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Executive Summary

With pressure mounting to improve operational performance while meeting escalating customer requirements, companies across all industries are adopting Lean techniques in manufacturing plants and Lean strategies in executive suites around the globe. While 66% of IM&C (Industrial Machinery and Components) companies are relatively new adopters of Lean, with initiatives less than three years old, those companies with a best-in-class approach to Lean deployment are already reaping the benefits. While many IM&C companies have already secured top management approval for Lean, the companies who identify and measure critical performance frequently are the ones positioned for success.

As Figure 1 demonstrates, best-in-class companies are responding to competitive threats by cycling through inventory and meeting customer delivery dates, a dramatic departure from laggard companies that fall behind by prioritizing cost concerns. Better-performing IM&C companies are following suit by recognizing the impact on time delivery has on competitive differentiation, with 75% (not shown) ranking this performance metric as key to success, with only 17% placing priority on cost per unit.

In speaking with several respondents, IM&C companies revealed how their organizations were already correlating current success directly to their Lean strategy. Best-in-Class IM&C companies are quickly attaining Lean successes of their own, by moving to a make-to-order or assemble-to-order environment. Some of the more tangible benefits included:

- Advancing from 13th to 3rd in the market with a 10% increase in market share
- Tripling throughput
Productivity increase resulting in $40 dollars to $104 per man hour

With the possibility for near-term success, IM&C companies regardless of where they are on their Lean journey should look to the following critical recommendations to begin the process:

**Recommendations for Action:**

- Focus on best in class KPIs that tie value back to the customer, on-time delivery being of paramount importance
- Measure these KPIs often. Do it on a daily basis.
- Evaluate technology capabilities to enhance visibility and improve supply chain flexibility
- Evolve to a “to order” environment, “pulling” demand directly from customers
- Leverage external consultants to pioneer Lean development
- Conduct Kaizen Blitz workshops to monitor continuous improvement efforts
- Map the value stream from customer to suppliers
- Implement basic Lean production techniques
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**Chapter One: Issue at Hand**

Companies adopt Lean strategies for a variety of reasons. In the automotive, aerospace, and a growing number of other industry sectors, “going Lean” is a requirement for doing business; it is mandated by OEMs and major aircraft companies. Also industries that ultimately serve the consumer have seen new demands over the past few years; in many cases expected delivery times dropped radically from weeks to days and in others mandated price reductions are taking their toll. IM&C companies cited the need to reduce costs and increase revenue (i.e., *improving operational performance*) as their top driver for adopting Lean. While IM&C companies are relative newcomers to Lean, they are already compelled to look to Lean with the goal of overall operational improvements (Figure 2). In comparison, best in class companies appear to be meeting customer demands, and are now evaluating other ways to maintain competitive superiority by focusing on continuous improvement.

**Figure 2: Top Drivers of Lean**

The second most important driver cited by 62% of IM&C respondents, *customers demanding shorter order cycle times*, is particularly common for those companies whose products ultimately serve the consumer. Mahindra & Mahindra is the leading provider of tractors to Indian farmers. Its leadership position was threatened when new international competitors entered its domestic market. As a result, the company leaned out both its manufacturing facilities and distribution channels to deliver new product to retailers “just
in time’” for spring planting. Through a combination of redesigned business processes, the consolidation of supply chain partner network information, and the implementation of SAP’S APO (Advanced Planning and Optimization) solution, M&M has achieved marked improvements: customer service levels have improved 80% (measured weekly) to 95% (measured daily). More information on Mahindra & Mahindra’s success can be found in Aberdeen’s *Lean Best Practice Report*.

Forty four percent of respondents cited *Competitive advantage in price and service* among their top three Lean drivers. However, since Lean is now becoming prevalent in IM&C, today the choice to go Lean is more about avoiding being at a disadvantage by *not* operating a Lean operation. The owner of a small (less than $50 million) niche milling equipment manufacturing company, has been using Lean for less than a year and has already achieved bottom line results and formidable market dominance. The company has gone from 13th in the milling equipment market to 3rd, and has maintained this competitive edge through Lean, with workforce productivity increasing from $40 to $104 per man hour.

**Barriers to Adoption**

For IM&C companies, the transition to a Lean manufacturing environment is a major change for many reasons. To improve customer order delivery times, many companies are moving to a make-to-order or an assemble-to-order environment, often causing bills of material to be “flattened” and work processes to be “postponed” until the customer order is received. Since the orders are now being “pulled” from the customer, work cell teams responsible for these final processes may be free from backlog tasks and actually be waiting for orders to initiate the processes. As a result, some of the more seasoned operators are often uncomfortable in this environment at first.

In addition to “postponing” final processes and potentially asking operators to hold off on production until the order arrives, employees also should accept responsibility for continuously looking for opportunities to make continuous improvements (Kaizen) by formally submitting ideas for consideration. As production and final processes may be delayed due to this new pull-based system, employees should take this time to conduct Kaizen blitzes to investigate opportunities for improvements. Many better performing companies have idea management programs in place to encourage participation, and are measured on the number of implemented improvements per employee, with 12-24 a reasonable goal for year one. One company that has had Lean in place for several years related that establishing this “hands-on experience” is key: “Everyone in the company knows their 20 by 20 space. If there is a problem in the area, they need to come up with a solution.”

However, resistance to an entirely new program and procedures remains a daunting challenge to 85% of IM&C respondents who cited *significant culture change* as their top adoption challenge, (Figure 3.) In a follow-up survey, one participant described how this initial reluctance to change was addressed. “From the outset there were several guys that fought pretty hard to make sure that the (Lean manufacturing) systems wouldn’t work; there was a lot of backbiting. However, once they found out they would be working smarter instead of harder, they got into the routine.”
The second most important adoption challenge for IM&C respondents is divided between top management commitment and maintaining customer delivery performance without costly buffers. From an operational perspective, as customer demand drives IM&C companies to shorten order cycle times while meeting on-time delivery expectations, companies are taxed with minimizing costly buffers.

As with any major operational change, securing upper management support is critical. While much easier if this decision starts at the top and is driven downward through the organization, many Lean implementations begin as grassroots efforts, which puts the onus on the Lean champion to gain the appropriate support from above. Because Lean has garnered so much good press over the past several years, this task has become a good deal easier, but still remains as a challenge.
Chapter Two: Strategic Actions of the Best in Class

Companies that are ultimately most successful with their Lean initiatives begin the process with a “blue sky” attitude unencumbered by current constraints. Cross-functional teams start with a white board (either physical or virtual) and collaboratively define and design their ideal “to be” processes beginning with the customer and moving back through production to the supplier.

Reducing non value-added manufacturing and supply chain costs was recognized by 66% of the respondents in Figure 4 as one of the most important strategic actions relative to pursuing Lean. Value Stream Mapping (VSM) is the technique of choice for accomplishing this goal. VSM workshops and tools are used to facilitate cross-functional brainstorming and design processes, generally supported by paper, pencil, and yellow “stickies” in war rooms. As cross functional teams define value streams, they develop a shared understanding of core processes, techniques to determine and correct root cause issues, and a joint go-forward strategy.

Figure 4: Best-in-Class Strategic Actions

![Chart showing strategic actions of the best in class.]

Source: Aberdeen Group, March 2006
The next highest priority strategic action undertaken by best-in-class Lean organizations is to implement continuous improvement culture and methods (or Kaizen), shown at 52% in Figure 4. This action is exemplified by Rockwell Automation. The company has considered itself Lean for five years and has made significant improvements throughout manufacturing and the supply chain. In terms of creating a culture of continuous improvement, Rockwell takes pride in its idea management program. Designed to encourage employees to make suggestions, this effort has been in place for three-years; today, the company implements and manages several change requests per employee on an annual basis.

Becton Dickenson, a leading provider of medical devices, is in the process of implementing a similar program based on the concepts set forth in Alan G. Robinson and Dean M. Schroeder’s Ideas Are Free; its goal is to solicit, rationalize, and implement between 12 and 24 recommendations per employee its first year.

The third most important strategic action cited by best-in-class companies is improving manufacturing and supply chain flexibility (38%). Recognizing that supply chain integration would not be possible using spreadsheets alone, best in class Mahindra & Mahindra tackled the challenge of supply chain integration through the development of a common source of supply chain information, the automation of key processes, and the integration of systems modules. As M&M faced new foreign competitors and increasing supply chain complexity, the company decided to embark on a major project to implement SAP’s APO solution in India and in facilities around the globe.

The selected SAP implementation partner, Bristlecone, Inc., charted out the APO implementation plan. However, to maximize value addition from APO, it was necessary to first reengineer the existing supply chain processes from “push” to “pull”, including the introduction of a pull-based replenishment from manufacturing to distributors, and the coordination of local deliveries with 3PL (3rd Party Logistics Providers) partners. Next, the project team identified supply chain network partners, material flows, and business rules; and then captured the data into its Indian domestic supply chain using APO modeling capabilities.

As APO became operational, it generated supply chain visibility into the entire Indian supply chain network, including customer and distributor shipments. As APO became operational, it generated supply chain visibility into the entire Indian supply chain network, including customer and distributor shipments. The implementation of the Supply Network Planner module of APO also provided a quick and easy way to handle its complex supply chain by ensuring constraint-based cost optimal planning across its plants. It also facilitated in quick re-planning across plants based on market demand changes and re-scheduling material plans accordingly.

Mastering Lean Basics

Beyond looking to enhance operational goals, best-in-class companies are committed to mastering basic Lean methodologies. During this study, we discovered a large gap between the way best-in-class companies and their poorer performing competitors tackle Lean as shown in Table 1.
Table 1: Best-in-Class Committed to Mastering Basic Methodology

<table>
<thead>
<tr>
<th>Significant Level of Involvement</th>
<th>Best in Class</th>
<th>Laggard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education: Lean Methodology</td>
<td>91%</td>
<td>16%</td>
</tr>
<tr>
<td>Identification of improvement opportunities</td>
<td>80%</td>
<td>21%</td>
</tr>
<tr>
<td>Lines/Work Cell Manufacturing</td>
<td>75%</td>
<td>8%</td>
</tr>
<tr>
<td>5S (Sort, Set in order, Shine, Standardize, Sustain)</td>
<td>75%</td>
<td>19%</td>
</tr>
<tr>
<td>Kanban</td>
<td>73%</td>
<td>7%</td>
</tr>
<tr>
<td>Value Stream Mapping</td>
<td>68%</td>
<td>4%</td>
</tr>
<tr>
<td>Kaizen (continuous improvement teams)</td>
<td>67%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: **AberdeenGroup**, March 2006

**Education Lean Methodology**

Most companies embarking on Lean have committed to some degree of formalized education. Smaller organizations hire external trainers and consultants to host workshops, others manage “train the trainer” programs to promulgate Lean concepts; and best-in-class have more formal and often global programs.

**Identification of Improvement Opportunities**

Kaizen is the philosophy of continuously looking for improvement opportunities, and efforts of IM&C companies should focus around continuous evaluation of visible processes, including those surrounding product flow, inventory reductions and quality.

**Line/Work Cell Manufacturing**

Cellular manufacturing typically comprises a small group of operators performing all the work necessary to make a part, component, or assembly; the place where they work is called a work cell. One company achieved “tremendous savings” as a direct result of establishing work cells throughout the shop floor: tripling throughput within the machining area.

One IM&C company, still early on its Lean journey, has already tripled throughput as a result of creating work cells within machining areas.
5S (Sort, Set in Order, Shine, Standardize, Sustain)

5S is a Lean methodology for establishing and maintaining a productive work environment. Several IM&C companies reported that having Lean consultants evaluate current work processes has resulted in more organized and effective work areas.

A 5S team member at an access equipment manufacturing company explained that his company began investigating Lean initiatives and external support at the suggestion of several companies that had undergone the process. The company brought in external expertise to begin pointing out areas of improvement on the shop floor, with consultants monitoring day to day operations and making suggestions for streamlining certain areas. This process was continued several times with different consulting groups over the years, and the outsider perspective enabled a better picture as to how incremental changes could yield substantive rewards. “Even though we are not yet 100% Lean, the benefits are apparent already as people work collaboratively and more efficiently. As a result our output has been increasing.”

Kanban

Kanban pull chains communicate pull signals up and out from the factory floor, across a series of customer/supplier relationships. This survey confirmed that three times more best-in-class companies are using Kanban systems than the industry average companies. The discrete manufacturing of most IM&C companies lends itself well to Kanban techniques.

Value Stream Mapping (VSM)

Value Stream Mapping is a technique used to evaluate company operations, starting with the customer and mapping processes back through internal operations and ultimately through the supply chain. The ultimate goal is to identify value in the eye of the customer and eliminate all non value-added activities.

How IM&C Companies Overcome Lean Obstacles

In order to break through adoption barriers, industrial machinery and components manufacturers are more likely than their more mature industry counterparts to leverage external consultants and even trainers to ramp up more quickly to keep pace. The pressure is on for IM&C companies to move ahead or face being left behind.

As Figure 5 displays, IM&C companies are still working through the introductory phases of Lean—trying to secure top management support, and relying heavily on Lean methodology (like 5S and Value Stream mapping) to guide the gradual transition. Best in class companies regardless of industry meanwhile have overcome barriers by taking a more active and actionable avenue through measuring the impacts of Lean and quantifying Lean opportunities. By identifying opportunities for proactive control throughout their Lean journey, best in class companies prove that Lean must eventually become a process that moves beyond the methodology. The value of Lean is in identifying areas requiring attention, but the next step has to be evaluating metrics for success and diligently monitoring performance. The evolution should be to move beyond the practice to the practical, and the way to facilitate this approach for actionable control is through the backbone of enabling technology.
**Technology-Enabling Lean Processes**

Although the Lean early adopters were not proponents of technology, circumstances have changed. The majority of manufacturers rely on a combination of corporate ERP and semi-automated Lean processes to support their business operating models. As these companies achieve solid ROI with Lean pilots and programs, operational knowledge should be captured electronically so that Lean processes can be (at least partially) replicated and scaled (up or down) into other factories and supply chain partners. Many advances in technology including Web-based solutions, improved analytical tools, and access to real-time production data, bear consideration and closer examination by Lean manufacturers.

In fact, one IM&C company in particular found the ability to coordinate manufacturing cells with “computer systems and new, innovative technology” was instrumental in having processes “work hand in hand to improve productivity.”

The ability to coordinate manufacturing cells with “computer systems and new innovative technology” was identified by one IM&C company as instrumental in having processes “work hand in hand to improve productivity.”
Chapter Three: Lean: Achieving Expectations

A number of IM&C companies report that Lean has been successful and reliably met expectations. But it is also interesting to note that for some companies Lean’s capacity to improve flexibility in manufacturing and across the supply chain was an unanticipated success (Figure 6). As the Mahindra & Mahindra story uncovered, achieving this flexibility is a critical step toward ensuring that customer service and performance objectives are met. An additional 11% report that Lean is exceeding expectations relative to customer service improvements, product quality improvements and cost reductions in manufacturing and the supply chain.

Figure 6: Lean Successes

<table>
<thead>
<tr>
<th>Category</th>
<th>Success exceeded expectations</th>
<th>Success is what we expected</th>
<th>Success below expectations</th>
<th>Initiative failed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved product quality</td>
<td>11%</td>
<td>68%</td>
<td>21%</td>
<td>0%</td>
</tr>
<tr>
<td>Improved customer service</td>
<td>11%</td>
<td>66%</td>
<td>23%</td>
<td>0%</td>
</tr>
<tr>
<td>Improve manufacturing and supply chain flexibility</td>
<td>21%</td>
<td>45%</td>
<td>34%</td>
<td>0%</td>
</tr>
<tr>
<td>Reduce inventory and assets</td>
<td>17%</td>
<td>50%</td>
<td>29%</td>
<td>4%</td>
</tr>
<tr>
<td>Reductions in manufacturing and supply chain costs</td>
<td>11%</td>
<td>57%</td>
<td>30%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: Aberdeen Group, March 2006

Driving Operational Performance with Metrics

Much of the success attributed to Lean is based on unrelenting focus on process standardization and continually looking for ways to improve. This premise is based on the ability to measure, set standards, and work toward improved performance. In the words of one IM&C survey participant, “you have to come up with a metric and continue to improve yourself. You have to have some basis to gauge (performance) upon and continue to improve.” While evaluating metrics for your organization, it’s important to note that there are multiple levels:
First, *individual metrics* capture task or activity performance. Examples include throughput on a particular piece of equipment or SPC (statistical process control) results on a particular test. Individual metrics are designed based on the objective of one or multiple processes. Second, *process metrics* are designed to capture performance across a group of activities. Examples include order-to-delivery time and product-to-volume time. Finally, *metric clusters* aggregate the individual metric and metric sets to link with strategic objectives such as quality, safety, and customer satisfaction.

During the course of this study, we asked study participants which metrics were most important to achieving success. Close to 80% of best-in-class companies cited on-time delivery among the top-three metrics, followed by 52% for inventory turns and 39% for manufacturing cycle time (Figure 7). On-time delivery is considered a *process metric* because it includes the time that it takes to accept and process a customer order, manage through production, and shipping to the end customer. When an organization achieves its order-to-delivery measures, generally this means that each participant who “added value” met his or her *individual metrics*. And although order-to-delivery may not link directly to a strategic objective, it is a strong contributor to customer satisfaction.

### Figure 7: Metrics Tied to Success

<table>
<thead>
<tr>
<th>Metric</th>
<th>Best in Class</th>
<th>Average</th>
<th>Laggard</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-time delivery</td>
<td>79%</td>
<td>62%</td>
<td>56%</td>
</tr>
<tr>
<td>Inventory turns</td>
<td>47%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Mfg cycle time</td>
<td>39%</td>
<td>26%</td>
<td>41%</td>
</tr>
<tr>
<td>Quality</td>
<td>30%</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Cost per unit</td>
<td>18%</td>
<td>30%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Source: *Aberdeen Group*, March 2006

In addition to finding a correlation between relative performance and what metrics were used, we also found a correlation with how frequently results are measured (Figure 8). Close to 30% of the best-in-class measure results daily, but only 3% of laggard companies measure this frequently. It is also interesting to note that 45% of laggards are measuring results on an ad hoc basis. The data also shows that some (11%) best-in-class companies are beginning to incorporate the use of real-time technologies into their measurement programs.

One company in particular, a small niche milling equipment manufacturer, has taken to monitoring quality on a daily basis, and the small staff of 50 people ensures that all product going out the door is thoroughly tested. But measuring success for the company ex-
tends beyond measuring the viability of its products. Tasks are divided by man hour, and a weekly report is published with current progress (positive or negative) by employee, sharing visibility with everyone in the company. By including these separate cluster metrics, the company has been able to tie back value to Lean initiatives and continually keep abreast of opportunities to improve.

**Figure 8: Measurement Frequency**

![Measurement Frequency Chart]

Source: **Aberdeen Group**, March 2006
Chapter Three: Recommendations for Action

While the companies in this study achieved very measurable and accelerated results, the progress to become Lean is a long-term commitment to continuous process improvements. With this in mind, IM&C companies in either the evaluation or early deployment phase of Lean can benefit from the following action items to pave a successful path to Lean:

- **Focus on customer-facing KPIs, such as on-time delivery.** Take tips from current best in class leaders and focus on meeting customer demands while continuing to strive for operational excellence.

- **Measure these KPIs often (ideally on a daily basis).** IM&C companies should “follow the leaders” and adopt the best in class mentality for maintaining strict standards for success based on frequent measurement of critical objectives.

- **Evaluate technology capabilities to enhance visibility and improve supply chain flexibility.** As customers drive IM&C companies to not only adopt Lean but quickly ramp up to meet expectations for shorter order cycle time and on-time delivery, IM&C companies will need to scale Lean processes throughout the supply chain to enhance flexibility. To become truly agile and responsive, IM&C companies will need to think about technology infrastructures that will unite the plant with the supply chain at large to facilitate the design and implementation of customer-focused business processes.

- **Evolve to a “to order” environment, “pulling” demand directly from customers.** Move beyond the traditional make to forecast methods that only encourage inventory congestion and other perpetual backlogs, to processes that are responsive to customer requests.

- **Leverage external consultants to pioneer Lean development.** Highlighted as a critical component of successful Lean deployment by IM&C companies and the best in class alike, look to external support to ease the Lean transition and get an outsider’s objective perspective on how your company could improve.

  **Conduct Kaizen Blitz workshops to monitor continuous improvement efforts**

  Kaizen workshops are cross-functional in nature, focused on continuous improvement, and conducted over one to five days. The goal of the workshop is to rapidly refine solutions to highest priority issues; workshops can be focused on either value stream improvements or on the elimination of waste. Because this is a well documented and structured process, consider training an internal leader or hiring an external consultant. Organize and prioritize Kaizen improvement efforts along the value stream to ensure that focused improvement efforts deliver value to the highest impact business areas. IM&C companies are 25% more likely to already be highly involved with Kaizen (55% vs 30% for all other industries). They should continue to leverage external resources i.e. external trainers or consultants to monitor continuous improvement.

- **Map the value stream from customer to suppliers**
Identify the specific resources and actions required to deliver a specific product to a specific customer. Create a future state of the value stream map. Identify and categorize waste in the current state, and eliminate it.

Implement basic Lean production techniques

Evaluate current bills of material and bills of process. Consider “postponing” final finishing or assembly instructions until the customer order comes in, then establish a workcell team to perform these specific tasks.
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Appendix A: Research Methodology

Using the month of January 2006, Aberdeen Group with Manufacturing Business Technology and the Association for Manufacturing Excellence (AME) examined Lean manufacturing philosophies, techniques, and technologies of 292 enterprises in aerospace and defense (A&D), automotive, high-tech, industrial products, and other industries.

Responding supply chain, logistics, and operations executives completed an online survey that included questions designed to determine the following:

- What is driving manufacturers today to adopt Lean? What are their business needs and expectations?
- How are best-in-class implementing Lean? What are their critical success factors and how are these being measured?
- What tools, techniques, and technology solutions are leaders using to deploy and scale their Lean operations?

Aberdeen supplemented this online survey effort with telephone interviews with select survey respondents, gathering additional information on Lean strategies, experiences, and results.

The study aimed to identify emerging best practices for Lean and provide a framework by which readers could assess their Lean capabilities.

Responding enterprises included the following:

- **Job title/function**: The research sample included respondents from the following functional areas: manufacturing (42%); business process management (10%), logistics/supply chain (9%), IT (8%), and others. Job titles included managers (37%), directors (18%), C-level or senior managers (13%), and others.

- **Industry**: The research sample included respondents predominantly from manufacturing industries: Industrial machinery manufacturers (16%) of the sample, automotive (10%) and finally aerospace and defense manufacturers, accounting for 10% of the sample. Other sectors responding included medical equipment, construction/engineering, and retail and distribution.

- **Geography**: Nearly all study respondents were from North America, including 92% from the U.S. alone. Remaining respondents were from the United Kingdom and the Asia-Pacific region.

- **Company size**: About 27% of respondents were from large enterprises (annual revenues above US$1 billion); 35% were from mid-sized enterprises (annual revenues between $50 million and $1 billion); and 37% of respondents were from small businesses (annual revenues of $50 million or less).
Appendix B: Related Aberdeen Research & Tools

Related Aberdeen research that forms a companion or reference to this report includes:

- *The Product Quality Benchmark Report*, December 2005
- *Manufacturing Transparency*, December 2005
- *Winning with Global Manufacturing Networks*, September 2005

Information on these and any other Aberdeen publications can be found at [www.Aberdeen.com](http://www.Aberdeen.com).
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To be the trusted advisor and business value research destination of choice for the Global Business Executive.

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Aberdeen delivers unbiased, primary research that helps enterprises derive tangible business value from technology-enabled solutions. Through continuous benchmarking and analysis of value chain practices, Aberdeen offers a unique mix of research, tools, and services to help Global Business Executives accomplish the following:

- IMPROVE the financial and competitive position of their business now
- PRIORITIZE operational improvement areas to drive immediate, tangible value to their business
- LEVERAGE information technology for tangible business value.

Aberdeen also offers selected solution providers fact-based tools and services to empower and equip them to accomplish the following:

- CREATE DEMAND, by reaching the right level of executives in companies where their solutions can deliver differentiated results
- ACCELERATE SALES, by accessing executive decision-makers who need a solution and arming the sales team with fact-based differentiation around business impact
- EXPAND CUSTOMERS, by fortifying their value proposition with independent fact-based research and demonstrating installed base proof points

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Aberdeen was founded in 1988 to conduct fact-based, unbiased research that delivers tangible value to executives trying to advance their businesses with technology-enabled solutions.

Aberdeen’s integrity has always been and always will be beyond reproach. We provide independent research and analysis of the dynamics underlying specific technology-enabled business strategies, market trends, and technology solutions. While some reports or portions of reports may be underwritten by corporate sponsors, Aberdeen's research findings are never influenced by any of these sponsors. 

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