Exposing Data Across Your Company to Drive Efficiencies and Quality
Panelists Introductions

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Manufacturing Challenges
& Industry Trends
Challenges Facing Manufacturing

Manufacturers Experience Constant Change

- **Global Uncertainty**
  - COVID-19
  - Monetary Policy and Trade Tension
  - Commodity Costs
  - Intellectual Property

- **Disruptive Technologies**
  - Business Process Automation
  - Advanced Manufacturing Technologies
  - Connected Devices
  - Artificial Intelligence

- **Business Model Pressures**
  - Commoditization
  - Margin Protection
  - Channel Complexity and New Marketplaces
  - Quality and Compliance
  - Safety and Sustainability

- **Rising Expectations**
  - Digital Experience
  - Self-service Engagement
  - Insights Driven Enterprise
  - Information On-demand
Trends in PMI level in H2 are key indicators for manufacturers

**US Purchasing Managers Index (PMI)**

- **September PMI:** 61.1% up from 59.9% in August
- Indicates leveling expansion in the economy
  - **Expanding indices:**
    - New orders
    - Production output
    - Inventories
  - **Contracting / Slowing indices:**
    - Employment (workforce shortages)
    - Supplier deliveries

**Takeaway:** Demand remains strong, while supply and employment are constrained
Trends in Manufacturing

**Digitalization**
- Digital IIoT: Connecting industry objects with sensors and software
- Smart Manufacturing: Real time data shared across the value chain
- Business Processes: Review, enhance and digitize business processes where possible

**New Business Models**
- Ecosystem Partnerships: Enable growth in developing markets such as electrification
- Equipment as a Service: Businesses pay for assets through recurring operating charges
- Data Monetization: Revenue from Service support through predictive analytics

**Total Customer Experience**
- Connected Channels: Customers, partners, and employees connected via proper platform
- Visibility / Transparency: Customers want to have traceability of their orders
- Fast and Easy: Customers compare speed and simplicity to Amazon experience

**Business Resilience**
- Sourcing Strategies: Localize, and source from multiple suppliers
- Upskill Workforce: Train and develop talent on use of digital tech
- Automation: Repetitive tasks automated to make work safer
## Trends in Distribution

<table>
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<tr>
<th>Digitalization</th>
<th>New Business Models</th>
<th>Total Customer Experience</th>
<th>Resource Improvements</th>
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<td><strong>M&amp;A</strong></td>
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**Logistics Transparency**
Customers want to have traceability of their orders

**Connected Channels**
Customers, partners, and employees connected via proper platform

**Horizontal Marketing**
Diversity product portfolio to sell what customers are buying

**M&A**
PEs running distributors independently to min risks and max margins in long run

**E-commerce**
Omnichannel approach to serve customers

**IoT**
Using sensor data to streamline processes at distribution centers

**Resource Improvements**

**Upskill Workforce**
Train and develop talent on use of digital tech

**Automation**
Combat labor shortages, and eliminate repetitive human tasks via automated warehouse solutions
Business Transformation Trends

“Applying technology to the activities of the commercial function could generate up to $300 billion in additional industrial revenue”

McKinsey, “Accelerating revenue growth through tech-enabled commercial excellence”

“84% of manufacturing executives believe differentiated experiences that customers increasingly expect can boost their competitive advantage”

Accenture, “Industrial Consumerism”

“Future ready manufacturers are 9.7x more likely to be offering and expanding service based revenue streams vs. unprepared manufacturers”

Salesforce, “Trends in Manufacturing Report”

“66% of manufacturing companies cited attracting and retaining talent as a top concern over the last eleven quarters”

National Association of Manufacturers, “Manufacturers Outlook Survey”

“98% of manufacturing companies cite reliable data and integrations as a critical top priority”

Forbes, “The State of Enterprise Data Integration”
POLLING QUESTION

Which functional areas are involved in your Digital Transformation initiative today? Choose all that apply

- Design / Engineering
- Manufacturing Operation
- Quality Management
- Supply Chain
- Customer/Field Service
- Customer Experience
First and largest manufacturer of optical sensing solutions

We are the instigators of the possible
Technologies

What we make:

Spectrometers, multispectral cameras and spectral sensors

Light sources, fiber optics and accessories

Software and advanced analytics (algorithm development, chemometrics, machine learning)

Digital tools (cloud deployment)

Sub-systems and turn-key systems

Biomedical & Life Sciences
  Blood Gas Analysis
  Cleanliness Monitoring
  Environmental
  Food & Agriculture
  Industrial & Process
  Material Identification
  PCR and PoC Diagnostics
  Process Monitoring
  Protein, DNA, RNA Quantification
  Research & Science
  Safety & Security
  Wave Illumination
  Wound Imaging
PANEL DISCUSSION
POLLING QUESTION

How Is Your Organization Approaching Digital Transformation?

- We are leveraging a Modern Cloud Platform
- We are connecting our existing Legacy Systems
- We are starting or are in the middle of our Digital Transformation
- We are not planning to do Digital Transformation
AI-powered cloud platform for Quality and Safety management solutions

- MARKET SURVEILLANCE
  - Complaint Management
  - Field Service Connector

- QUALITY MANAGEMENT
  - APQP
  - Audit
  - CAPA
  - 5 Why RCA
  - Change Control
  - Equipment
  - Investigation
  - NC
  - Product Inspection

- SUPPLIER MANAGEMENT
  - Audit
  - On/Off-Boarding
  - Accreditations
  - Deviations
  - SCAR
  - 5 Why RCA
  - Portal
  - Inspections
  - PPAP
  - Document Exchange
  - Supplier Ratings
  - Score Cards
  - Permit to Work

- RISK MANAGEMENT
  - Audit
  - Risk Register
  - Process Inspection
  - JSA
  - Permit to Work
  - Investigation

- WORKFORCE DIGITALIZATION
  - Document Management
  - SOP Enforcement
  - Training
  - Change
  - Learning Portal
  - LearnAbout Safety

- HEALTH AND SAFETY
  - Injuries, Vehicle, Security, Property
  - Claims Management
  - Safety Observations
  - Near Miss
  - Investigation
  - 5 Why RCA
  - Regulatory Forms
  - Inspections
  - JSA
  - Permit to Work
  - Management of Change
  - Toolbox Talk

- ENVIRONMENT & SUSTAINABILITY
  - Spills and Releases
  - Sustainability
  - Permits
  - Regulatory Library
  - Notice of Violation
  - Audit

- INTEGRATIONS
  - CRM
  - ERP
  - HRMS
  - LIMS
  - MES
  - MOM
  - PLM
  - Others

- CONNECTIVITY
  - INTEGRATIONS
  - CRM
  - ERP
  - HRMS
  - LIMS
  - MES
  - MOM
  - PLM
  - Others

- PLATFORM POWERED BY
  - Analytics
  - Dashboards, Reports
  - Collaboration
  - Community
  - Communication
  - Mobile
  - Validation
  - Artificial Intelligence

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THANK YOU