



THE CHANGING DYNAMICS OF **Supply Chain**

IN THE UK RETAIL SECTOR

SpencerStuart

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In 2007 Spencer Stuart interviewed a number of the leading supply chain professionals operating in the UK retail sector to ascertain how the function is evolving to meet the ever-increasing demands of the marketplace.

The interviews produced a clear picture of today's top-flight supply chain professional as a strategic decision maker with a thorough understanding of finance and technology; someone with strong relationship development skills who can operate on the global stage and contribute to debate at executive committee and board level. The modern supply chain professional is far removed from the person who used to simply be responsible for managing distribution and warehousing.

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The retail sector today

The UK retail sector has undergone significant change in the past few years and is recognised as one of the fastest moving industry sectors. The supply chain professional is often at the front line of this change and must respond to each aspect of the changing environment.

THE EMERGENCE OF HIGHLY VOLATILE FAST RETAILING. Customers want instant access to new products. Businesses must respond to these demands or lose their customers. For the supply chain director this means getting goods to the store by the most efficient and effective means, while maintaining high levels of customer service.

CHEAPER MANUFACTURING IN ASIA AND CENTRAL AND EASTERN EUROPE. This is driving more companies to either locate manufacturing activities in these regions or source from these markets. However, as these markets evolve, pushing up the cost of production, the supply chain director needs to be constantly on the lookout for new low-cost markets. For the supply chain director this has meant developing an entirely new set of skills, including an international mindset, cultural awareness and sensitivity, and linguistic ability.

THE GREEN EFFECT. Increased awareness of environmental and socially responsible manufacturing and retailing is resulting in greater demand for eco-friendly products. Customers want to feel confident that their £2 t-shirt or kitchen utensil was made by an adult receiving a proper wage and working in good conditions. They also want recyclable packaging and recycling facilities. The supply chain director with responsibility for sourcing must ensure that factory owners maintain minimum levels of health, safety and environmental standards.

*“THIS IS RETAIL, SO THINGS ARE CONSTANTLY CHANGING.
ALTHOUGH WE DO IT WELL, WE CAN ALWAYS DO IT BETTER.”*

PRICE-DEFLATIONARY ENVIRONMENT. This is a particular issue in the non-food arena, with increased pressure on the supply chain to get products into the stores efficiently and effectively.

THE ECONOMIC CYCLE. Reduced consumer confidence and spending has an immediate impact on the retail sector, which in turn means a constant attack

on the supply chain cost base and assets and the need to constantly review outsourcing/insourcing capabilities. The high price of fuel contributes further to the squeeze on margins.

“RETAIL IS ABOUT TWO THINGS — SUPPLY CHAIN AND CASH COLLECTION — GETTING THE GOODS TO THE STORE SO THE CUSTOMER CAN BUY AND PAY FOR THEM.”

Evolution of the role of the supply chain director

The role of the supply chain director has evolved substantially over recent years. Ten to fifteen years ago the typical profile was that of a non-graduate who had started working on trucks or in a warehouse and who had worked his way up (few if any women worked in supply chain). They had little contact with, or interest in, the rest of the business; most sat in their sheds hoping that the phone would not ring.

Today, many supply chain directors are graduates. Thanks to industry bodies such as the Institute of Logistics and Transport and universities such as Cranfield and INSEAD, many have professional qualifications and/or second degrees. The modern supply chain director may manage thousands of people and have budgetary responsibilities running into hundreds of millions of pounds. He or she is expected to be conversant in business operations, marketing and finance; understand the latest technology; deal with outsourced operations and the unions; and play an increasingly important role on the global stage.

“We work very closely with trading and merchandising and with our top suppliers — everyone is hand-in-glove.”

The supply chain function plays a central role in the delivery of business strategy and supply chain directors are expected to participate actively in strategic debate concerning the entire business, not just their own function.

Today's supply chain director typically sits on the operations board or its equivalent and regularly participates on trading, technology and property committees. He or she will often present to the main board and occasionally to the investor community.

"We are a tight team and our roles are pretty interchangeable. I'm expected to contribute to debate regarding our stores and our plans for international expansion. All of my colleagues take a great deal of interest in what I do."

Although reporting lines for supply chain directors seem to vary according to the size and structure of each business, all the executives we spoke to felt that they had at least an open door to the chief executive and most felt their chief executive recognised their contribution to the overall running of the business. However, many questioned whether their chief executive really understands what they do or what the role entails, due partly to the fact that few chief executives have had practical experience of working within supply chain.

We examined more than fifty organisations for this study and found that only eight chief executives had spent time in supply chain, compared with eighteen who had come up through the trading and marketing routes, ten through strategy/finance and nine through retail operations.

... FEW CHIEF EXECUTIVES HAVE HAD PRACTICAL EXPERIENCE OF WORKING WITHIN SUPPLY CHAIN.

Although the supply chain directors we spoke to felt empowered to make decisions concerning their function, they recognised that this right does not come naturally with the job and has to be earned.

"We've gained a lot of credibility over the past few years because we've played a strong part in growing the business."

The notion that the supply chain is functioning well when the phone does not ring has all but disappeared. Instead, today's professionals go out into the business and get themselves known. To be able to do this effectively they need to understand the entire business, have effective working relationships throughout the organisation and be equipped with strong selling, negotiating and presentation skills.

“You need to be able to influence your colleagues and sell the benefits of supply chain.”

It is also helpful to look at the definition of today’s typical supply chain remit. In our survey, we found that this now covers the full movement of stock from the sourcing operation or manufacturer to the stores; in other words, the supply chain has become elongated. Some supply chain directors have additional responsibility for sourcing, especially in non-food businesses. Today, sourcing and manufacturing operations can be based anywhere in the world, although they are typically found in Asia, Eastern Europe and sometimes Latin America.

In addition to a full range of technical skills, today’s supply chain director needs a complementary set of softer skills. He or she must be able to think across functions and boundaries, be an effective multitasker, and be able to collaborate with and influence others.

***“SUPPLY CHAIN IS THE ENGINE ROOM OF A RETAIL BUSINESS.
IT IS DEFINITELY A CORE FUNCTION”***

SPECIALISED SERVICE GROUP OR CORE FUNCTION?

In our survey, opinion was evenly split over whether the supply chain function should be viewed by the organisation as a specialised service group or as a core function. Different supply chain directors argued vociferously for different ways of positioning the function internally, much of which had to do with the culture of the business and the personalities of those involved. In reality, the way supply chain is labelled internally is less significant than whether or not supply chain has equivalent status to other functions — does it have a voice at the top table on a par with finance and HR, for example? The supply chain function must work hand-in-hand with the other functions and be recognised as an integrated part of the business, providing added value, boosting efficiency and improving customer service.

Typically, the chief executive determines how supply chain is perceived within the organisation. If he or she understands and acknowledges the critical role the function plays in the continued health of the business, the rest of the organisation tends to follow.

“We are always going to be the Cinderella behind stores and trading, but now we feel we are an integrated part of the business.”

The supply chain function touches every part of a consumer business — buying, operations, marketing, finance, HR and technology — so relationship building between functions is critical, especially with trading. Supply chain professionals who have the respect of the business and are treated as equals have almost certainly taken the time to develop their influence and build relationships with other functions. Supply chain directors need to be prepared to reach out across the business, publicise their strategy and lead discussions on how to enhance the service and reduce costs. Some run programmes to educate the rest of the business on how the supply chain works.

“Supply chain projects can prove to a business that it can accept change. It’s a good place to light a fire — you can see the improvements pretty quickly.”

Key skills and competencies

Today’s supply chain director must be a highly versatile professional with a range of technical and ‘soft’ skills at his or her disposal. Outstanding technical ability and project management experience are prerequisites for the role, but just as important is the ability to influence others and to act as a credible advocate for the entire supply chain function.

From our discussions we have identified the following attributes, beyond core supply chain skills, that are considered necessary for success in the role today.

MARKET AND CUSTOMER ORIENTATION: the only way for the supply chain function to become successful is if its actions are driven by the market and by the needs of its customers.

LEADERSHIP: the ability to talk to, influence and motivate people at all levels of the business.

“You need to be able to speak in plain language to get a commercial decision at corporate level — you mustn’t blind people with technical talk.”

RELATIONSHIP BUILDING: the ability to build strong relationships with customers, suppliers and manufacturers, as well as with internal colleagues.

STRATEGIC MINDSET: as a participant in decision making, the supply chain director needs to be able to look beyond the function and consider the commercial challenges and other issues facing the business — both in the present and the future.

“The supply chain director must have a good strategy that the board can approve, and be able to successfully execute it.”

FINANCIAL AND OPERATIONAL EXPERTISE: managing costs and increasing efficiency are so critical that a supply chain director must have a strong grasp of numbers and total command of operational issues.

STRONG UNDERSTANDING OF TECHNOLOGY: given the mission-critical role that technology plays within supply chain, a leader has to be able to communicate with technical professionals, evaluate their performance and understand where they can add value.

“YOU MUST BE A GREAT TEAM LEADER AND A NATURAL TEAM PLAYER. YOU MUST UNDERSTAND THE DETAIL AND BE ABLE TO SWITCH YOUR MIND VERY QUICKLY FROM STRATEGY ON MONDAY TO THE UNIONS ON TUESDAY.”

PRAGMATISM, FLEXIBILITY AND RESILIENCE: new situations are constantly arising, so the ability to adapt and find solutions is important. Being entirely process-driven is limiting.

“You need to be self-reliant because there are no shoulders to cry on. The chief executive is very unlikely to have come up the supply chain route, so he won't really understand what you're dealing with.”

INTERNATIONAL MINDSET AND CULTURAL AWARENESS: even for supply chain directors whose customers are mainly in the UK, more and more goods are being sourced, manufactured and shipped from countries around the globe.

BUSINESS EFFICIENCY AND ATTENTION TO DETAIL: the supply chain director cannot sit in an ivory tower theorising about what might be. He or she must be able to develop solutions to ensure that the chain continues to flow. He or she must have an eye on the smallest detail and leave nothing to chance.

Key issues and challenges

From our conversations we have identified a number of issues that are at the forefront of supply chain directors' minds. In this section we explore each of these in turn.

“My job is to make goods available in a hyper-efficient way and take the costs out day-to-day, week-to-week and year-to-year.”

CUSTOMER: serving the internal and external customer by making sure that deliveries are made accurately and on time is critical. Inventory must be carefully managed to ensure in-store availability and realise trading ambitions.

“It's the same old chestnut — if things are going well it's your fault there's not enough stock on the shelves, and if things aren't going well it's your fault that there's too much stock on the shelves.”

COSTS: constant cost management has become the name of the game. The challenge for the supply chain director is managing of cash flow and assets, and leveraging outsourcing opportunities, without comprising on service levels. Without the ability to control costs the supply chain director will lose the trust and credibility of the business. To complicate matters, cost reduction can be at the expense of safety and environmental considerations.

“The traditional supply chain was about making the existing model more effective by using management techniques. I think now we need to create a new supply chain model because we are a fixed cost in an environment of rapid price deflation — set against this, any other challenge is irrelevant.”

The size of the supply chain team is to a large extent dictated by the size of the business and the extent to which operations are outsourced. However, in the constant quest for cost reduction, this is an area in which the supply chain director must be vigilant.

“An important KPI for us is: have people numbers and spend gone down while the business continues to grow?”

Budgets, like teams, are dictated by the type and the size of the business, but budgetary pressure does seem to vary between food and non-food businesses.

FOOD: “We aspire to take cost down, but the business is growing at such a strong rate that we are not under too much obligation here.”

NON FOOD: “Between 2005 and 2007 prices have come down 20%. This means there is enormous pressure on us to keep our costs down. A high percentage of our UK costs in logistics is variable labour, but the workers still want their annual pay rises. Therefore I have to find a lot of increased productivity.”

PEOPLE: the supply chain director can have responsibility for thousands of employees, ranging from highly paid management to those on the minimum wage in a distribution centre. Being able to connect with people at all levels within the organisation, influence, motivate and retain them, is essential. Today’s supply chain director recognises the need to put increased focus on developing people skills to match the scope of the function.

“The people aspect is the most important piece to me. Previously none of the team had been given any training in leadership; learning how to cope with stressful situations, people development, prioritising or decision making.”

OUTSOURCING: one way of managing labour costs and gaining new skills and capabilities is to outsource elements of the supply chain. All the executives contacted for this survey outsource some part of their operations. One business we spoke to outsources almost its entire operation, leaving a small head-office team to manage the outsourced relationships and make decisions on strategy and policy to meet the growth aspirations of the business.

The most common reasons given for outsourcing were cost; the core competencies of third-party logistics providers, including their ability to deal with employment relations; and the flexibility outsourcing gives growing businesses to take up extra space as and when required without commitment to increasing the asset base.

We encountered varying degrees of satisfaction with outsourcing relationships, particularly with regard to third-party logistics providers. On the negative side, there was frustration with lack of control over certain commercial aspects, the inability to manage people and get rid of bad practices. On the positive side, outsourcing operations and people management frees up time to concentrate on business issues. Those we spoke to quoted the same companies as models of outsourcing: DHL/Exel, Wincanton, Christian Salvesen, Unipart, Maersk and Kuehne + Nagel.

“By doing it in-house you can better manage your own people, get rid of bad practices, pick up advantages from scale and do things your own way.”

“They’re part of our business, we set them clear objectives and they deliver. They’re committed and deliver operationally.”

Building a strong relationship with the outsourced operation is crucial. One supply chain director argued that an outsourced operation should be no different from an in-house one; managed in the same way, with outsourced people treated as if they were employed directly.

Many of the executives contacted for this survey keep a team from the third-party logistics company in-house, involving them in strategy discussions so that they feel part of the team and have a sense of ownership.

The general consensus was that it is necessary to maintain some internal capacity to protect the business against union action and in order to develop their own people.

EMPLOYEE RELATIONS: The importance of good employee relations cannot be overestimated, especially in an environment where keeping costs to the minimum is an absolute necessity. The supply chain director needs to be able to communicate with people at all levels within the supply chain on a regular basis. Standing up and talking in front of 1,000 people in a distribution centre does not come easily to everyone, but it is a skill which must be learned,

especially if you have to deliver difficult news about reduction in available overtime, or the need to raise productivity with no increase in pay.

“You need to be able to present influence and propose a proper commercial case to your audience, whoever that may be. If you can do that, people will listen to you.”

TECHNOLOGY: with increasing dependence on technology, the supply chain director needs to understand how to apply technology solutions to make the business more effective. In some businesses, the supply chain director is also the chief information officer, which shows just how close the relationship between the two has become.

“Technology is fundamental to everything we do — it’s our nervous system.”

The supply chain director also needs to talk the same language as the systems providers to ensure that the increasingly costly and complex options on offer serve the needs of the business. In addition, the supply chain director needs to be able to sell the need for investment in this area to the board or IT investment committee.

STRATEGY: the supply chain director is responsible for the function’s strategy as well as its day-to-day operations. Strategic considerations include establishing growth requirements; assessing whether the current infrastructure is capable of meeting growth objectives; and creating an organisational design that ensures accountability and avoids unnecessary cost. The supply chain strategy also needs to be fully integrated with the overall business strategy and the pull of the market.

ENVIRONMENT AND CSR: the supply chain directors we spoke to recognise the importance of addressing environmental and related CSR issues in the supply chain. One stated that he needed to halve his function’s carbon footprint over the next six years. Another is spending a lot of time looking at waste and is currently designing new eco-friendly warehouses and lorries. Ethical sourcing is also a major concern.

“If you come up against child labour or serious health and safety concerns you have two options. You can just walk away and not challenge it, dealing a major economic blow to a small town. Or you can take the slow-burn approach of education to change their mindsets, encouraging businesses

to look after their employees and not to employ children. You must understand the issues and agree proper procedures within a reasonable timeframe for practices to be changed.”

FINANCE AND RISK MANAGEMENT: the supply chain director needs to take into account a range of financial and risk matters, including currency fluctuations, the cost of energy, and the length and security of the supply chain.

What next for the supply chain director?

The skills of the supply chain director can be transferred across sectors, but are they transferable into different functions? We believe that they should be. The core constituents of the role are much broader today than in the past; consequently the path to general management should be available to supply chain directors just as it is for those leading other functions.

“I THINK EVERYONE SHOULD DO A STINT IN SUPPLY CHAIN AS PART OF THEIR CORE DEVELOPMENT. YOU LEARN SO MUCH FROM THIS, AND I DON’T BELIEVE YOU CAN RUN A STORE IF YOU DON’T UNDERSTAND THE SUPPLY CHAIN.”

The career paths of those interviewed for this survey ranged widely. Some came up the pure supply chain route in retail and other sectors; others rose up through third-party logistics, manufacturing, finance, strategy, retail operations and general management.

“I don’t think I could do my job as well if I hadn’t spent time in retail operations beforehand, though I knew I didn’t want to stay there forever.”

Nearly all the executives we spoke to were seeking to gain experience in other areas beyond supply chain. Some were in supply chain roles specifically for developmental purposes in preparation for a move into general management.

“The time I’ve spent in this role has been incredibly helpful to me. I’ve been able to really get under the skin of the business and I’ve learnt so much — I’ve finally learnt how things work here.”

However, the reality is that few businesses seem prepared to take what they consider a risk of appointing a supply chain professional to a general management role, despite the fact that these executives have had responsibility for vast budgets and teams while making decisions that can affect the success (or failure) of a business. The supply chain director should be valued as more than a highly paid project manager who leaves a business when his or her job is done. Supply chain offers great scope and challenges, but companies must find a way of keeping talented supply chain directors who may have aspirations beyond their current role.

“My career choices are to look for a plc supply chain role, or join a smaller business as COO. I know that my current employer can't offer me anything else so when I've completed what I was brought in to do, I'll leave.”

Many retail businesses create silos in which skills are concentrated, rather than encouraging people to transfer their expertise across functions. We found that the supply chain directors who feel most confident about themselves and their marketability are those who have spent time in a number of functions. This means that not only do they understand what happens in the rest of the business, but they have developed relationships within other functions.

Some supply chain directors feel that the most logical next step for their career is to take on responsibility for retail operations. This can be seen in practice with David Potts at Tesco, Patrick Lewis at John Lewis Partnership and Lawrence Christensen when he was at Sainsbury and Safeway. To be able to step into this broader role, however, the supply chain director has usually spent time in the stores.

“I think that to really get to general management in retail you need to have had some exposure to trading or operations. Personally, I see many synergies between supply chain and operations; they are faced with similar issues and the core competencies required are also broadly similar.”

Asda and Tesco are examples of businesses that encourage staff to broaden their skills. As a result, the UK retail sector today is benefiting, with alumni from both businesses taking leadership roles at J Sainsbury, DSGi and HBOS, as well others who are playing leadership roles in international businesses such as Maxeda in The Netherlands, Coles Myer and Wesfarmers in Australia, and Loblaws in Canada.

Of course, not all supply chain directors want to leave the profession. A number still see supply chain as an attractive career path in its own right, with the best people being recognised for their contribution to an organisation through highly attractive remuneration packages and, in a few cases, having a seat on the board. We see this happening increasingly in the USA, but this trend has yet to cross the Atlantic. Private equity is another route opening up for supply chain professionals, where experience of operating “lean and mean” is highly valued.

Summary

Ten to fifteen years ago supply chain was barely recognised as a profession. This is changing for the better, but supply chain still lags behind other functions in retail in terms of recognition, remuneration and board representation.

No doubt supply chain leaders will continue to establish the profession and demonstrate the contribution that supply chain and logistics make to the commercial success of an organisation. They must be prepared to continuously challenge the perceptions of the function and extend their influence across the entire business, demonstrating collaborative behaviour, cross-functional thinking and effective leadership.

The leading industry bodies are playing their part through the establishment of approved training and qualifications for the profession, but the biggest impact on the future of the function will be made by the supply chain community itself.

About the authors



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Jonathan Smith is head of the European Retail Practice and head of the UK Consumer Goods & Services Practice. He is also a member of the Board Services Practice.

He has recruited chief executives and other board directors for many leading retail, business services and consumer products companies in the UK and internationally. He works extensively with quoted and private equity companies and also recruits non-executive directors across a broad range of industries.

Previously, Jonathan spent seven years in strategy consultancy primarily with Bain and Co, where he advised UK and international companies on corporate and business unit strategy. After several years at J Sainsbury plc he joined Somerfield plc as group development director.

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Previously she worked with two other leading international search firms, focusing on board and consumer appointments mainly for FTSE 100 companies.

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