

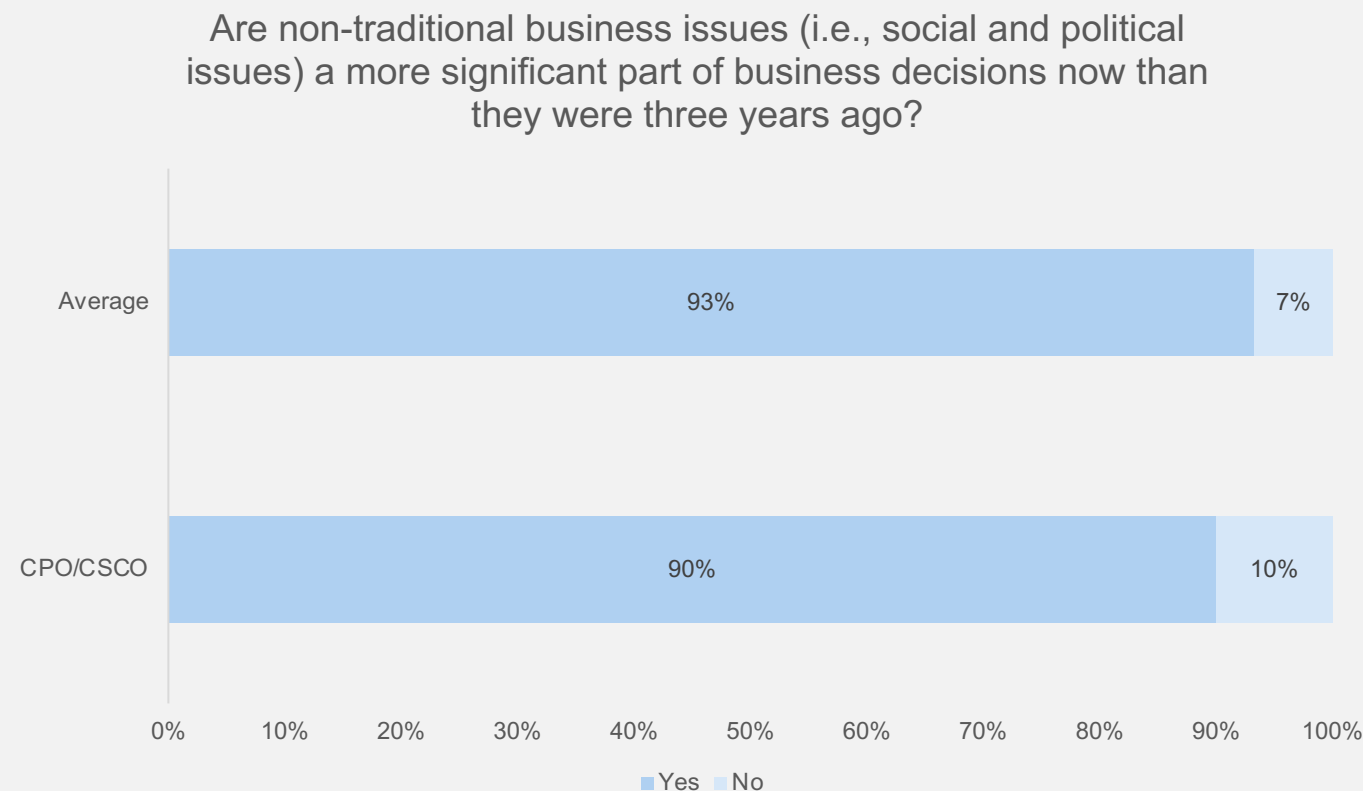


Untethered World

Leading in a Time of Chaos

Viewpoints From Chief
Procurement Officers and
Chief Supply Chain Officers

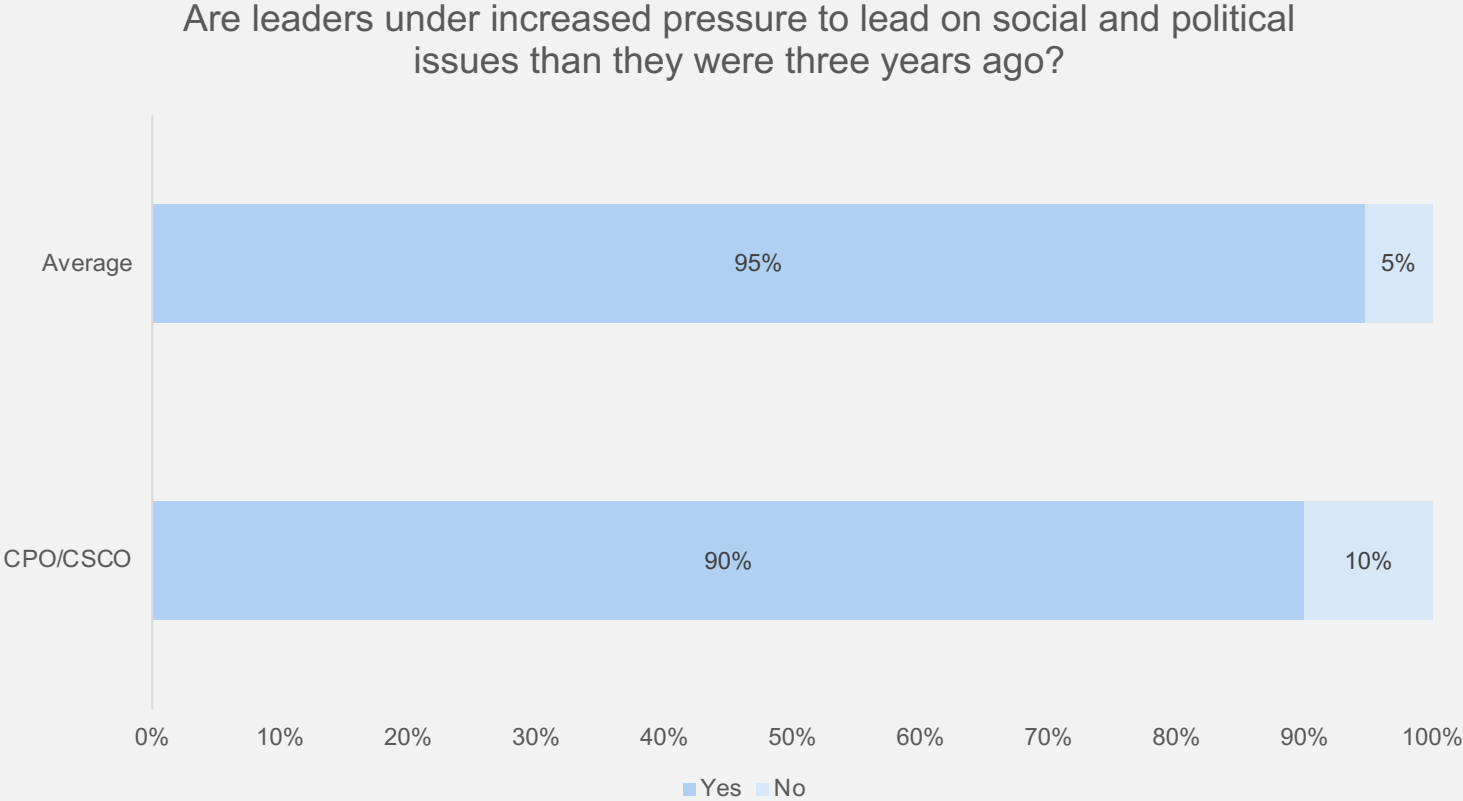
Expanding Scope of Non-Traditional Business



90% of CPOs and CSCOs are seeing an increase in their consideration of non-traditional business issues in comparison to three years ago. This figure is slightly less than the average of 93%.

n=209

More Pressure to Take a Stance

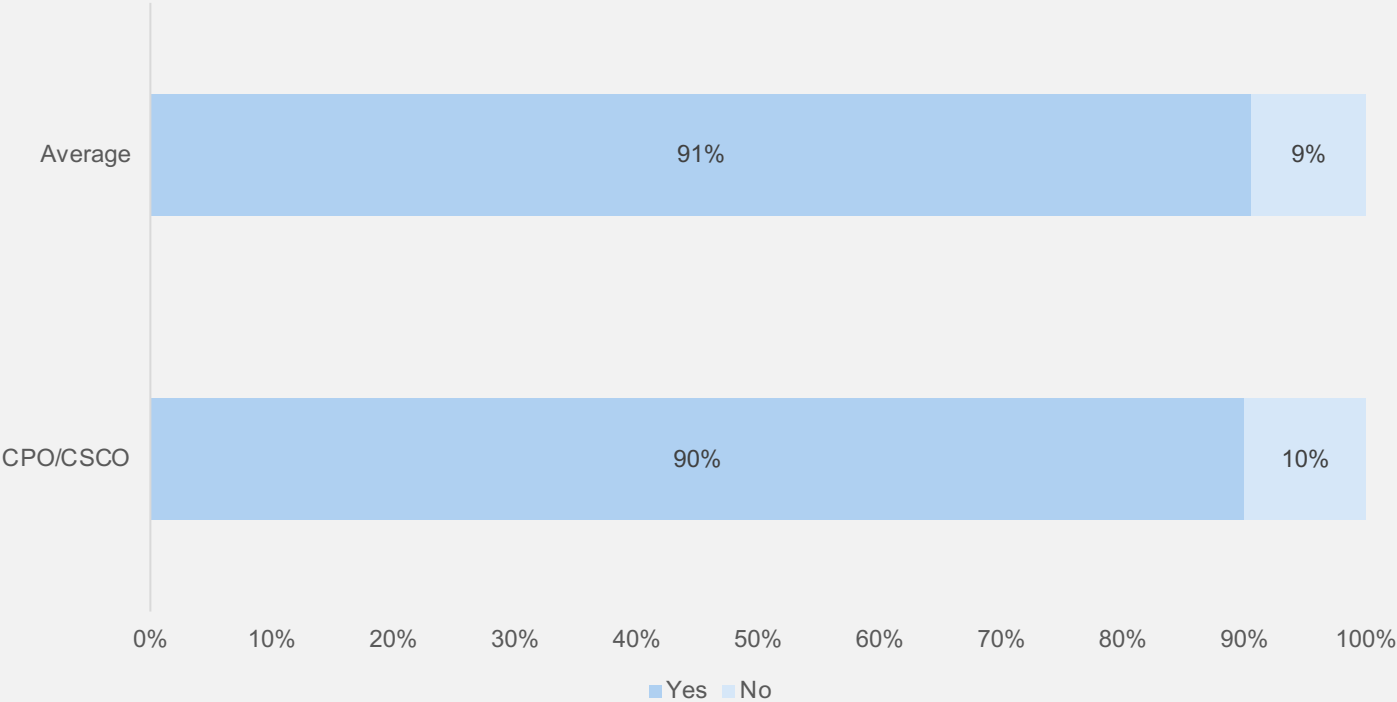


90% of CPOs and CSCOs are facing more pressure to lead on social and political issues today in comparison to three years ago, but less than the average of 95%.

n=209

CPO/CSCOs: More Stakeholders to Manage

Are leaders managing a wider range of stakeholders than they were three years ago?



90% of CPO and CPSO respondents indicated they are managing a wider range of stakeholders than they were three years ago.

n=203

Consumers, Not Employees, Are Top Consideration for Complex Decision-Making

Please rank the following considerations influencing leaders when making complex decisions today.

CPO/CSCO

Considerations	Rank
Consumer reaction	1
Brand image	2
Board expectations	3
Shareholder reaction	4
Employee reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

n=190

Average

Considerations	Rank
Employee reaction	1
Brand image	2
Consumer reaction	3
Board expectations	4
Shareholder reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

CPOs and CSCOs ranked employee reaction as the fifth greatest consideration when making complex decisions—in stark contrast to the sample average, which ranked it first.

Complex Decision-Making: No Change From Three Years Ago for CPOs and CSCOs

Please rank the following considerations influencing leaders when making complex decisions today compared with three years ago.*

Today

Considerations	Rank
Consumer reaction	1
Brand image	2
Board expectations	3
Shareholder reaction	4
Employee reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

Three years ago

Considerations	Rank
Consumer reaction	1
Board expectations	2
Brand image	3
Shareholder reaction	4
Employee reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

CPOs and CSCOs ranked consumer reaction and board expectations as topmost decision-making considerations three years ago.

n=180

*Note that executives were asked to rank their own perspectives as they believed they would have ranked them three years ago. This survey was not conducted three years ago.

Consumer Backlash Is the Greatest Risk

Rank the impact of the following risks of failing to appropriately respond to a major external crisis.

CPO/CSCO

Risks	Rank
Consumer backlash	1
Employee turnover	2
Stakeholder discontent	3
Investor abandonment	4
Regulatory action	5
Backlash from business community	6
Supplier disaffection	7
Other	8

Average

Risks	Rank
Employee turnover	1
Consumer backlash	2
Regulatory action	3
Stakeholder discontent	4
Investor abandonment	5
Backlash from business community	6
Supplier disaffection	7
Other	8

CPOs and CSCOs highlight consumer backlash, employee turnover, and stakeholder discontent as the top three risks of failing to respond to a major external crisis appropriately.

n=195

The Most Important Stakeholders: Employees

Please rank the following stakeholders in order of how important they are in shaping your decision-making.

CPO/CSCO

Stakeholder	Rank
Employees	1
Internal executive leadership	2
Consumers	3
Regulators	4
Institutional investors	5
Suppliers	6
Local communities	7
Individual investors	8
Business peer groups	9
Online influencers	10
Other	11

n=204

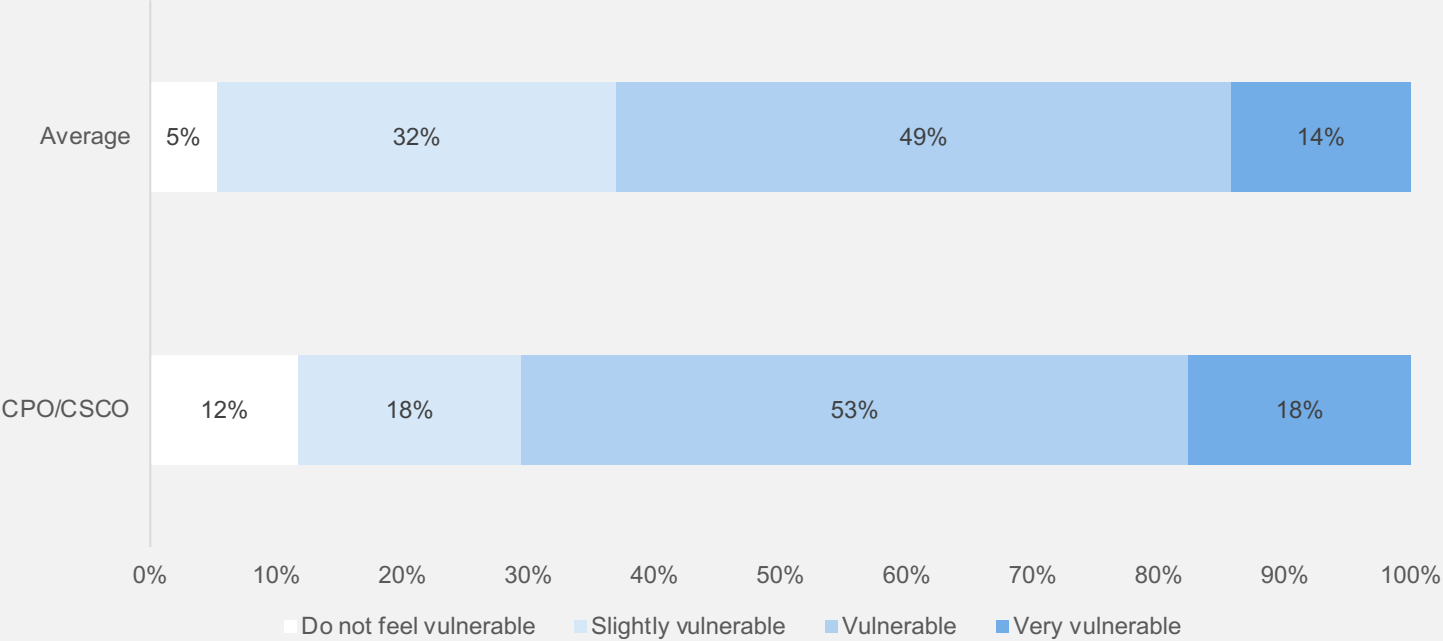
Average

Stakeholders	Rank
Consumers	1
Employees	2
Internal executive leadership	3
Institutional investors	4
Regulators	5
Suppliers	6
Local communities	7
Individual investors	8=
Business peer groups	8=
Online influencers	10
Other	11

CPOs and CSCOs ranked employees as the most important stakeholders, followed by internal executive leadership and consumers.

CPOs and CSCOs Feel Vulnerable When Making Complex Decisions

How vulnerable do leaders feel when making a complex decision regarding a major external crisis?



18% of CPOs and CSCOs indicated they feel very vulnerable when making complex decisions regarding an external crisis, compared to 14% among the sample average.

n=189

Top Two Skills: Adaptability and Resilience

Please rank the following skills or capabilities leaders need in the current environment.

CPO/CSCO

Qualities	Rank
Adaptability	1
Resilience	2
Risk assessment	3
Vision	4
Personal courage	5
Stakeholder management	6
Political awareness	7
Empathy	8
Social media awareness	9
Other - please specify	10

n=181

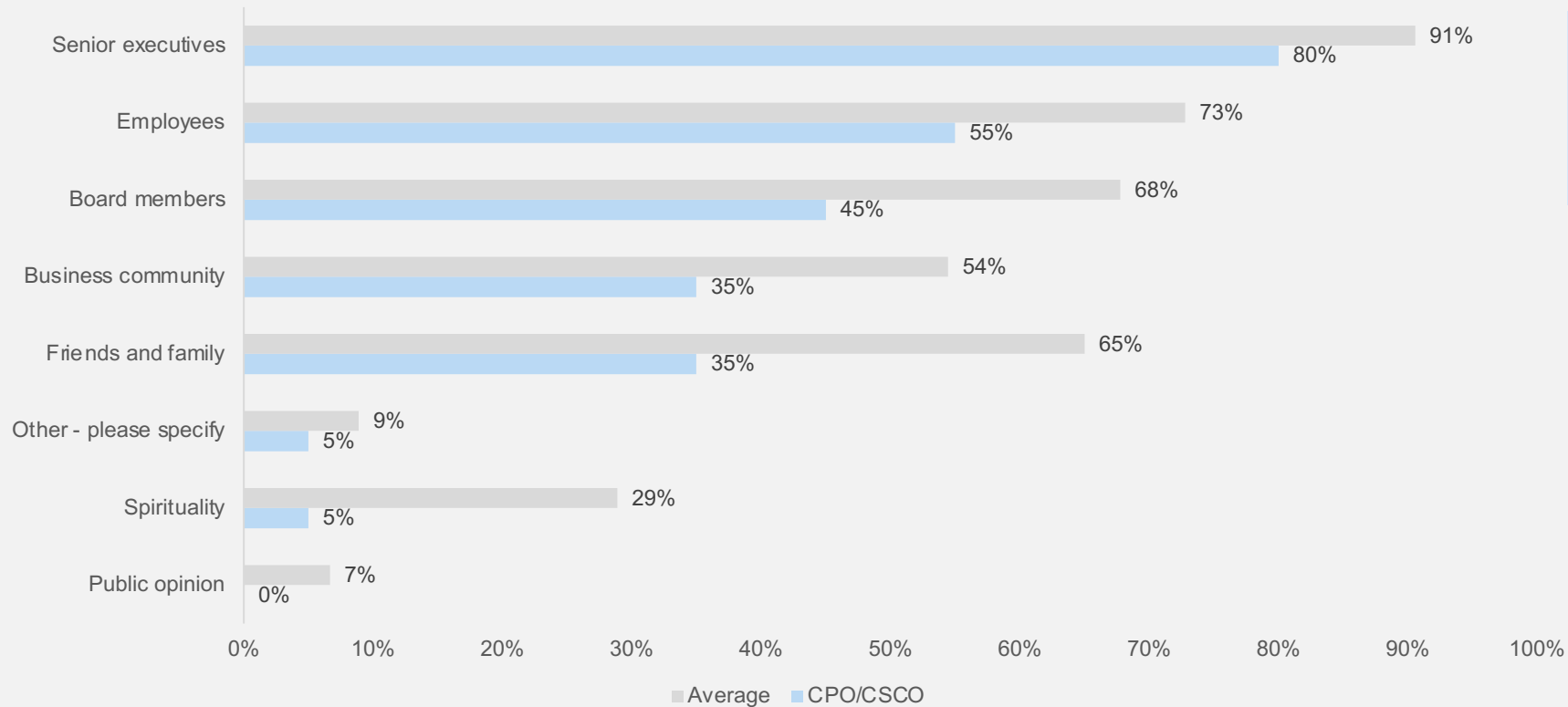
Average

Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

CPOs and CSCOs rank risk assessment above vision and empathy as eighth priority, significantly differing from the sample average.

CPOs and CSCOs Rely on Senior Executives for Support

When making complex decisions, where do leaders get support or draw strength from?



80% of CPOs and CSCOs depend on senior executives for support, while 55% rely on employees when it comes to making difficult decisions.

n=180