

The Supply Chain Management Playbook

A guide to supply chain planning and operations to improve logistics efficiency.

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What is supply chain management (SCM)?



Supply chain management

The entire process of transforming raw materials into products and transporting them to their final destination. It also involves managing finances, data, logistics and goods throughout the process.

Well-executed supply chain management that streamlines the entire product journey from first mile, to middle mile, all the way to the last mile, optimizes the movement of raw materials through production, distribution and finally to the end customer.

Supply chain performance fueled by innovation and backed by the right strategy will give your business a competitive advantage. Planning and forecasting with efficiency in mind is key to [sustainable supply chain success](#). An efficient supply chain streamlines the process of getting products to market and ultimately to consumers.

Supply chain evolution

The global supply chain is ever-evolving. Businesses in the industrial, healthcare, automotive and many other sectors can learn from the rapid changes in the retail industry. For instance, many retailers have incorporated [omnichannel strategies](#) into their supply chains. This strategy offers a holistic approach to customer service and ensures a seamless customer experience.

Staying customer-centric is essential since demand forecasting and planning in supply chain management rely on consumer behaviour and expectations. For example, retail customers expect physical retail locations and their e-commerce counterparts to work together. They demand convenient services like the option to visit a nearby store to exchange goods that they purchased online. Therefore, businesses need to ensure that inventory is quickly available. Precise inventory management is an important part of the supply chain in any industry.



By 2030, analysts predict that 40% of freight shipments will move to nearshore markets, according to [Deloitte](#). In fact, 62% of manufacturers have already begun this transition.



Supply chain evolution in retail and beyond

Retail businesses that understand the evolution of the retail supply chain will be better equipped to adapt, plan strategically and gain an advantage over their competitors. Businesses in other industries can also modify retail supply chain trends, observe changing consumer behaviour and apply these takeaways to their own supply chain strategy.

[Learn more](#)

How to keep up with supply chain evolution

To keep up with consumer demands and the changing market, businesses will need to have a holistic view of their inventory and employ progressive inventory forecasting. They'll also need to work with innovative logistics partners who can provide flexible solutions that can scale up and down with their business.

Technology has become increasingly vital to both logistics and supply chain management. Businesses can also

keep up by paying closer attention to green supply chain management as well as efficiency. Sustainable facilities with automated unloading capabilities like [Purolator's National Hub](#) will be beneficial to all types of businesses as the supply chain continues evolving.

Businesses will also need to offer personalized services and experiences to attract and retain customers. Providing customized delivery is an invaluable way to consistently provide this type of experience. With [Purolator Your Way](#), customers gain more visibility into every shipment and can change their delivery preferences even once their items are in transit.

Why your business requires supply chain operations



To gain a clear view of the business process

To identify inefficiencies

To be more competitive

To help balance supply and demand

The three foundations of a supply chain

Supply chain performance can be subject to internal and external risks. For example, relying solely on offshore may be cost-effective. However, geopolitical instability or port congestion on your suppliers' side leaves your business vulnerable to inventory shortages. With that risk in mind, your supply chain strategy should include strong relationships with suppliers and working with multiple (possibly nearshore) suppliers.

By focusing on the following three foundations—strategy, service and value—you can achieve supply chain performance success.

Strategy



- Ensure that your planning and policies work harmoniously so you can keep customers happy and manage internal costs, even during high-volume periods
- Align on strategy (including company objectives and your customers' expectations) to satisfy your C-suite and all stakeholders

Service

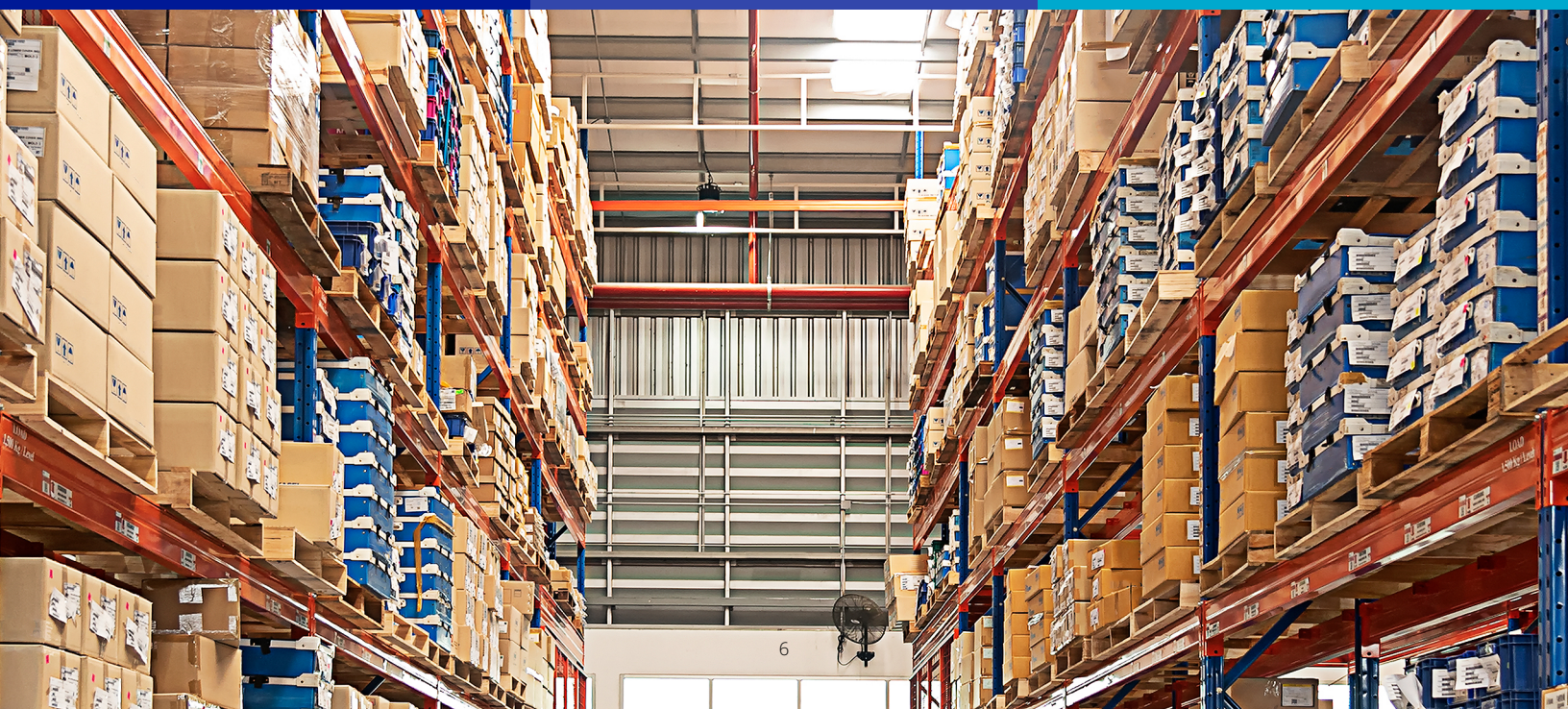


- Focus on customer satisfaction and loyalty with reliable delivery, high-quality manufacturing, superior customer service, a seamless returns policy and well-stocked high-demand items
- Ensure consistently efficient order fulfilment and consider intermodal transportation for deliveries if needed

Value



- Use cost-effective reverse logistics with a centralized returns centre and an easy returns process
- Analyze warehouse operational costs and inventory management on a regular basis
- Consider sourcing from nearshore or offshore suppliers depending on your customers' needs, manufacturing requirements and market demand



The six types of supply chain management models

These six primary supply chain models act as the foundation of a business' supply chain. To determine which model best suits your business, you'll need to identify your business needs and goals, conduct a thorough supply chain process analysis, assess customer needs and understand your competitive landscape. Below is a breakdown of each model and the business needs it fills as well as examples of how to select a model depending on your industry.



Agile

- Involves tracking demand and quickly changing production according to demand
- This type of supply chain management requires market sensitivity, a network base, virtual integration and process alignment
- E-commerce retailers will benefit from a dynamic supply chain founded on the agile model
- **Best for** businesses in industries with lots of demand variation



Continuous

- Focuses on continuous and steady delivery
- Stable regardless of the market or seasons
- Considered one of the most traditional models
- **Best for** businesses that sell through vendors in industries with a lot of supply and demand stability



Custom-Configured

- A mix of agile and continuous supply chains
- Works well in consistent markets with little to no seasonal demand variation
- **Best for** businesses that offer consumers highly customized product options



Efficient

- Focuses on efficiency in terms of inventory management and use of production and labour
- **Best for** business in competitive markets where deliveries are key to keeping them ahead of competitors



Fast

- Helps businesses produce varied products quickly
- Involves quickly setting up new fast supply chains as trends change
- **Best for** businesses that sell trend-based products with short market lifecycles



Flexible

- Multiple suppliers used, along with a stocking algorithm to ensure season-appropriate inventory, allows for increased flexibility
- Requires flexible planning, part segmentation and precise stocking algorithms
- **Best for** businesses that experience both high and low demand depending on seasons (e.g. holidays, back-to-school, etc.)

Considerations for healthcare supply chain management

The healthcare supply chain includes procurement, supply management and fast and secure delivery to customers. Healthcare businesses face the added layer of working with insurance companies, healthcare providers and regulatory agencies. They also deal with unpredictable fragmentation and disruption. From prescription drugs to computers, these businesses have a wide range of inventory to manage. Many find it challenging to get their delivery needs and supply chain to work harmoniously. Agile supply chain management is often suitable for these businesses since they may experience surges in demand.

Healthcare logistics solutions

Considerations for retail supply chain management

Businesses in this industry may be cost-conscious because of inflation and the high cost of shipping. Agile and flexible supply chains work well in retail by providing a solid foundation for adapting to changes in demand. Developing a strong retail supply chain strategy is important for a number of reasons. A sound strategy helps retailers manage inventory costs, avoid running out of stock, satisfy customers and get ahead of competitors.

Retail and e-commerce logistics solutions

Considerations for industrial supply chain management

Industrial suppliers and manufacturers often have unique logistics needs. With that in mind, it's critical to properly manage earlier stages of the supply chain. These businesses might opt for an efficient supply chain model since it focuses on optimizing inventory, labour and production.

Small and medium-sized businesses in this space can also get ahead of the competition by building specialization into their logistics or using the custom-configured model. By partnering with logistics provider that offers customized industrial solutions, they can get shipments delivered right on time and build long-lasting relationships with customers.

Industrial shipping solutions



“Adopting a new operating model for an effective supply chain transformation can be a game changer”.

KPMG Powered Enterprise

Considerations for telecommunications supply chain management

Shipping high-value and fragile tech items presents a number of challenges. Whether they operate in the business-to-business (B2B) or business-to-consumer (B2C) space, these businesses need to focus on fast and secure shipping, as well as tracking visibility. For security, businesses should consider investing in tamper-proof packaging and cushioning to prevent damage in transit. They also need to partner with shipping and logistics providers that offer specialized services to meet their specific business needs.

Services like [Purolator Your Way](#) allow customers to track their packages and customize their preferences to help avoid missed deliveries. Meanwhile, [Mission Critical](#), an expedited shipping solution, also offers enhanced tracking visibility along with 24-hour access to shipping specialists.

Telecommunications shipping solutions

Considerations for small and medium-sized businesses

The most suitable type of supply chain management will depend on what types of products a business offers. However, efficiency is critical to the success of small and medium-sized businesses. They need to optimize their inventory management to avoid overproduction, which can lead to extra costs and wasted warehouse space.

It's also crucial for these businesses to have a strong relationship with their delivery providers. These partners need to provide fast and reliable shipping to help small and medium businesses compete with larger companies in their industries. With the support of the right partner, businesses can focus on the specialized products and personalized customer service that sets them apart.

Small business shipping solutions



“[A survey conducted by McKinsey & Company] suggests improvements in companies’ ‘decisions making’ speed at a rate of five to 10 times when focusing on agility. Those without the agility focus improved by only two times”.

Shopify



Essential core elements of successful supply chain management



1 Planning

- Crucial for efficient manufacturing and inventory management
- Analytics and supplier forecasting used to precisely gauge demand and avoid over or underproduction
- Essential for making sure your business has products in stock and keeping customers happy

2 Sourcing materials

- Find and work with reliable suppliers and vendors that offer high-quality but cost-effective goods
- Gather information on delivery times, how many orders suppliers and vendors can handle and what capabilities they offer



3 Manufacturing

- Turns raw materials into finished products
- During times of market volatility, having a variety of vendors comes offers many advantages
- Focuses on producing goods that meet customers' needs

4 Logistic delivery

- Involves finished products and raw materials
- Includes invoicing and returns
- Ensures on-time delivery to both customers and other warehouses
- Many companies work with outside logistics providers



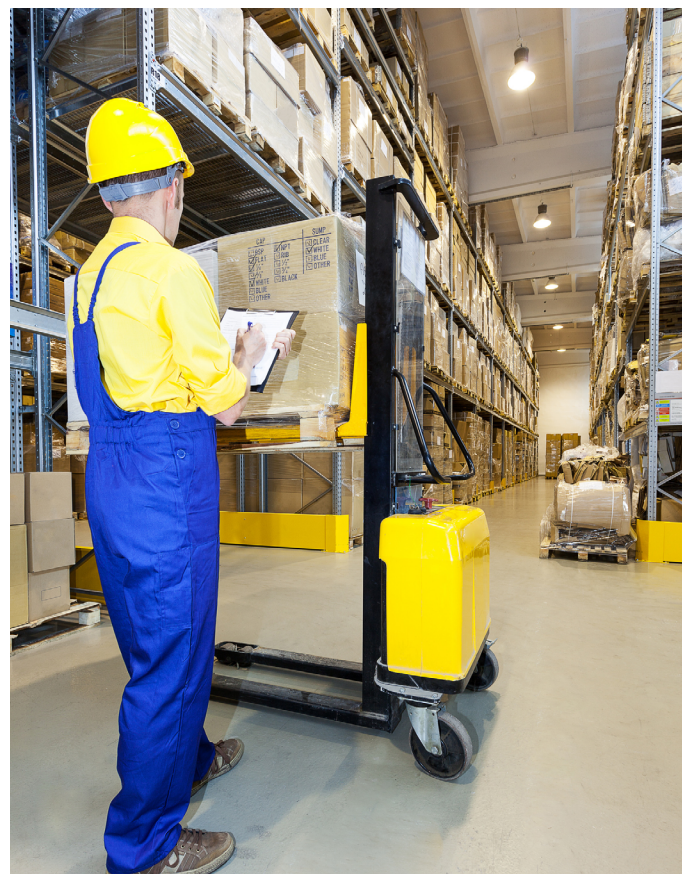


5 Returns

- Products moving backwards through the supply chain (from the end consumer back to your business)
- Consider green supply chain management and ways to increase sustainability as you develop your returns process
- Returns management is a crucial part of the e-commerce supply chain because it improves the customer experience and encourages repeat patronage
- Focus on a seamless experience and customer satisfaction (especially in terms of refunds)
- Recycle, repair or resell products or parts to keep profitability and sustainability up

6 Inventory management

- Proactive inventory management ensures that your business can fulfil customers' needs on time
- Use progressive inventory forecasting (which relies on historical data) to more accurately predict inventory needs
- Progressive inventory forecasting is crucial for retail and e-commerce supply chains since these industries are subject to seasonal peaks and lows in demand
- Industrial and relatively peak-proof businesses still need accurate inventory management to handle global supply chain disruptions



Supply chain management process flows

The way in which materials ultimately reach a customer's door can be broken down into various supply chain flows. By optimizing each flow, your overall supply chain strategy will operate more smoothly and your customers will be happier. It's important to understand these flows, especially as you work with multiple vendors and third-party providers, which can make your supply chain more involved and complex.



Procurement

- Identify any raw materials needed for manufacturing
- Work with a range of suppliers and vendors to procure raw materials with a focus on affordability and material availability
- Reduce dependence on a single supplier and opt for local vendors when possible. This will reduce the impact of changes in market demand and global supply chain disruptions



Manufacturing

- Ensure the availability of appropriate raw materials according to customer demand and inventory forecasting
- Use supply chain forecasting to predict demand and avoid over or under manufacturing specific products, which can lead to additional storage costs and wasted warehouse space



Products

- Goods moving from the supplier or manufacturer (as raw material) to the end customer
- E-commerce customers likely do not have much visibility into this flow, which makes the next flow (information flow) all the more important
- Includes reverse product flow (or returns)



Information

- Information about goods as they're being transported
- Can include quotes, delivery status, invoices, purchase orders and more
- Vendors and third-party delivery providers need to be included in this flow, as it may also involve customer complaints and other important information



Documentation

- Crucial to keeping track of both information and goods in transport
- Includes tracking documentation like bill of lading, packing list, [certificate of origin](#) and export license



Finances

- Payment for both products and raw materials
- Can be broken down into logistical costs like transport, storage and administration



Value

- Involves value chains, the string of related activities that takes a product from manufacturing all the way to final use and ultimate disposal
- Products earn additional value throughout the production, distribution and retail processes
- An example of a value flow in retail is the value added to a product once it reaches a retail location by virtue of being more readily available to consumers



Logistics

- Must be managed well to avoid shipping delays, dissatisfied customers, damaged products and associated expenses
- Includes inbound and outbound transportation, demand forecasting, inventory management and working with third-party logistics providers



Risk

- Internal and external risks can happen upstream or down in the supply chain and often result in financial losses
- **Main types of internal risks:** manufacturing disruptions, planning and control, changes in business structure and lack of contingency planning
- **Main types of external risks:** unpredictable or miscalculated demand, supply chain disruptions, physical risks (warehouse and storage facility conditions) and business risks (e.g. restructuring and financial instability)
- Risks are connected to the product, finances and information flows



Inventory management

The issue:

Too much inventory leads to extra storage costs and wasted warehouse space

The impact:

- Warehouse performance lowered
- Unsold stock costs must be covered
- Stock may have to be sold at a loss

The issue:

Too little inventory leads to customers turning to competitors for similar products

The impact:

- Out-of-stock items
- Dissatisfied customers due to inability to meet demand

A data-based and progressive approach to inventory will ensure your business has the right balance of products available.

Use your customers' needs and market demand as a foundation for your inventory management. From there, you can make strategic logistics decisions at a minimal cost or no cost to your business. Here are some inventory management best practices that are especially important in the face of changing demand and peak periods:

• Regional shared warehouses

Products are closer to customers, delivery is faster, you can save costs on space and access specialty services as needed.

• Vendor-managed inventory

Supplier tracks and manages inventory levels.

• Demand management

Use historical sales data and seasonal patterns to forecast customer demand and align your supply chain to meet those projections.

• Demand sensing

Use real-time indicators like open orders and daily sales to predict near-term demand.

• Just-in-time inventory

Control your costs by stocking only what you need to meet the immediate demand. Have a backup plan, especially if you rely on one supplier for key parts.



Purolator worked with Legrand, a company that provides and manufactures electrical devices, to optimize their distribution. By understanding the demands that Legrand needed to meet, we were able to offer freight shipment consolidation. This allowed Legrand to reduce delivery times for their B2B and B2C sectors at no extra cost.

[See the case study](#)





Keep your products moving efficiently and sustainably

Purolator's National Hub helps businesses scale as they grow. With technology-based solutions and sustainable operations, we unload, sort and deliver a high volume of parcels even during peak periods.

The National Hub is:

- Equipped with the Siemens Remote Underbelt Unload System (RUBUS) to unload nearly 12,000 parcels per hour
- Strategically located near four major highways for faster deliveries
- Sustainable with battery-powered forklifts and high-albedo concrete to increase energy efficiency
- Designed to meet the [Toronto Green Standards](#) program

[Learn more](#)



Transportation optimization

If you need transportation service across Canada or the U.S., you may be at the mercy of your carrier's pickup and delivery schedules if they don't have multiple, flexible shipping options and the expertise to get your shipments to, from and within Canada.

Transportation optimization best practices to keep your business ahead of the competition:

- **Route optimization**
Software can calculate the most efficient route and match available trucks/drivers to streamline deliveries, save time, reduce mileage and lower fuel costs and also help lower emissions to help meet sustainability targets.
- **Distribution centre bypass**
Use regional centres to accommodate local needs for more direct travel. Your business can save seven to 14 days, reduce costs and better manage inventory with the right distribution centre changes.
- **Intermodal options**
Rail, for example, is 15% to 18% less expensive than trucks for long distances and is also fuel-efficient and environmentally friendly.



Learn four ways to optimize your freight shipping strategy and streamline your freight.

[Get started](#)

- **Hassle-free cross-border shipments**
Partner with a delivery provider that has [cross-border shipping expertise](#). They'll help your business secure customs clearance, find a customs broker, fill out paperwork accurately and categorize goods correctly for quick and seamless shipping.
- **Consolidation**
Combine smaller shipments, pack multiple orders in the same carton, ship multiple cartons together, palletize shipments or use a full truck. The goal is to cross the border as a single unit to reduce clearance times and fees. This [can bring freight shipping costs down](#) by as much as 10%.



Learn to reduce inefficient processes, lower costs and improve your supply chain.

[Learn more](#)



Cost efficiencies

How to manage cost efficiencies with supply chain management to offer competitive prices:

- **Horizontal collaboration**
Businesses in the same industry share supply chain processes and assets, such as warehousing and transportation. Be wary of information disclosure, trust issues and clarity over who's in charge.
- **Vested outsourcing**
Create relationships in which each party has a stake in the others' success.
- **Manage freight costs**
Ensure understanding of freight classification used to determine charges and extra fees for services (e.g. border clearance, wait time, storage, packing and extra fuel) which can be up to 40% of freight expenses.

What you should know about reverse logistics and returns management

Reverse logistics can be costly and complex even for major retailers. It's essential to [understand reverse logistics](#) and to make it a part of your supply chain planning.

Returns continue to rise

- ✓ Courier services estimated [60 million parcels of returned goods](#) from the 2021 holiday season.
- ✓ In 2022, [around 16.5% of retail purchases in the United States were returned](#) (including online and in-store purchases).
- ✓ Although returns aren't expected to rise as much as they did in 2022, [retail returns are predicted to exceed \\$62 billion \(USD\) in 2023](#).

When managing returns, consider how you can provide customers with a seamless and efficient returns process. Here are some practical tips for optimized returns:

- ✓ **Flexibility in scheduling**
How often do you receive returns? Daily, weekly or biweekly? Ensure that your scheduling accommodates the frequency of returns.
- ✓ **Centralized returns**
Designating a single warehouse for returns is 20 times more efficient than multiple points. It's also more cost-effective.
- ✓ **Border consolidation**
Consolidate shipments for quicker [customs clearance](#) and reduced costs.
- ✓ **Integrated returns authorization**
Include pre-printed return labels with shipments or approve returns using a web-based system.
- ✓ **Multi-channel visibility**
Provide customers with complete visibility into the status of their returns online.
- ✓ **Sustainability**
Find second lives for returned goods by repairing them or breaking them down into component parts for resale.



What you need to know about sustainable shipping

We've researched changing customer expectations around sustainable shipping to help you understand what your business can do to stay competitive.

[Learn more about sustainable shipping](#)

Keep your returns moving

The ultimate goal for your business is to sell returned goods (whole or partial), so your process may include repairs and recycling as well as traditional returns. The good news is many returned items can be resold across a range of industries. For example, about [70% of high-end apparel](#) can be resold. Meanwhile, around [30% of opened consumer electronics](#) can be refurbished and then resold.

To take advantage of resale opportunities, you'll need to ensure that they get back to your warehouse quickly and undamaged. This is where a partnership with a logistics provider is key. Purolator offers [Special Handling Services \(SHS\)](#) to help irregularly shaped and overweight packages move smoothly through your supply chain.

Proper packaging is also crucial. It will keep your items secure in transit. By preventing damage in the first place, your business can avoid additional returns from customers. Purolator can advise you on how to package fragile items, pallets, oversized fragile items and more with our [easy-to-use packing guide](#).

In addition to making sure your items are secure and ready for shipment, you'll need to have an established returns process that gives your business more flexibility for both peak and off-season planning. Think of the post-holiday season when returns are at all-time highs.



"It's not just about having a good product or service. It's about creating an amazing overall customer experience, and the supply chain is instrumental in delivering the brand promise if it has deep insights into customers' needs and expectations."

Robert Barrett, Supply Chain Leader at KPMG in the U.S. ([KPMG Powered Enterprise](#))



Hassle-free reverse logistics for your business

Purolator offers reverse logistics services that focus on sustainable solutions, faster refunds for your customers and getting your returns back in inventory quickly. Here's what you can expect from Purolator's returns management:

- Seamless returns for better customer experiences and increased brand loyalty
- Fast returns shipping so your customers can get their refunds faster
- E-commerce partnerships complete with shipping platform integrations
- Electric vehicle deliveries for more sustainable transport
- Flexible return options for your business and your customers



Get in touch with the Purolator team for hassle-free reverse logistics.



Supply chain priorities, challenges and opportunities

As businesses identify their supply chain priorities, they'll need to consider ongoing issues such as:

Labour and warehouse shortages

The challenge:

[International truck driver shortages](#), inflation and geopolitical events have all contributed to [labour shortages](#). Understaffed businesses are at risk of production delays and inaccurate inventory reports. Additionally, port congestion around the world has led to full warehouses with inventory that isn't moving and no room for incoming goods.

Solutions and opportunities:

Re-evaluate your approach to hiring, talent retention and compensation if your business is understaffed. To combat warehouse overloads, look for a digitized warehouse management solution. It should be focused on data-based planning and forecasting. This will also give your business an opportunity to identify other performance gaps and consider adopting more technology-based solutions.

Inflation

The challenge:

[Inflation inevitably impacts the supply chain](#) by increasing expenses. This includes the costs of essential operations such as labour and transportation.

Solutions and opportunities:

[Working with different suppliers](#) is an opportunity to grow your business in other regions and gain a competitive advantage locally.

- [Over 90% of respondents](#) to a McKinsey survey said they recently invested in digital supply chain solutions.
- [58% of respondents](#) from that same survey cited inventory optimization as a top priority.

Sustainability challenges

The challenge:

Many businesses have committed to sustainability or even net-zero goals. However, geopolitical uncertainty presents new and evolving challenges on the road to more eco-friendly operations. Changing climate change regulations can also be difficult to keep up with.

Solutions and opportunities:

[Use AI and data to increase supply chain visibility](#) and track environmental, social and governance (ESG) goals. Here, you'll have an opportunity to increase innovation across your business and get ahead of competitors.

Port congestion and bottlenecks

The challenge:

In 2021, congestion in the Suez Canal had freight containers at a standstill for nearly a week. Businesses were forced to think of ways to future-proof their supply chains and logistics in case of unforeseeable obstacles.

Solutions and opportunities:

Optimize your process. Ocean freight is a necessity for many industrial manufacturers and suppliers. You can ensure faster shipping by using standardized documentation for international shipments. You should also consider digitizing your processes with a cloud supply chain management solution for increased visibility.



Strengthen your supply chain

Learn how to improve your supply chain strategy and management so your business is prepared to face challenges and unexpected changes within your industry.

[Learn how to build a resilient supply chain.](#)

The benefits of supply chain forecasting

At a glance, supply chain forecasting might seem like looking into a crystal ball. However, it's an essential part of your business' success. Well-executed forecasting helps ensure that you have the right amount of supply to meet the current demand without the high cost of overproduction or the price of customer dissatisfaction.

Supply chain forecasting entails examining supply and historical product demand data. You might look at specific elements including:

- Product turnover rate
- Warehouse storage costs
- When warehouses receive products

You can use different methods of supply chain forecasting depending on your industry and whether or not you have significant seasonal peaks and lows.



“Tracking inventory velocity over time involves being able to monitor bestsellers and staying ahead of production—even as demand changes.”

Shopify



Stay ahead of the competition with supply chain planning

Improved planning is foundational to your business' success. Here's what you need to consider to help your business remain competitive:

- 1 Inventory and production management**

Be sure that you have enough visibility into the early stages of production. Progressive inventory forecasting and management will help keep high-demand items—and the space needed to store and distribute them—readily available.
- 2 Transportation and cross-border optimization**

Partner with a delivery provider with a wealth of cross-border shipping experience. Their network, brokers and services should make shipping simpler. Consider providers that offer services to suit your unique needs. This might include [Special Handling Service \(SHS\)](#), dangerous goods shipping and [Mission Critical](#).
- 3 Cost efficiencies**

Reduce costs by monitoring them at every stage of your supply chain. This can entail renegotiating contracts with vendors and suppliers or branching out to partner with new ones. You might consider partnering with a single source supplier and a shipping partner that can sweep the dock. This will help ensure more efficient deliveries to improve customer satisfaction.
- 4 Returns management**

Proper [returns logistics management](#) creates a better customer experience. It's also an integral part of any circular supply chain. Repurposing and repairing returned products is an effective way to make your business more sustainable.
- 5 Commodity classifications**

Classify each shipment correctly to avoid significant delays. This is especially important when [shipping dangerous goods](#) such as gas, [lithium batteries](#) and cleaning chemicals across borders.
- 6 Supply chain analytics**

Along with visibility, more companies are using big data analytics to improve their [supply chain strategy and performance](#). This allows businesses to gain useful insights for a more strategic approach to distribution, procurement and supply chain management.



"...in the real world, cost optimization and resiliency can't really be separated. Both must be prioritized,"

Thomas O'Connor (Senior Director Analyst with Gartner Supply Chain in an interview with Sourcing Journal)



Ready to optimize your supply chain?

Get in touch to learn how we can help your business with customized solutions, including import and border clearance management, warehousing and fulfillment, transportation and returns processing.

[Get in touch](#)

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