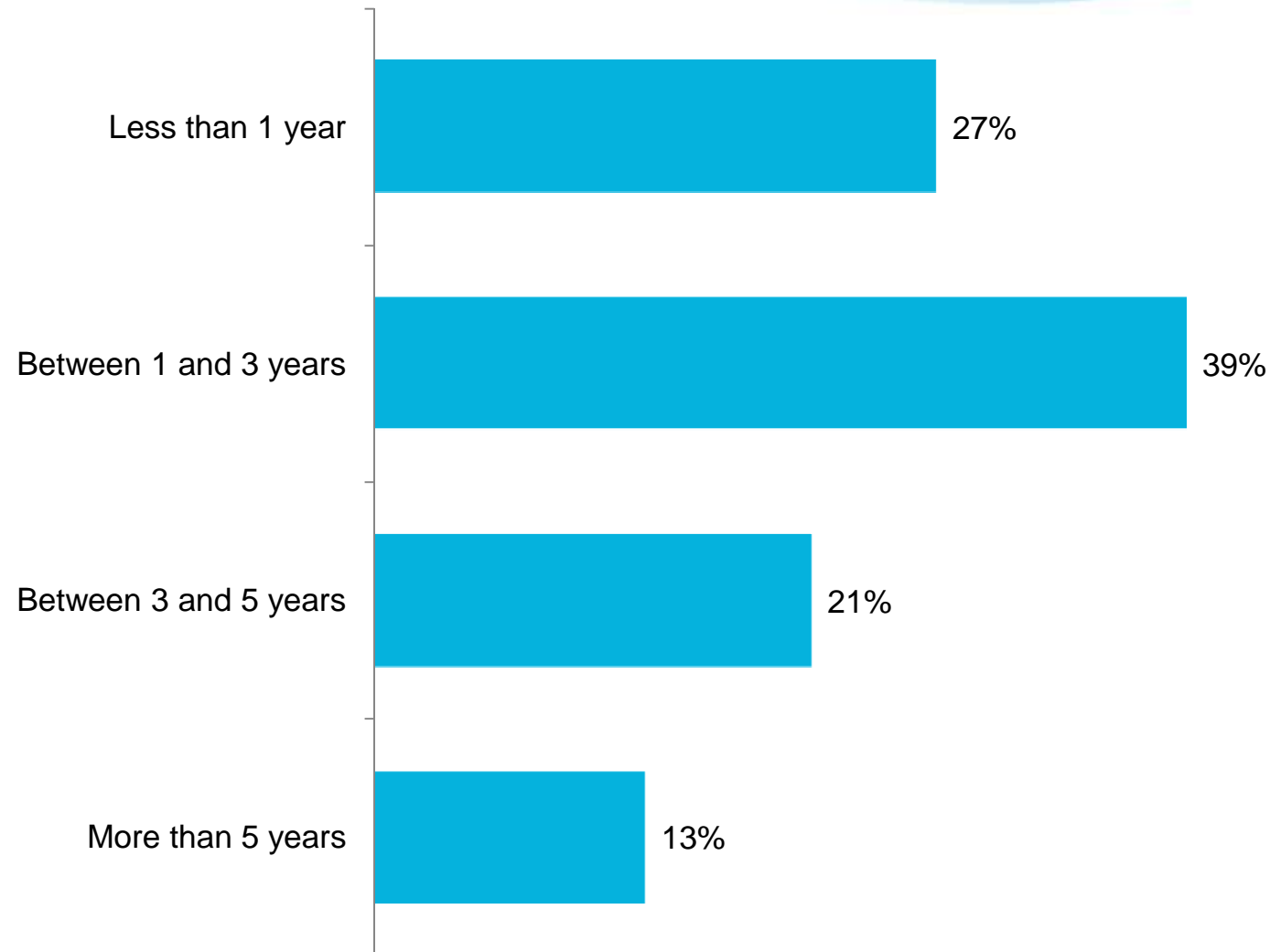
Key drivers of innovation strategy – highly profitable



Q. Which of the following are the key drivers of the company's innovation strategy?

Base: highly profitable only (37)

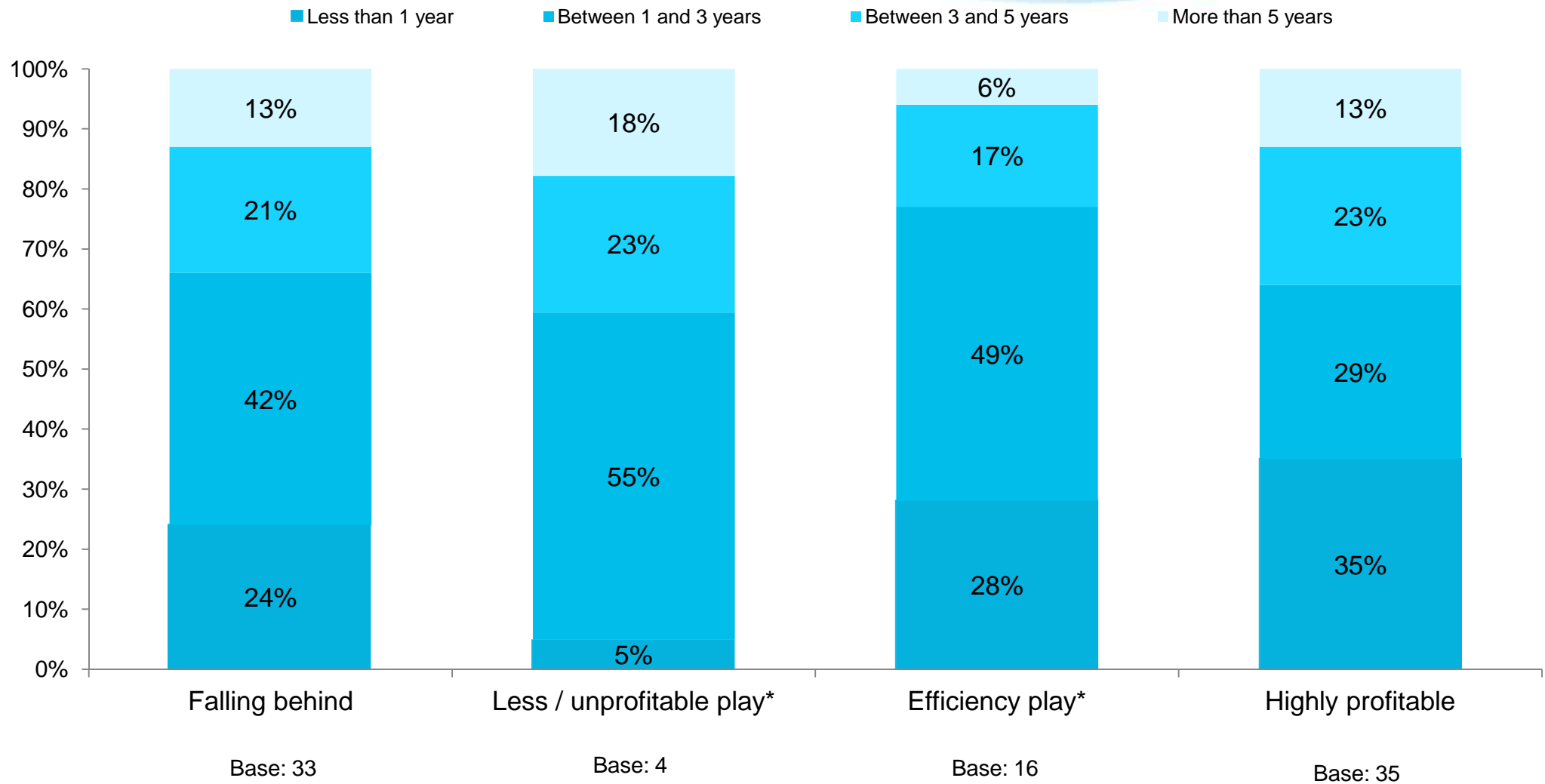
Percentage of current innovations expected to deliver in ...



Q. Approximately what percentage of current innovations are expected to deliver in the following time frames?

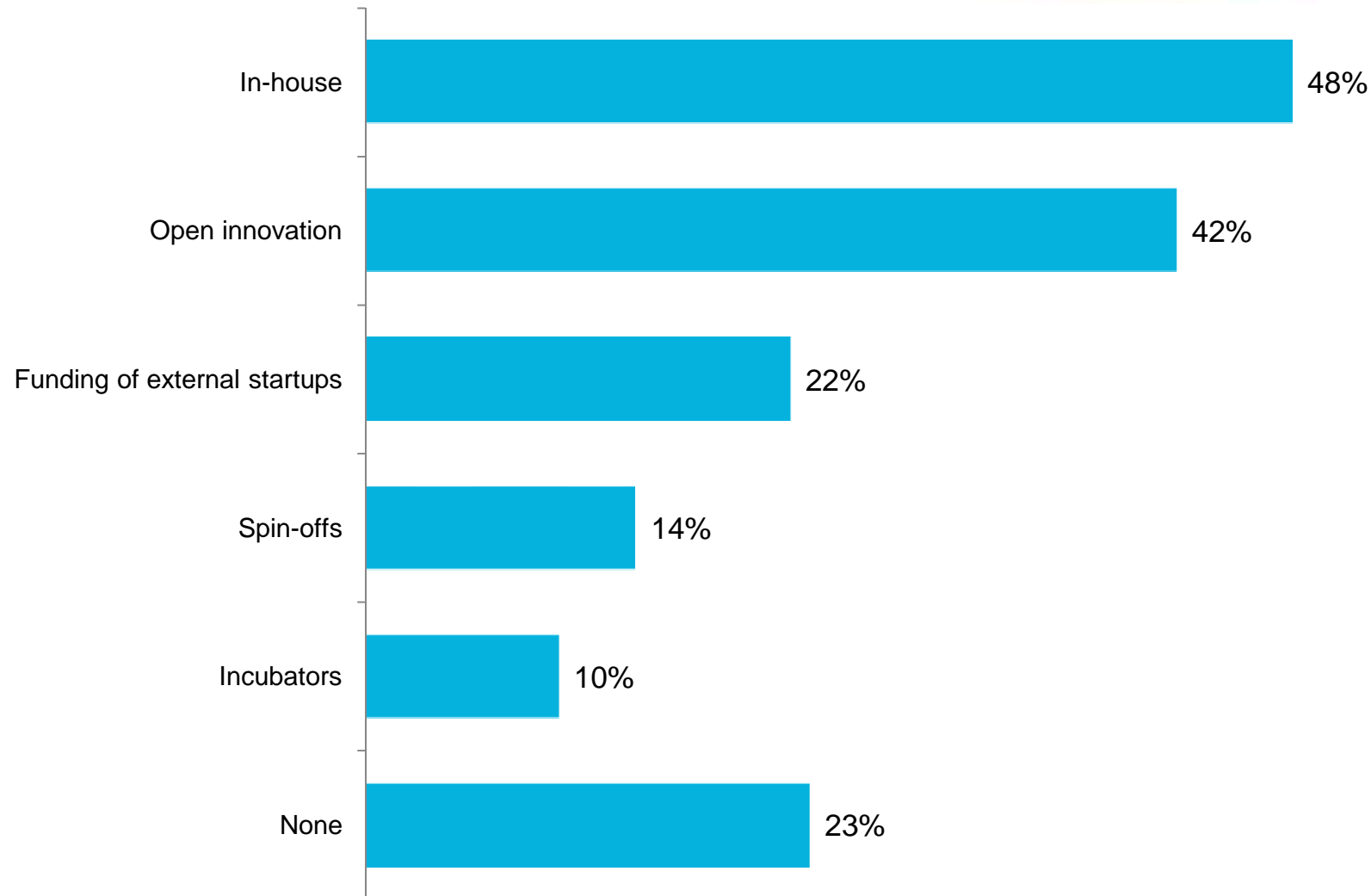
Base: all responding (218)

Percentage of current innovations expected to deliver in the following time frames by segmentation



Q. Approximately what percentage of current innovations are expected to deliver in the following time frames?

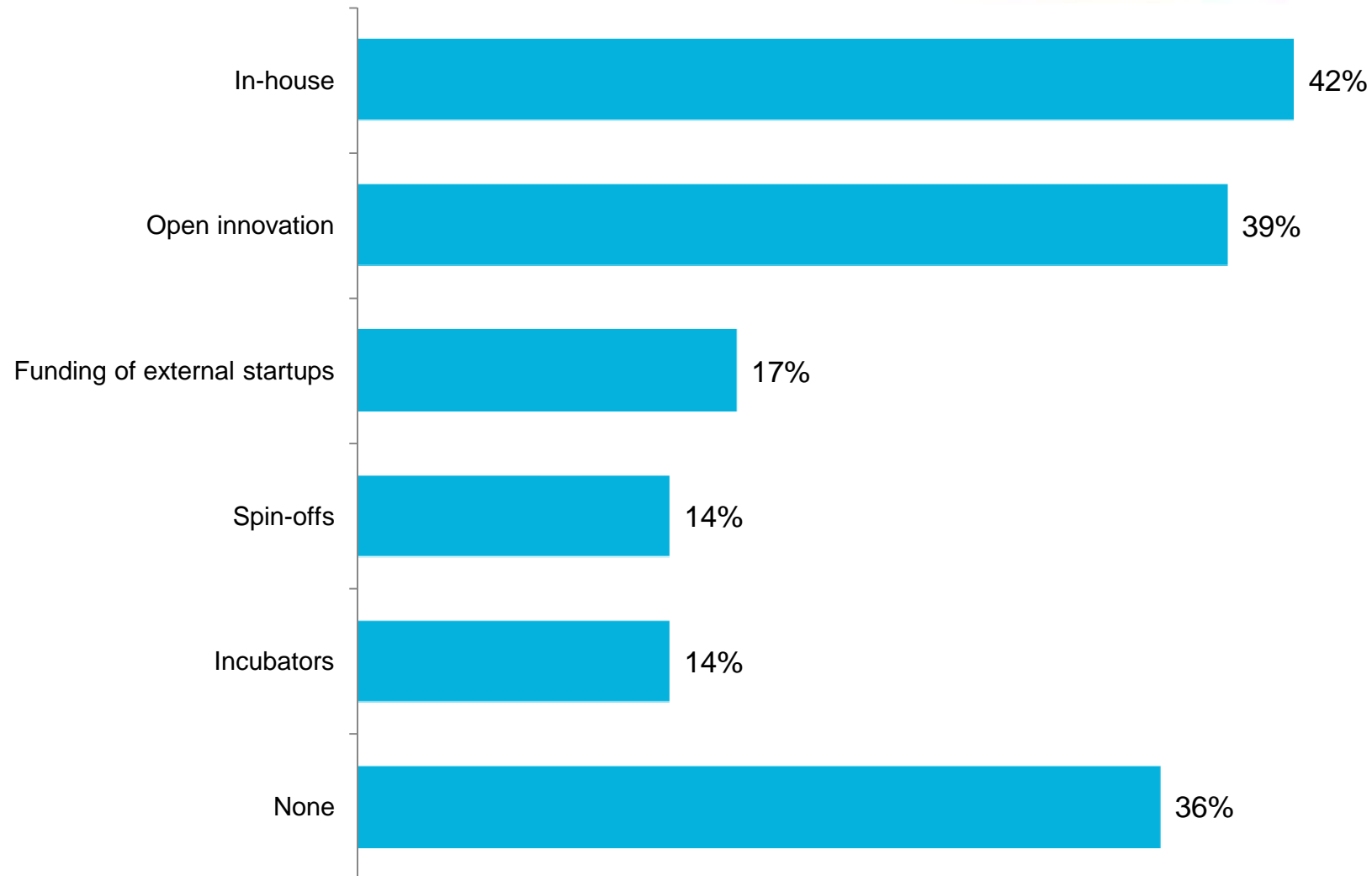
Mechanisms used by the company to foster disruptive innovation



Q. What mechanisms, if any, are being used by the company to foster disruptive innovation?

Base: all responding (235)

Mechanisms used by the company to foster disruptive innovation – falling behind



Q. What mechanisms, if any, are being used by the company to foster disruptive innovation?

Base: falling behind only (36)

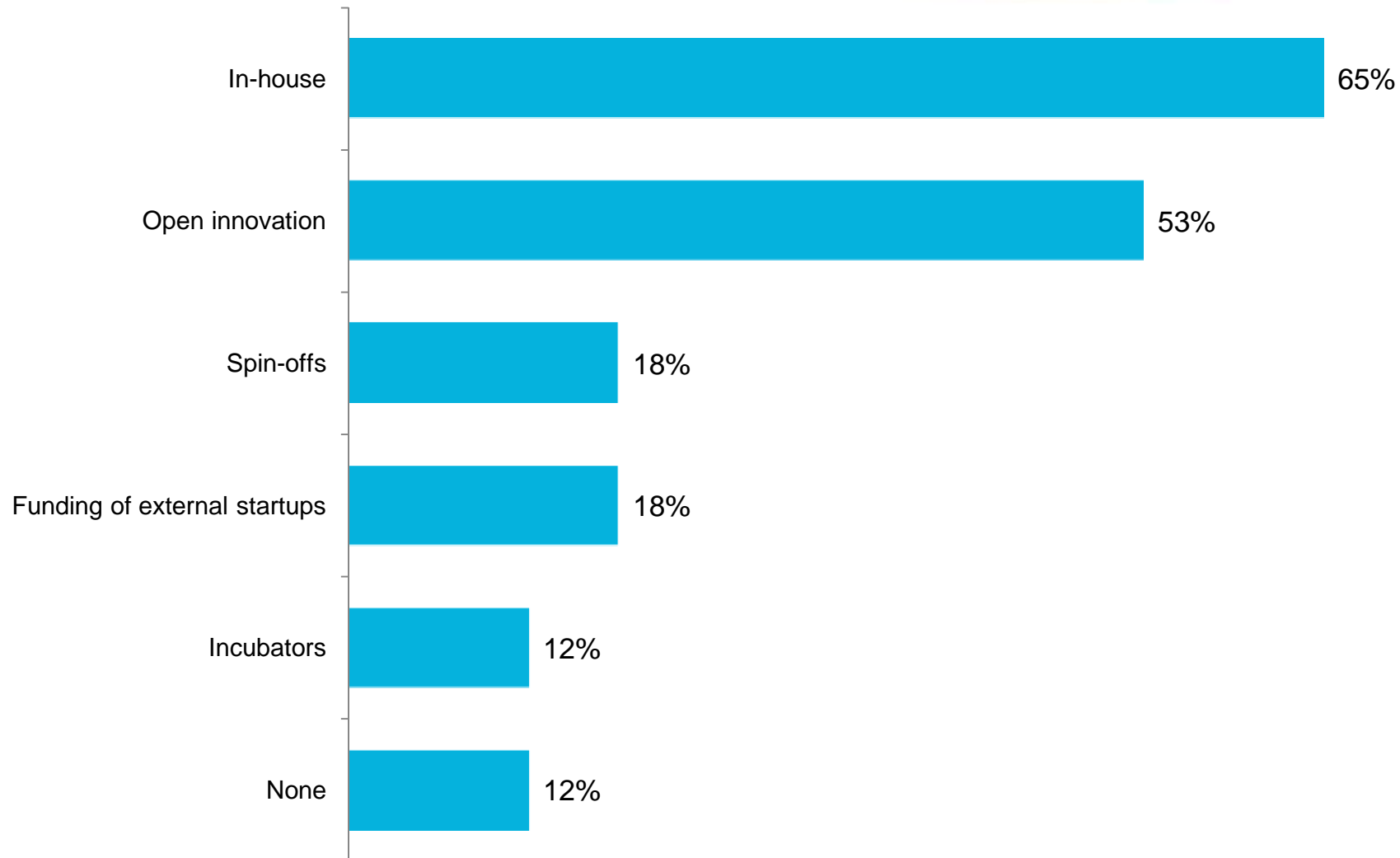
Mechanisms used by the company to foster disruptive innovation – less / unprofitable play



Q. What mechanisms, if any, are being used by the company to foster disruptive innovation?

Base: less / unprofitable play only (4)

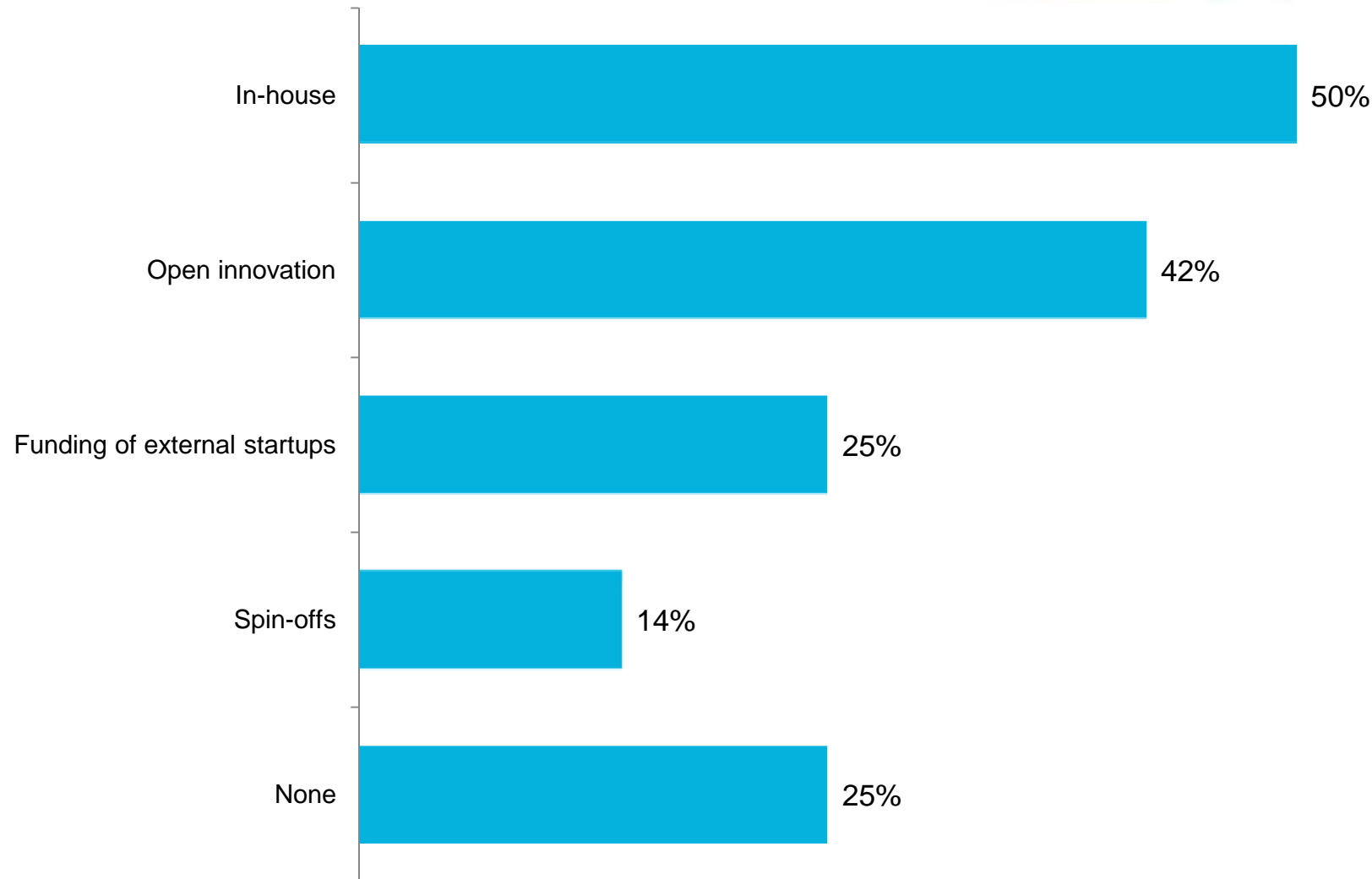
Mechanisms used by the company to foster disruptive innovation – efficiency play



Q. What mechanisms, if any, are being used by the company to foster disruptive innovation?

Base: efficiency play only (17)

Mechanisms used by the company to foster disruptive innovation – highly profitable

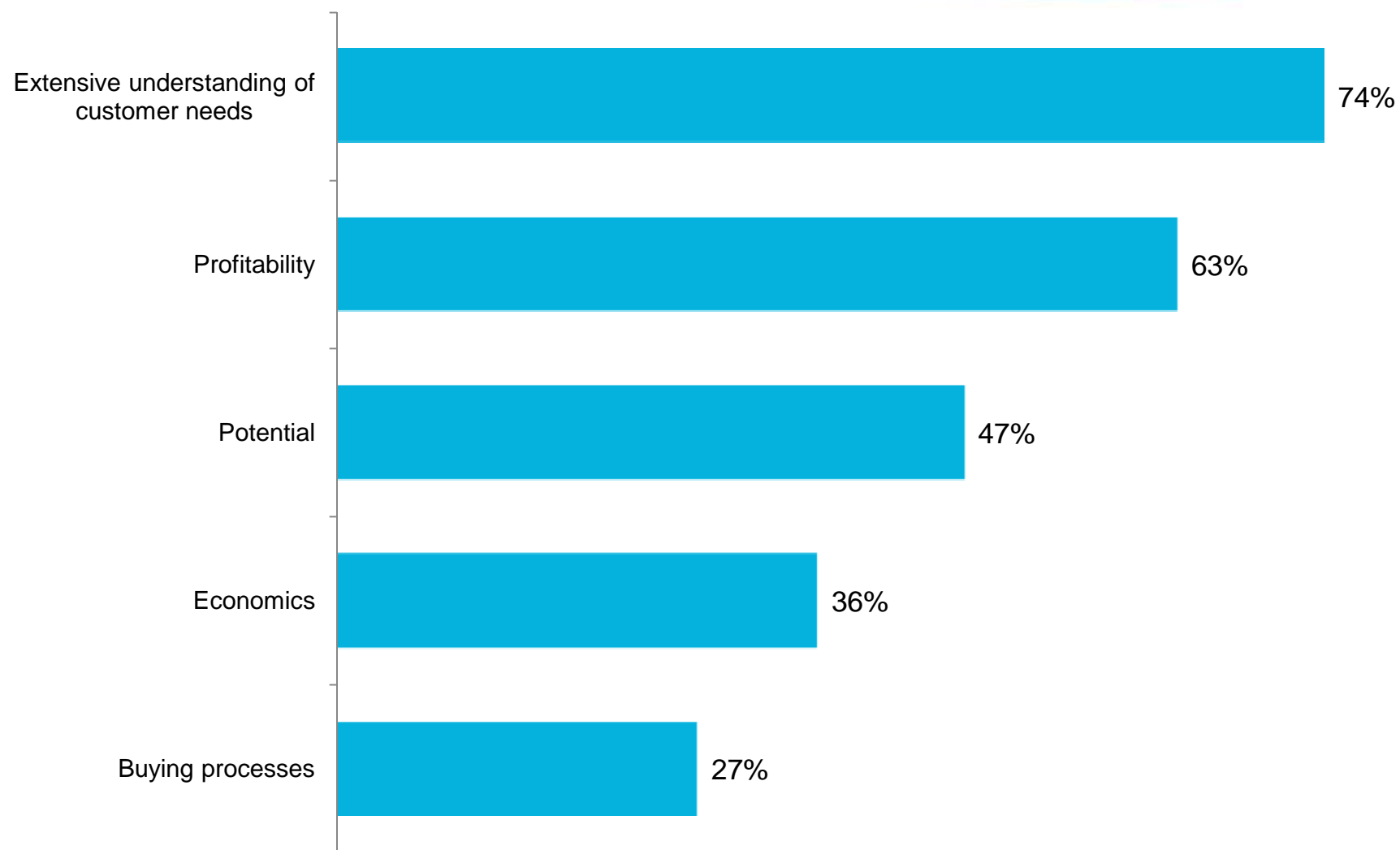


Q. What mechanisms, if any, are being used by the company to foster disruptive innovation?

Base: highly profitable only (36)

Business Excellence

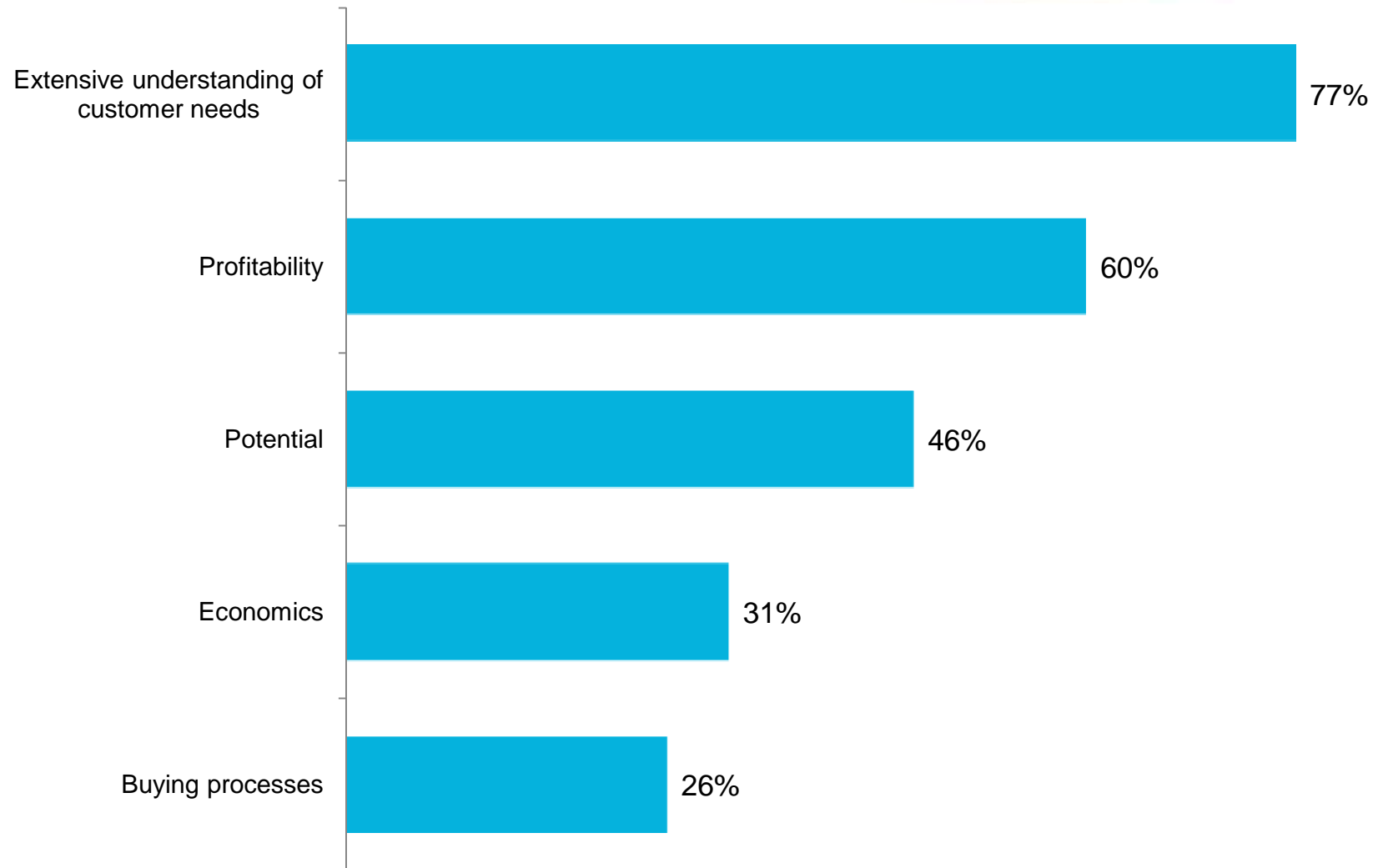
Factors of most importance in formulating account strategies



Q. Which of the following are the factors of most importance in formulating account strategies?

Base: all responding (231)

Factors of most importance in formulating account strategies – falling behind

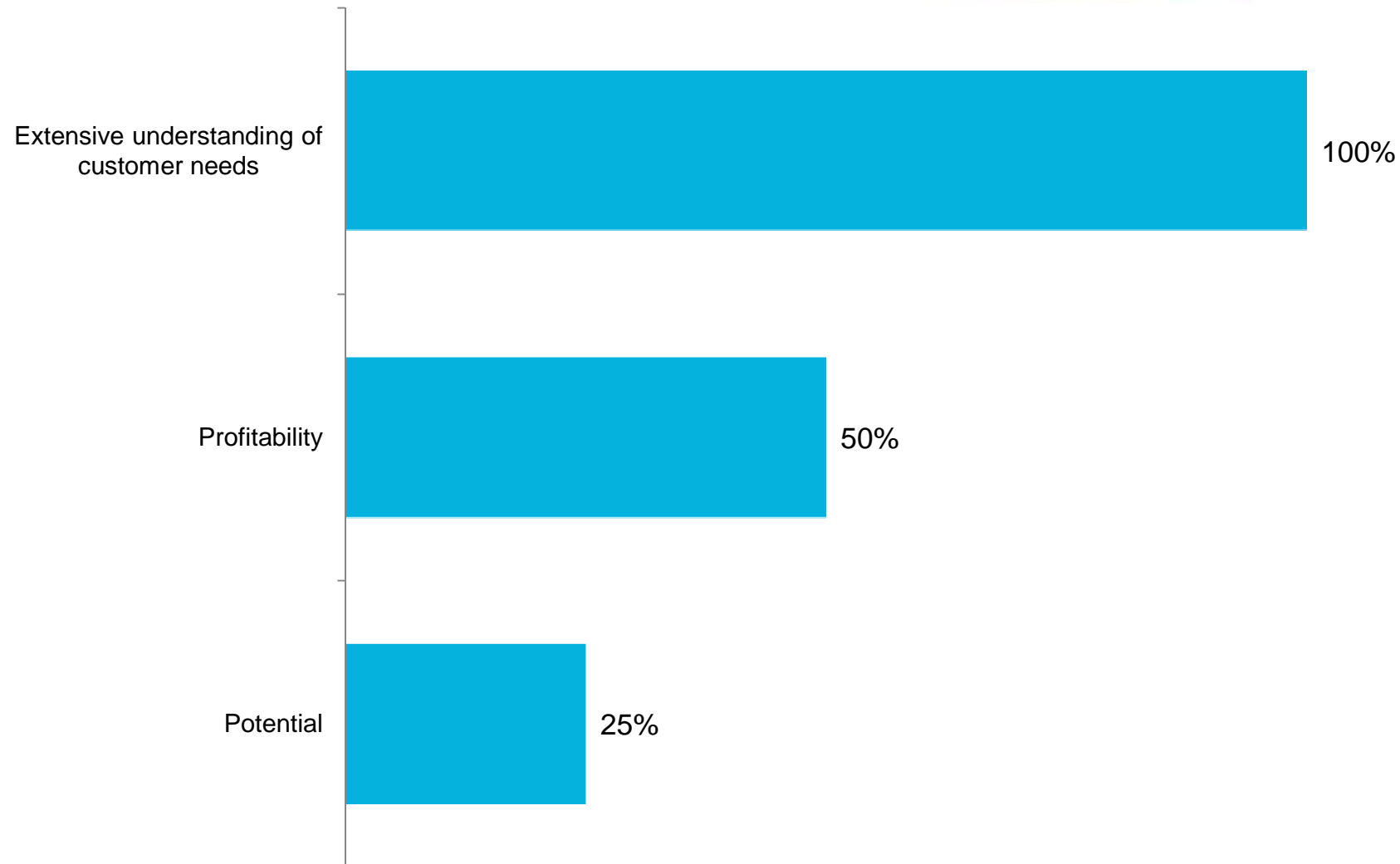


Q. Which of the following are the factors of most importance in formulating account strategies?

Base: falling behind only (35)

Factors of most importance in formulating account strategies

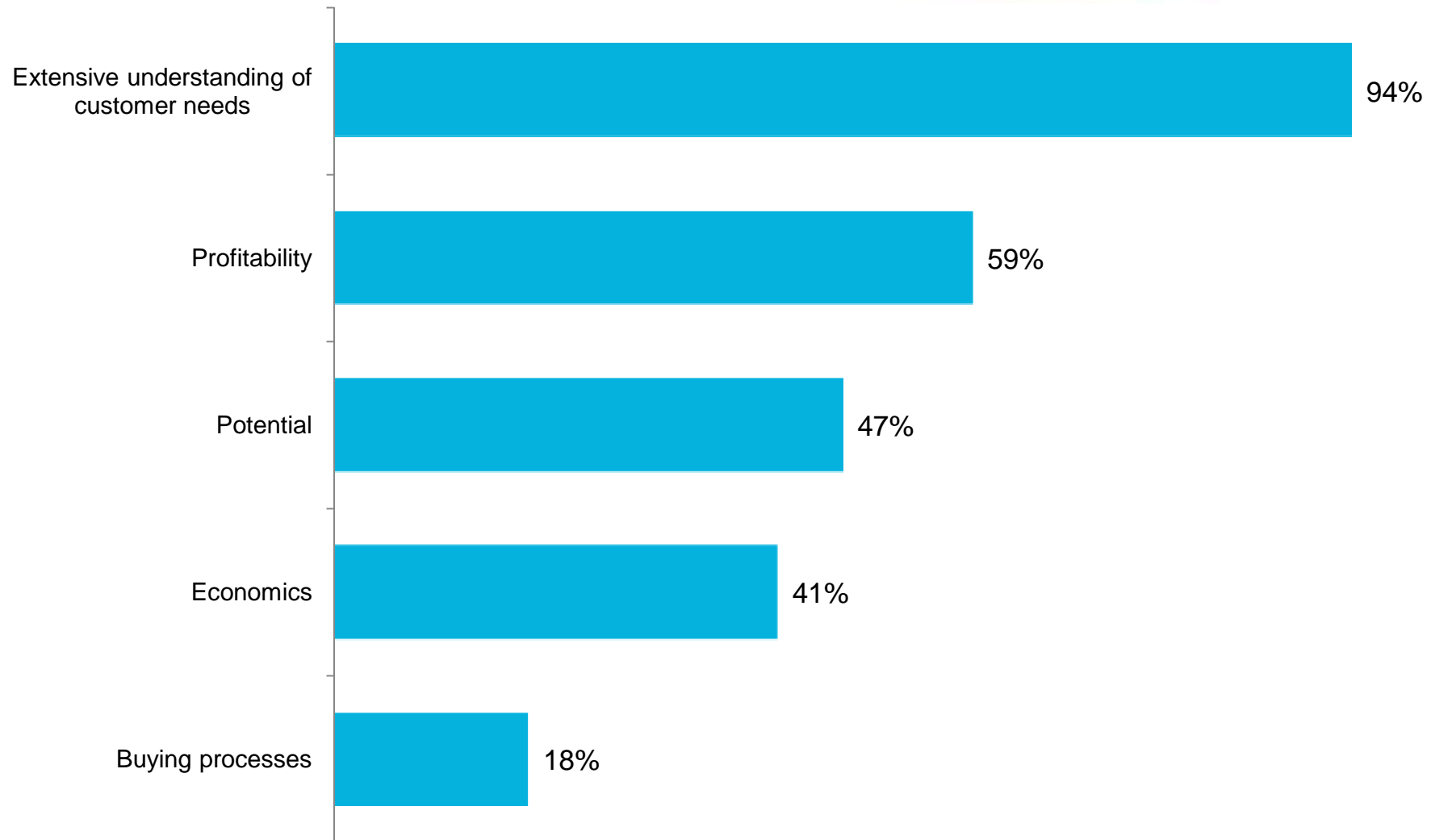
– less / unprofitable play



Q. Which of the following are the factors of most importance in formulating account strategies?

Base: less / unprofitable play only (4)

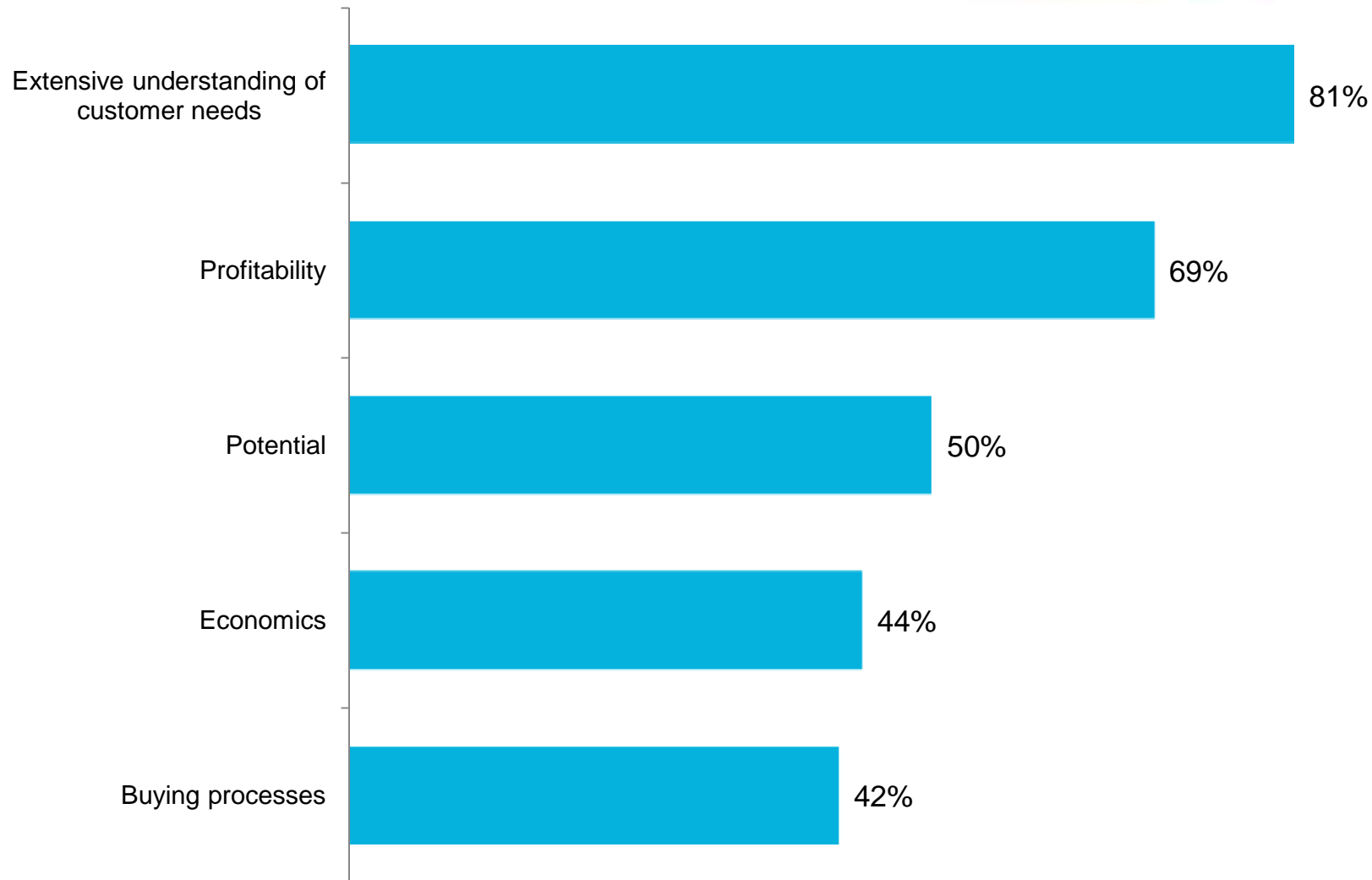
Factors of most importance in formulating account strategies – efficiency play



Q. Which of the following are the factors of most importance in formulating account strategies?

Base: efficiency play only (17)

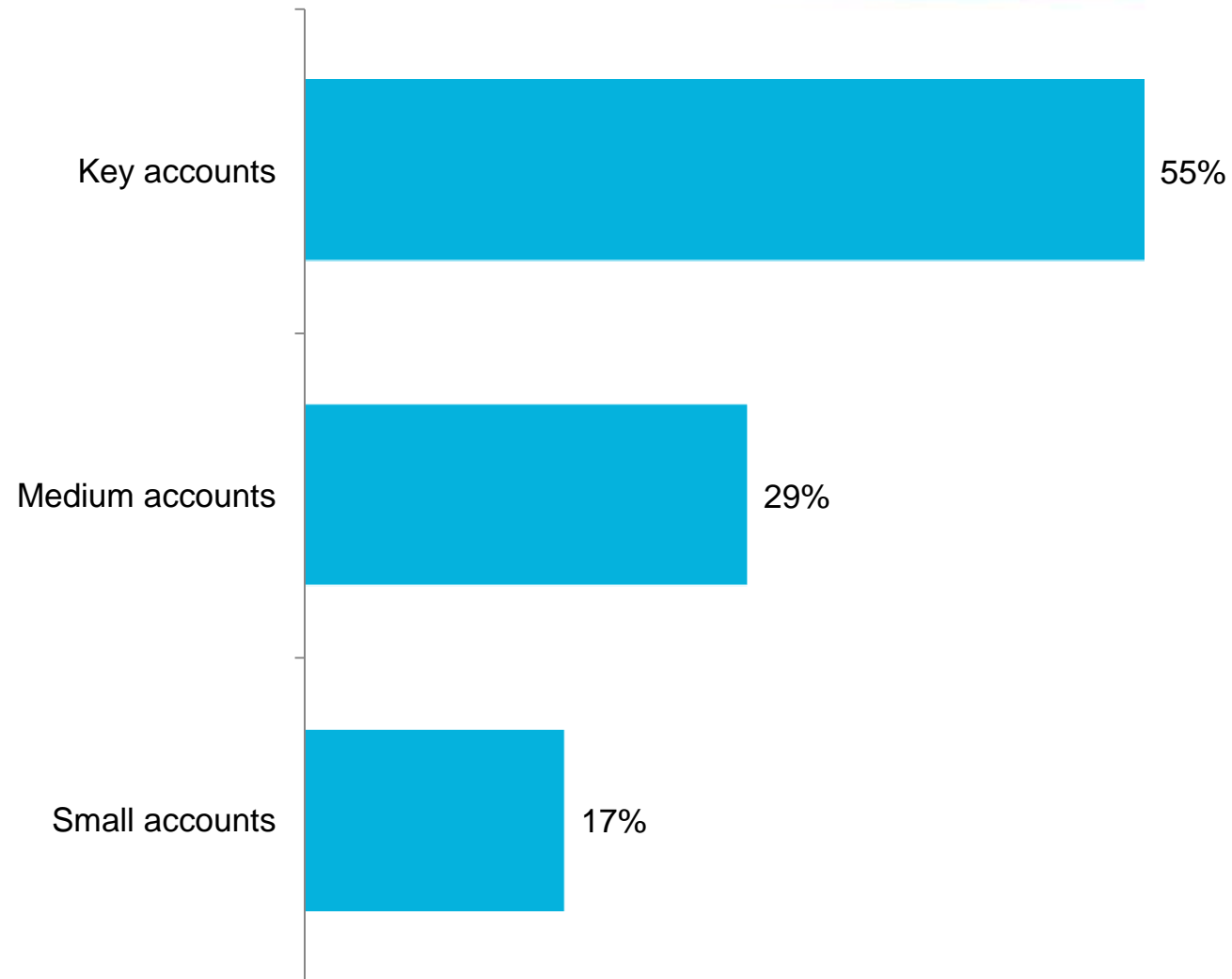
Factors of most importance in formulating account strategies – highly profitable



Q. Which of the following are the factors of most importance in formulating account strategies?

Base: highly profitable only (36)

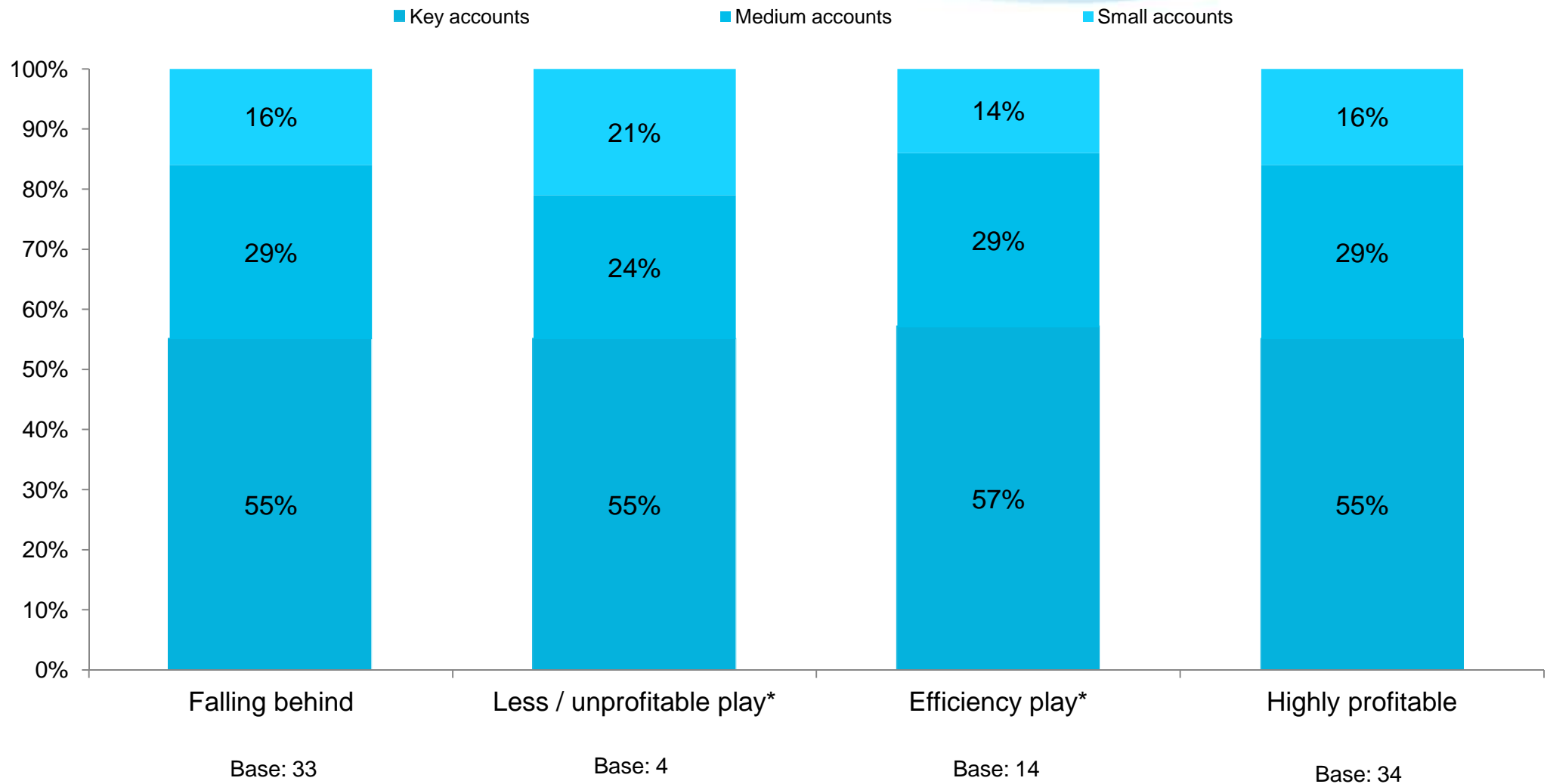
Percentage of sales / commercial effort focused on ...



Q. Approximately what percentage of sales / commercial effort is focused on the following size of accounts?

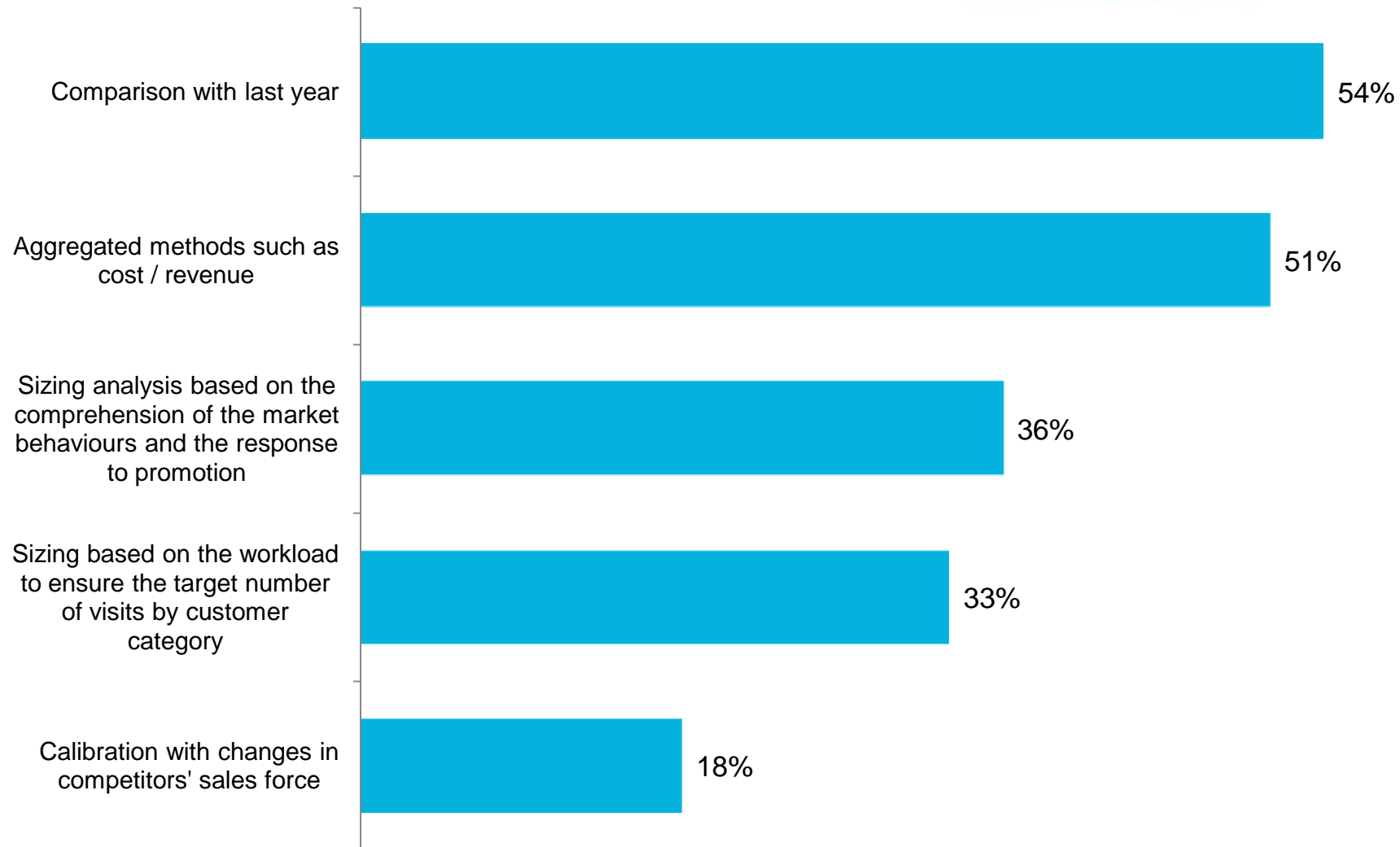
Base: all responding (210)

Percentage of sales / commercial effort focused on size of accounts by segmentation



Q. Approximately what percentage of sales / commercial effort is focused on the following size of accounts?

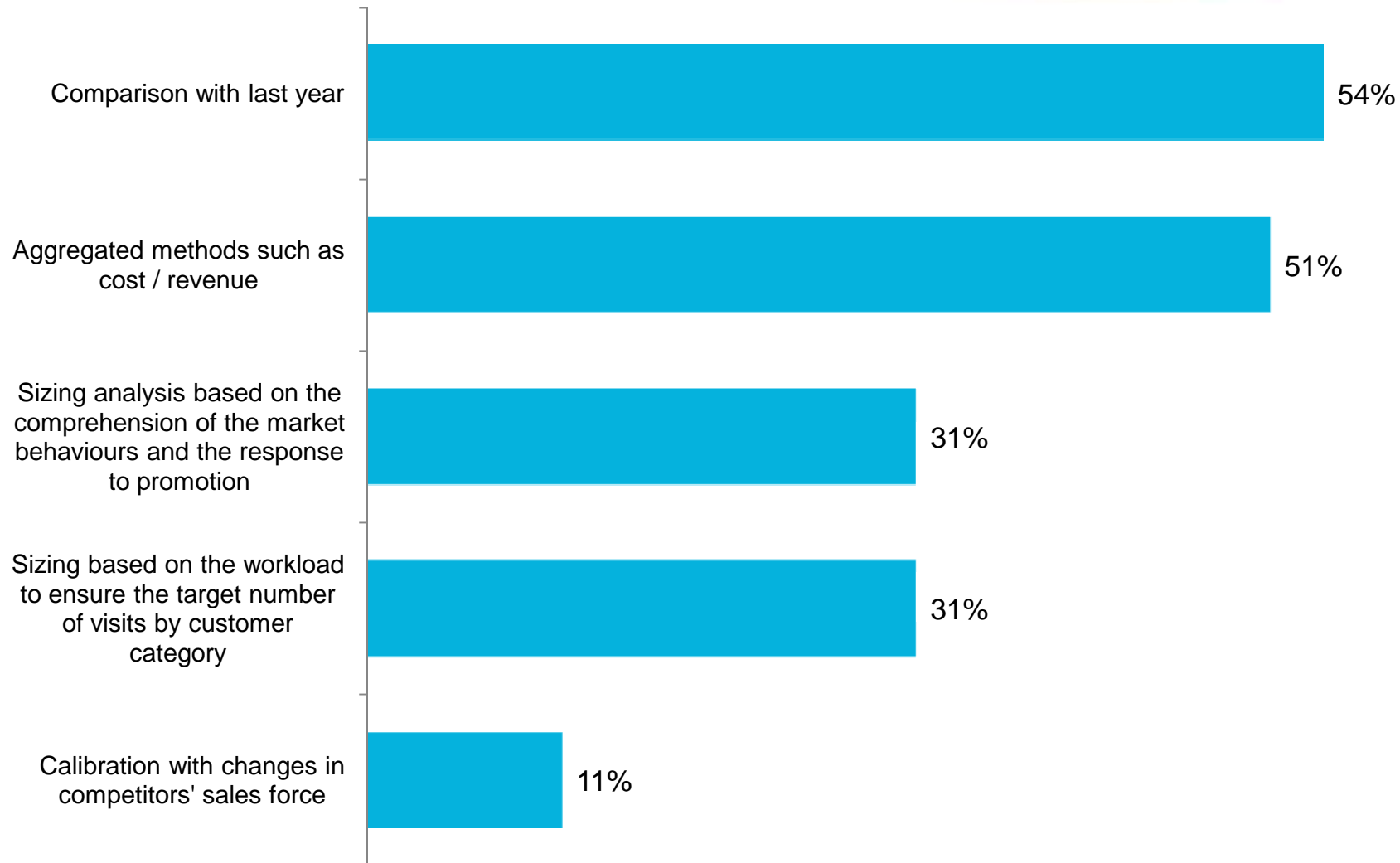
Methods currently used to size the company's sales force



Q. What methods are currently used to size the company's sales force?

Base: all responding (226)

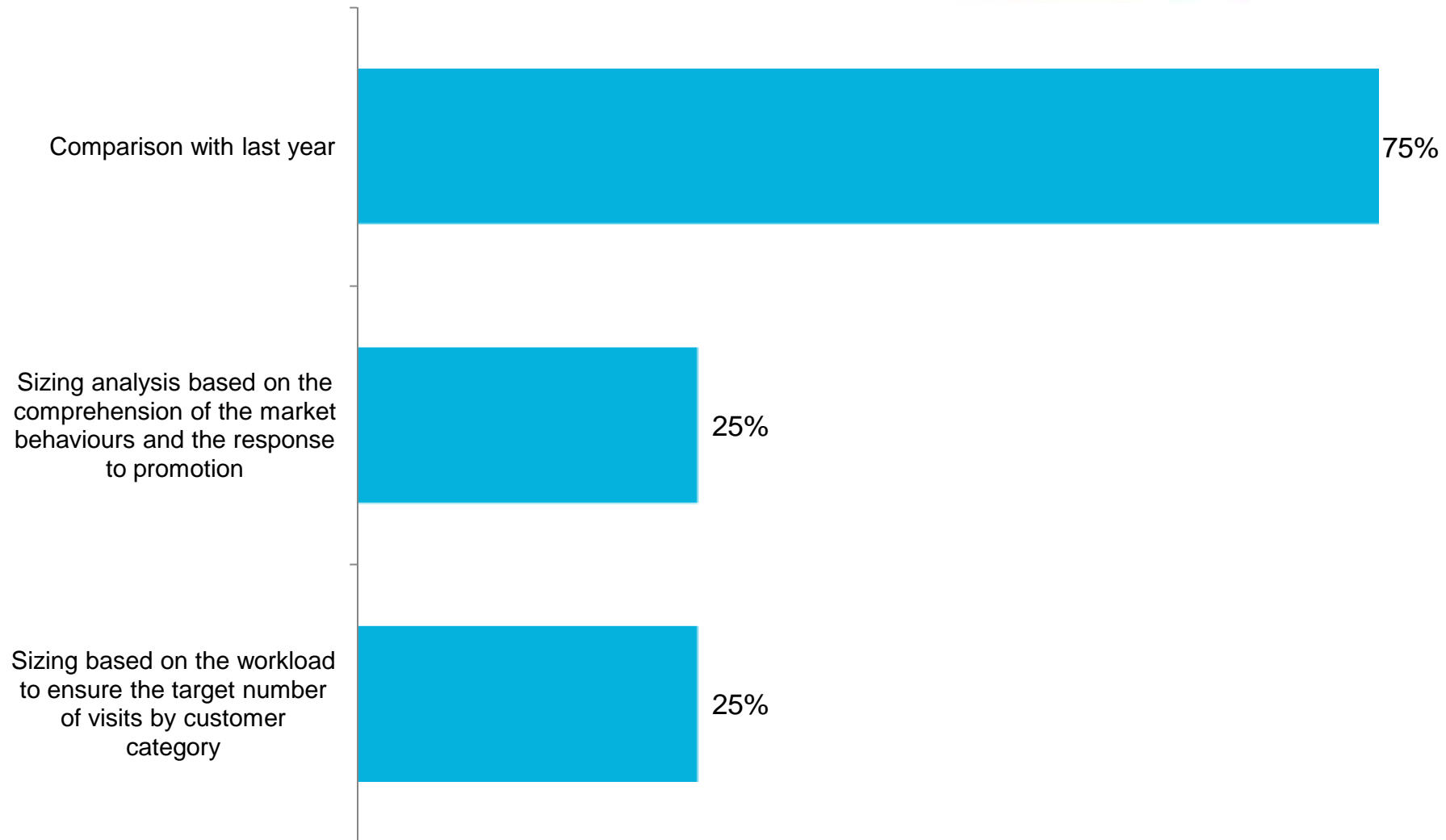
Methods currently used to size the company's sales force – falling behind



Q. What methods are currently used to size the company's sales force?

Base: falling behind only (35)

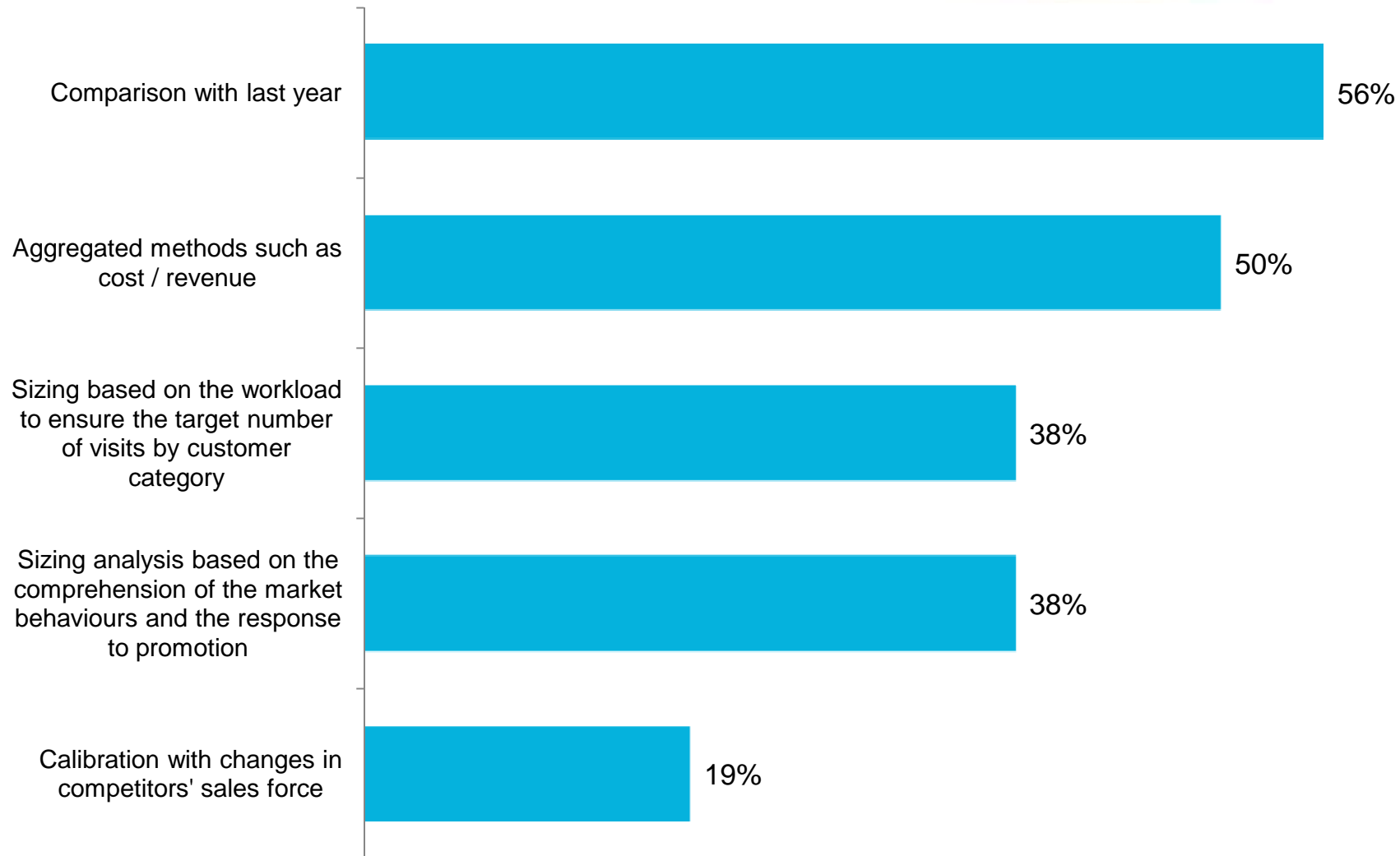
Methods currently used to size the company's sales force – less / unprofitable play



Q. What methods are currently used to size the company's sales force?

Base: less / unprofitable play only (4)

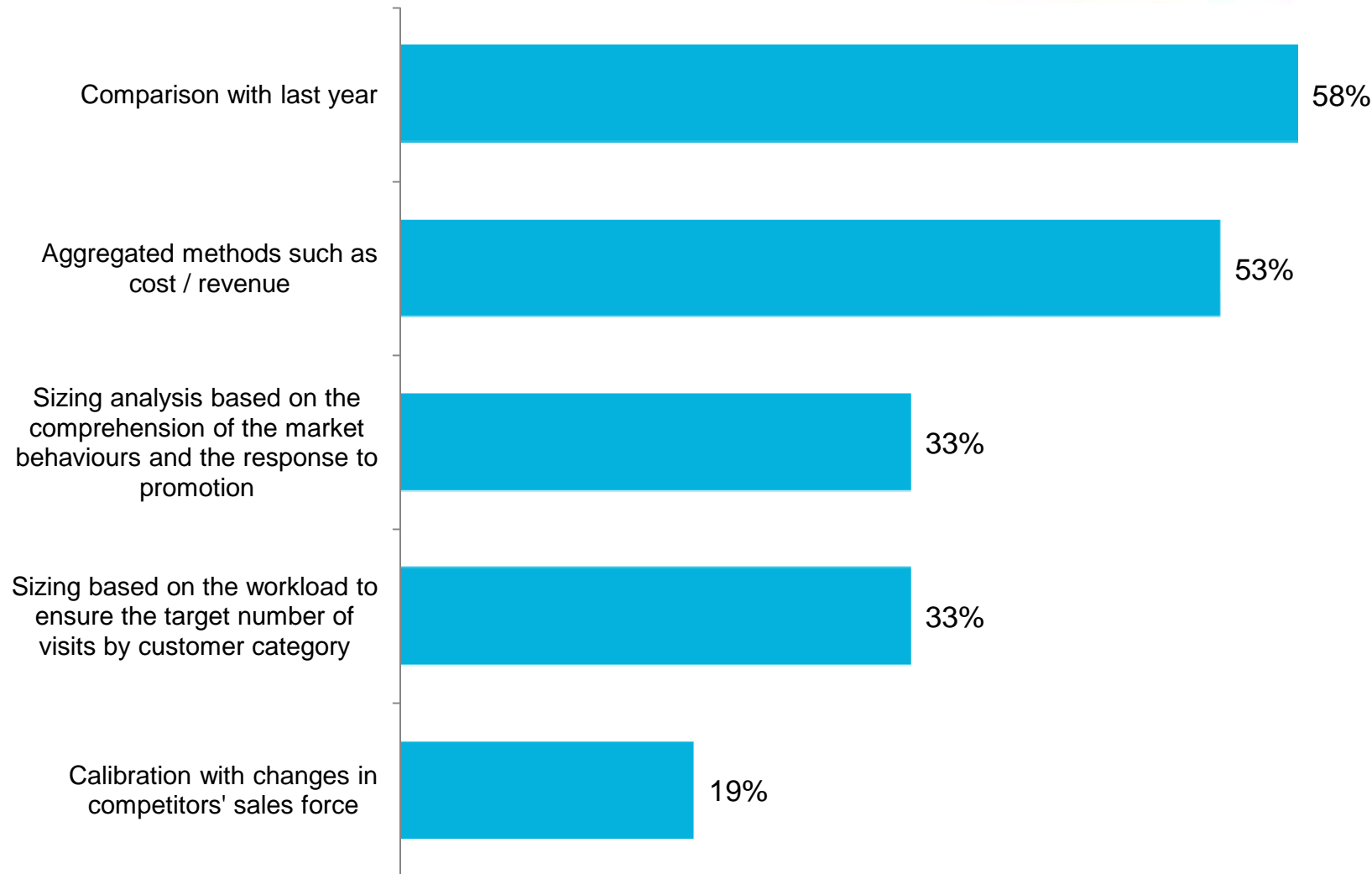
Methods currently used to size the company's sales force – efficiency play



Q. What methods are currently used to size the company's sales force?

Base: efficiency play only (16)

Methods currently used to size the company's sales force – highly profitable

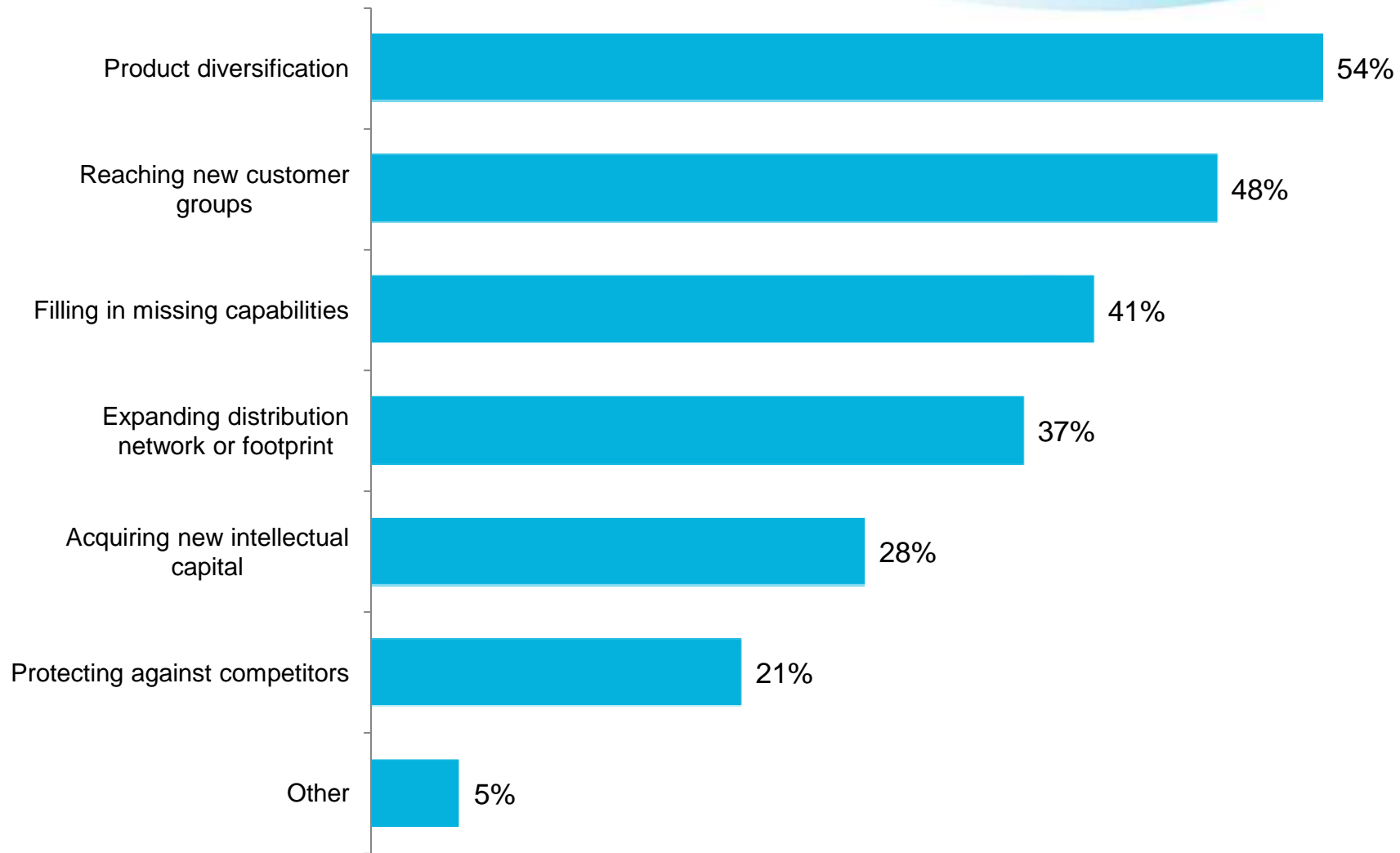


Q. What methods are currently used to size the company's sales force?

Base: highly profitable only (36)

Acquisition

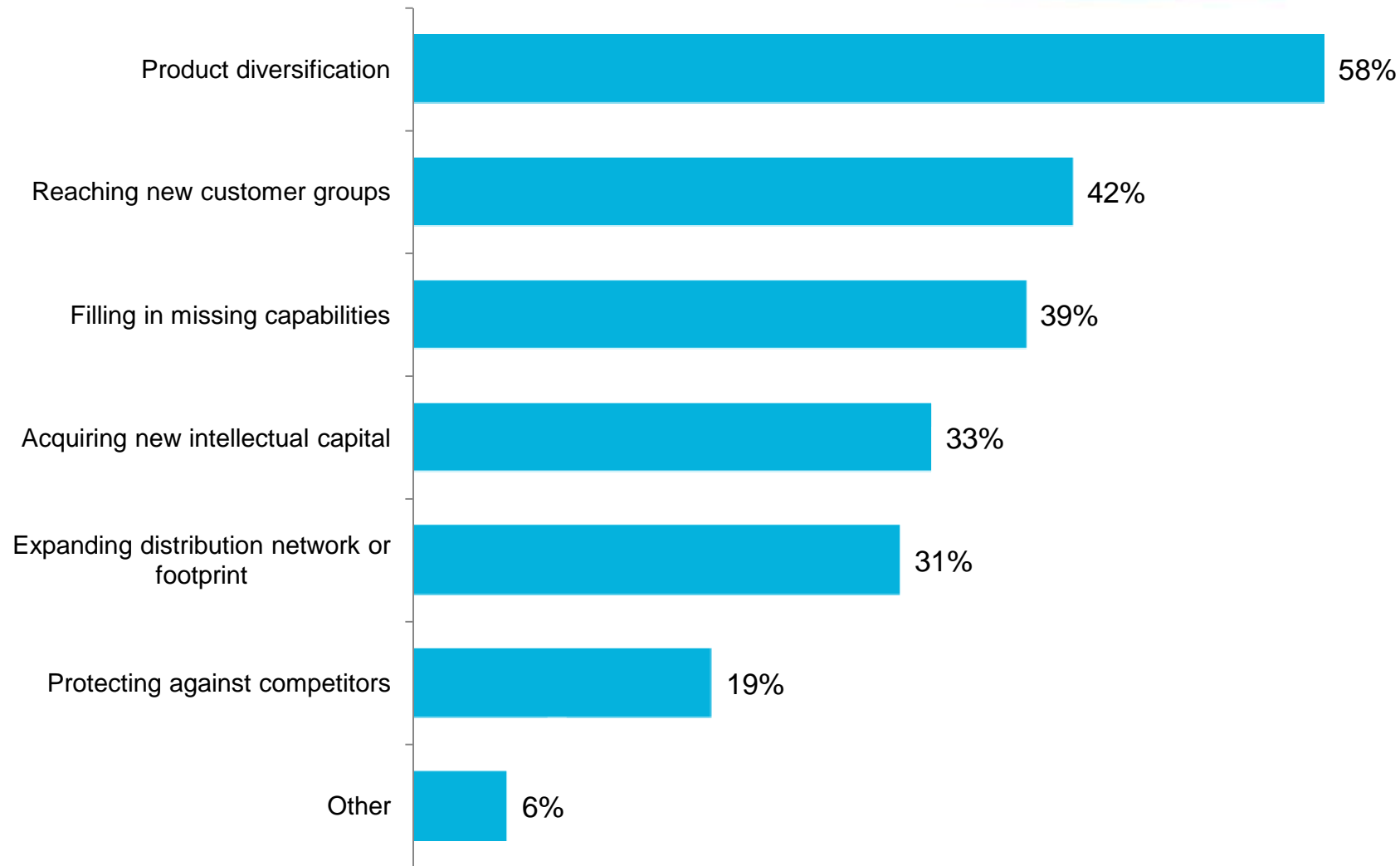
Areas where the company prefers to grow via acquisition rather than organically



Q. In which of the following areas does the company prefer to grow via acquisition rather than organically?

Base: all responding (222)

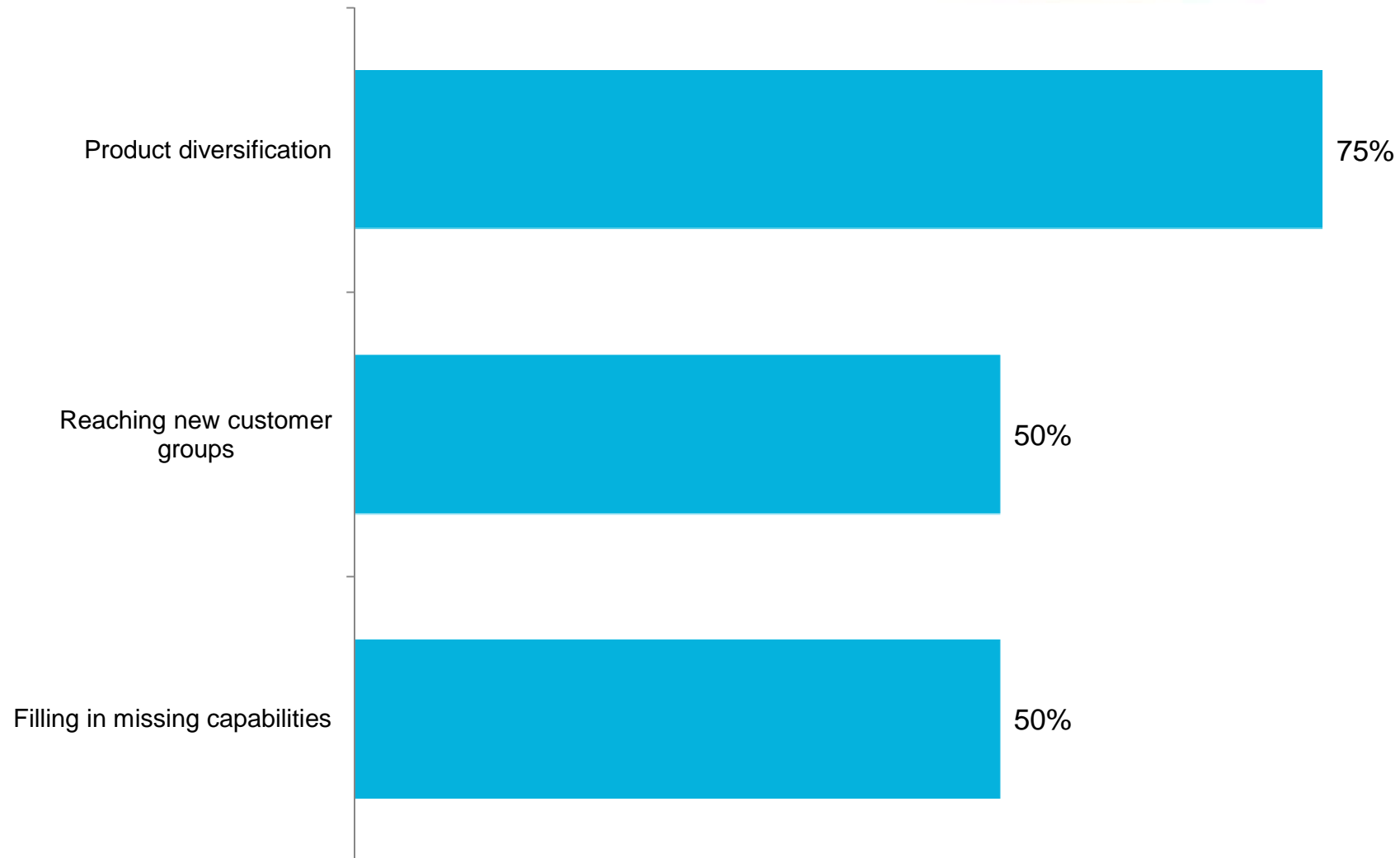
Areas where the company prefers to grow via acquisition rather than organically – falling behind



Q. In which of the following areas does the company prefer to grow via acquisition rather than organically?

Base: falling behind only (36)

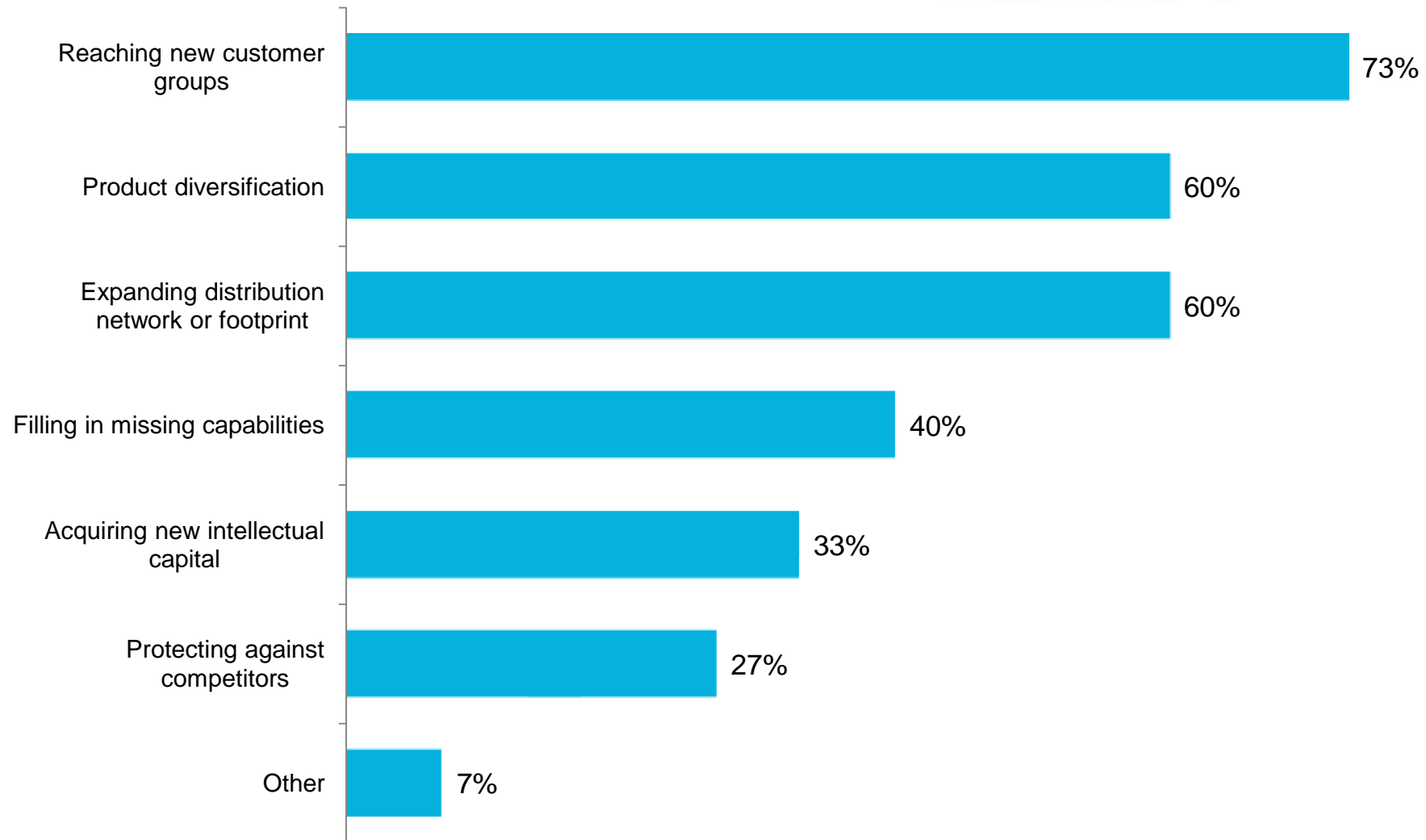
Areas where the company prefers to grow via acquisition rather than organically – less / unprofitable play



Q. In which of the following areas does the company prefer to grow via acquisition rather than organically?

Base: less / unprofitable play only (4)

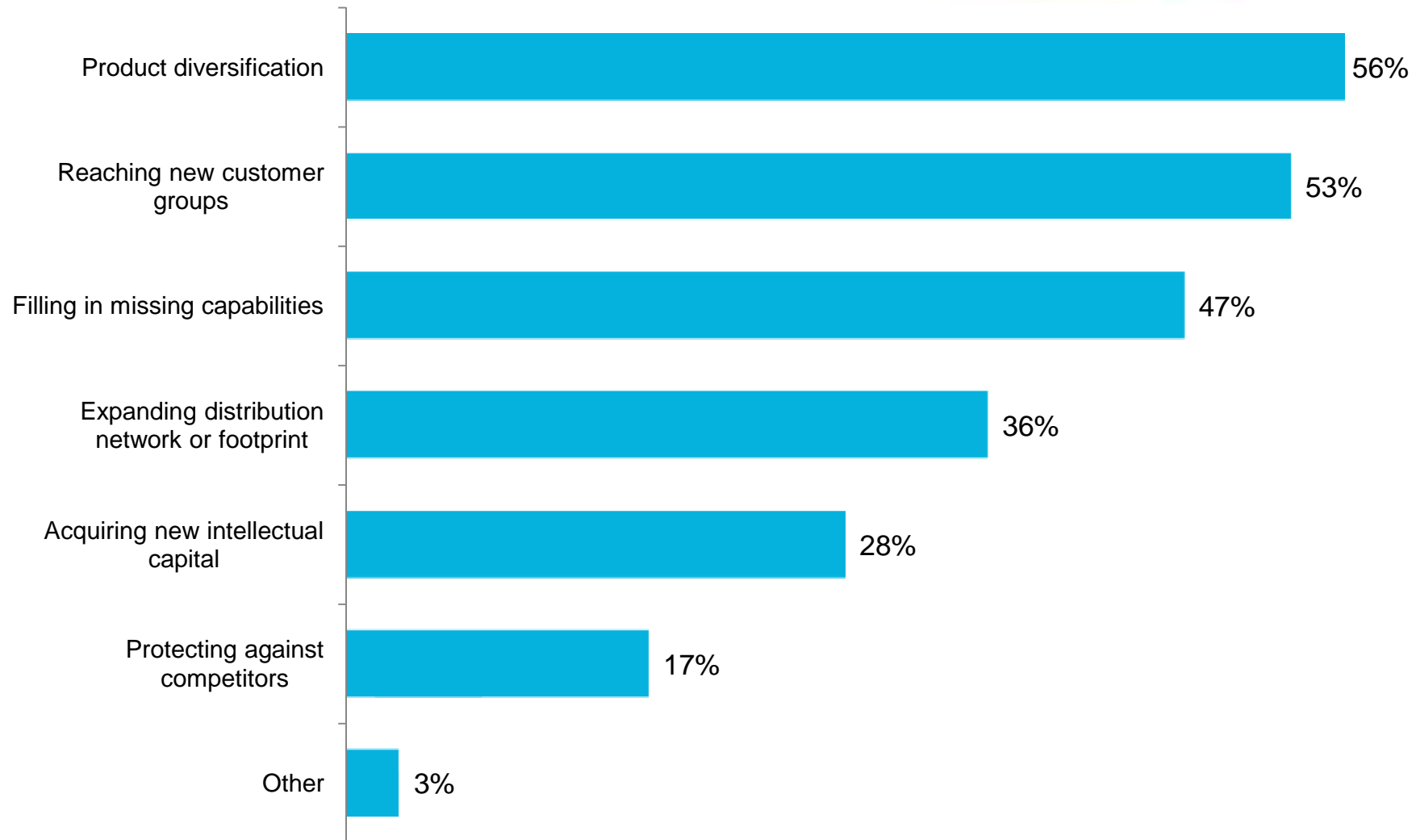
Areas where the company prefers to grow via acquisition rather than organically – efficiency play



Q. In which of the following areas does the company prefer to grow via acquisition rather than organically?

Base: efficiency play only (15)

Areas where the company prefers to grow via acquisition rather than organically – highly profitable

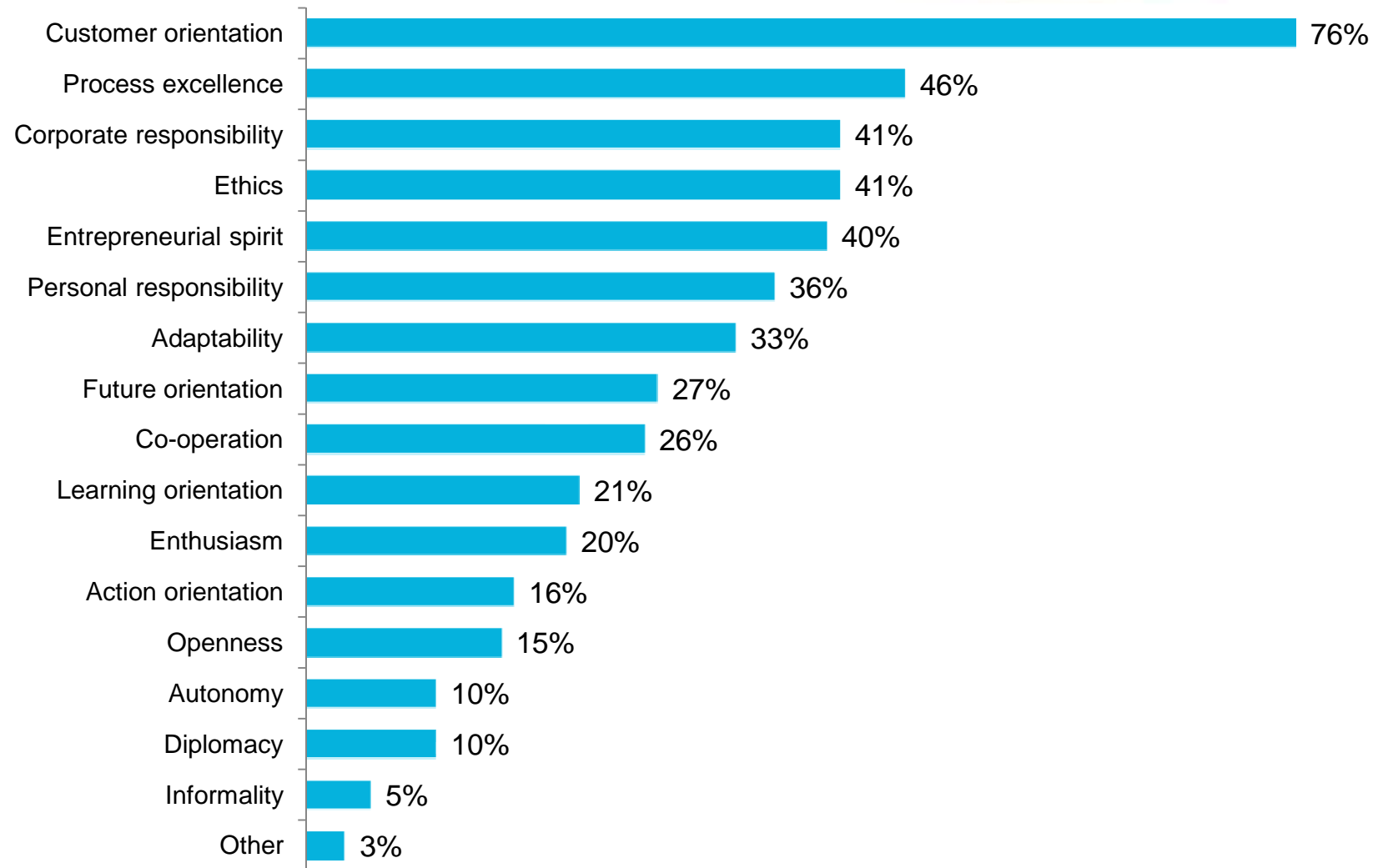


Q. In which of the following areas does the company prefer to grow via acquisition rather than organically?

Base: highly profitable only (36)

Culture

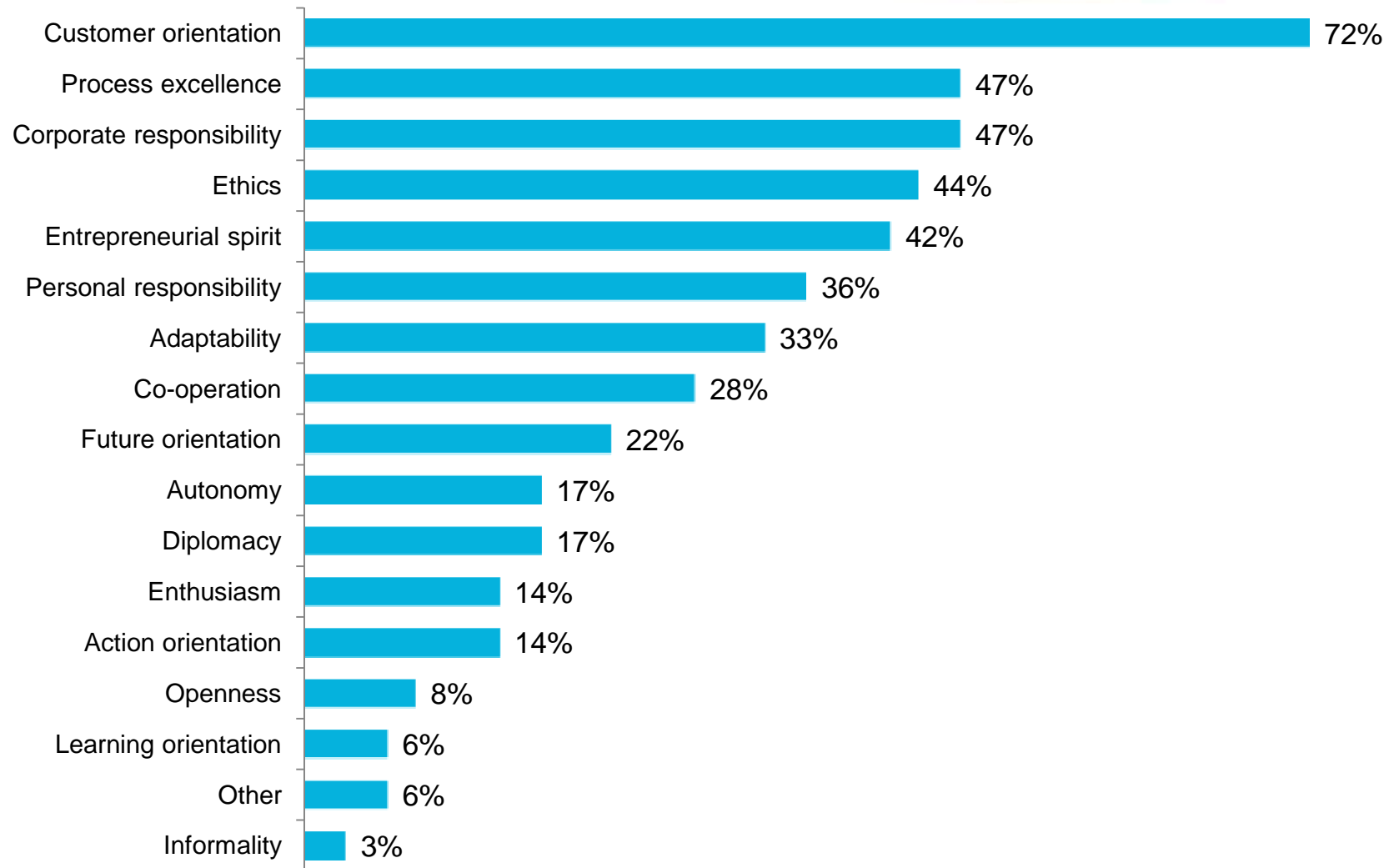
Key values that define the desired company culture



Q. In your view, what are the 5 key values that define the desired company culture?

Base: all responding (233)

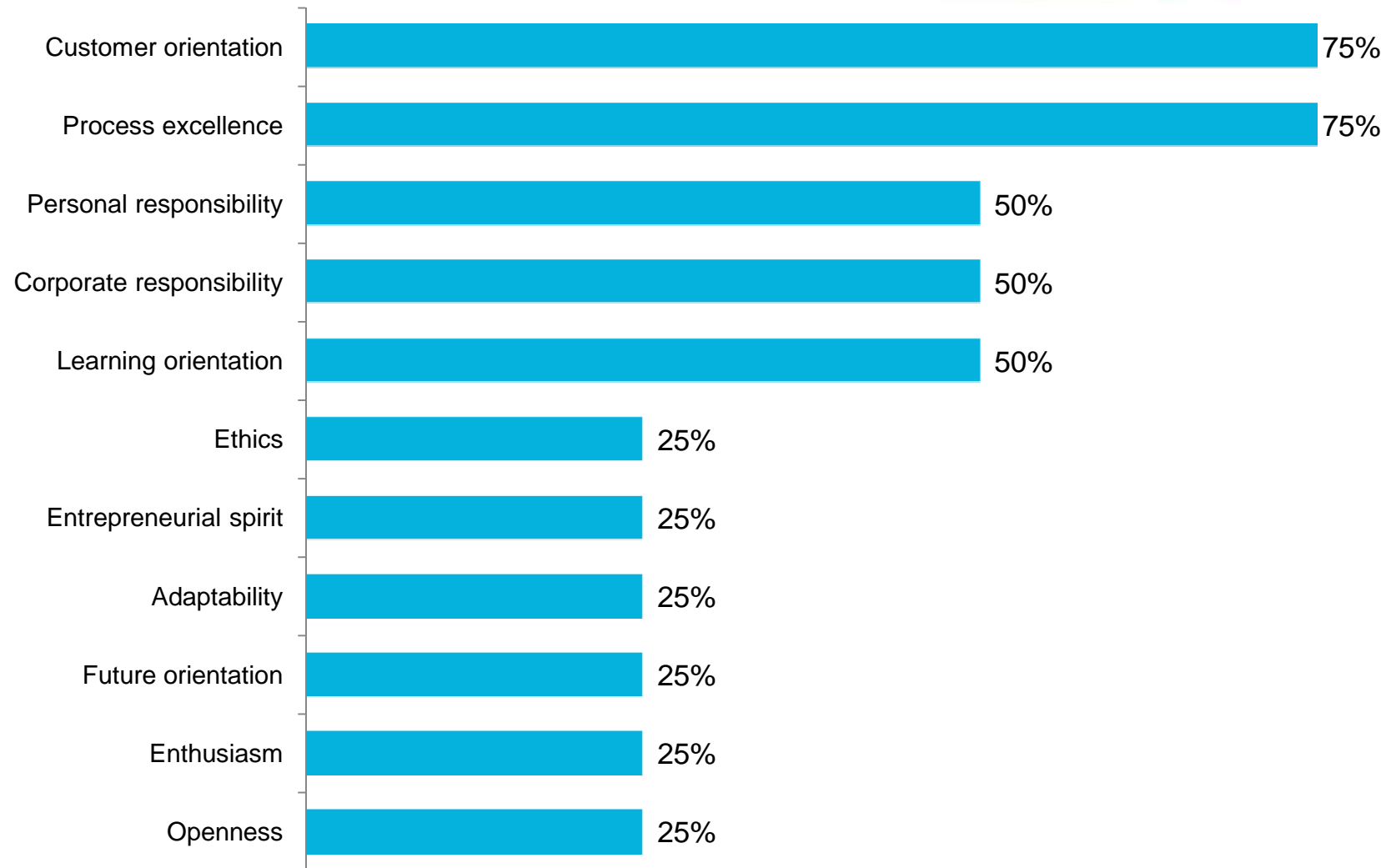
Key values that define the desired company culture – falling behind



Q. In your view, what are the 5 key values that define the desired company culture?

Base: falling behind only (36)

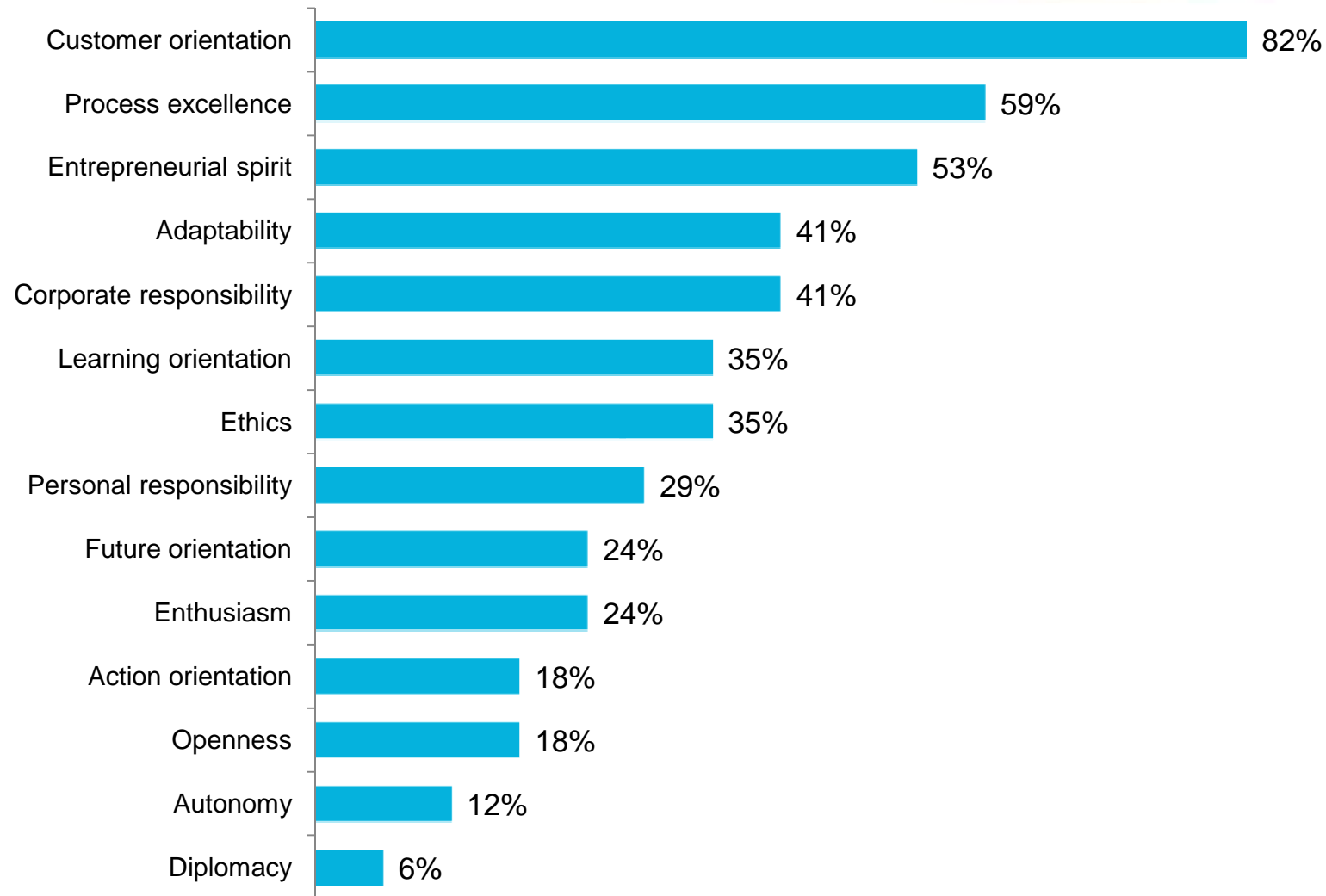
Key values that define the desired company culture – less / unprofitable play



Q. In your view, what are the 5 key values that define the desired company culture?

Base: less / unprofitable play only (4)

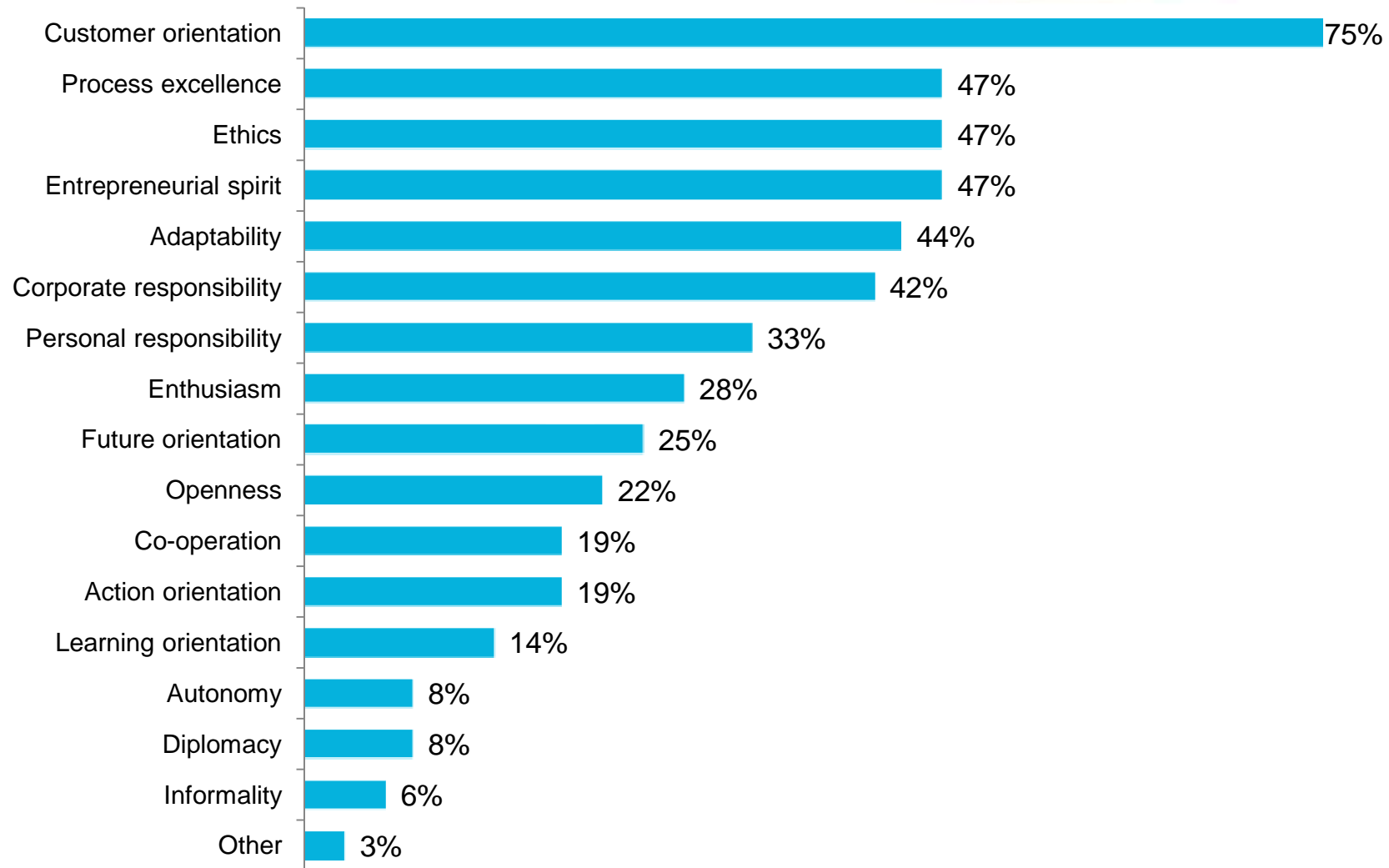
Key values that define the desired company culture – efficiency play



Q. In your view, what are the 5 key values that define the desired company culture?

Base: efficiency play only (17)

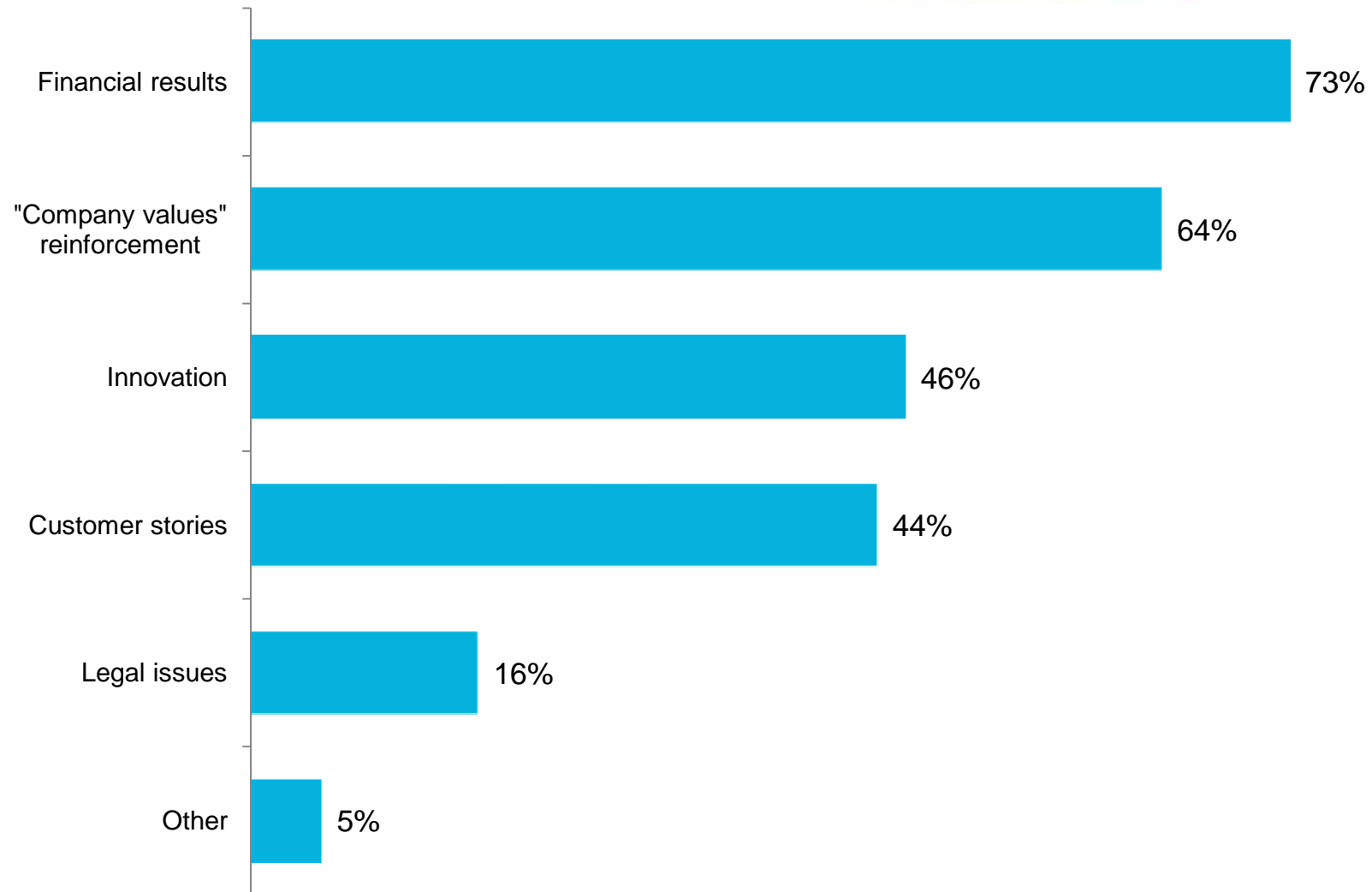
Key values that define the desired company culture – highly profitable



Q. In your view, what are the 5 key values that define the desired company culture?

Base: highly profitable only (36)

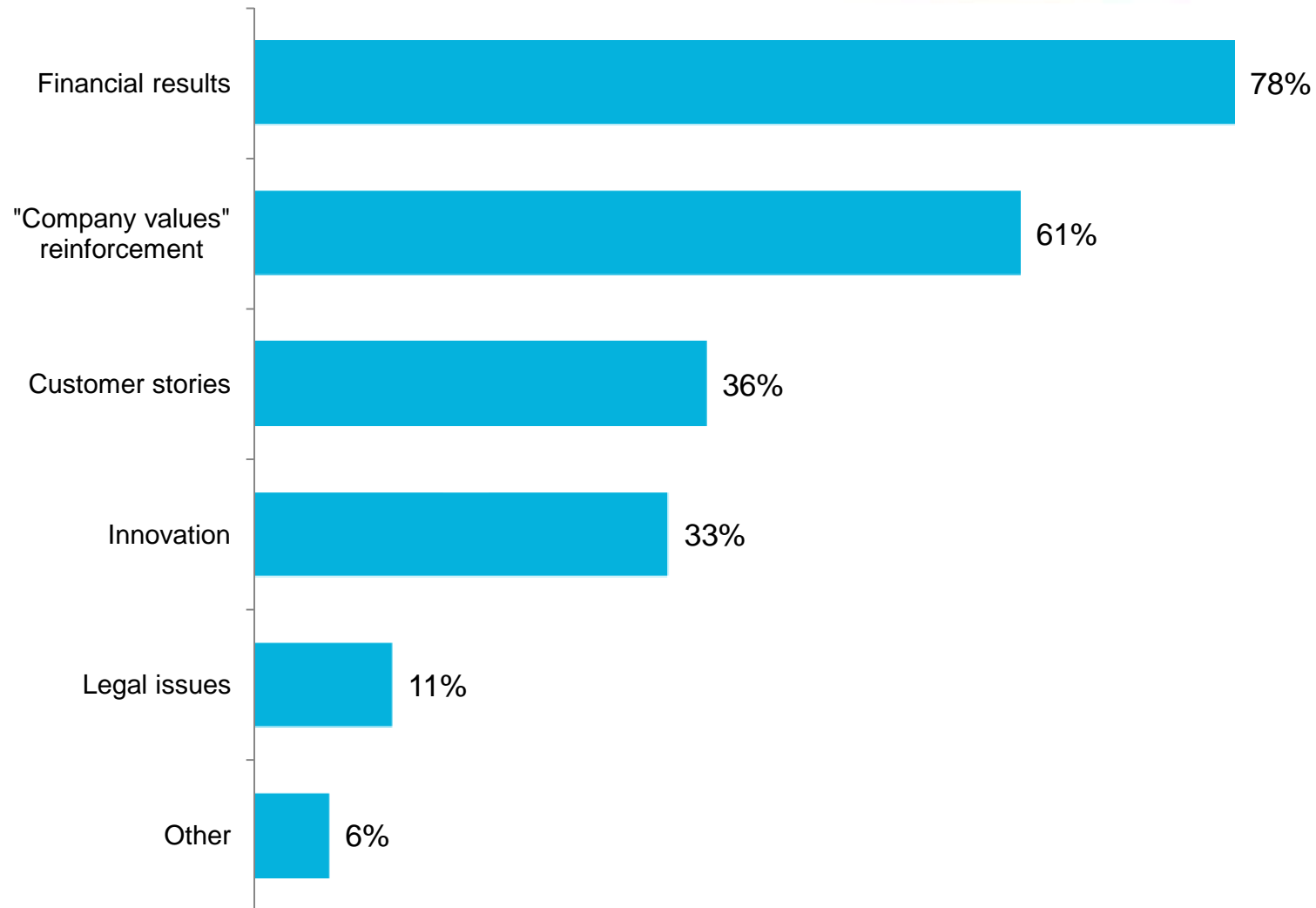
Type of content the CEO uses in messages to communicate with employees



Q. What types of content does the company CEO use in messages to communicate with employees?

Base: all responding (232)

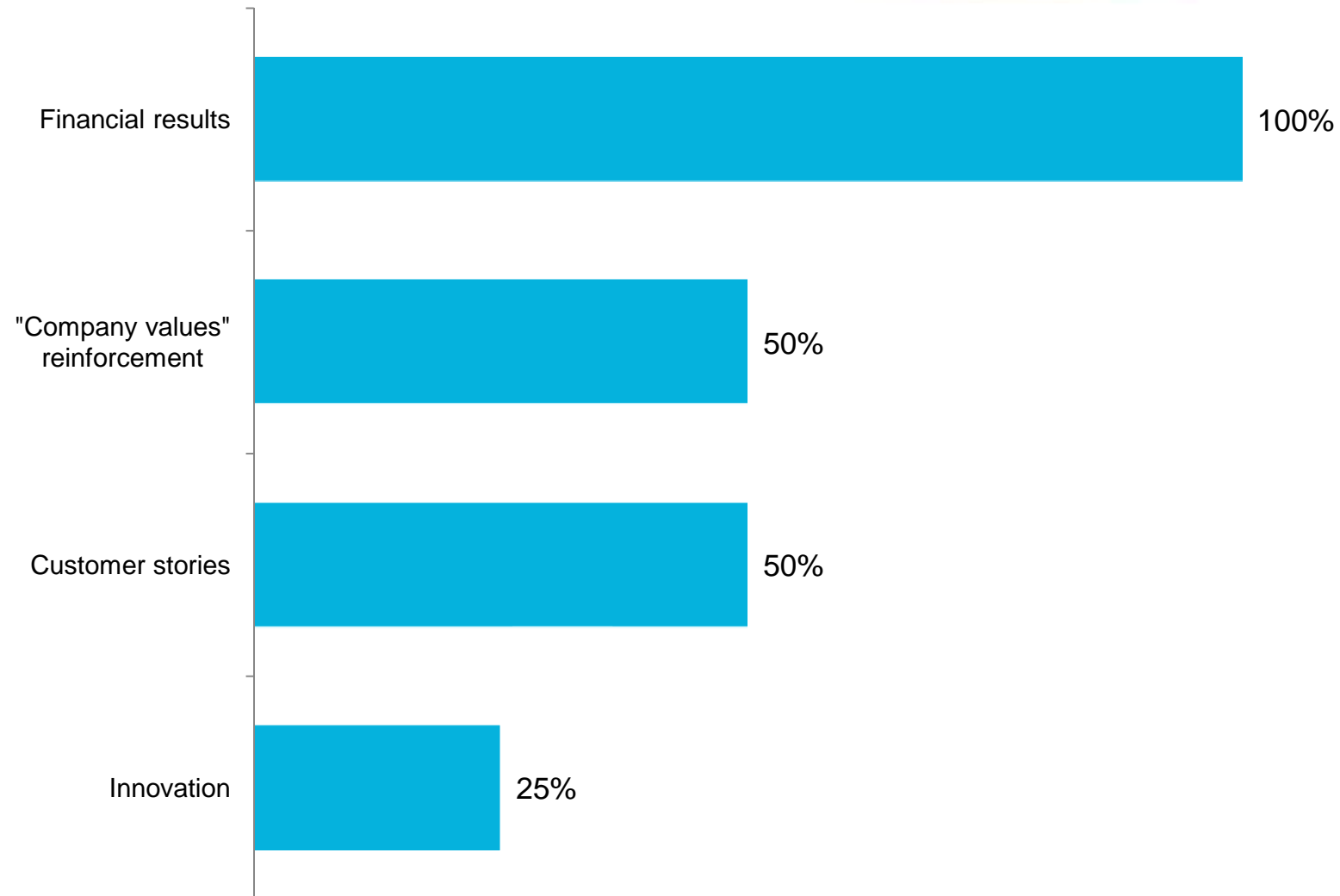
Type of content the CEO uses in messages to communicate with employees – falling behind



Q. What types of content does the company CEO use in messages to communicate with employees?

Base: falling behind only (36)

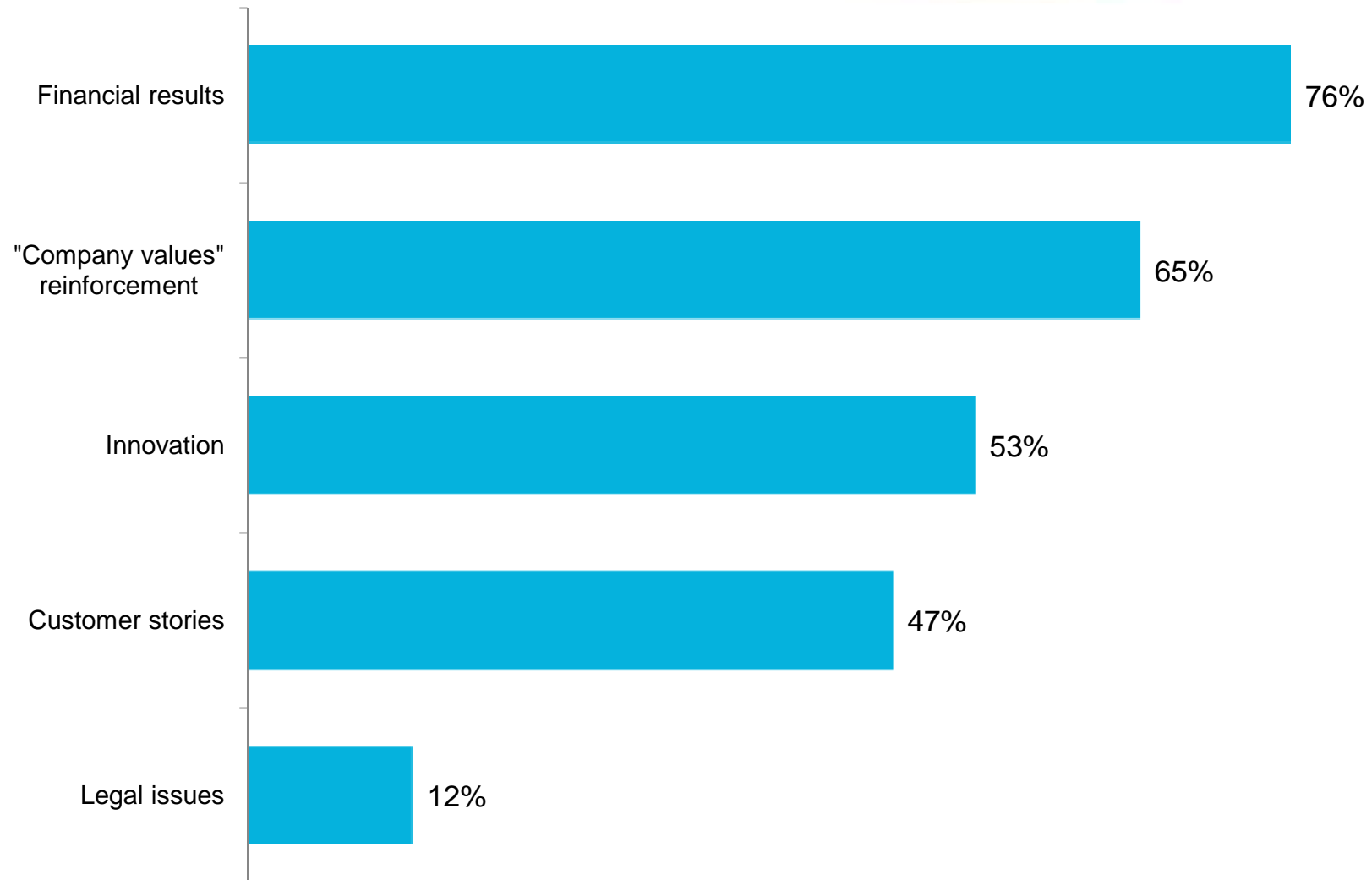
Type of content the CEO uses in messages to communicate with employees – less / unprofitable play



Q. What types of content does the company CEO use in messages to communicate with employees?

Base: less / unprofitable play only (4)

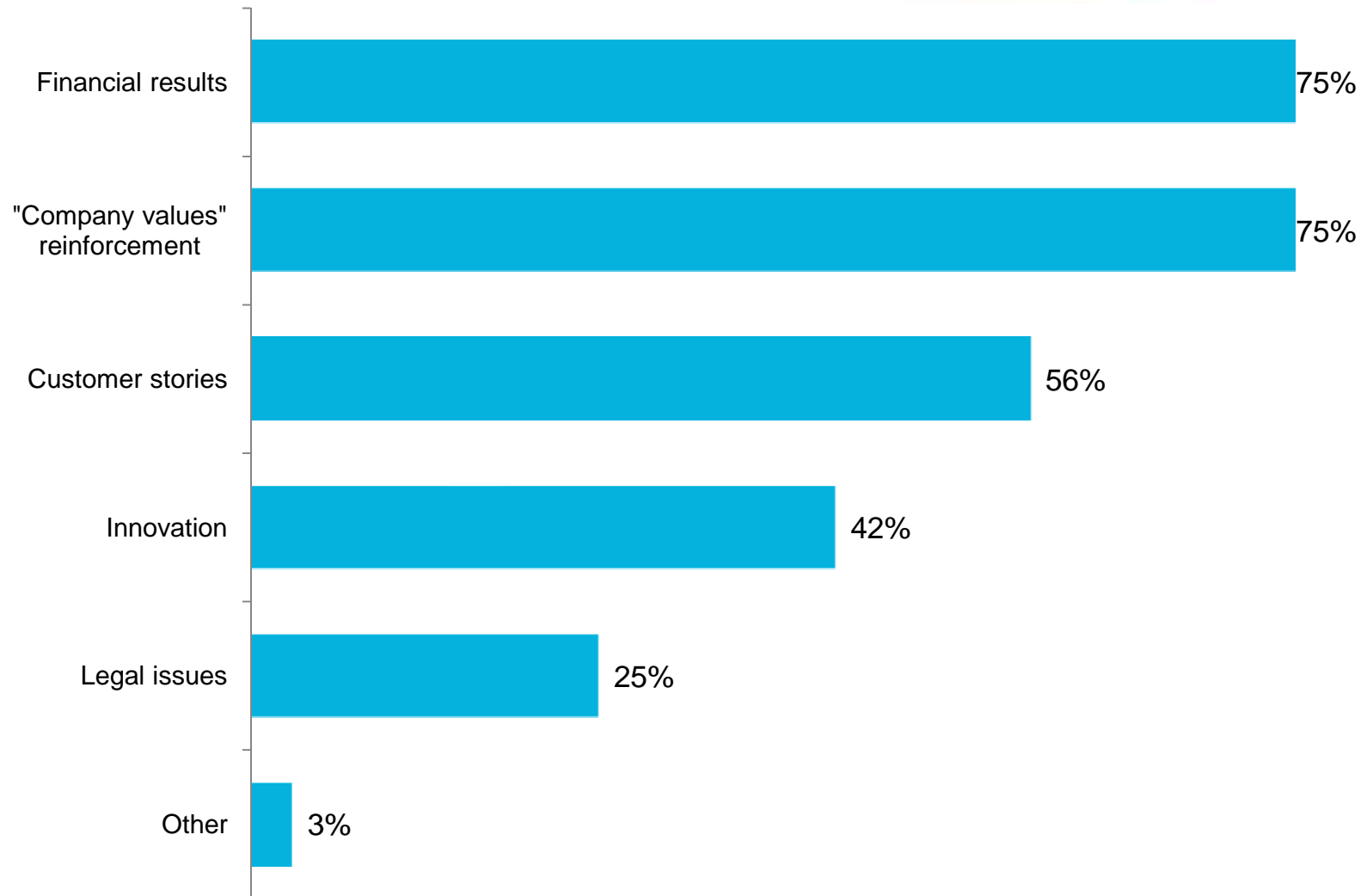
Type of content the CEO uses in messages to communicate with employees – efficiency play



Q. What types of content does the company CEO use in messages to communicate with employees?

Base: efficiency play only (17)

Type of content the CEO uses in messages to communicate with employees – highly profitable

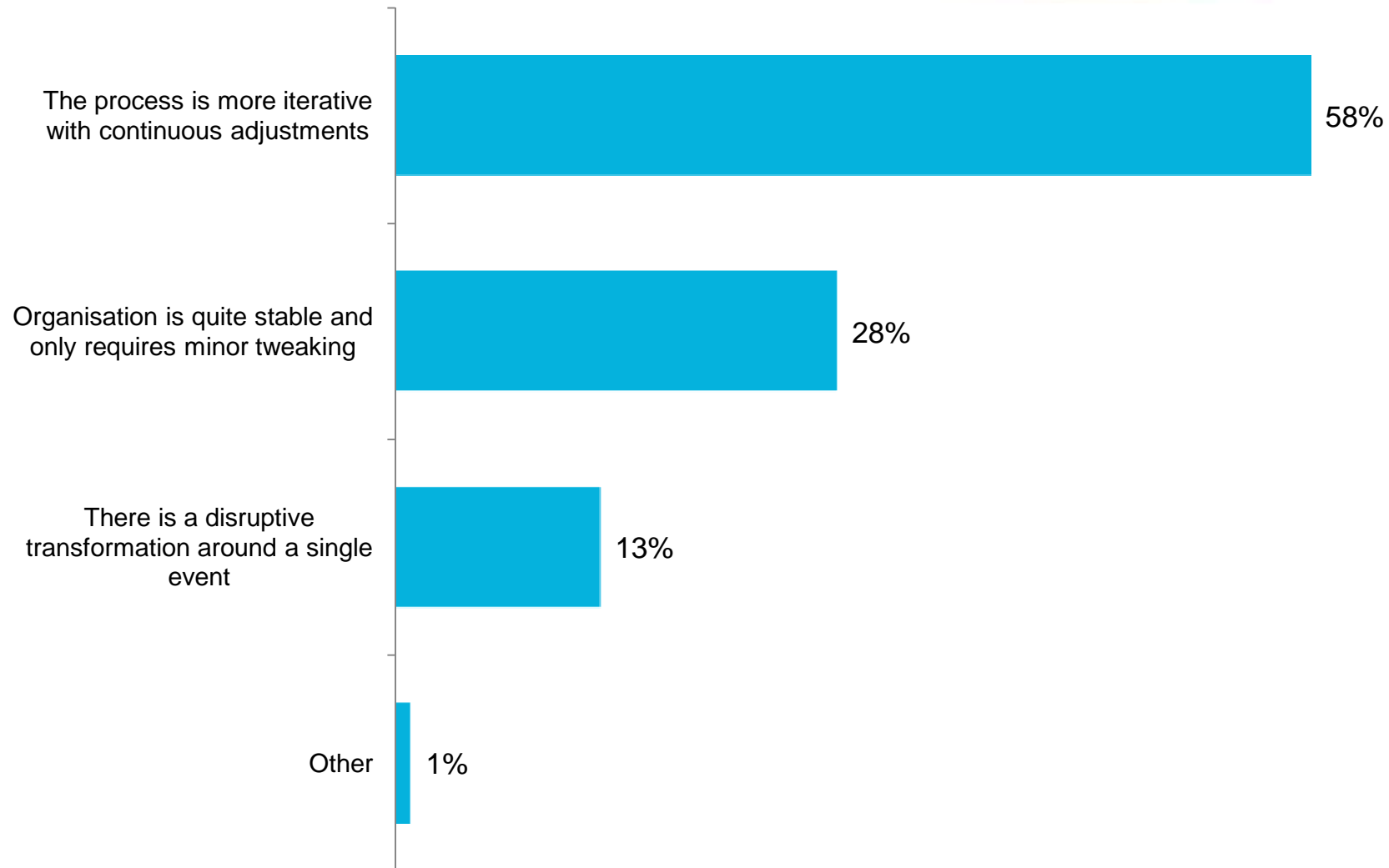


Q. What types of content does the company CEO use in messages to communicate with employees?

Base: highly profitable only (36)

Transformation

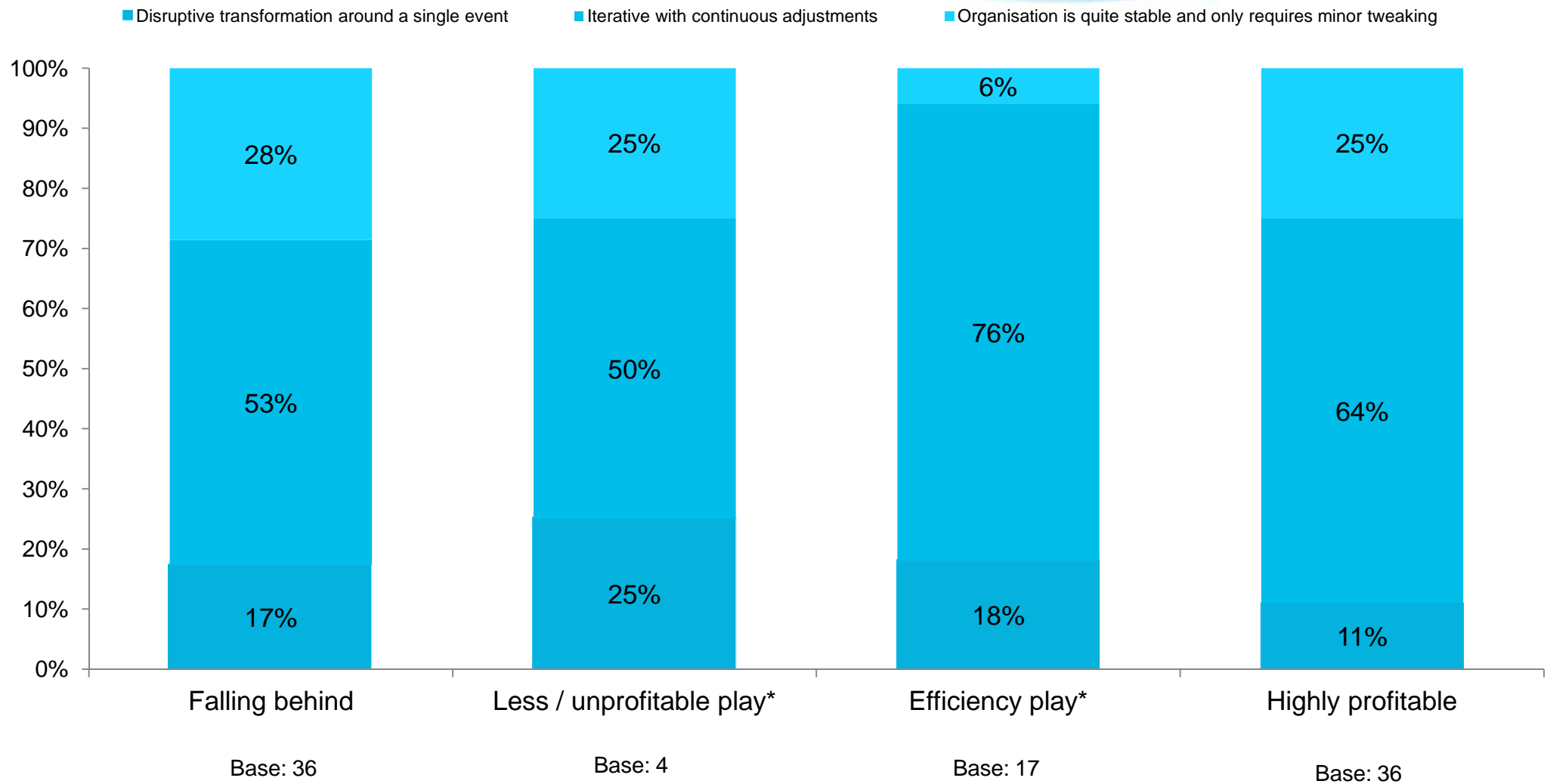
Typical approach to transformation



Q. How does the company typically approach transformation?

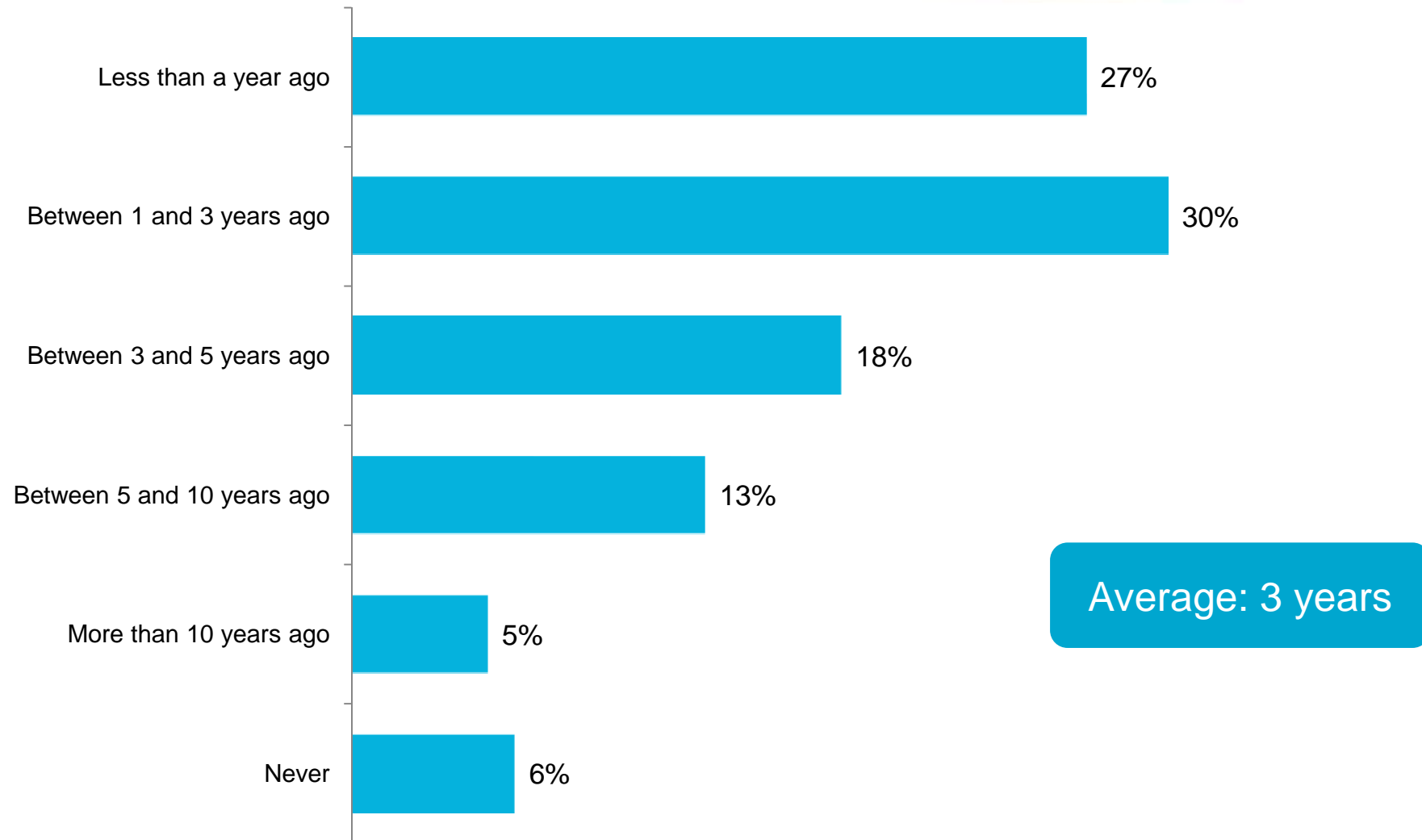
Base: all responding (229)

Typical approach to transformation by segmentation



Q. How does the company typically approach transformation?

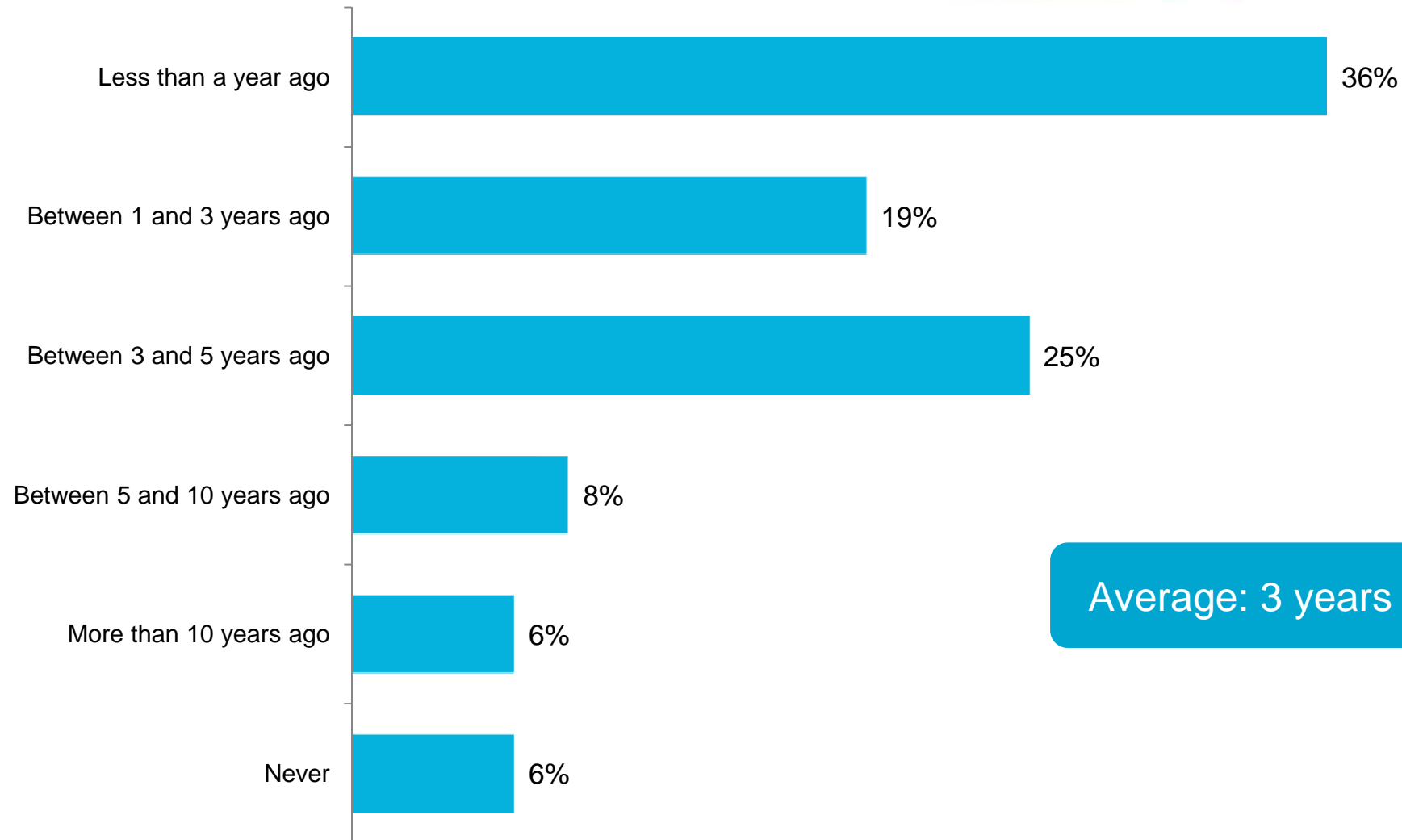
Most recent major organisational redesign



Q. When was the last time that a major organisational redesign involving a significant portion of the company occurred?

Base: all responding (231)

Most recent major organisational redesign – falling behind

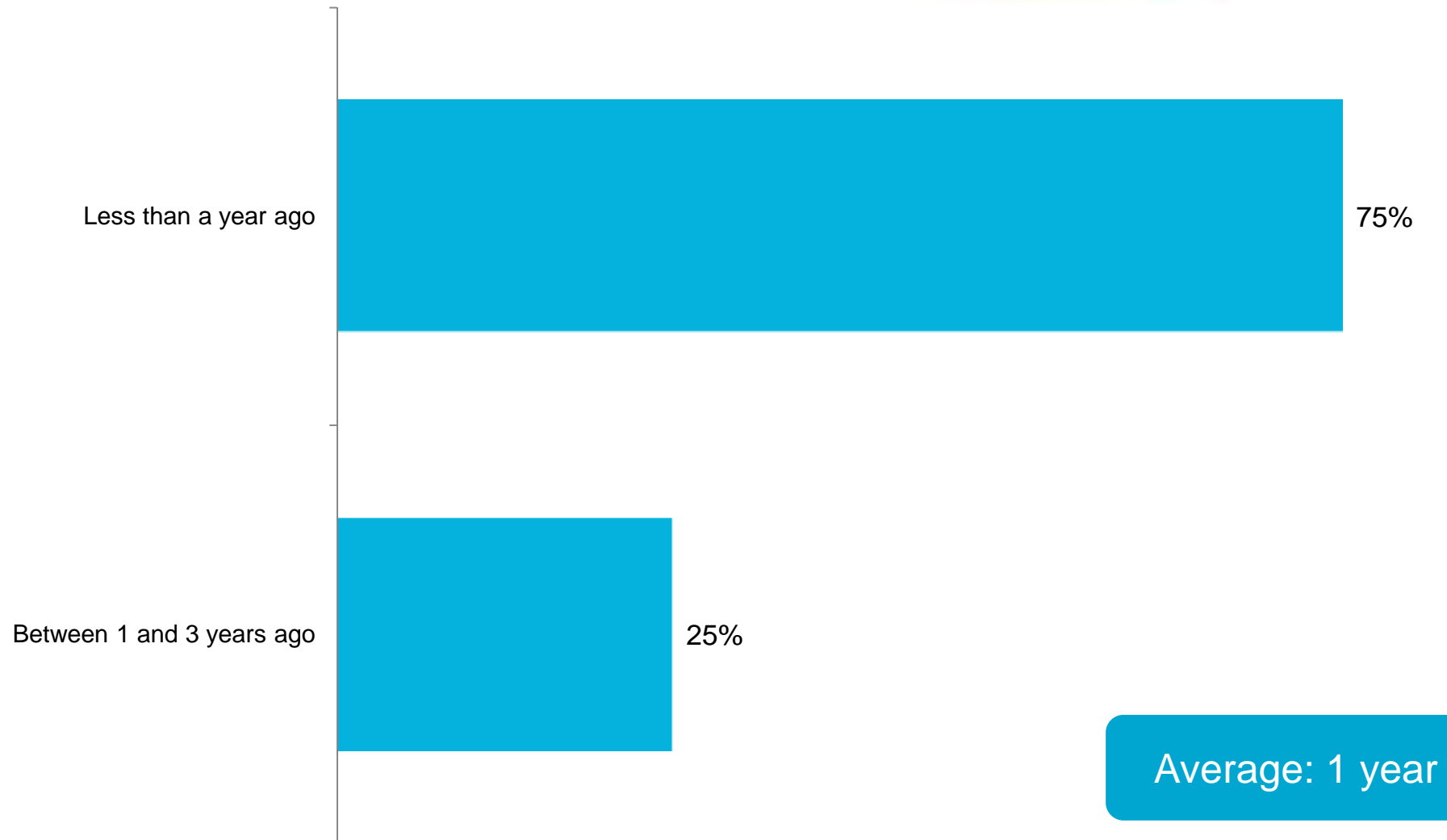


Q. When was the last time that a major organisational redesign involving a significant portion of the company occurred?

Base: falling behind only (36)

Most recent major organisational redesign – less / unprofitable play

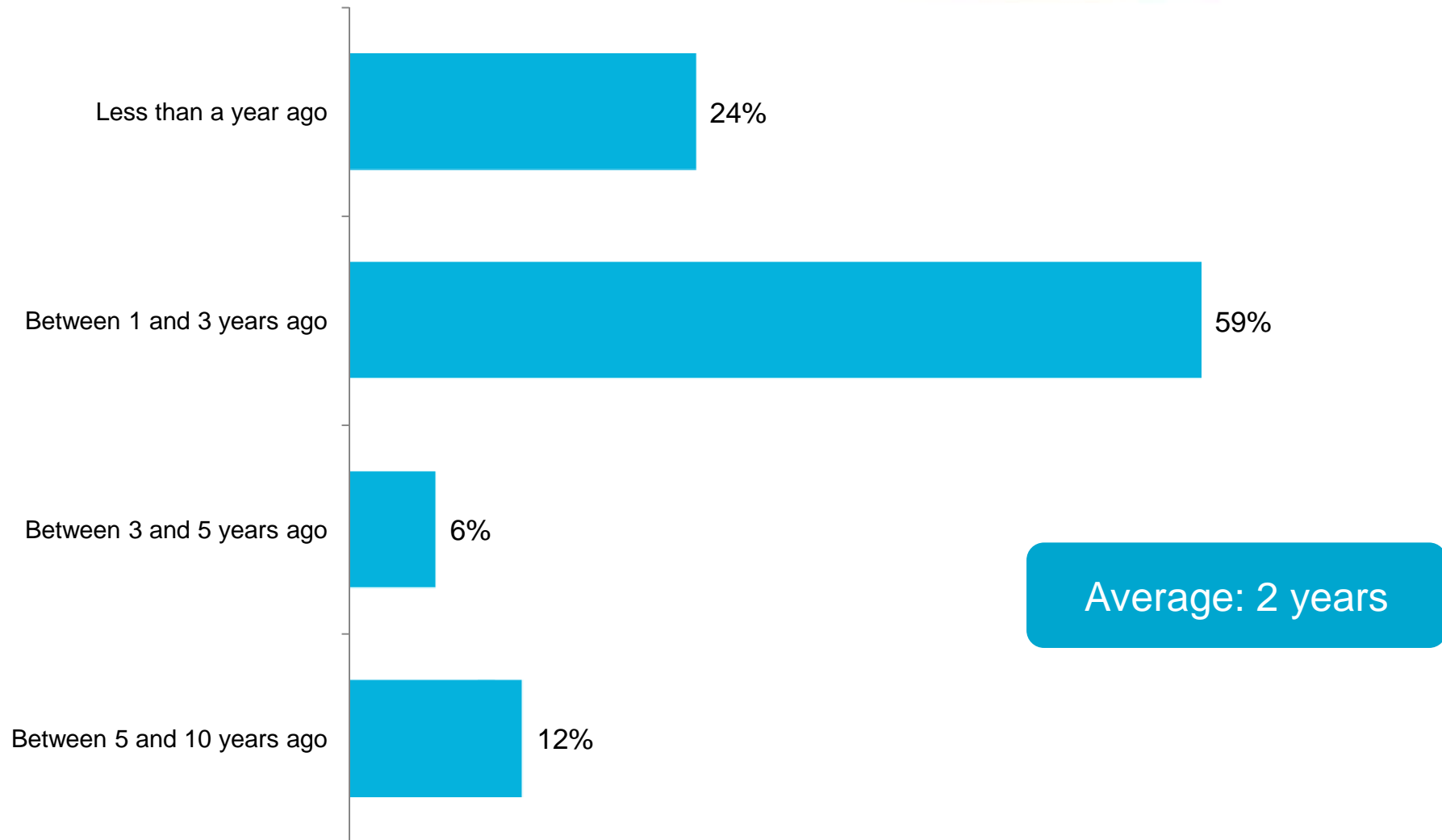
Please view %'s with caution due to low base



Q. When was the last time that a major organisational redesign involving a significant portion of the company occurred?

Base: less / unprofitable play only (4)

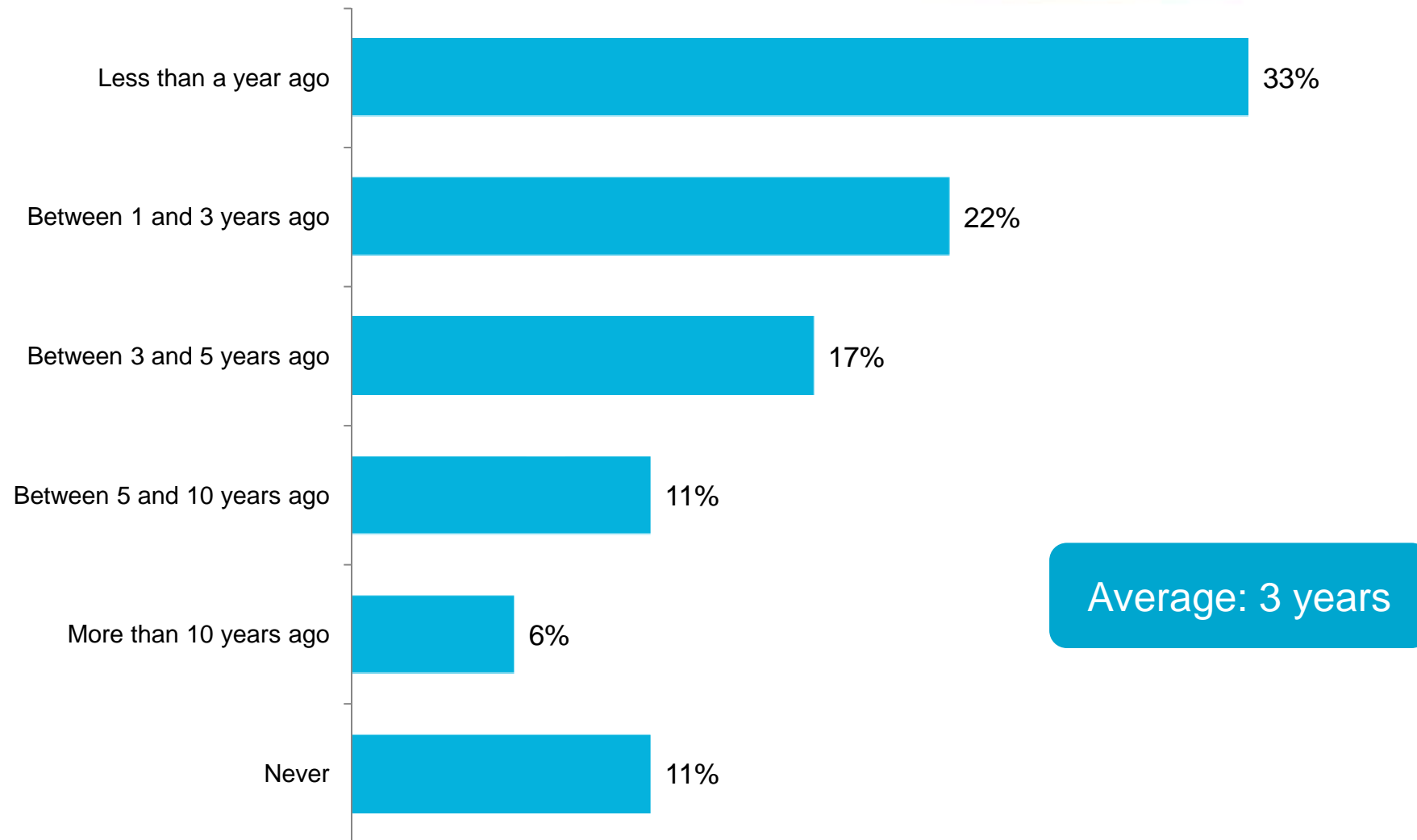
Most recent major organisational redesign – efficiency play



Q. When was the last time that a major organisational redesign involving a significant portion of the company occurred?

Base: efficiency play only (17)

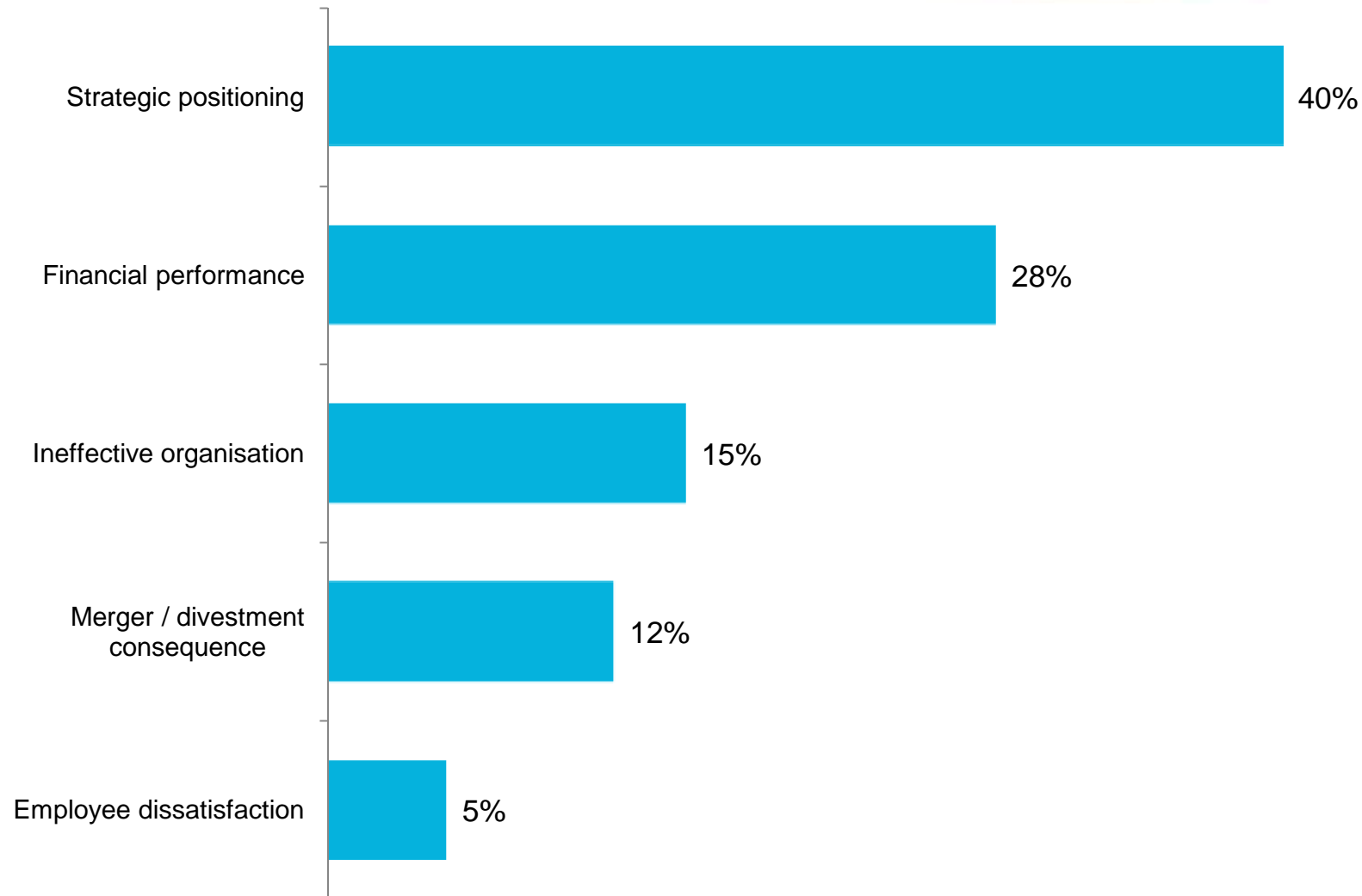
Most recent major organisational redesign – highly profitable



Q. When was the last time that a major organisational redesign involving a significant portion of the company occurred?

Base: highly profitable only (36)

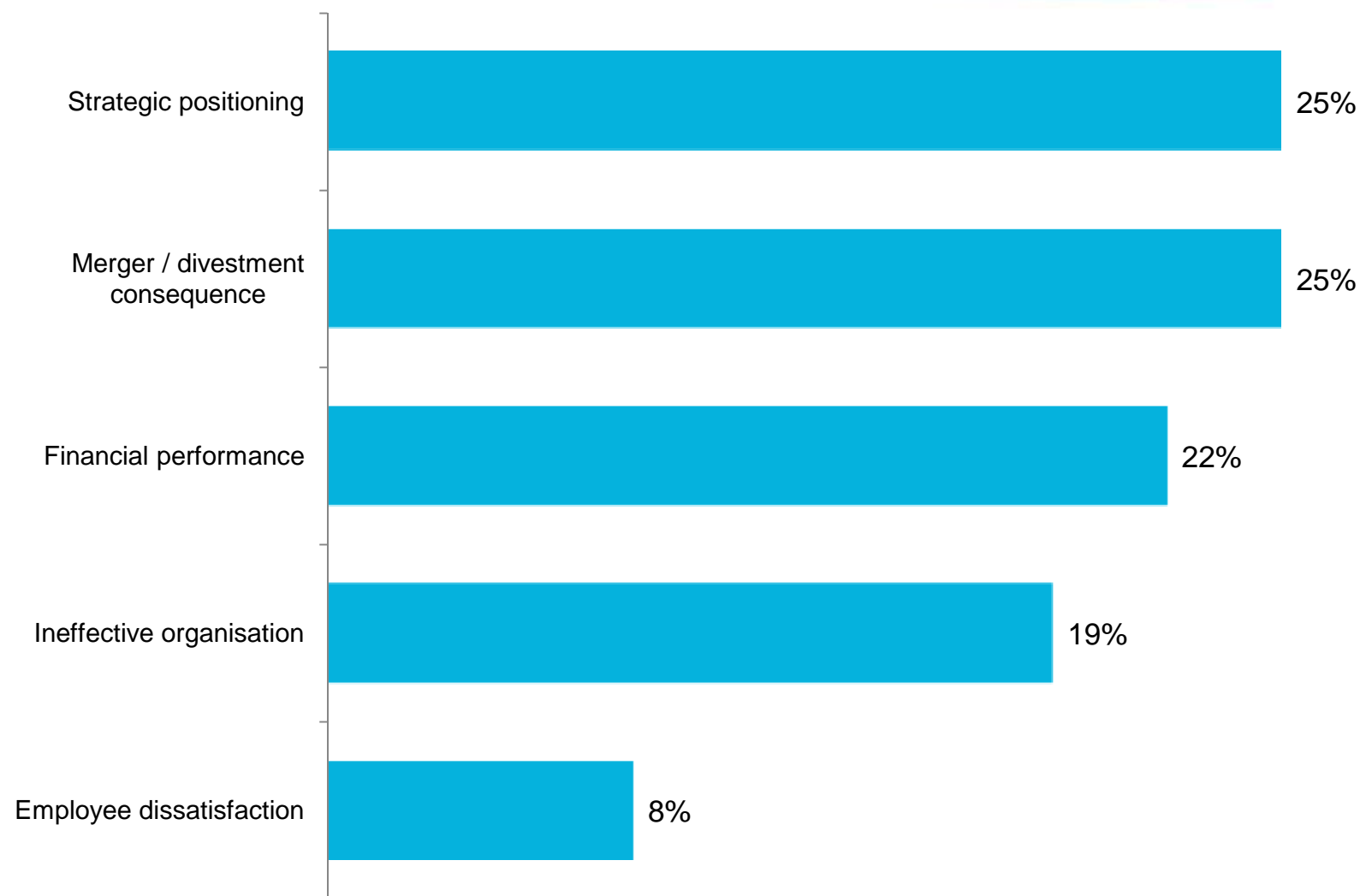
Key rationale for change in the most recent transformation



Q. In the company's most recent transformation, what was the key rationale for change?

Base: all responding (227)

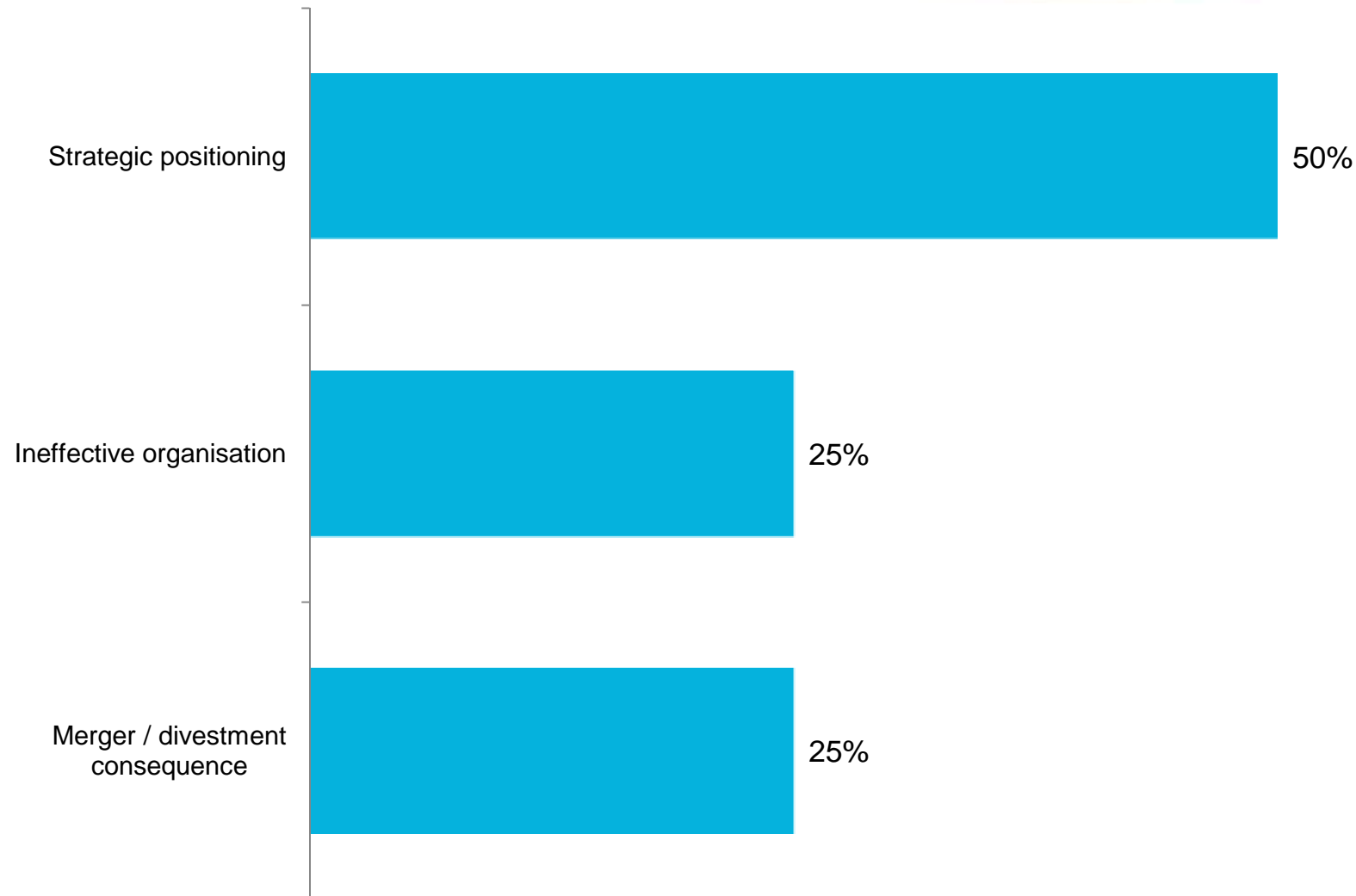
Key rationale for change in the most recent transformation – falling behind



Q. In the company's most recent transformation, what was the key rationale for change?

Base: falling behind only (36)

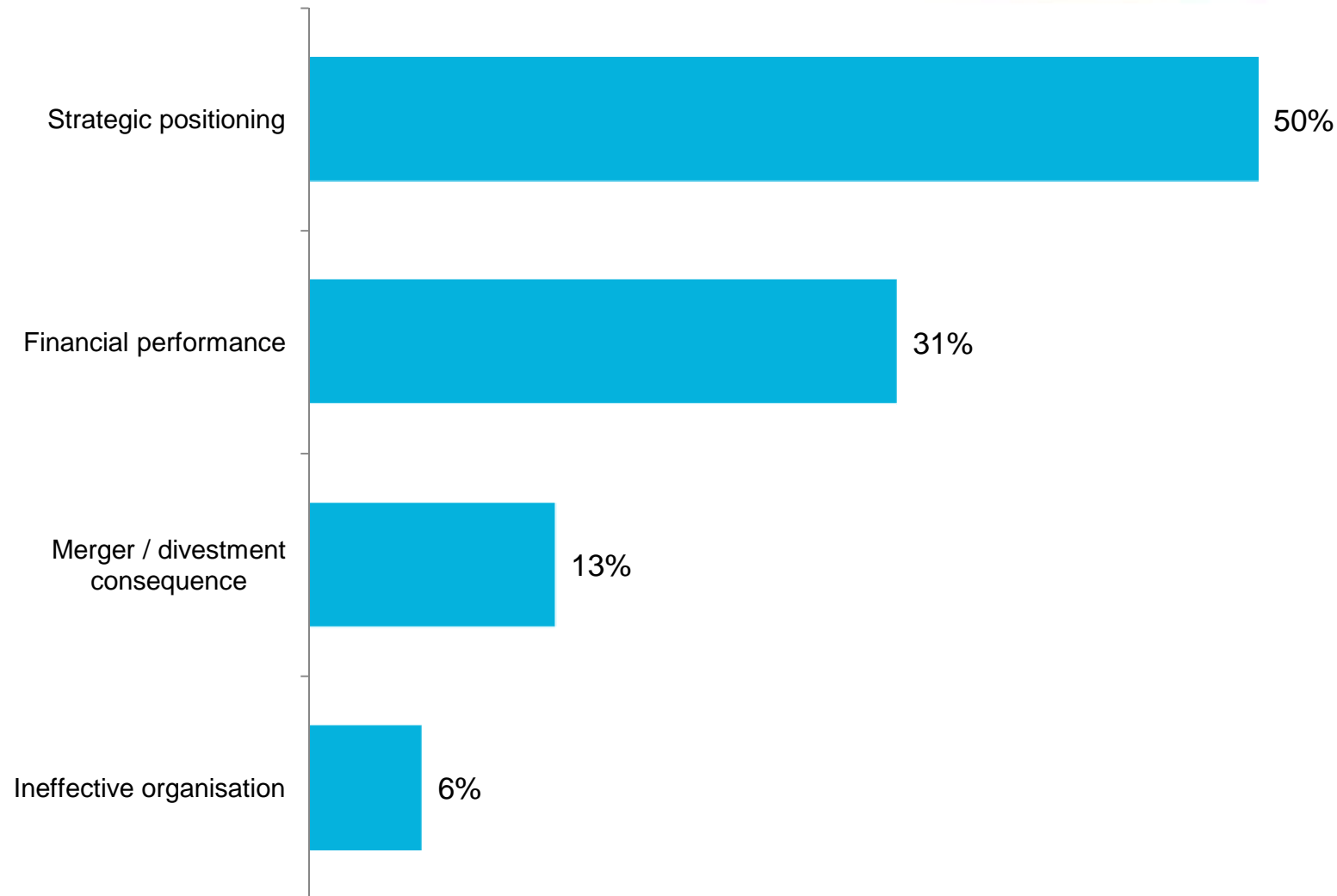
Key rationale for change in the most recent transformation – less / unprofitable play



Q. In the company's most recent transformation, what was the key rationale for change?

Base: less / unprofitable play only (4)

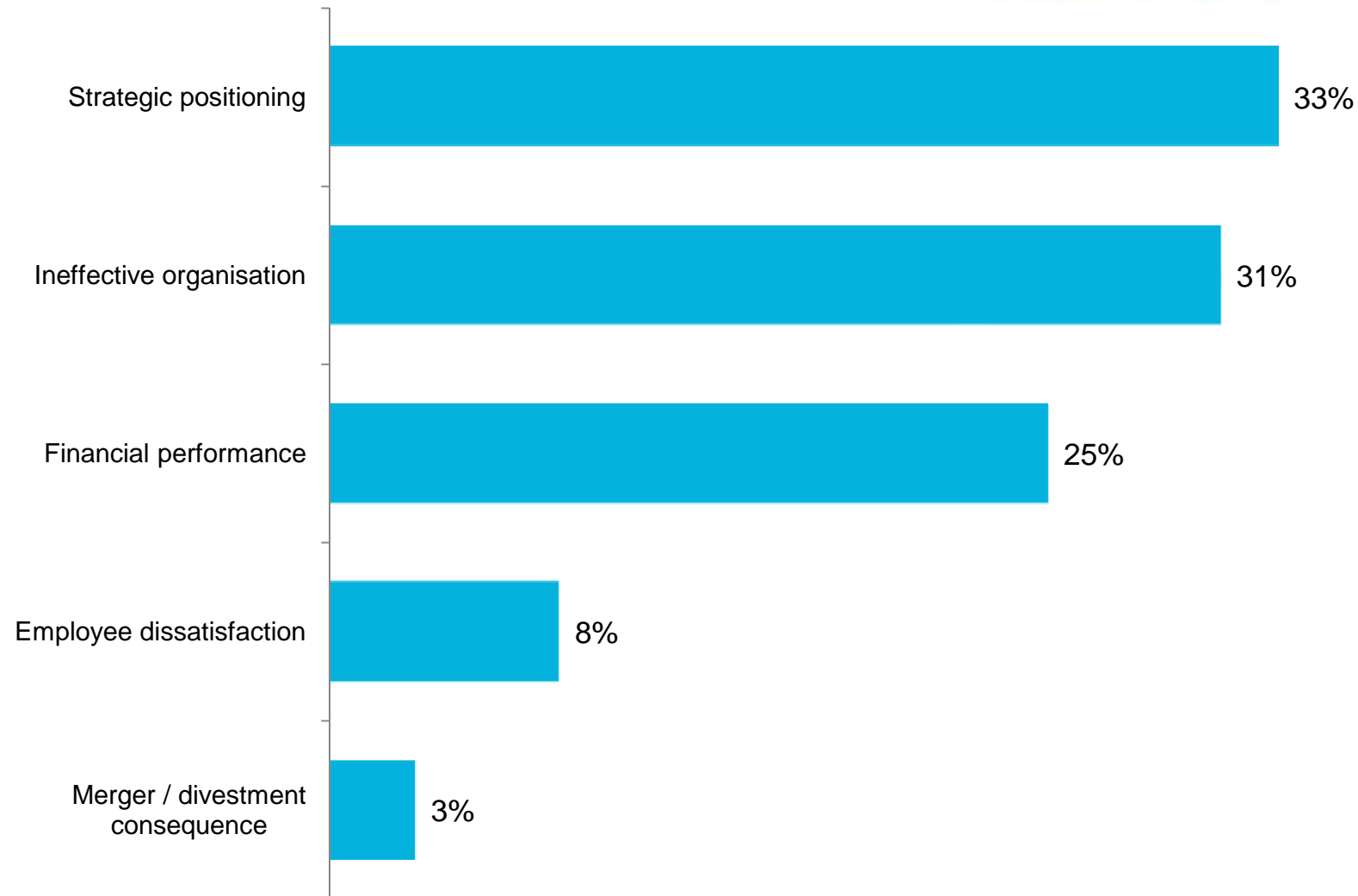
Key rationale for change in the most recent transformation – efficiency play



Q. In the company's most recent transformation, what was the key rationale for change?

Base: efficiency play only (16)

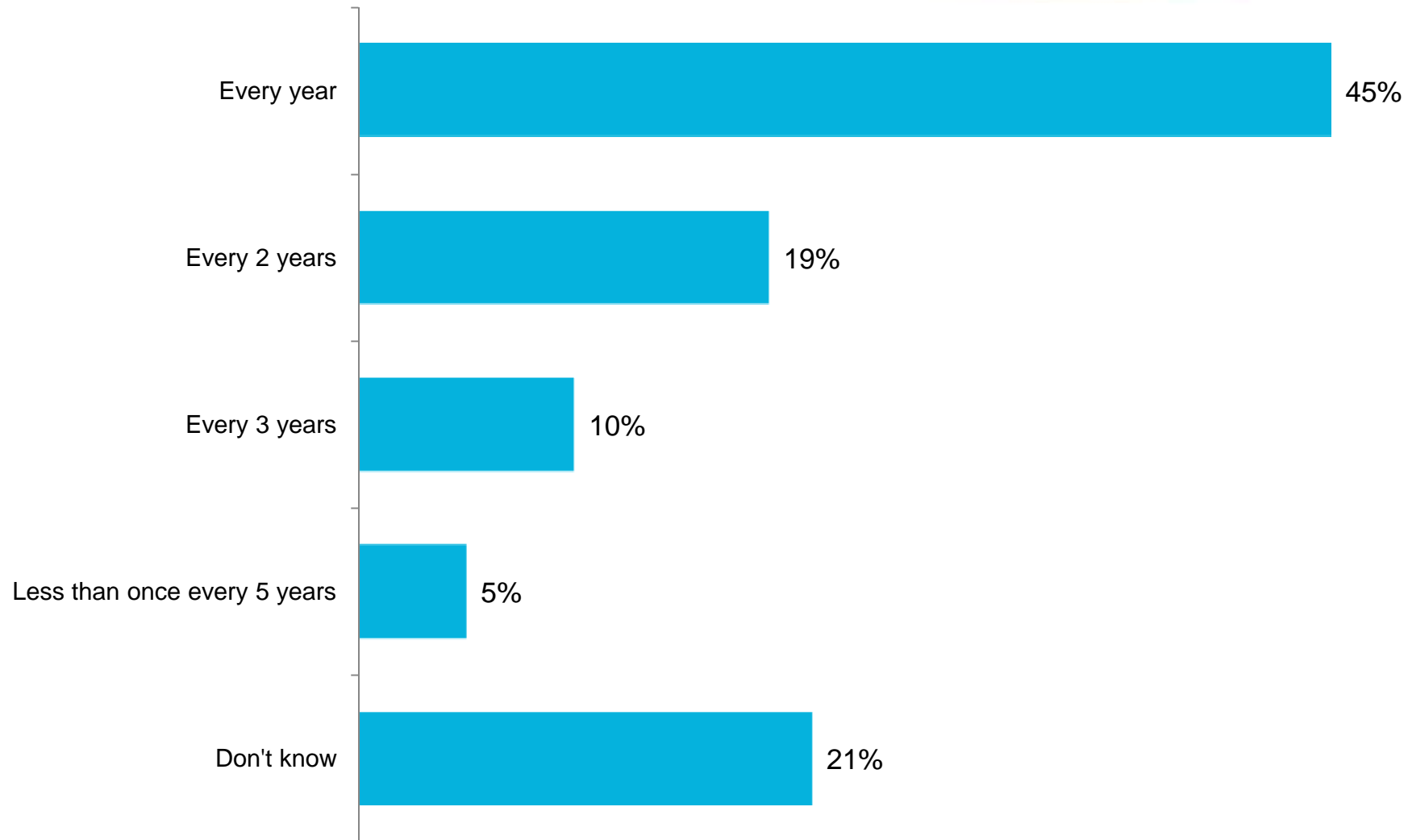
Key rationale for change in the most recent transformation – highly profitable



Q. In the company's most recent transformation, what was the key rationale for change?

Base: highly profitable only (36)

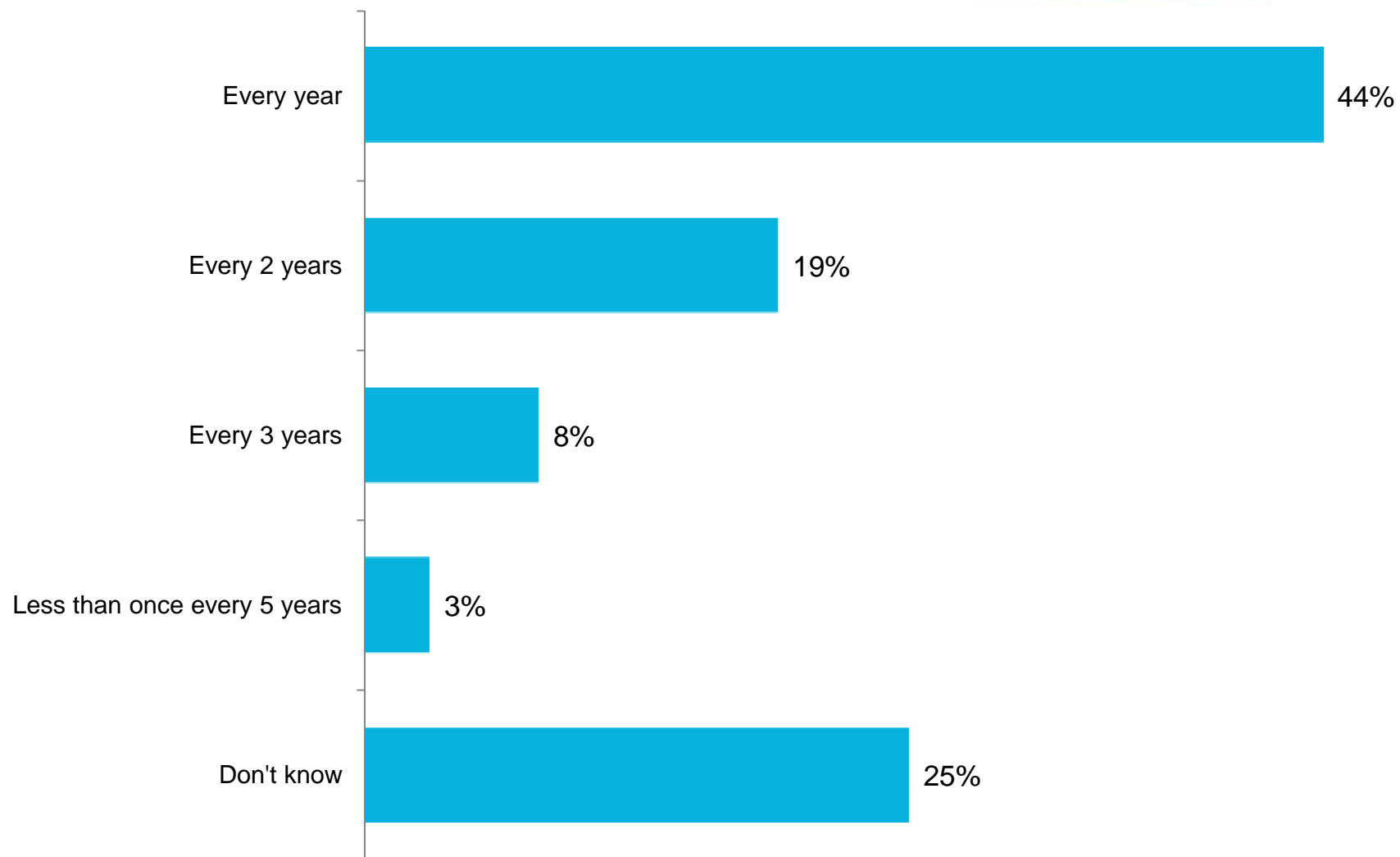
How often the company benchmarks itself



Q. How often does the company benchmark itself against industry and world-class best practices?

Base: all responding (230)

How often the company benchmarks itself – falling behind

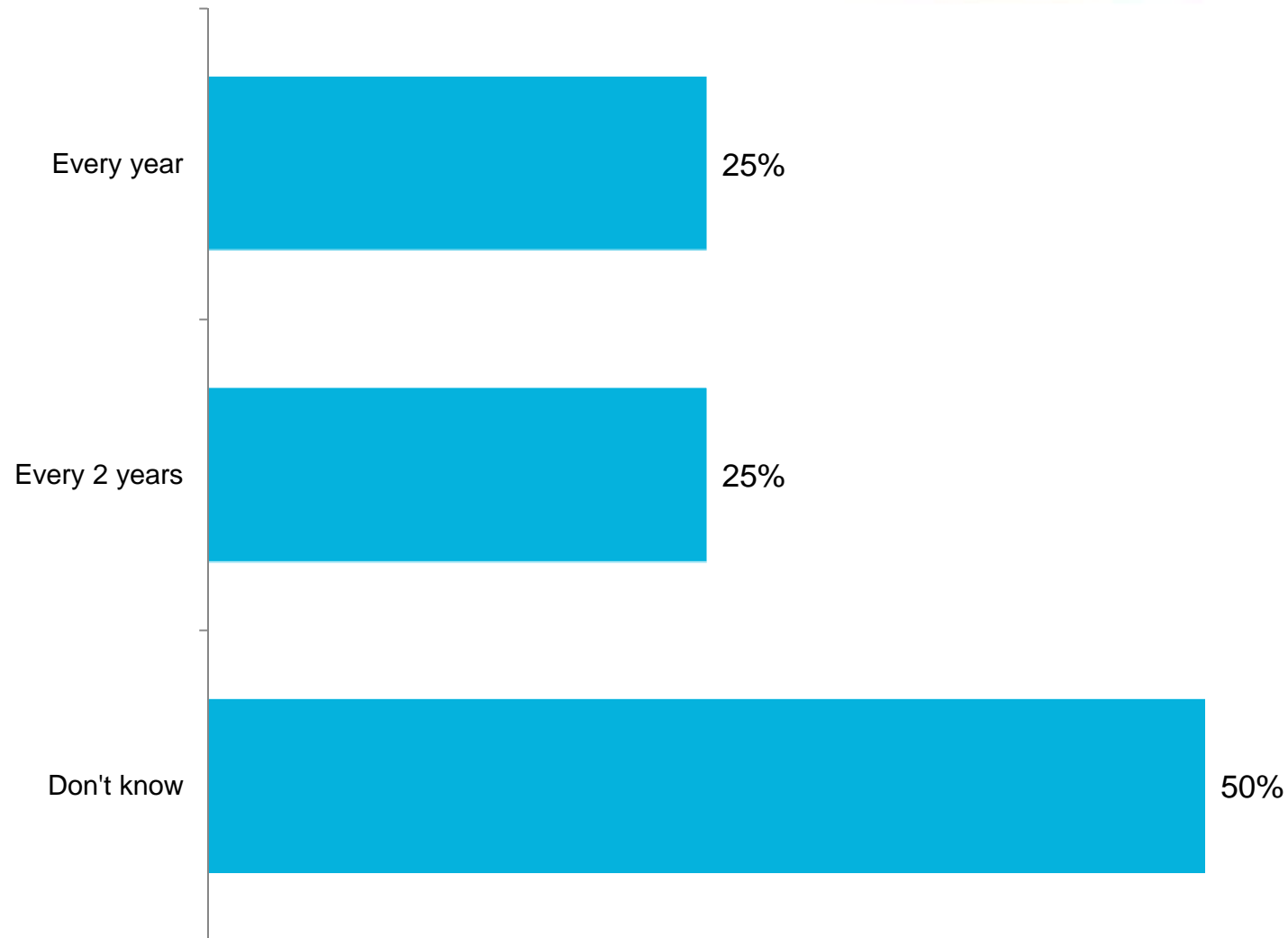


Q. How often does the company benchmark itself against industry and world-class best practices?

Base: falling behind only (36)

How often the company benchmarks itself – less / unprofitable play

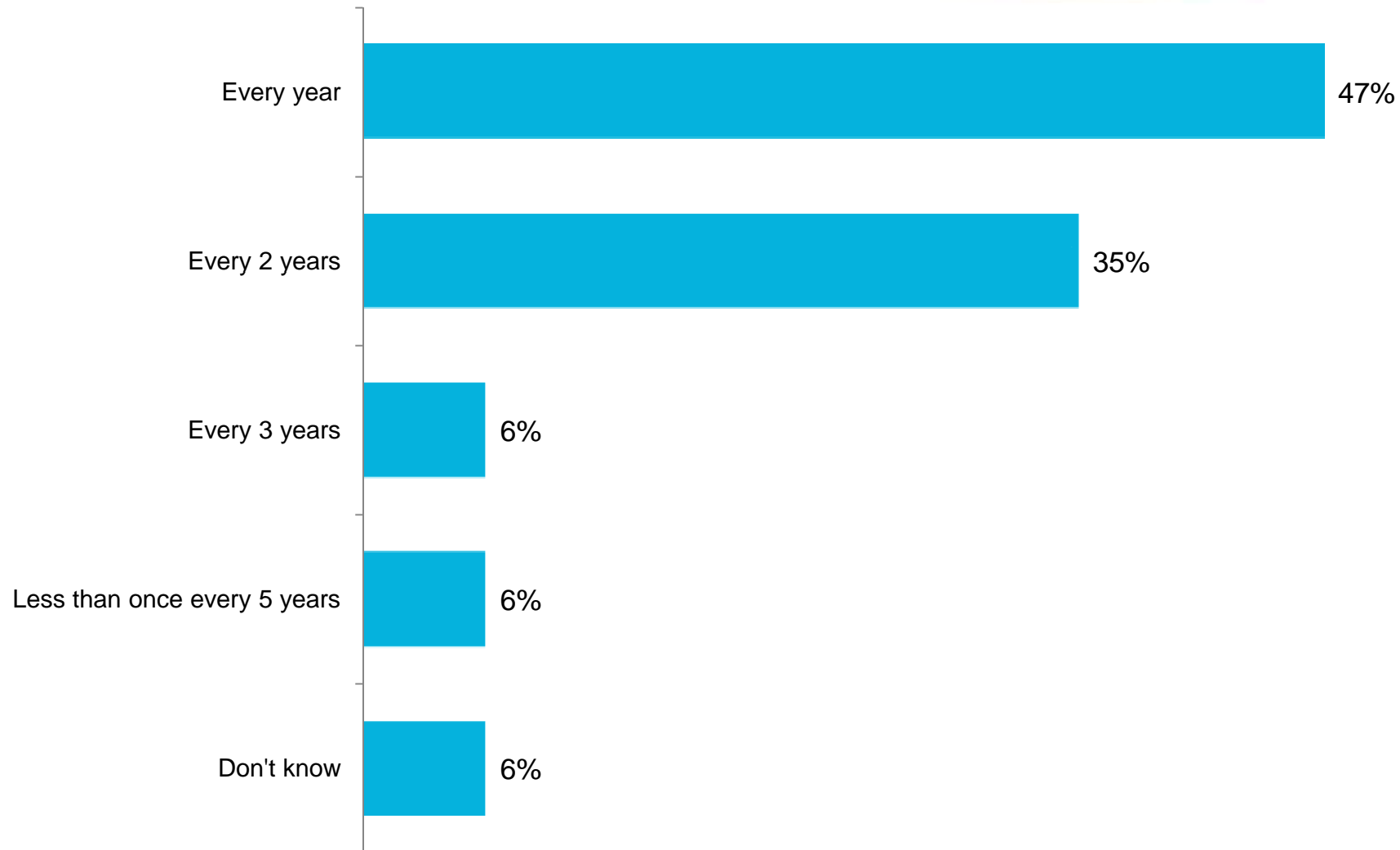
Please view %'s with caution due to low base



Q. How often does the company benchmark itself against industry and world-class best practices?

Base: less / unprofitable play only (4)

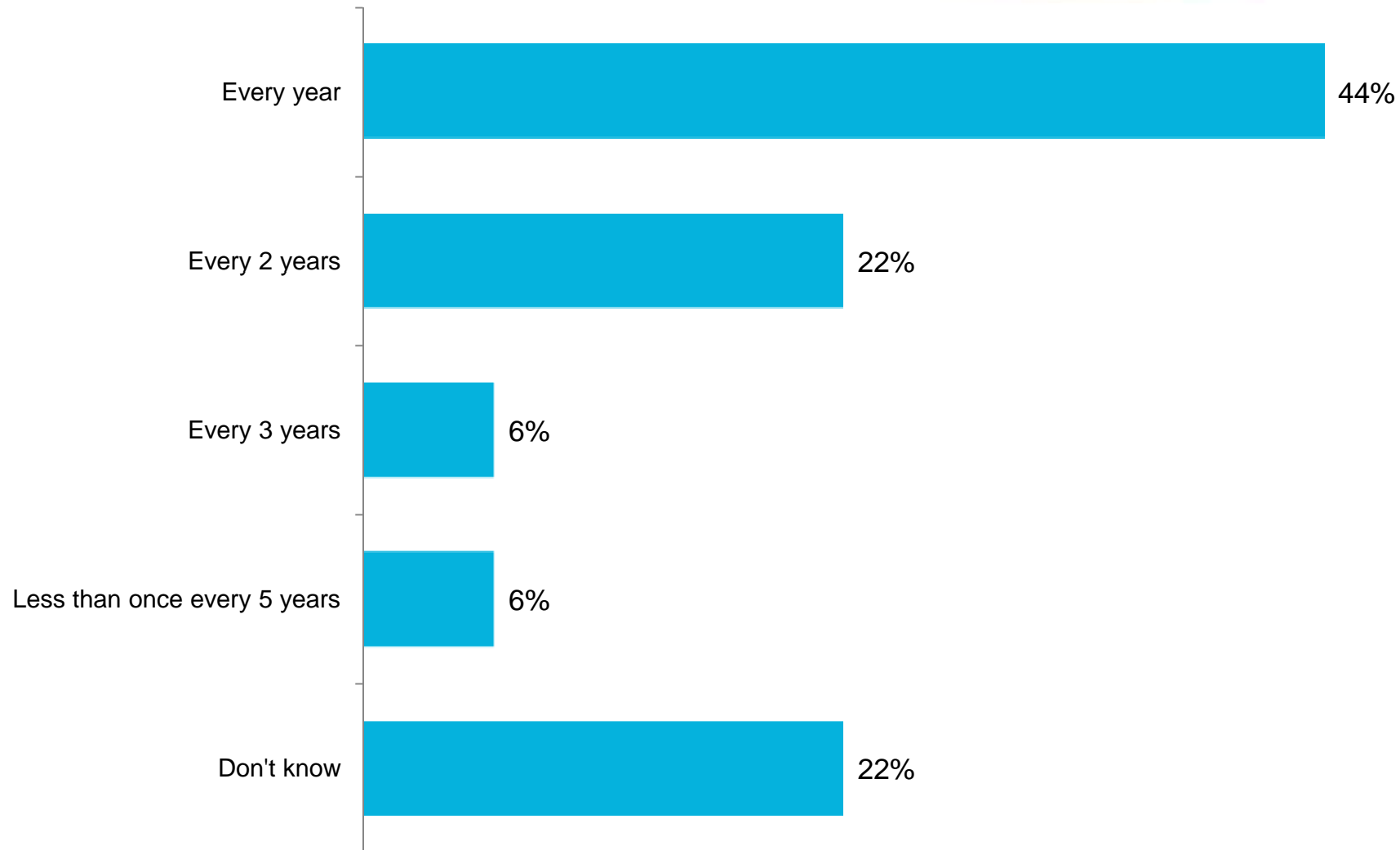
How often the company benchmarks itself – efficiency play



Q. How often does the company benchmark itself against industry and world-class best practices?

Base: efficiency play only (17)

How often the company benchmarks itself – highly profitable

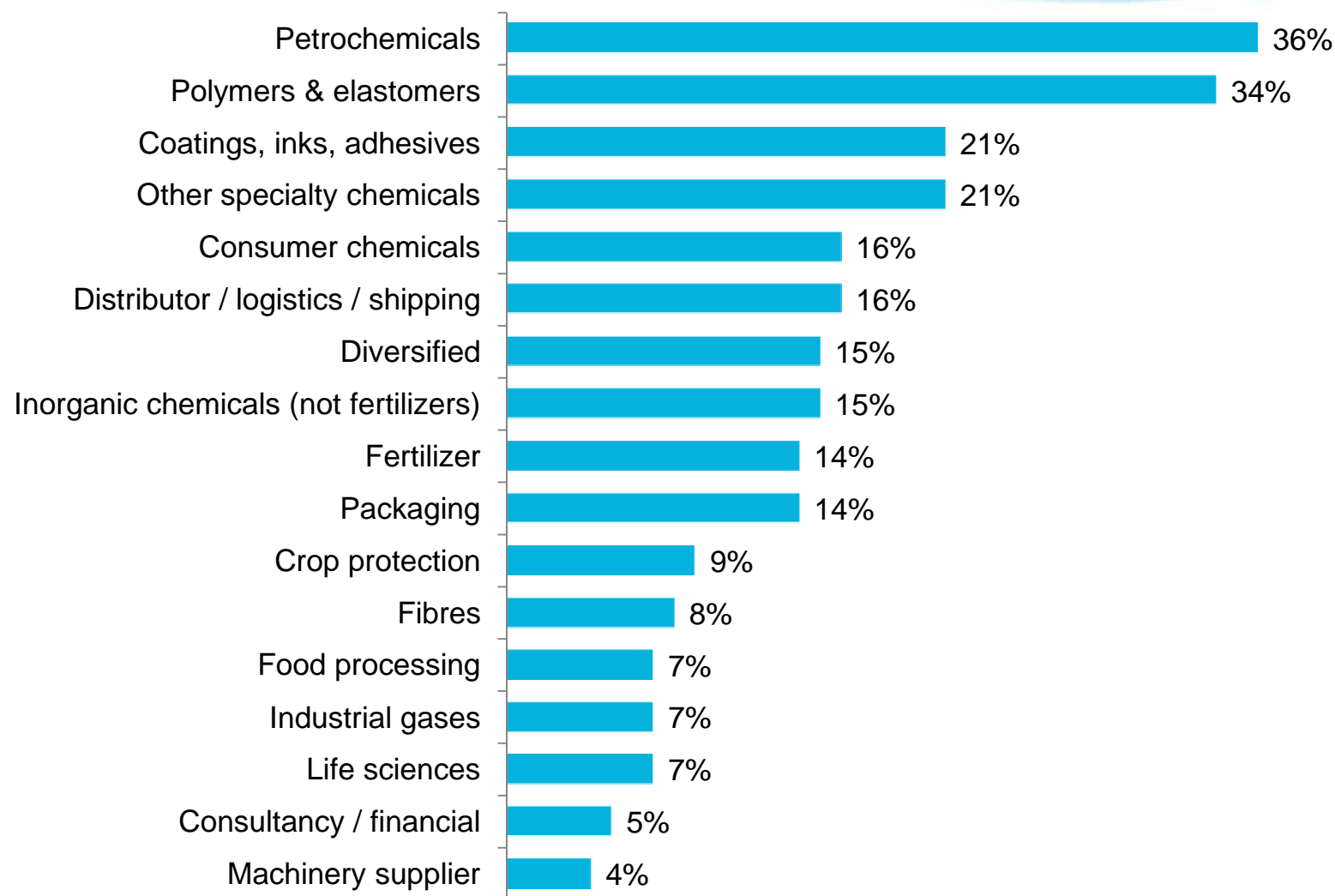


Q. How often does the company benchmark itself against industry and world-class best practices?

Base: highly profitable only (36)

Respondent profile

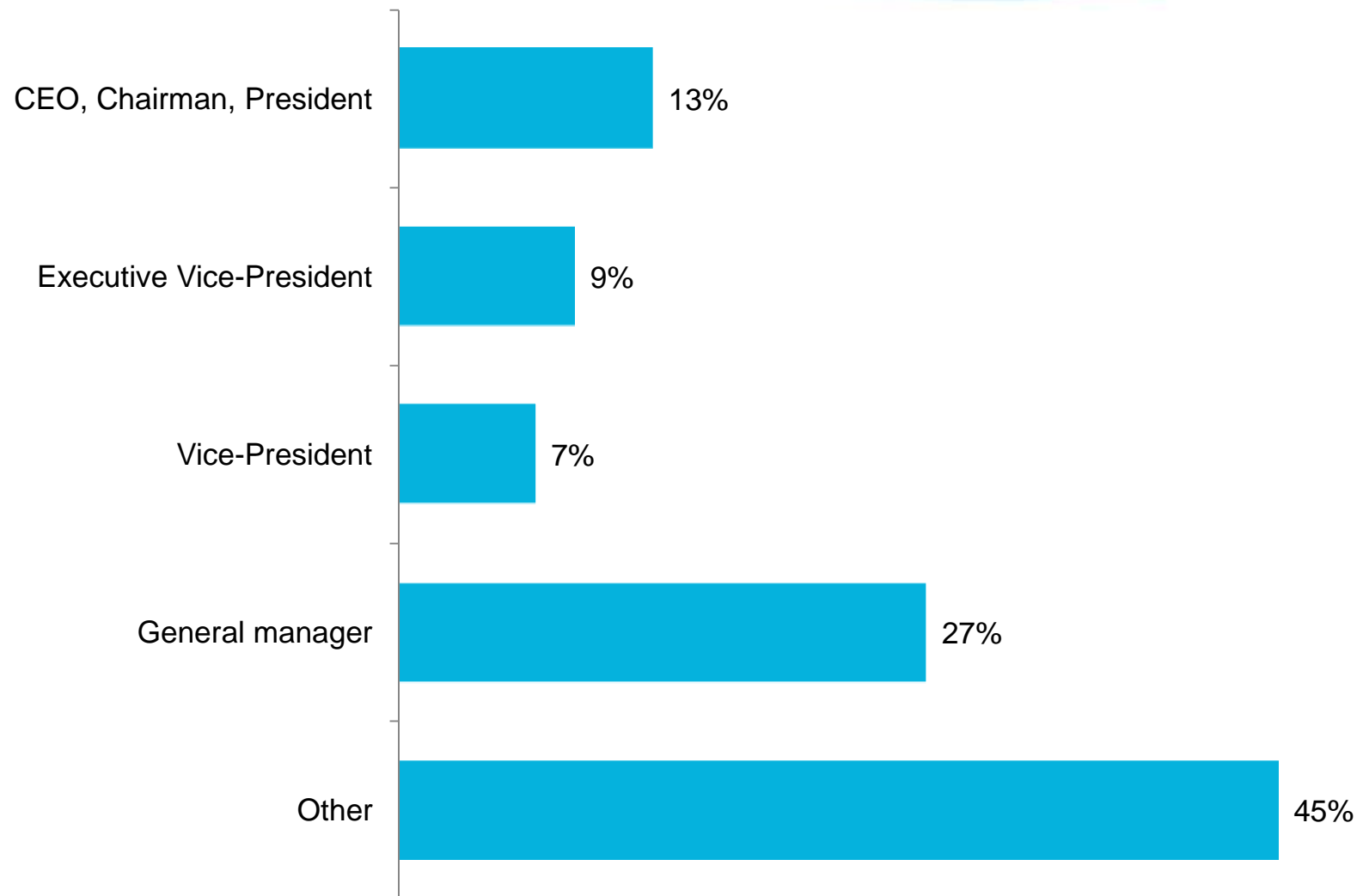
Company segment



Q. In which of the following segments does your company operate?

Base: all responding (232)

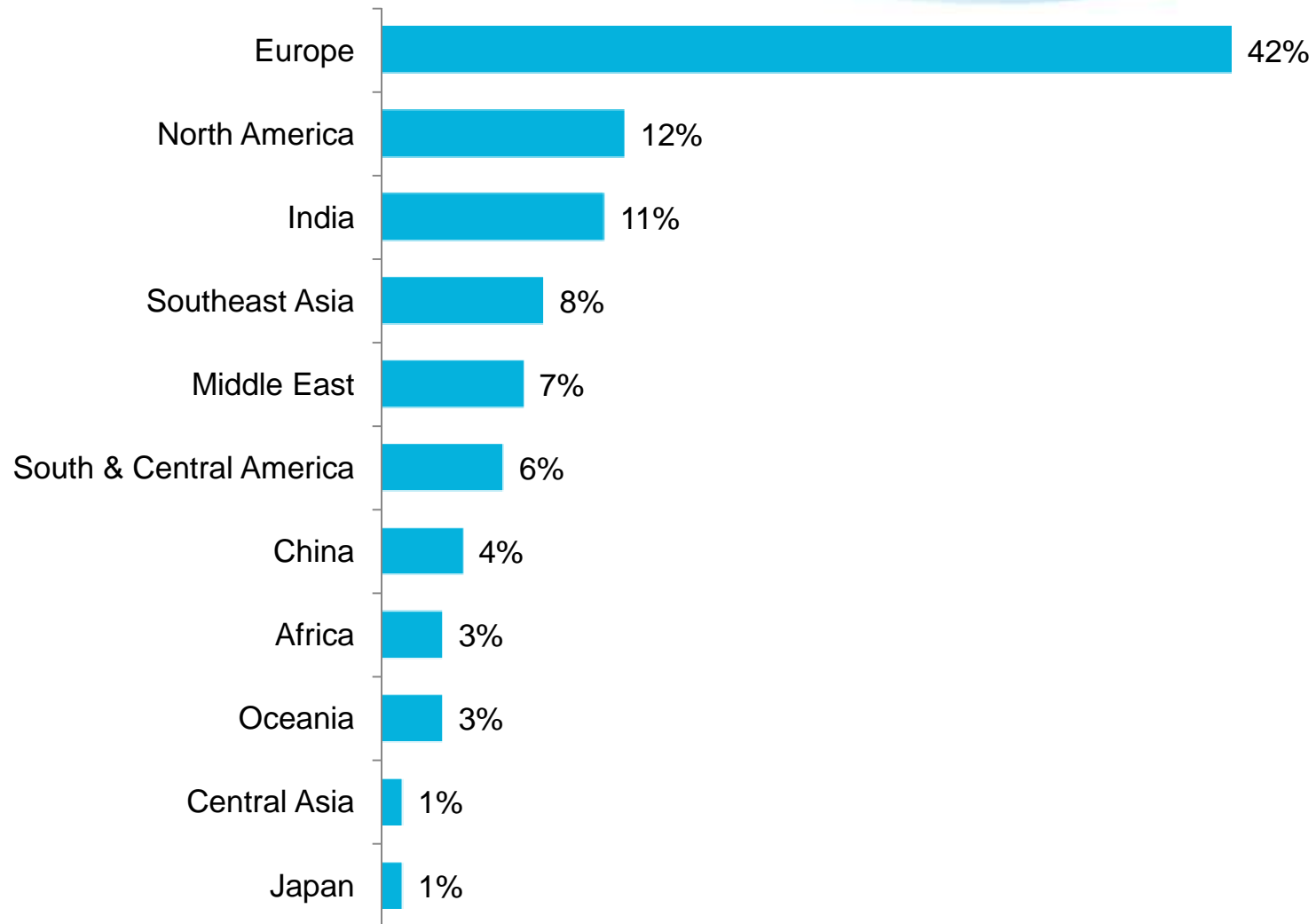
Job title



Q. Which of the following job titles best reflects your position?

Base: all responding (230)

Where company is headquartered



Q. Where is your company headquartered?

Base: all responding (229)