CSO's Role in Times of Uncertainty

Report of the CSO Survey 2012

Roland Berger Strategy Consultants

Institute of Management
University of St.Gallen

Report of the CSO Survey 2012
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I. Study Overview

Purpose, method, and sample

Report of the CSO Survey 2012
Study overview

Joint Study by the Institute of Management at the **University of St. Gallen** and **Roland Berger Strategy Consultants**

PURPOSE

> Understanding of role, background, behavior, agenda, and benefits of CSOs

> Identifying current developments and major changes compared to 2011 study

> Building/further strengthening CSO-Community

PARTICIPANTS

> Targeted at the strategy heads of the 250 largest companies in DACHLI

> 54 CSOs participated in the study (22 % response rate)

Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

Report of the CSO Survey 2012
Authors and contact information

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Please cite the report as follows:
Menz, M.; Müller-Stewens, G.; Zimmermann, T.; Lattwein, C. 2012. CSO's Role in Times of Uncertainty, Report of the CSO Survey 2012. St. Gallen/Munich. University of St. Gallen/Roland Berger Strategy Consultants.

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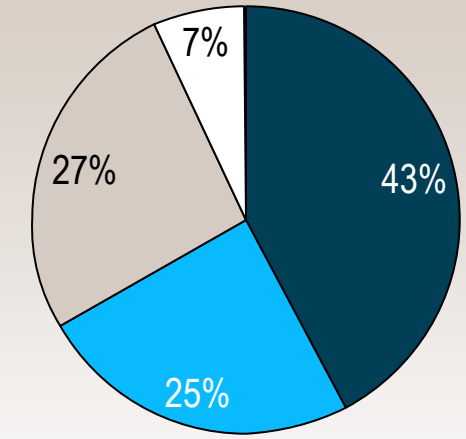
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II. The Role of Chief Strategy Officers

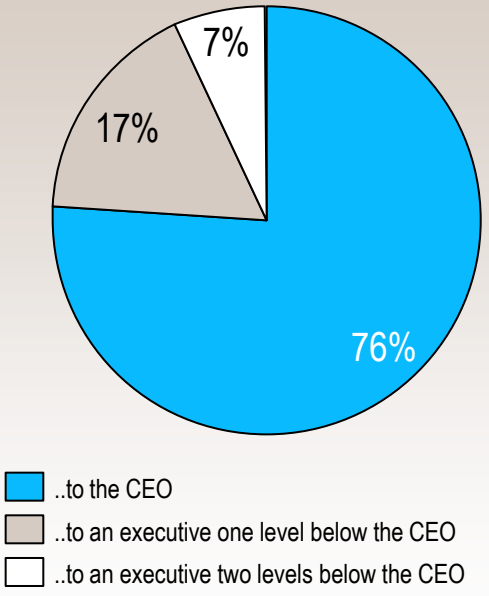
Key insights of the study

Development of the CSO Role – Firms are seeking outsiders with direct CEO access

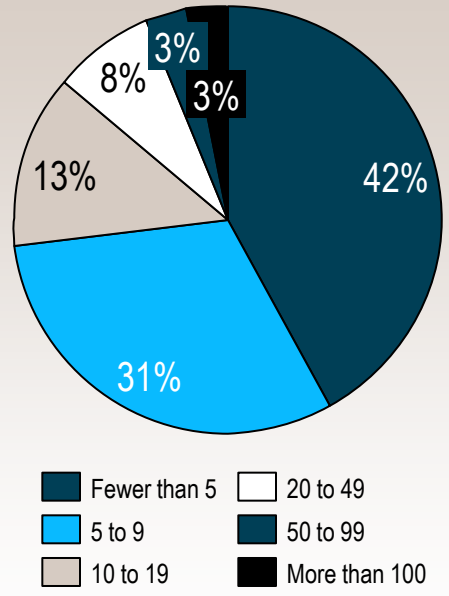
CSOs firm-specific experience



CSOs are primarily reporting to..



No. of employees in the strategy department



Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

Chief Strategy Officer Survey 2012: Six Insights

Insight 1 Although **uncertainty** is **increasing**, CSOs require for a **leaner** strategy process

Insight 2 High performing firms see **megatrends** primarily as an **opportunity**

Insight 3 **Shifting tasks** in times of economic downturns are one of the pain points in strategic decision-making

Insight 4 Importance of almost all CSO tasks has **significantly increased** compared to last year

Insight 5 High performing firms focus their **collaboration** efforts to **selected functions**

Insight 6 Standard approach for **measuring impact** of **strategic decisions** is not yet established

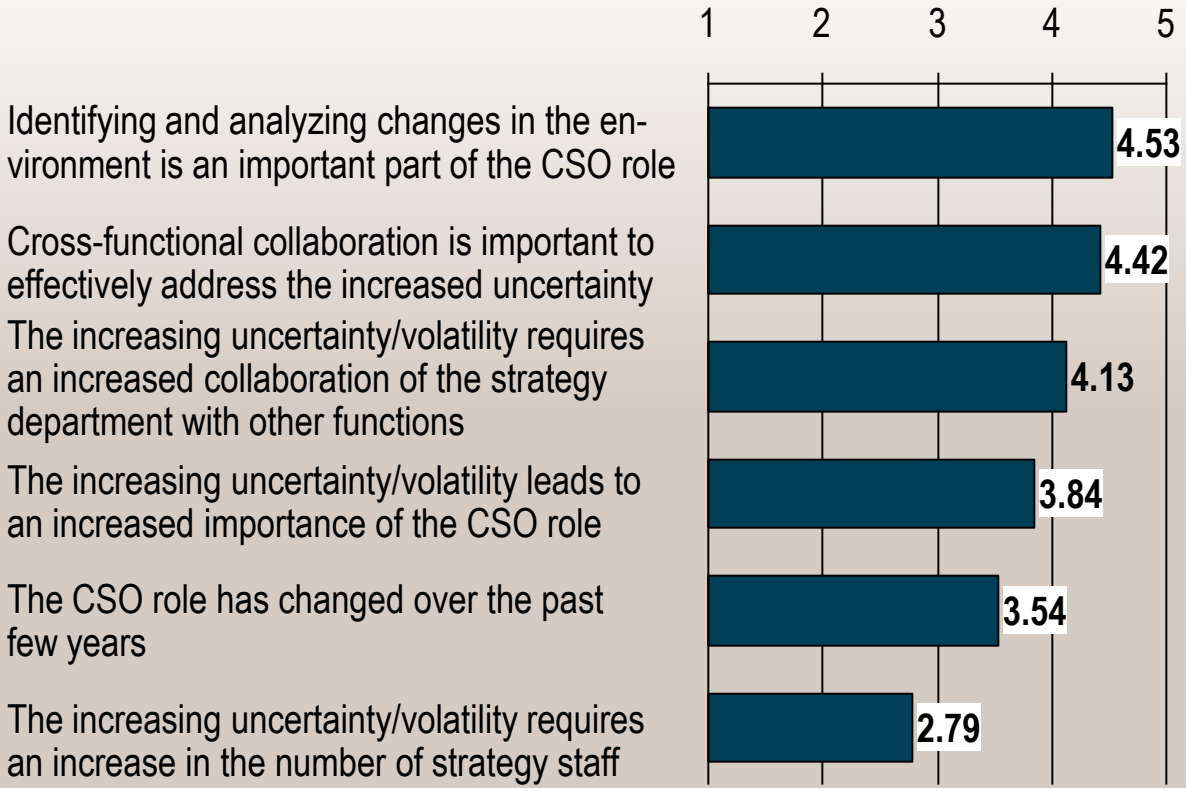
Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

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Although uncertainty is increasing, CSO's require for a leaner strategy process

Uncertainty's effect on the CSO role



1 = To no extent 5 = To a very great extent

TAKEAWAYS

> The increasing uncertainty and complexity has substantial **implications** for the CSO role

> Particularly, it requires both analyzing **environmental changes** and **cross-functional collaboration**

> While the **CSO role's importance is likely to increase** due to the increased uncertainty, this will not affect much the size of strategy departments

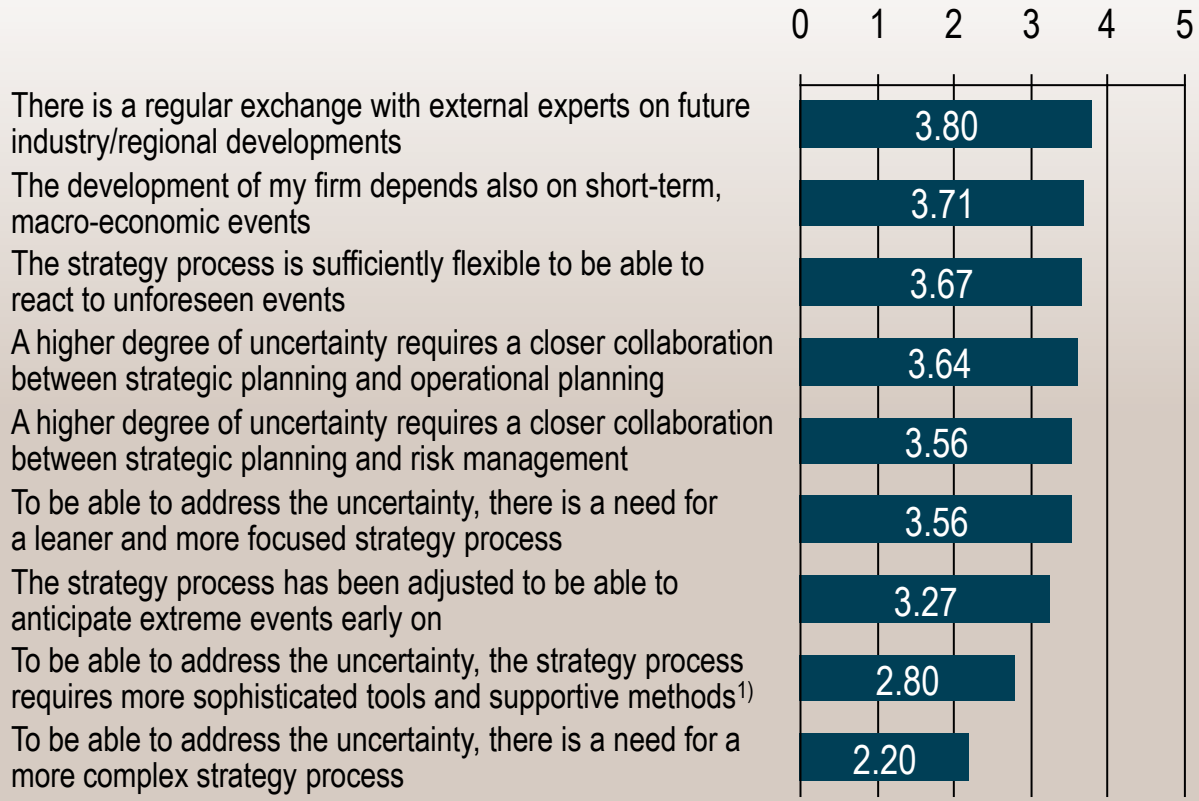
Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

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One implication of uncertainty is the closer collaboration between strategic and operative planning as well as with risk management

Uncertainty's effect on the strategy process



1 = To no extent 5 = To a very great extent

1) e.g., financial modeling

TAKEAWAYS

> There is a high level of consensus regarding the impact of **uncertainty** on the firm's development

> The **collaboration** of strategic planning with **risk management** and **operative planning** will be critical

> The increased uncertainty and complexity requires a **more focused** and thereby **leaner strategic** planning process

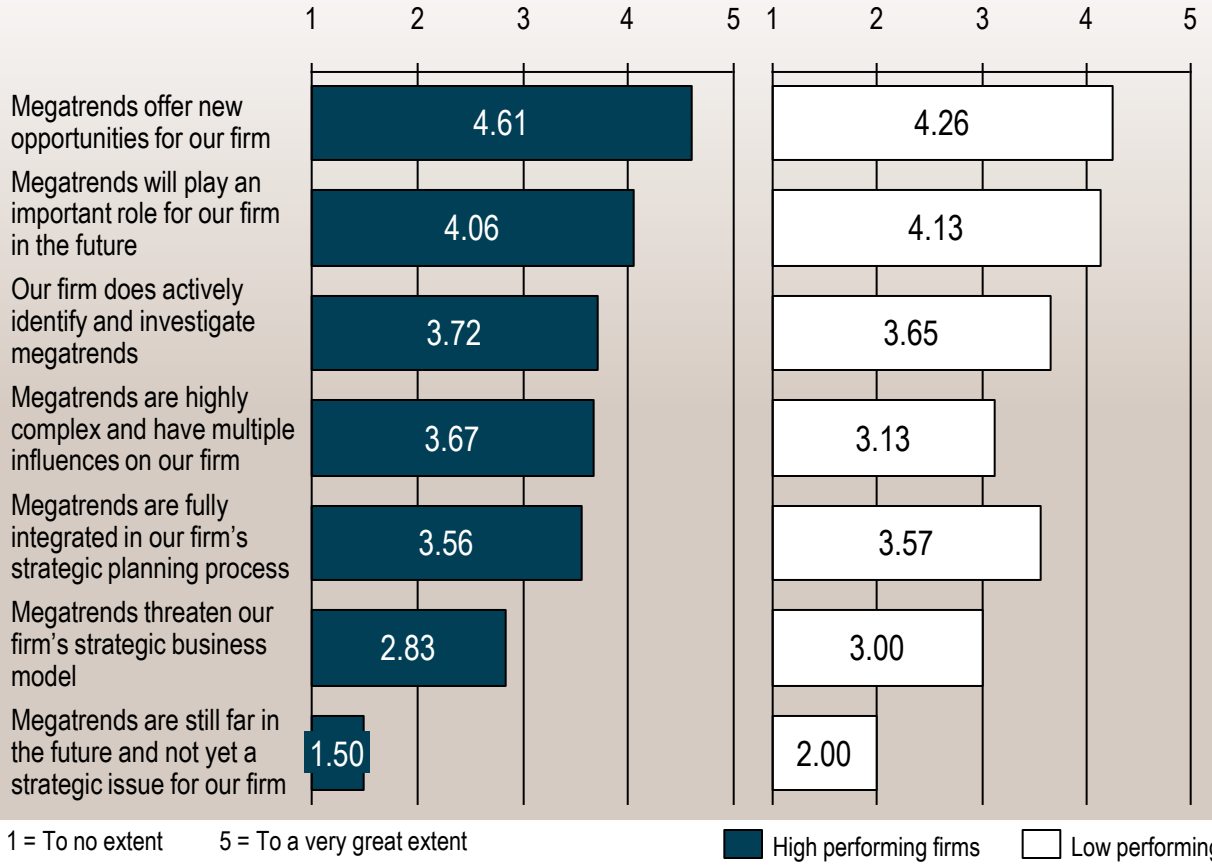
Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

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High performing firms see megatrends primarily as an opportunity

The influence of megatrends on the strategy process



TAKEAWAYS

> High performing firms have a **longer-term orientation** and a **more optimistic picture** of the future than low performing firms

> High performing firms see megatrends as an **opportunity** more than low performing firms do (whereas low performing firms see megatrends as a **threat** more than high performing firms do)

> High performing firms **integrate** megatrends more in the **strategic planning process** than low performers

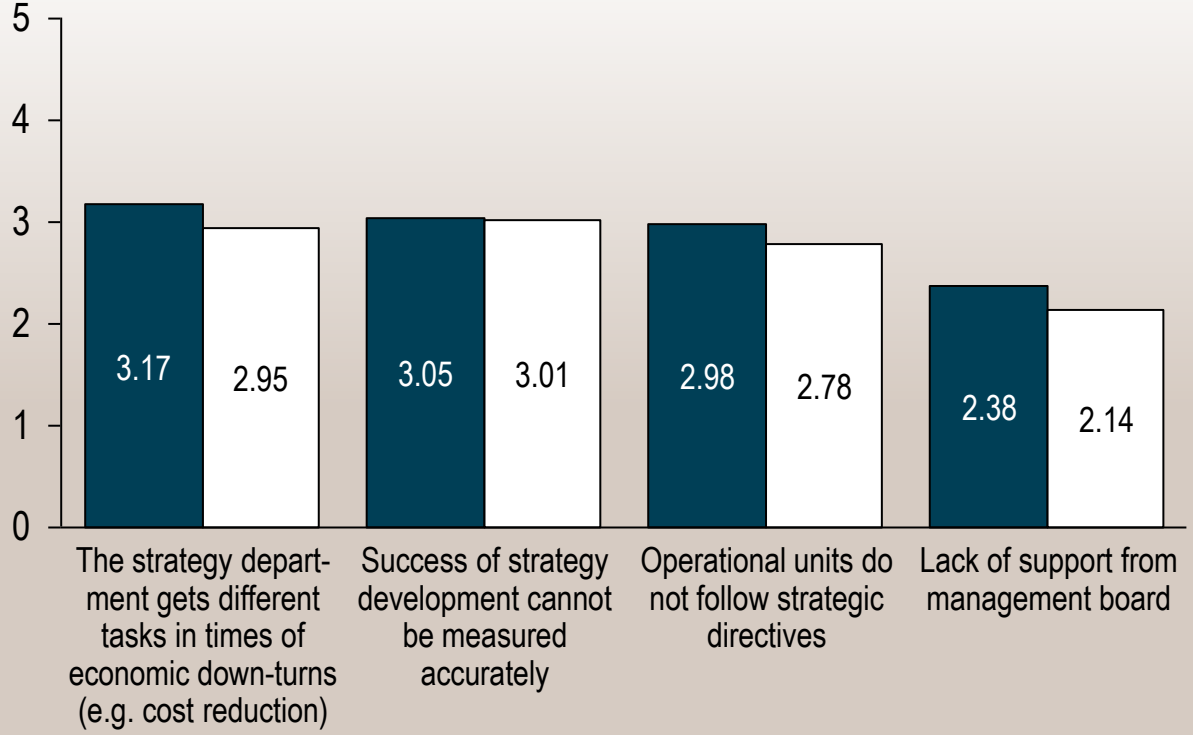
Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

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Shifting tasks in times of economic downturns are one of the pain points in strategic decision making process

Hurdles and pain points of the strategy process



1 = To no extent 5 = To a very great extent 2012 2011

KEY QUESTIONS

> Do you frequently experience that predefined **responsibilities** are **adjusted** in the short run?

> Does your organization have a standardized approach to **measure the success** of strategy development accurately? If yes, how does it work?

> Do these hurdles and pain points reflect your own experience? Do you see additional **hurdles** and **paints points** in the strategic decision-making process?

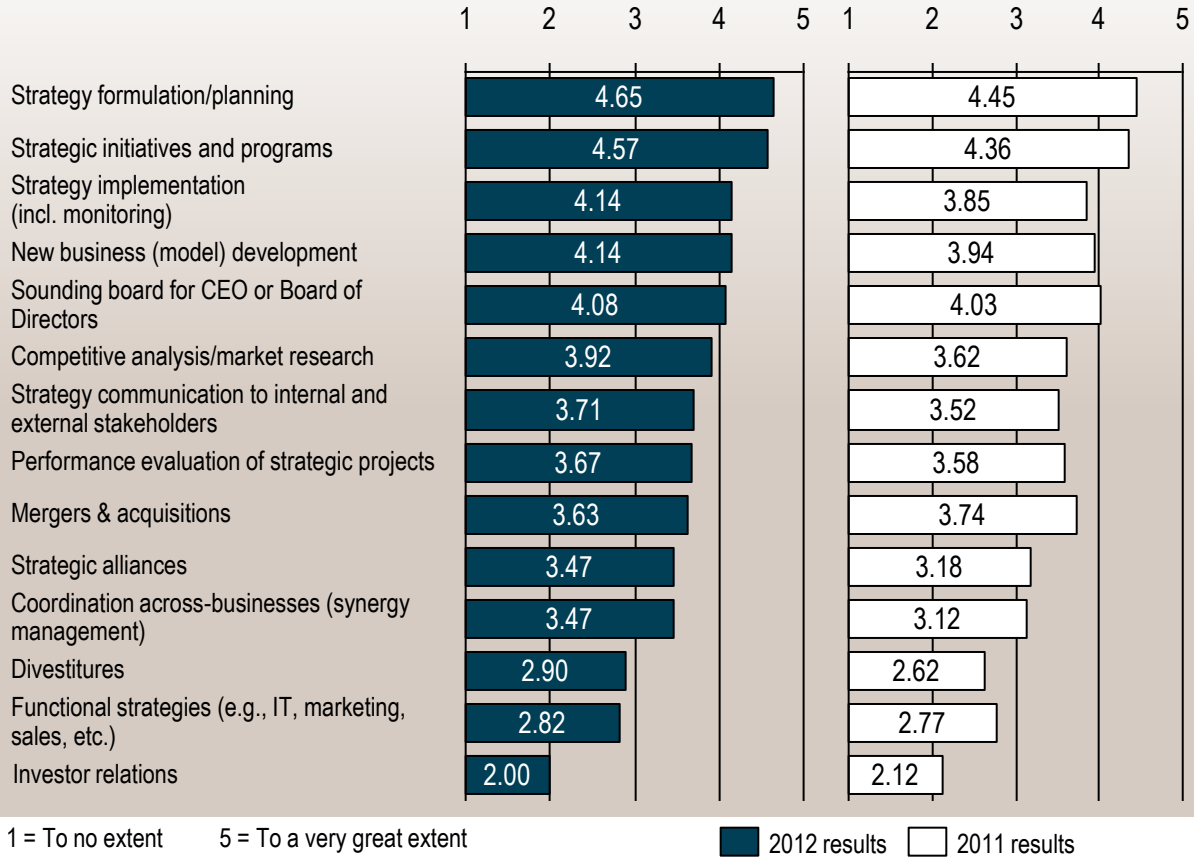
Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

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Importance of almost all CSO tasks has substantially increased compared to last year

Importance of CSO's activities



TAKEAWAYS

> While almost every activity **gained relevance** compared to last years survey, **M&A tasks** are considered less relevant for the CSOs

> Firms **optimize** the value captured from their existing portfolios by **coordinating activities across businesses** to realize synergies or by **divesting businesses**

> In 2012, CSOs tend to focus more on activities related to the **strategy process**, particularly on **strategy implementation**

Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

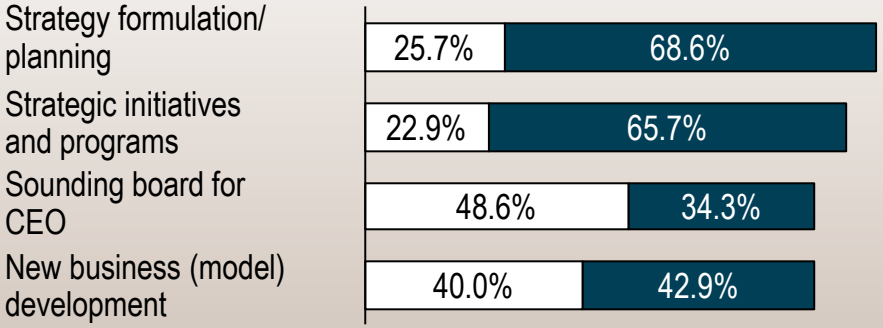
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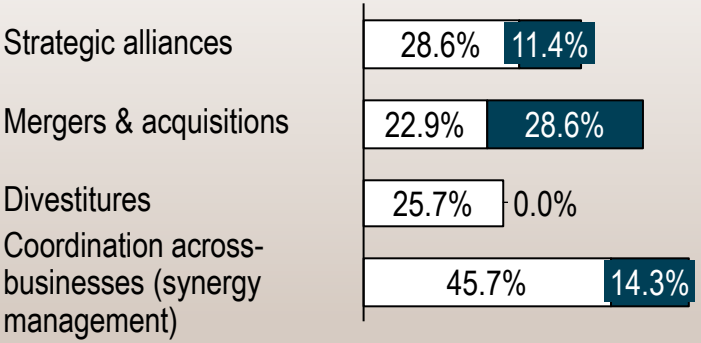
Besides corporate development, process management is a key focus of the CSO role

% CSOs considering activity important

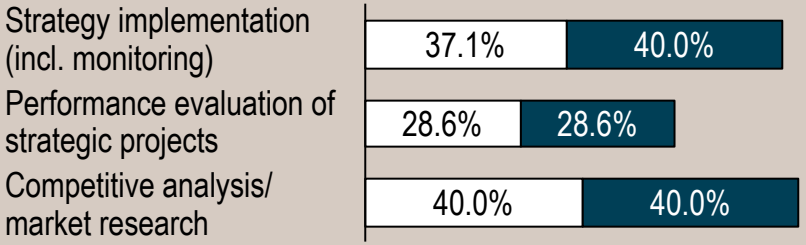
"CORPORATE DEVELOPMENT"



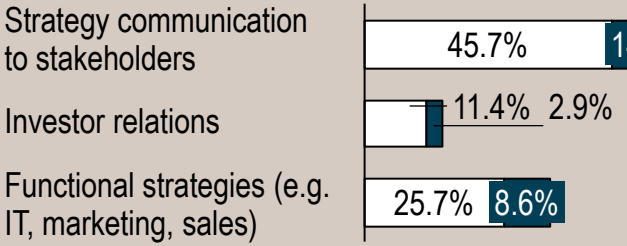
"PORTFOLIO MANAGEMENT"



"PROCESS MANAGEMENT"



"CEO ASSISTANCE"



Important Very important

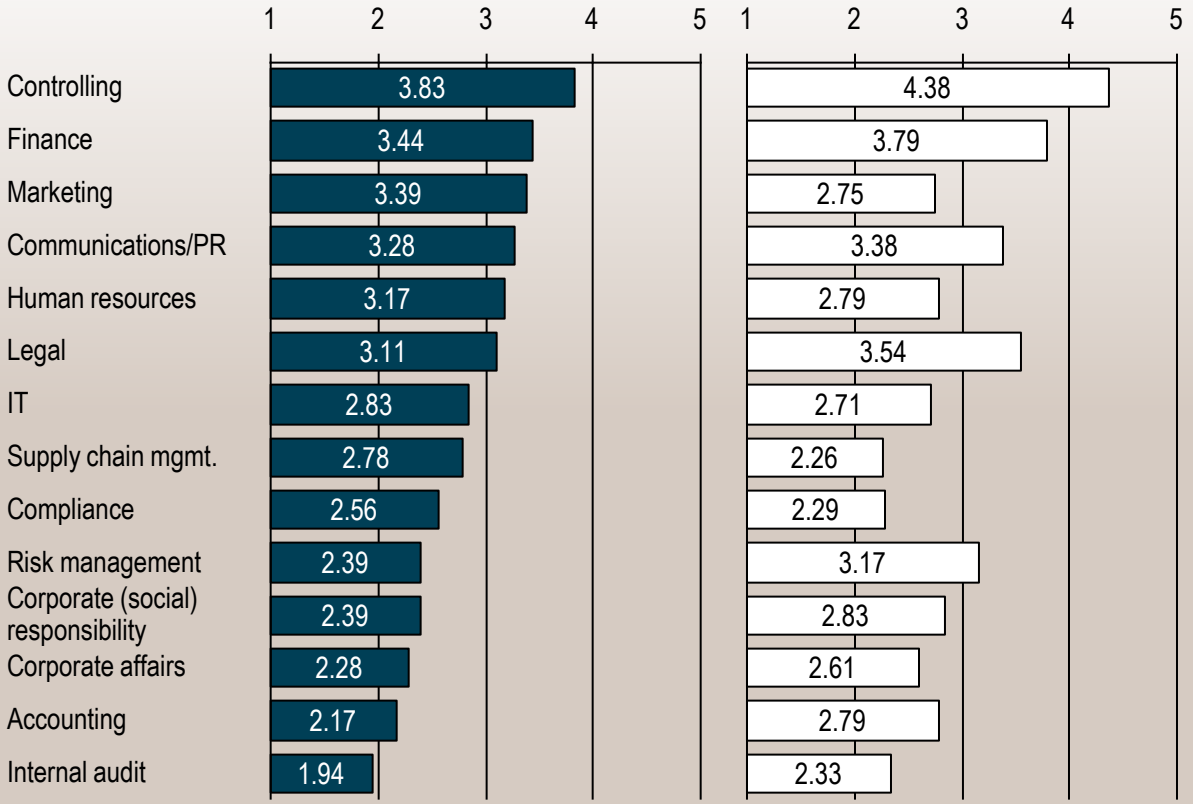
Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

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High performing firms focus their collaboration efforts to selected functions

Collaboration with centralized corporate-level functions



TAKEAWAYS

> High-performing firms focus their cross-functional collaboration efforts much more on certain **selected functions** than low-performing firms

> Strategy departments of high performing firms collaborate more with functions that are **top-line** oriented (e.g., marketing); vice versa do the low-performing firms concentrate on **bottom-line** functions (e.g., risk management, accounting)

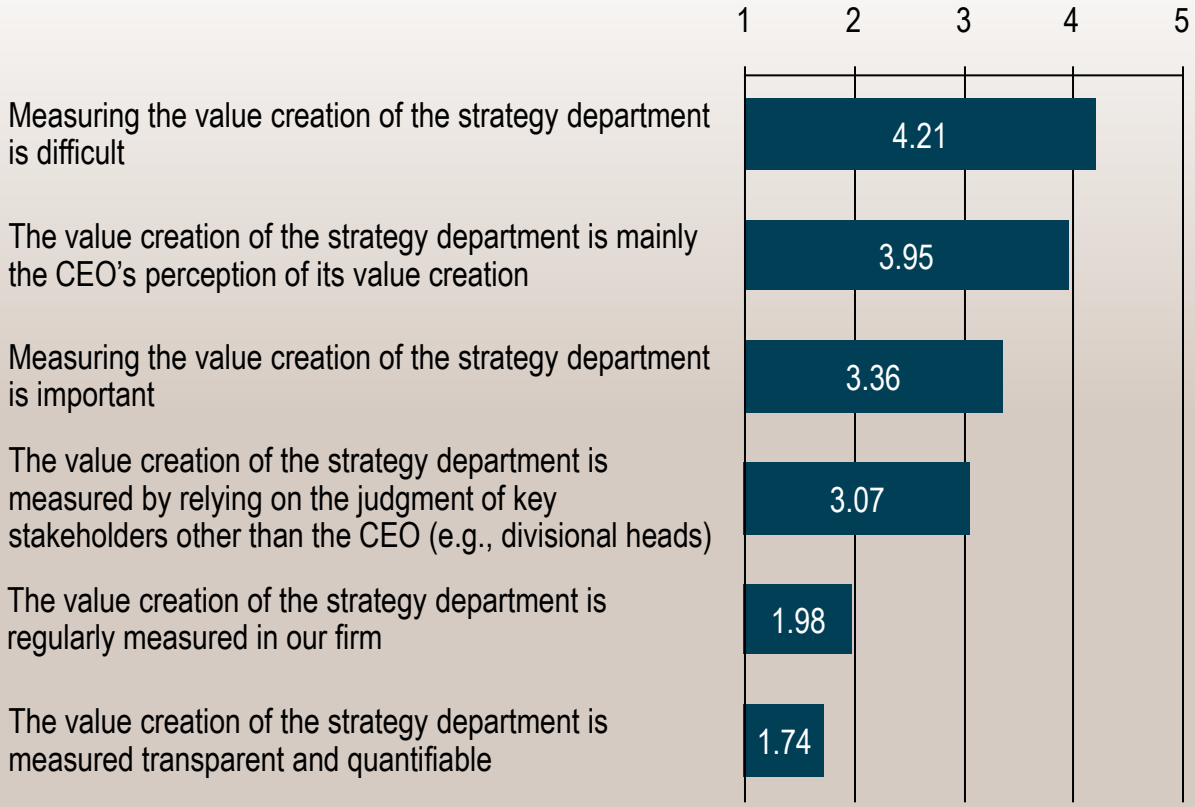
Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

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Standard approach for measuring impact of strategic decisions is not yet established

Measurement of the department's value creation



1 = To no extent 5 = To a very great extent

TAKEAWAYS

> Value creation is currently primarily measured by the **CEO's perception**

> The need for a **standardized** way of measuring the strategy department's value creation is clearly addressed, but seen as a **highly difficult task**

> Most firms currently **fail** in **establishing** a transparent and quantifiable way of measuring the impact of strategic decisions on value creation

Source: University of St. Gallen; Roland Berger Strategy Consultants (CSO Survey 2012)

III. Chief Strategy Officer Survey 2012

Complete overview of study results

Detailed overview of the study method

Sample 2012: 54 respondents (2011: 90 respondents)

Sample analysis:

> Comparison of the 2012 results with the previous year

> Analyses of subgroups of the 2012 sample (where applicable):

Industry subgroups

> Classification of the sample into five industry groups: Financial services, retail & consumer products, industrial sector, life sciences, services

Firm performance subgroups

> Multi-item average of CSO's assessment of their firm's performance in 2011 relative to their competitors (growth in sales, growth in profitability, EBIT, ROE, and financial gearing)

> Classification of high vs. low performers (median split)

Strategic decision quality subgroups

> Multi-item average of CSO's assessment of their firm's quality of strategic decisions

> Classification of companies with high vs. low strategic decision quality (median split)

Organization design subgroups

> Multi-item CSO's assessment of their firm's centralization of strategic decision-making

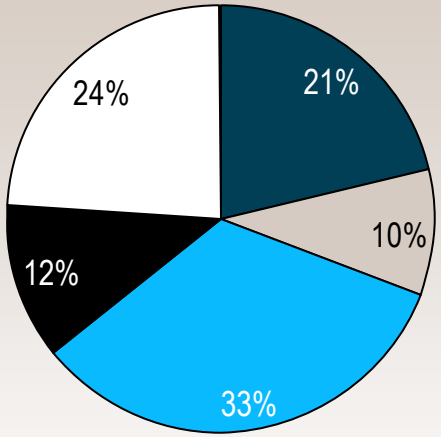
> Classification of companies with centralized vs. decentralized strategic decision-making

Firm size subgroups

> Classification of the sample into large (>25'000 employees), medium (5'001 to 25'000 employees) and small (5'000 and less employees) companies

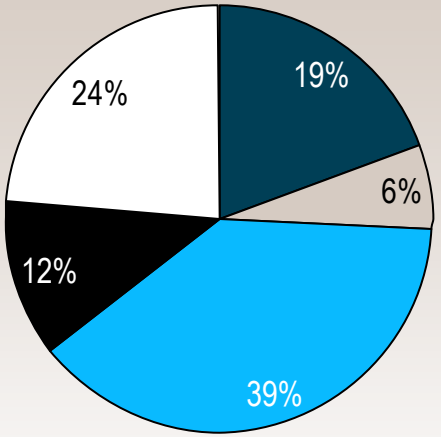
Profile of the participants: Industries

Sample distribution: Industry sectors 2012



- Financial Services
- Retail and Consumer Products
- Industrial Sector
- Life Sciences
- Services (Media, Comm., Transportation, Logistics)

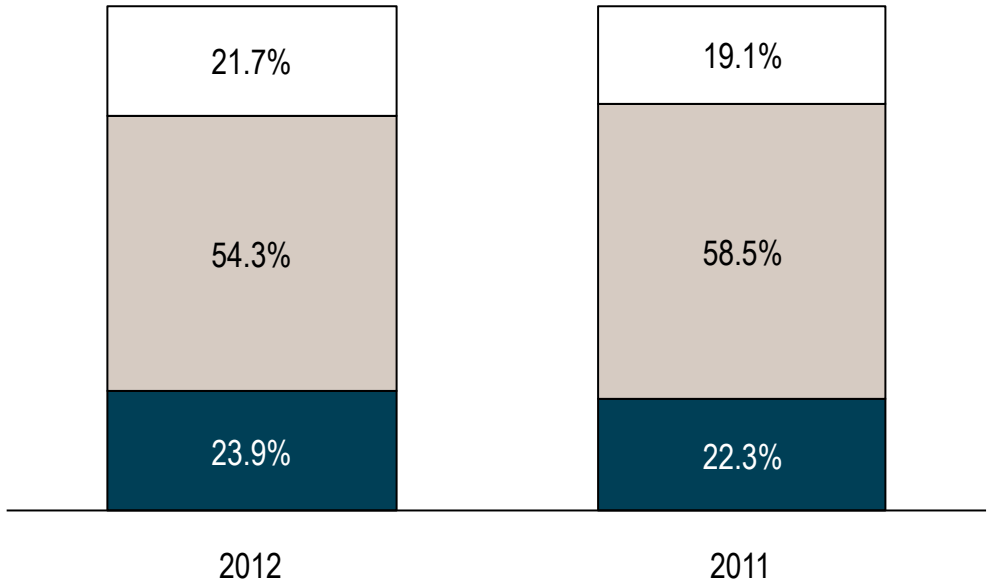
Sample distribution: Industry sectors 2011



- Financial Services
- Retail and Consumer Products
- Industrial Sector
- Life Sciences
- Services (Media, Comm., Transportation, Logistics)

Profile of the participants: Firm size

Sample distribution: Firm size (No. of employees)

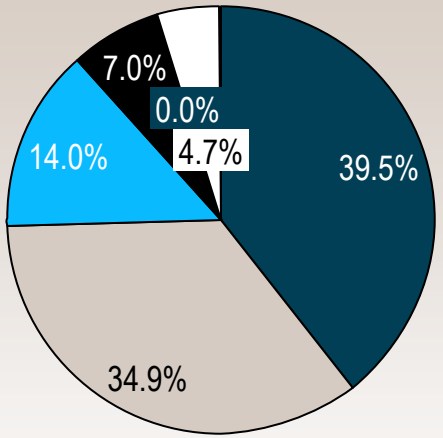


More than 50,000 | 2,500 - 49,999 | Fewer than 2,500

Mean: 20'904 employees (2012), 33'103 employees (2011)

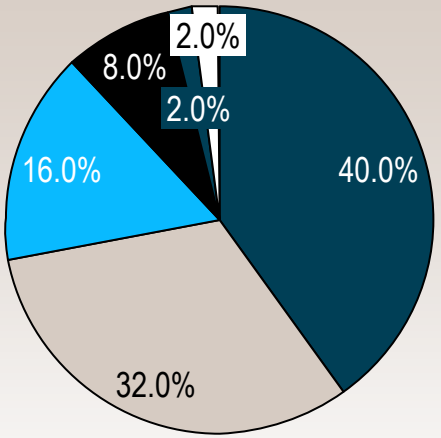
Profile of the participants: No. of employees in the strategy department

No. of employees in the strategy department 2012



Fewer than 5
20 to 49
5 to 9
50 to 99
10 to 19
More than 100

No. of employees in the strategy department 2011

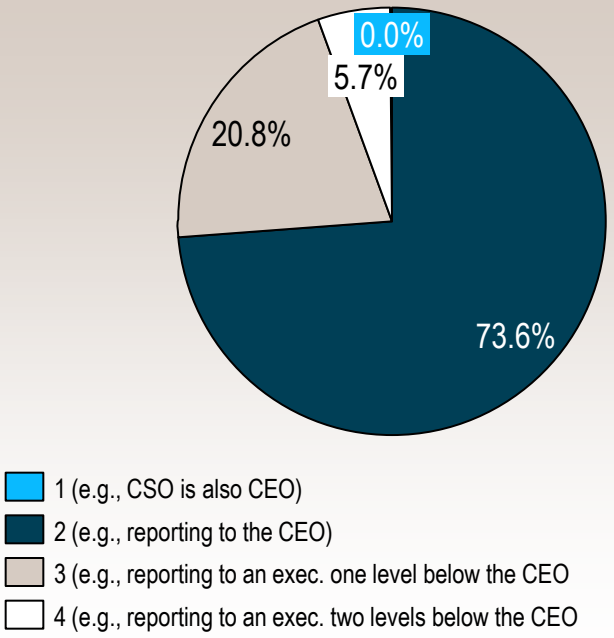


Fewer than 5
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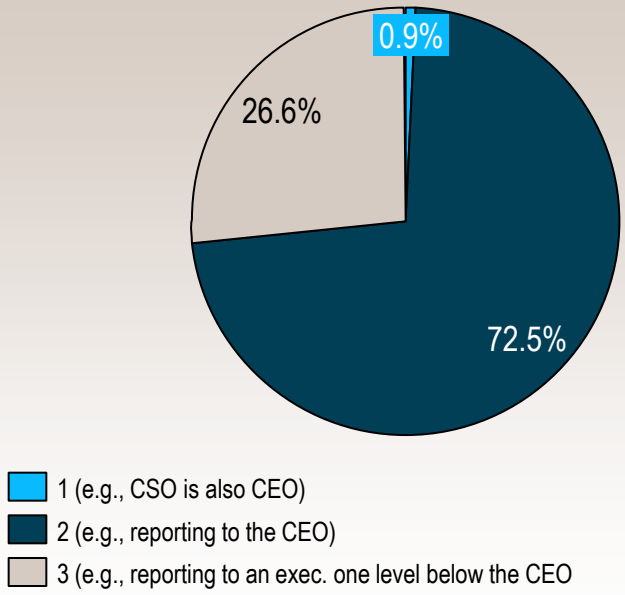
General aspects of the CSO role

What is your level of hierarchy (CEO = 1)?

CSO's level of hierarchy 2012

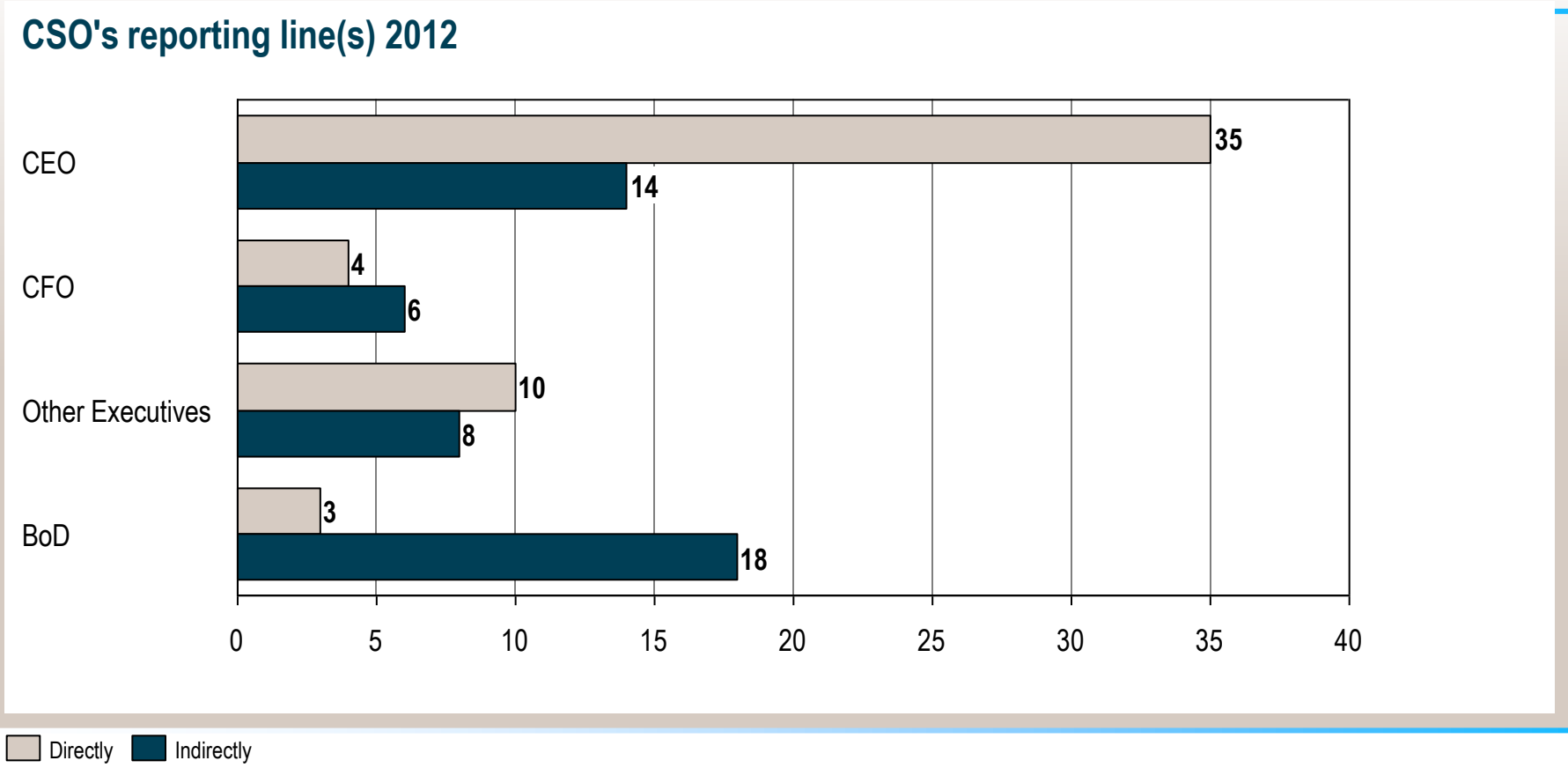


CSO's level of hierarchy 2011



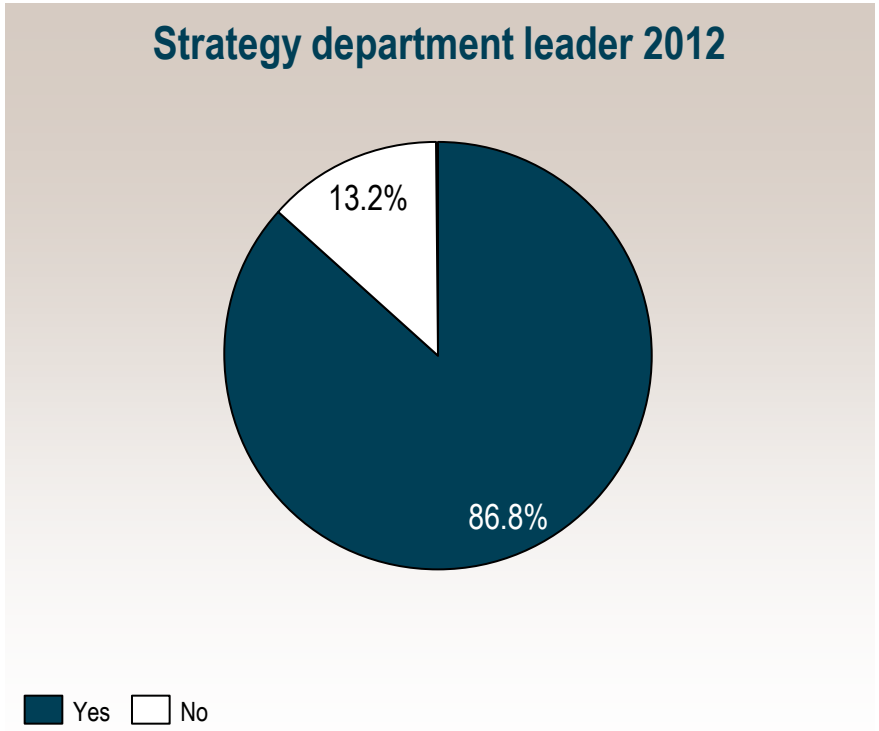
General aspects of the CSO role

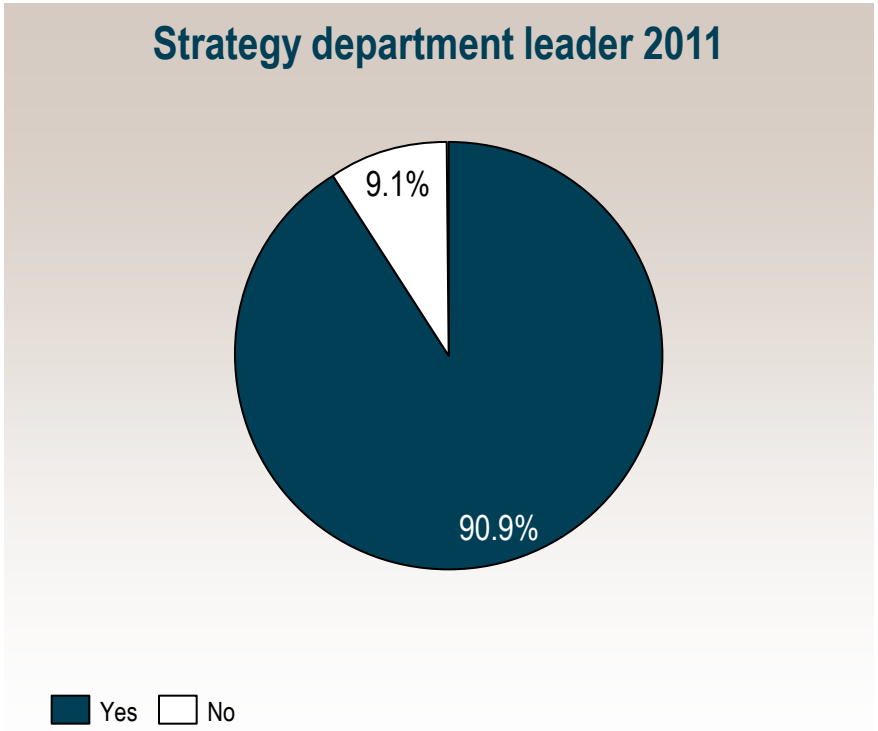
To whom do you report directly/indirectly



General aspects of the CSO role: All Firms

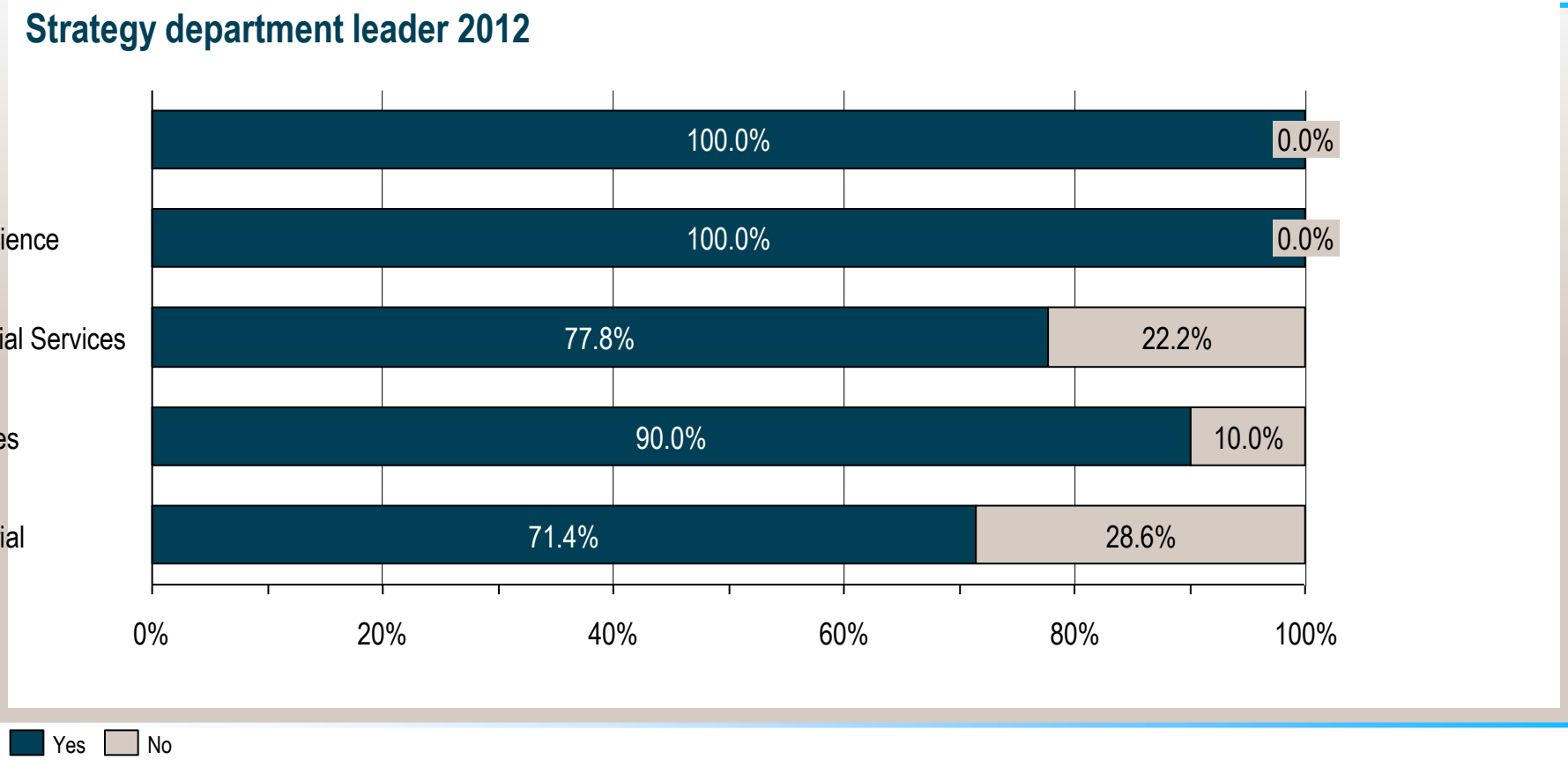
Do you lead a department dedicated for strategy/development/etc.?





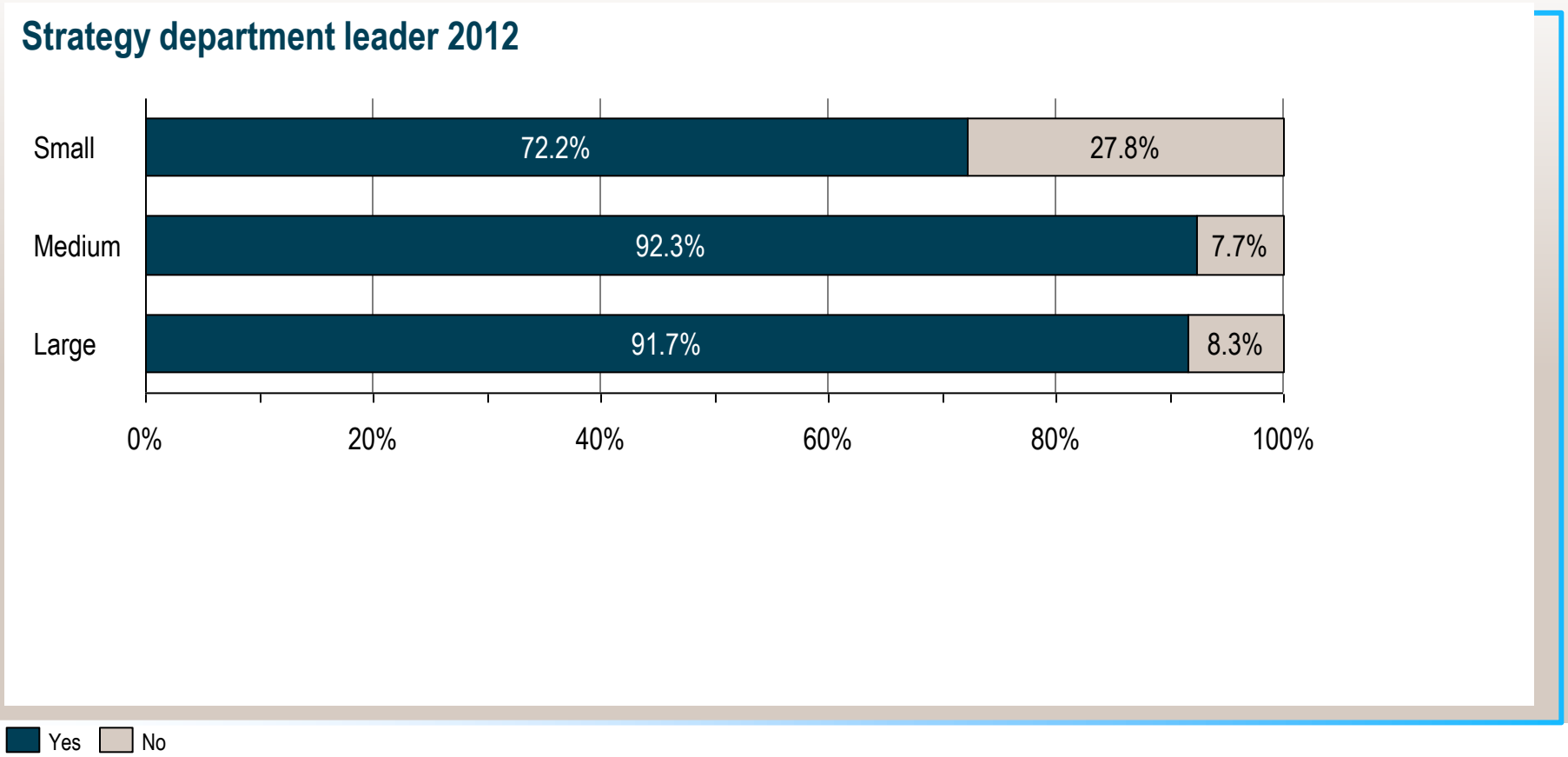
General aspects of the CSO role: Various Industries

Do you lead a department dedicated for strategy/development/etc.?



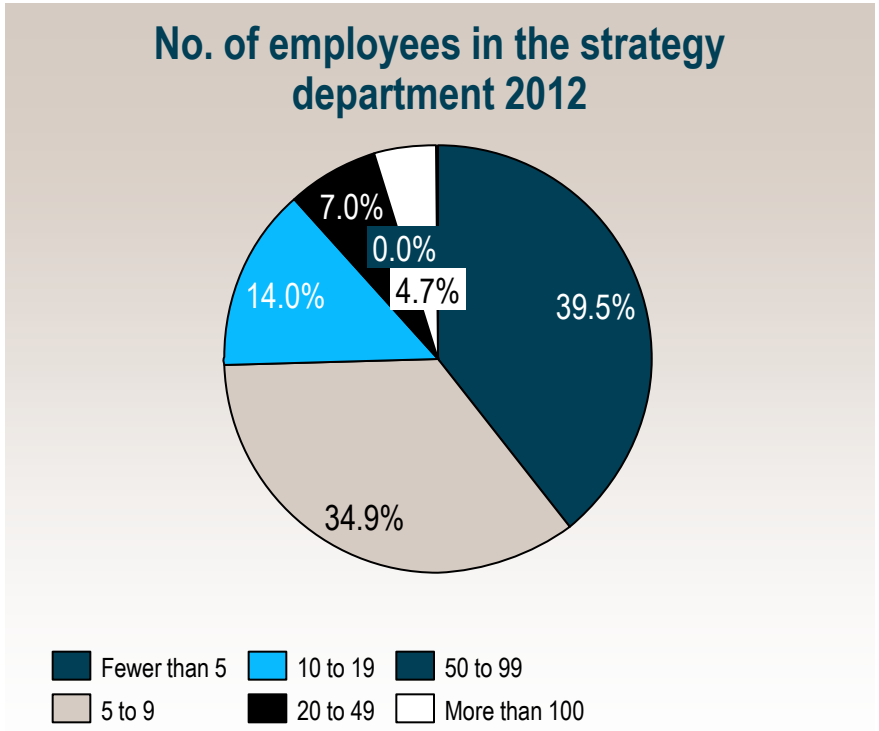
General aspects of the CSO role: Firm size

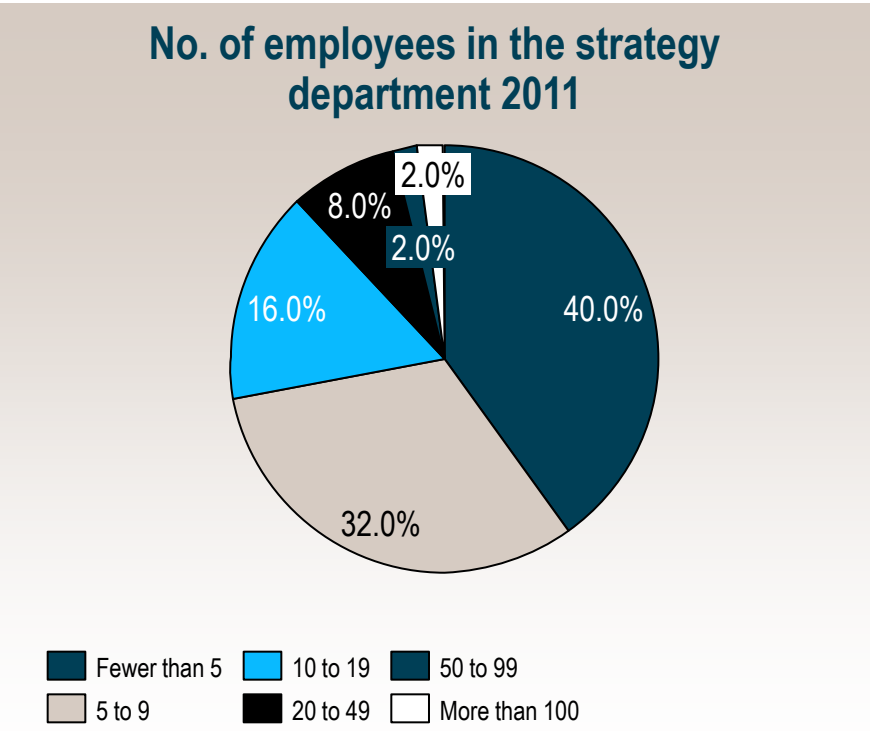
Do you lead a department dedicated for strategy/development/etc.?



General aspects of the CSO role: All Firms

How many people are working in this department (FTEs end of 2011)?

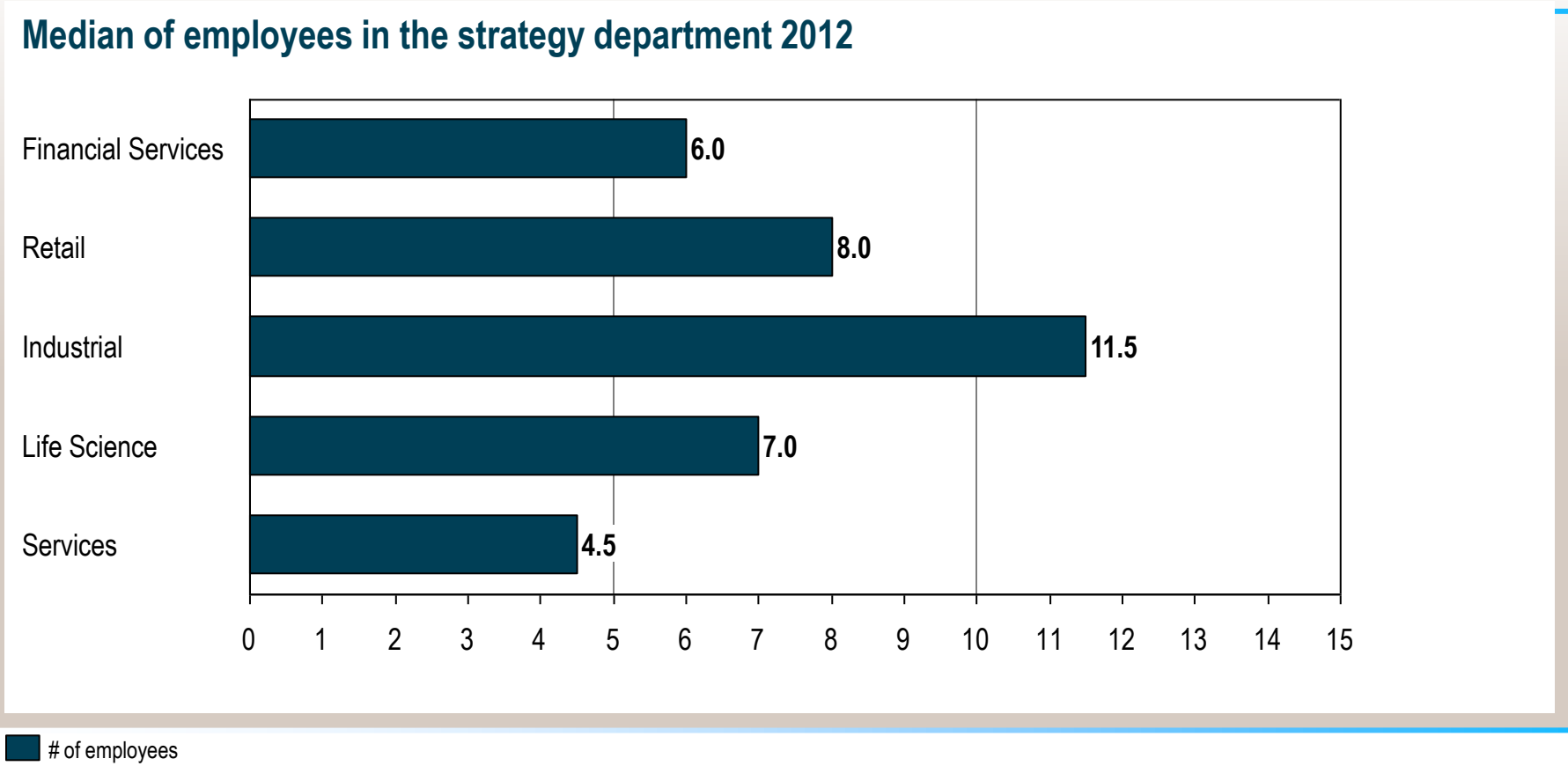




Mean: 11.2 employees (2012), 16.4 employees (2011); Median: 6 employees (2012), 7 employees (2011)

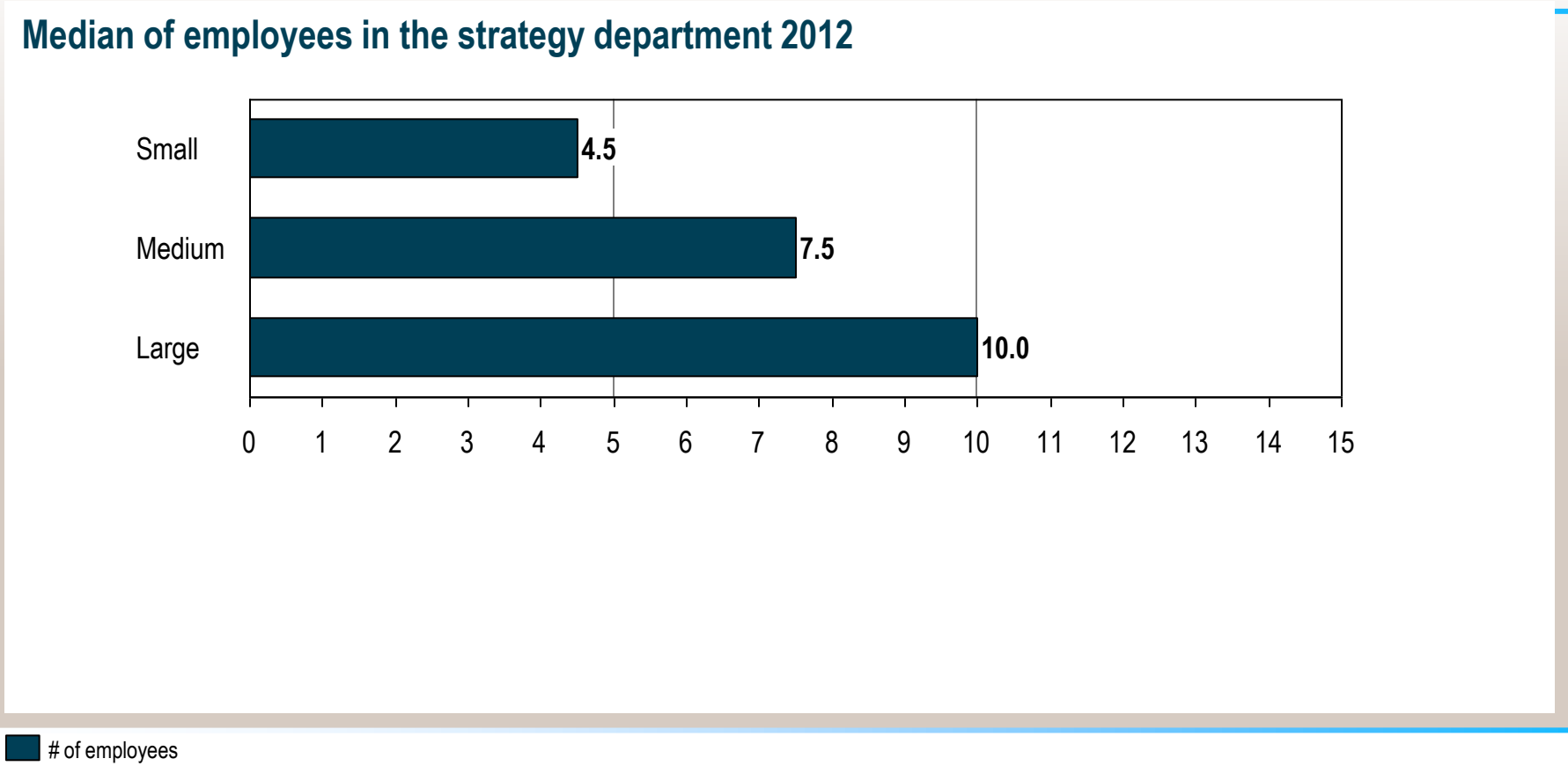
General aspects of the CSO role: Various Industries

How many people are working in this department (FTEs end of 2011)?



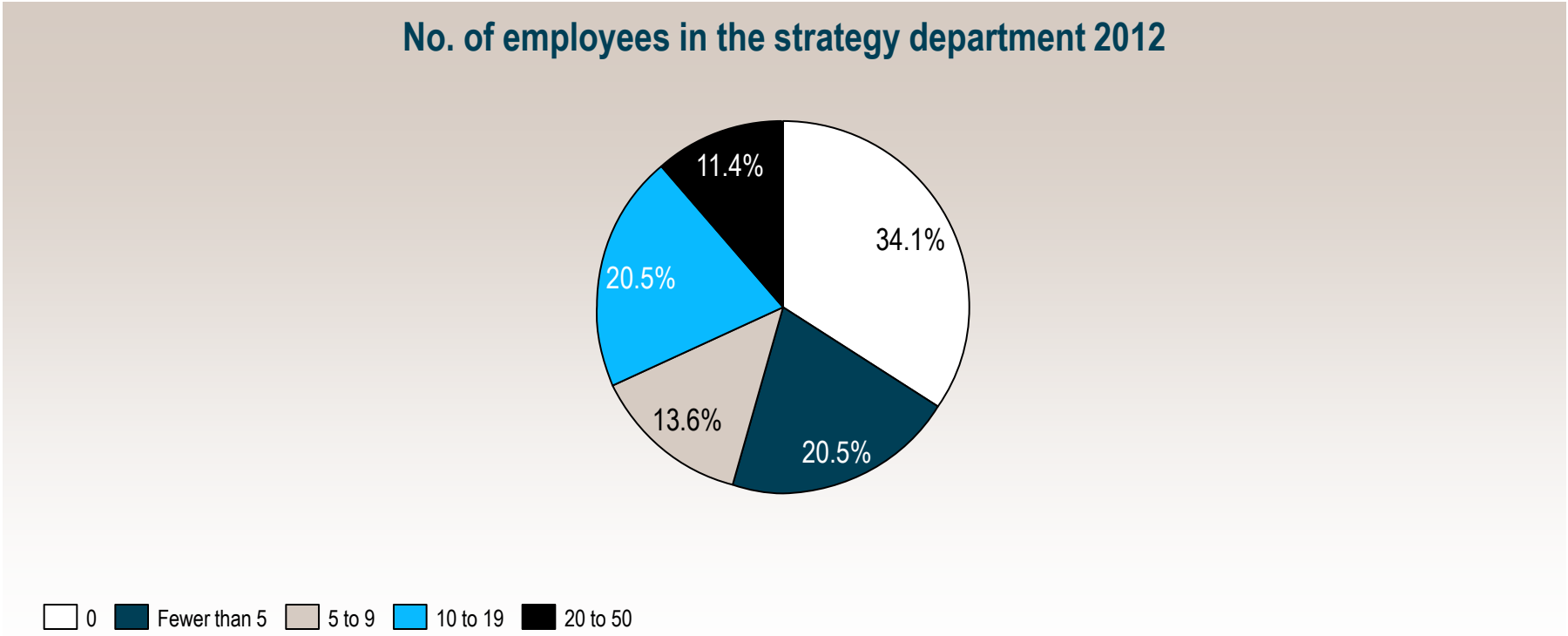
General aspects of the CSO role: Firm size

How many people are working in this department (FTEs end of 2011)?



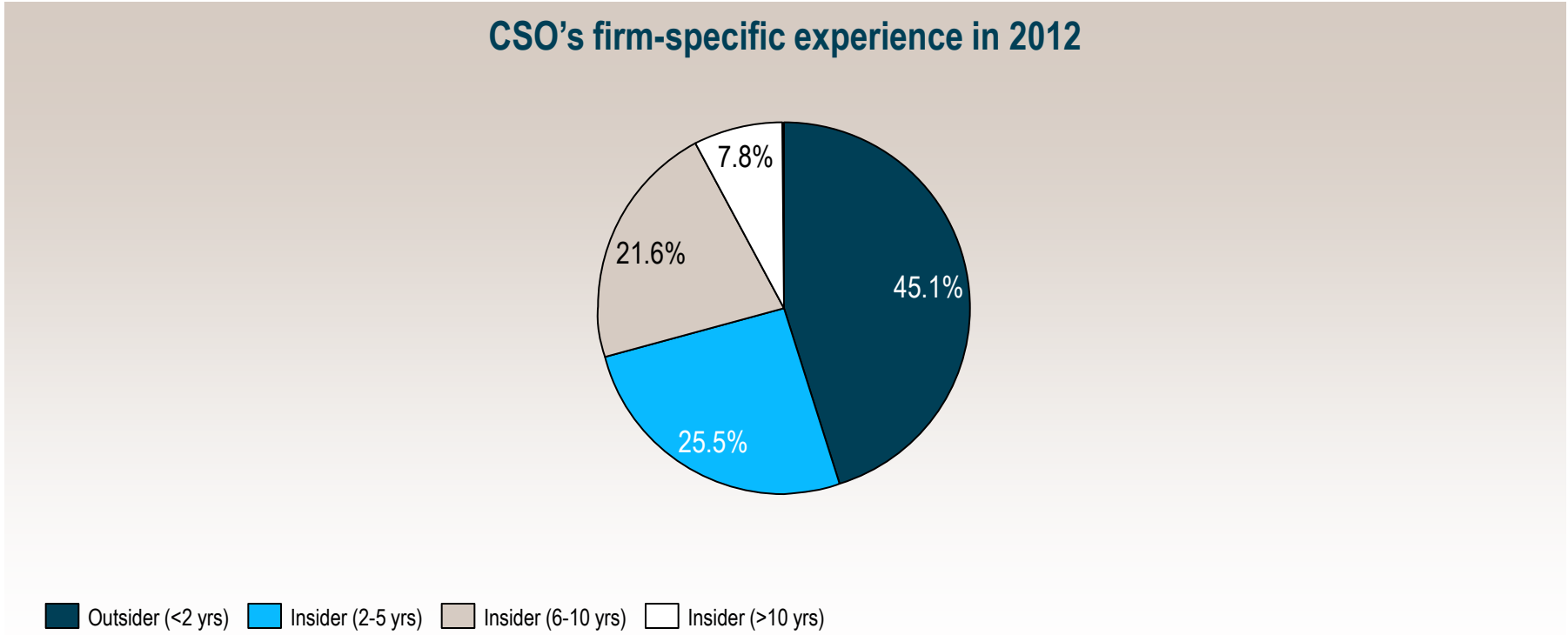
General aspects of the CSO role

How many full-time strategists/corporate developers are working else-where/additionally in your firm (FTEs end of 2011)?



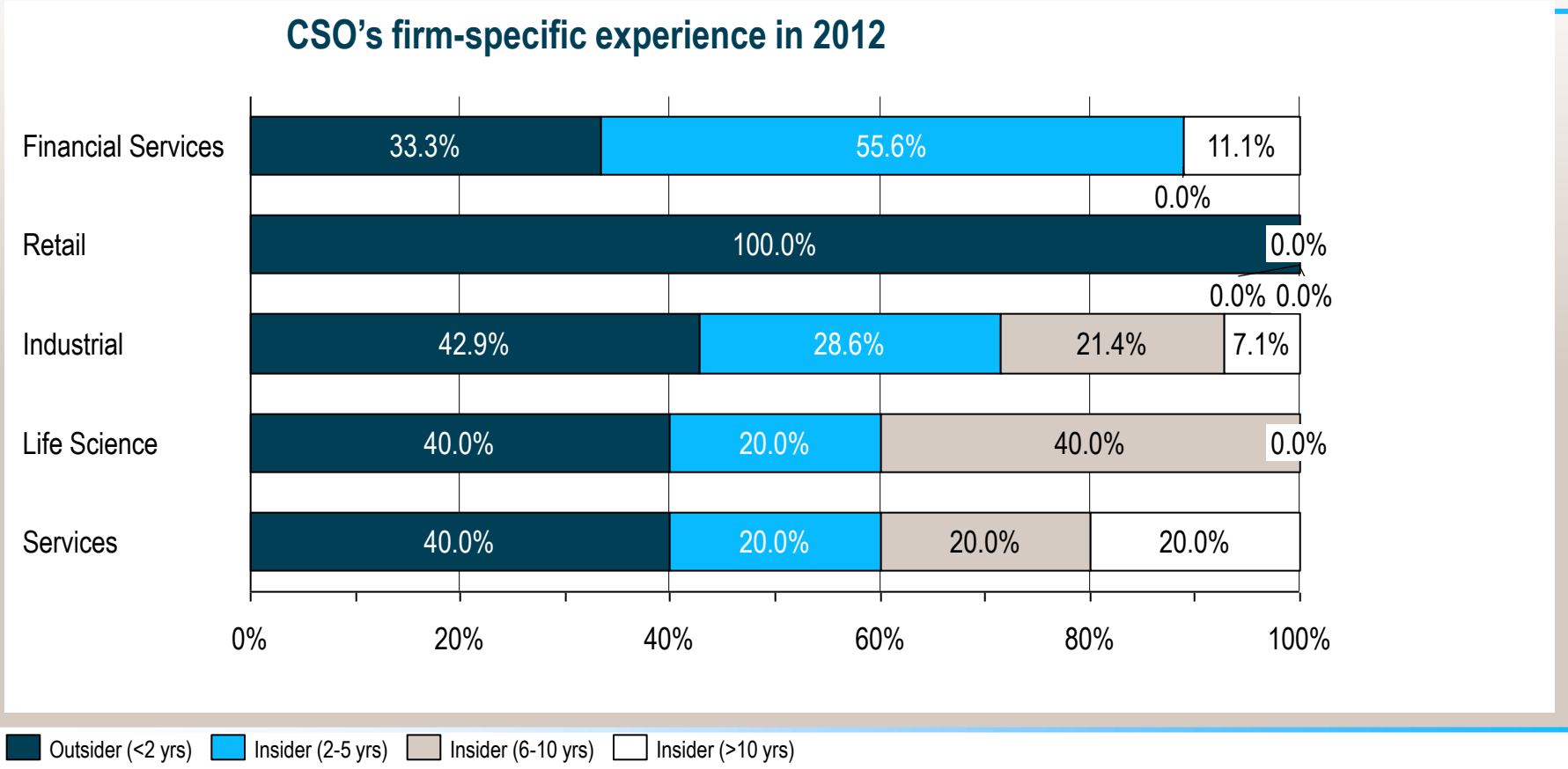
General aspects of the CSO role: All Firms

How many years of experience in the focal firm did you have when assuming the CSO role?



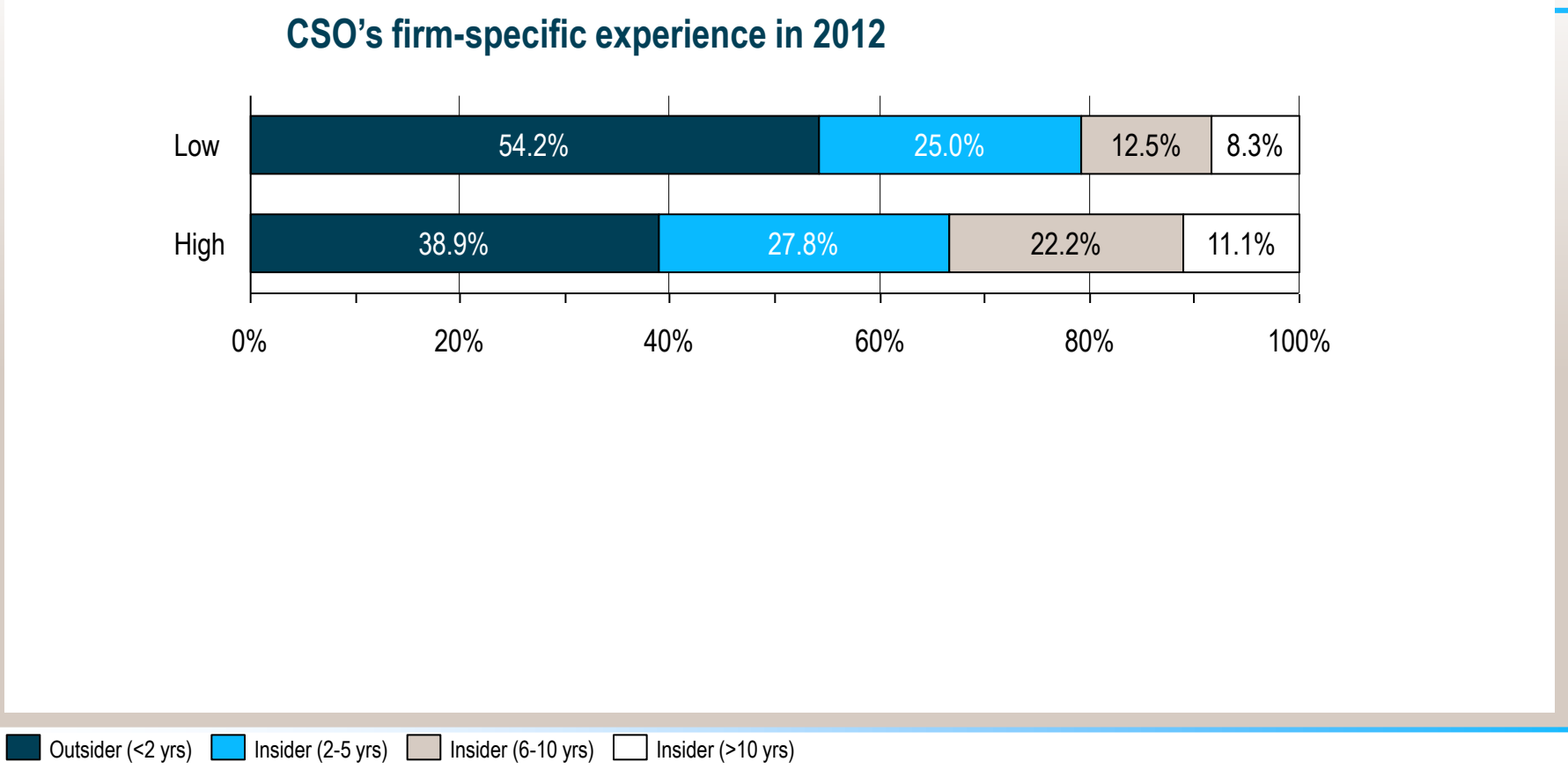
General aspects of the CSO role: Various Industries

How many years of experience in the focal firm did you have when assuming the CSO role?



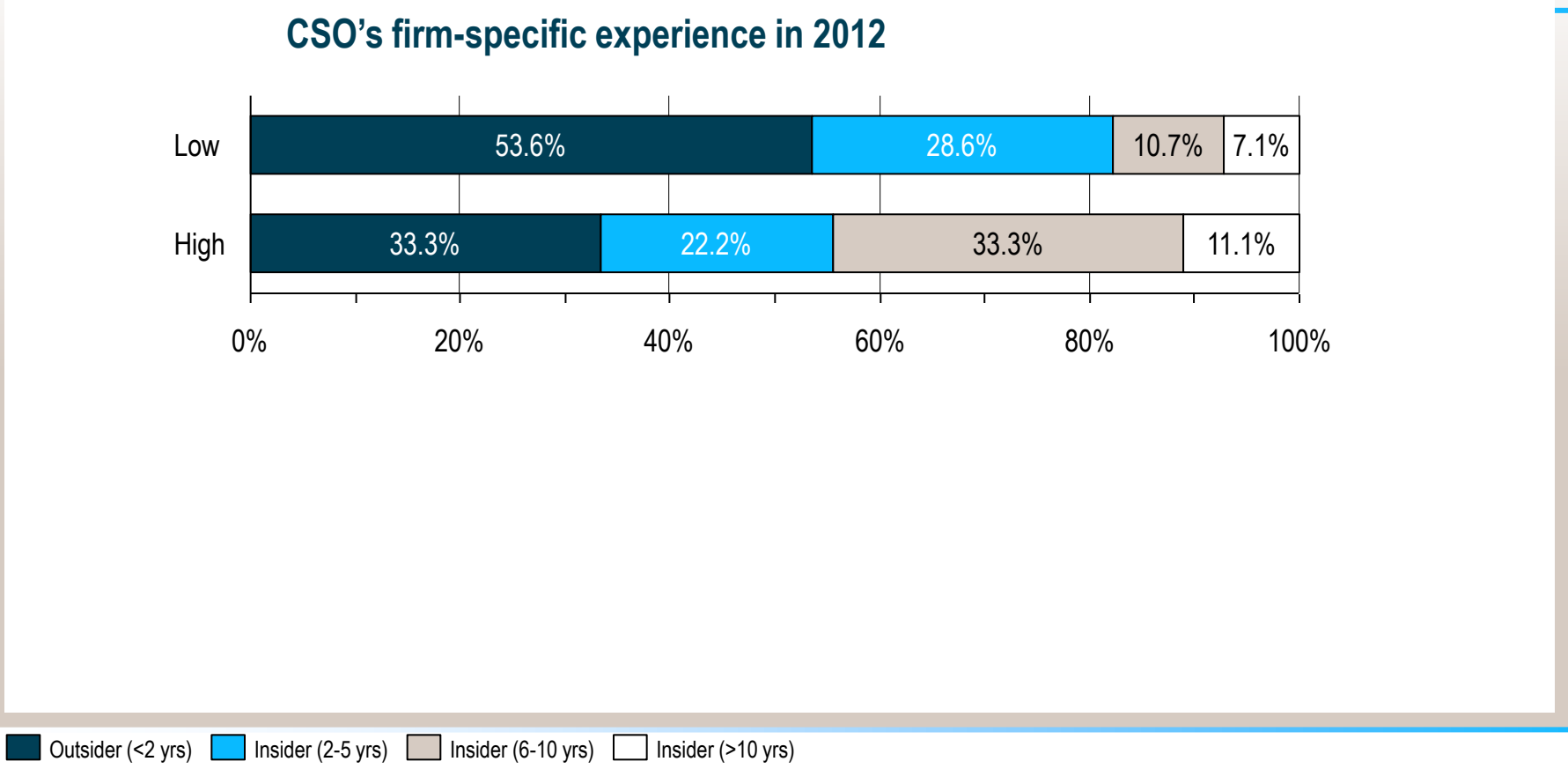
General aspects of the CSO role: High vs. Low Performer

How many years of experience in the focal firm did you have when assuming the CSO role?



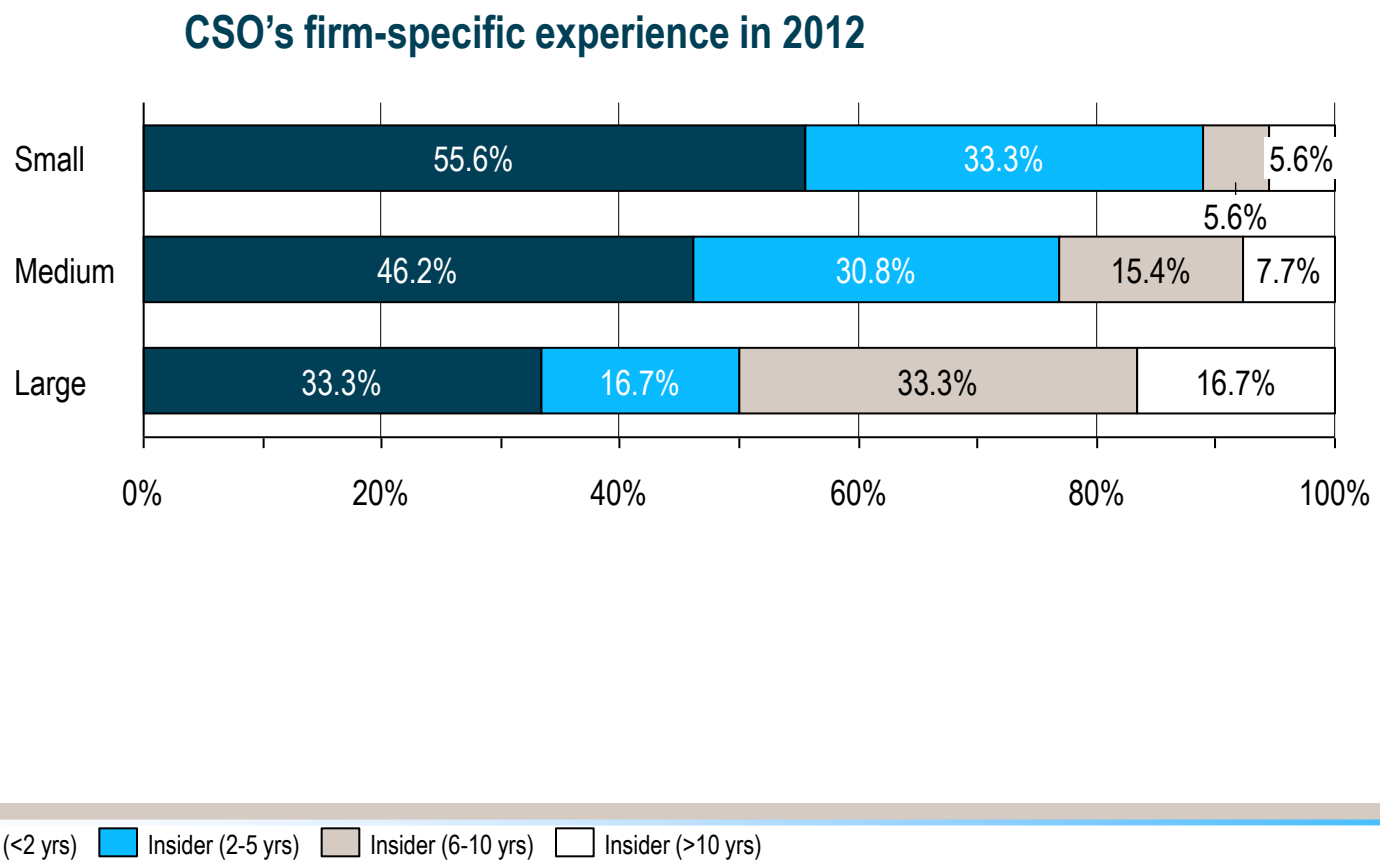
General aspects of the CSO role: Quality of Strategic Decisions

How many years of experience in the focal firm did you have when assuming the CSO role?



General aspects of the CSO role: Firm size

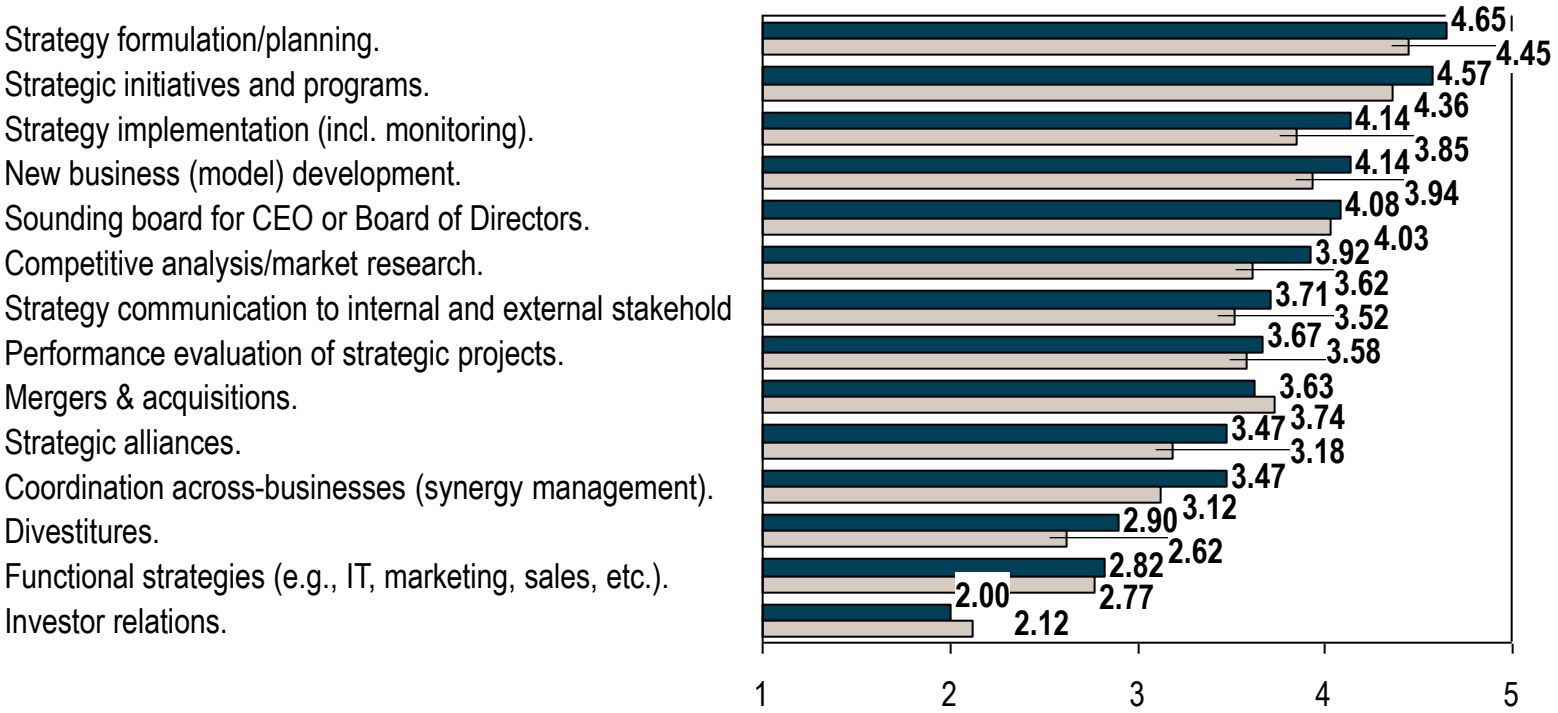
How many years of experience in the focal firm did you have when assuming the CSO role?



Activities: All Firms (I/V)

For each of the following activities, please indicate their importance as part of your job

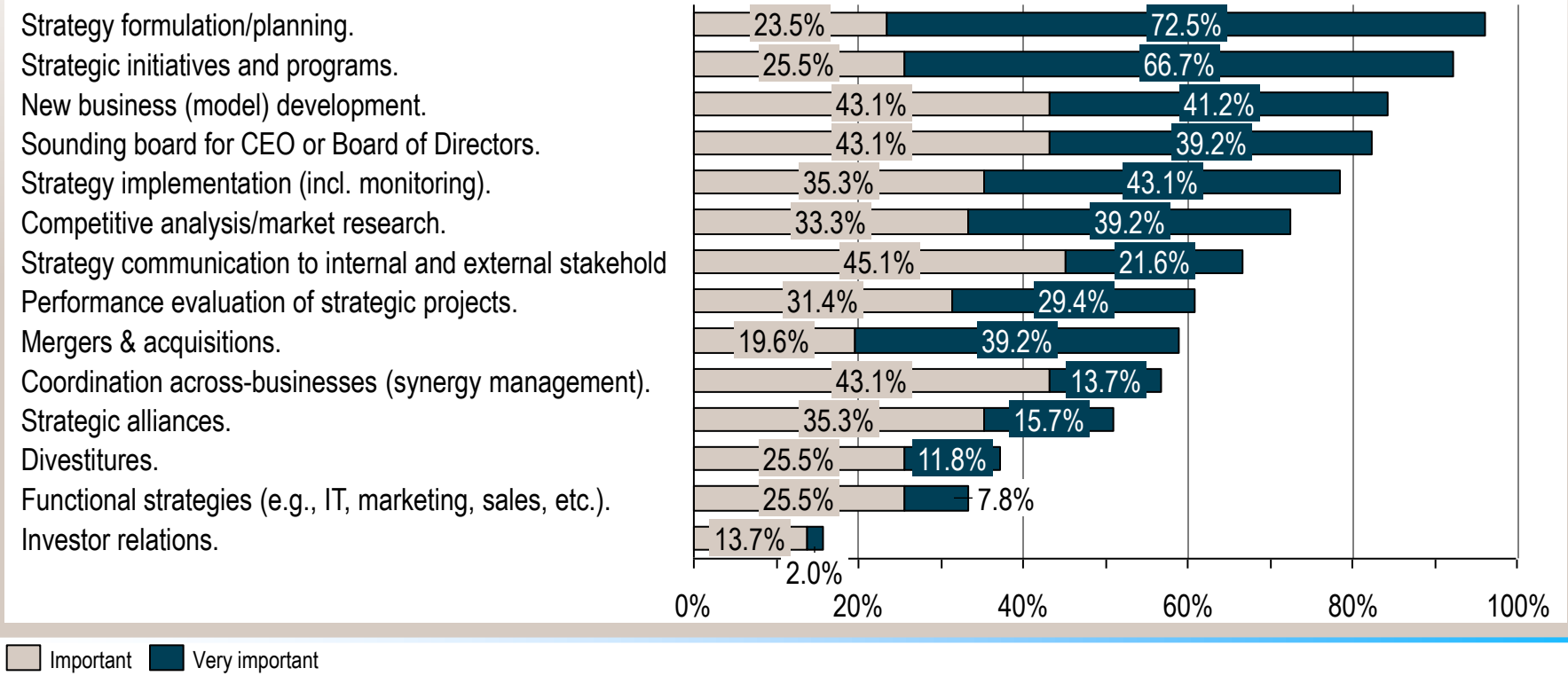
Importance of CSO's activities



Activities: All Firms (II/V)

For each of the following activities, please indicate their importance as part of your job

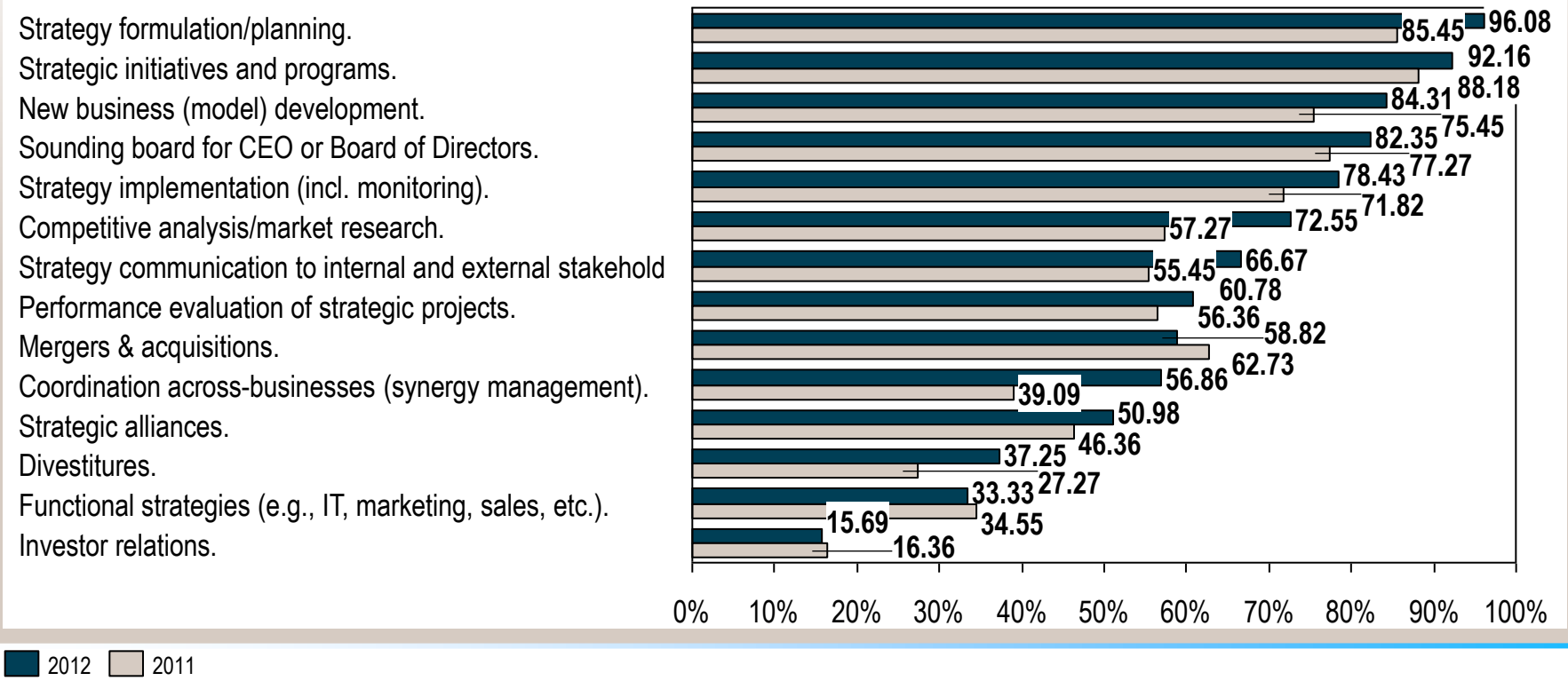
% of CSOs considering activity "important" or "very important" 2012



Activities: All Firms (III/V)

For each of the following activities, please indicate their importance as part of your job

% of CSOs considering activity "important" or "very important" 2012 vs. 2011



Activities: All Firms (IV/V)

Classification of four activity clusters

Classification

Corporate Development

> Multi-item average of:
- New business (model) development
- Sounding board for CEO or Board of Directors
- Strategic initiatives and programs
- Strategy formulation/ planning

Portfolio Management

> Multi-item average of:
- Coordination across-businesses (synergy management)
- Divestitures
- Mergers & acquisitions
- Strategic alliances

Process Management

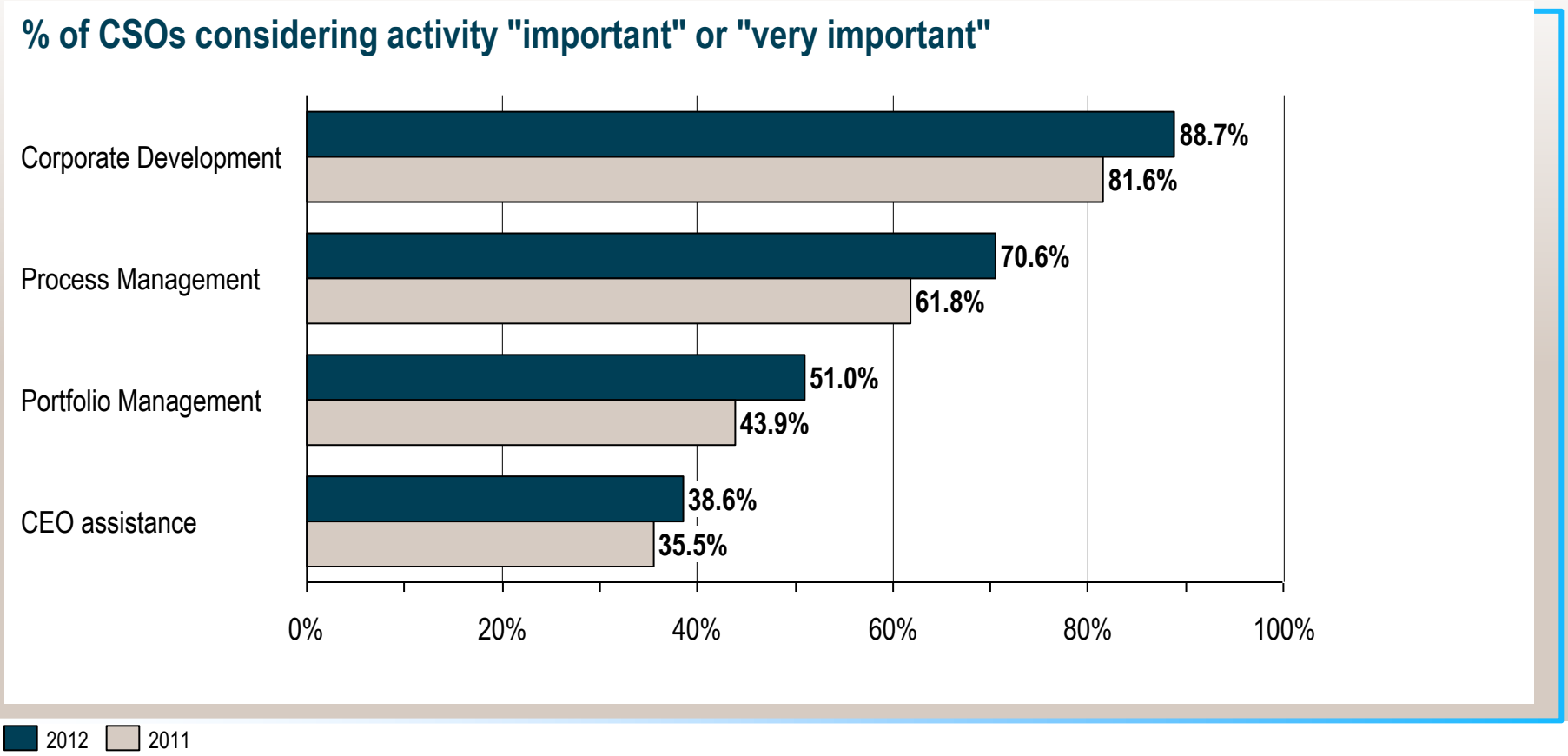
> Multi -tem average of:
- Competitive analysis/market research
- Performance evaluation of strategic projects
- Strategy implementation (incl. monitoring)

CSO Assistance

> Multi-item average of:
- Functional strategies (e.g., IT, marketing, sales, etc.)
- Investor relations
- Strategy communi-cation to internal and external stakeholders

Activities: All Firms (V/V)

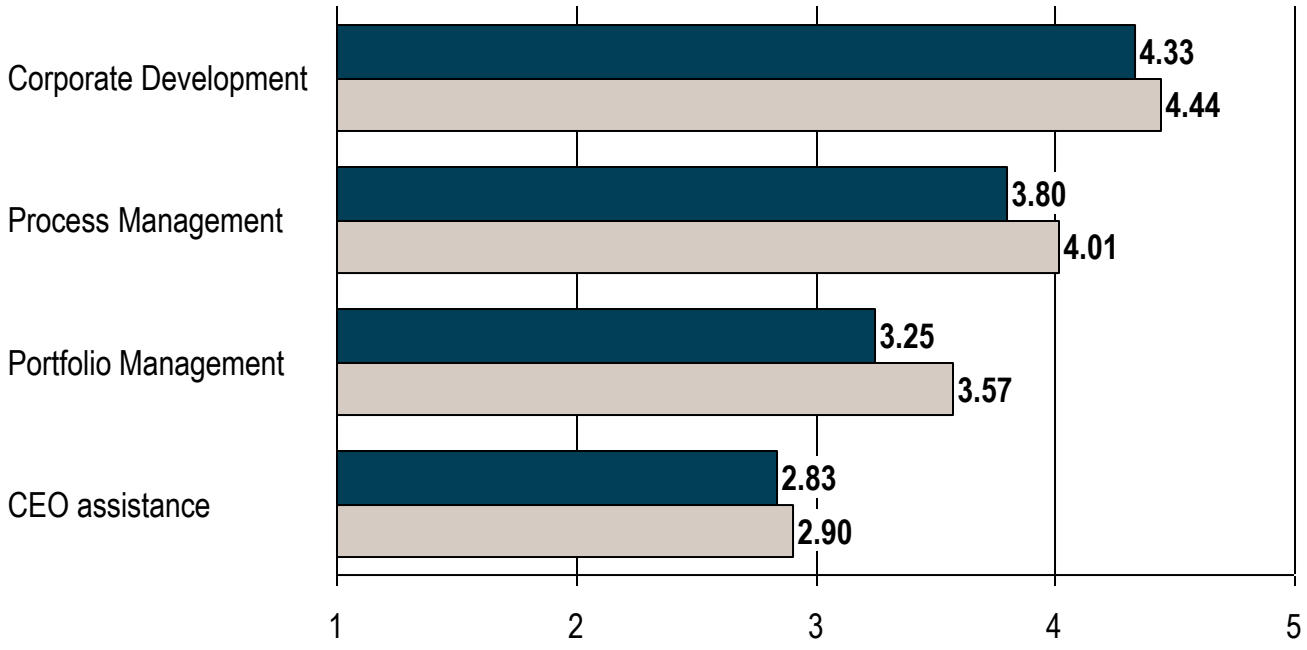
For each of the following activities, please indicate their importance as part of your job



Activities: High vs. Low Performer

For each of the following activities, please indicate their importance as part of your job

Average importance of CSO activity cluster 2012

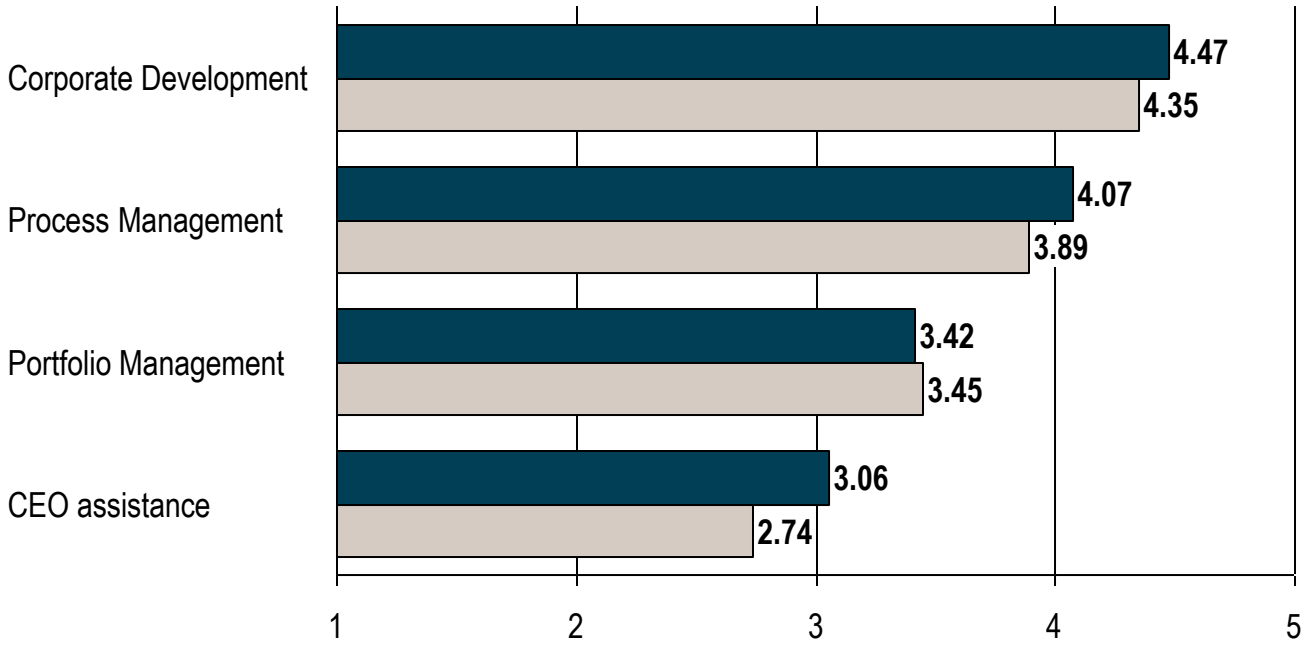


High Low Mean values: 1: not important, 5: very important

Activities: Quality of strategic decision

For each of the following activities, please indicate their importance as part of your job

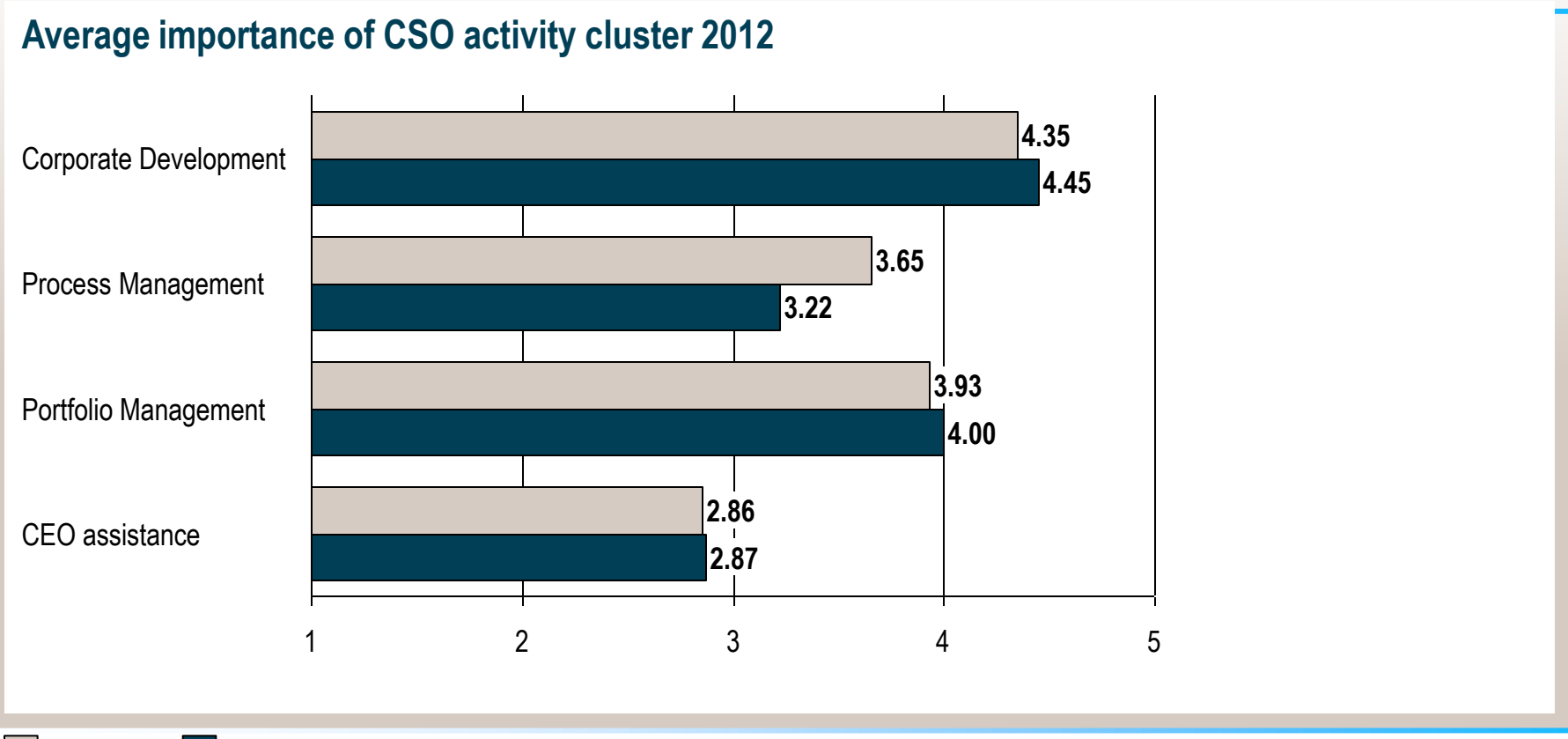
Average importance of CSO activity cluster 2012



High Low Mean values: 1: not important, 5: very important

Activities: Organization design

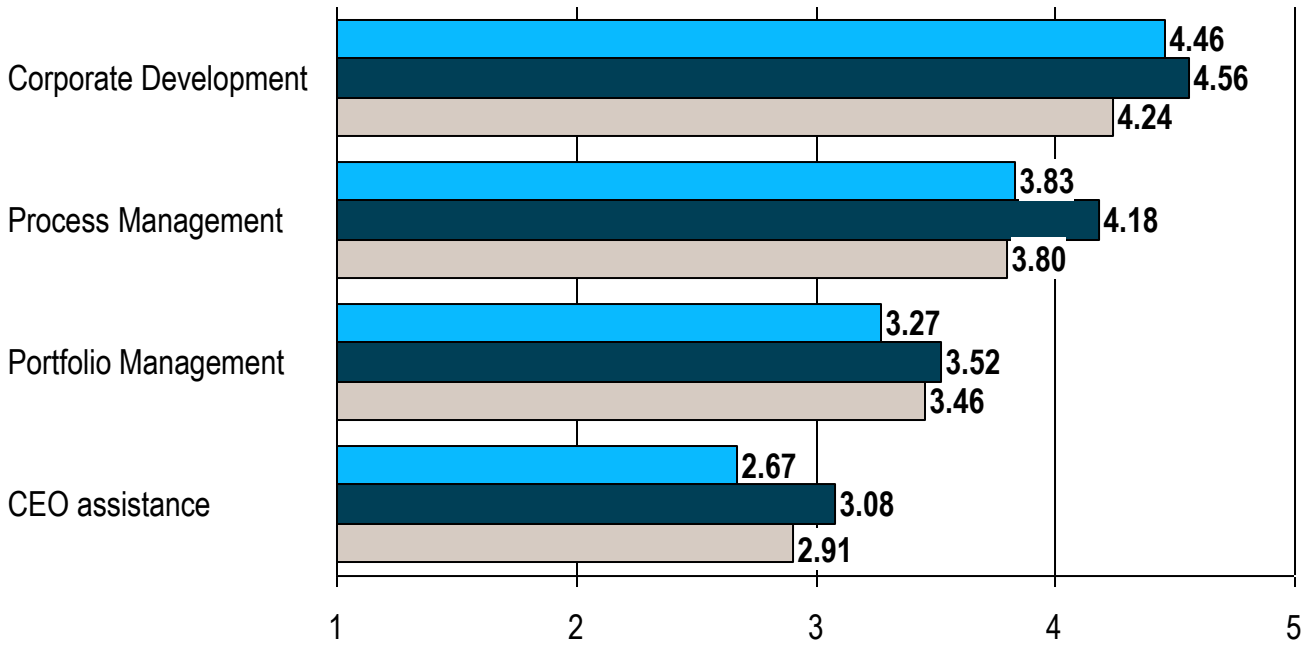
For each of the following activities, please indicate their importance as part of your job



Activities: Firm size

For each of the following activities, please indicate their importance as part of your job

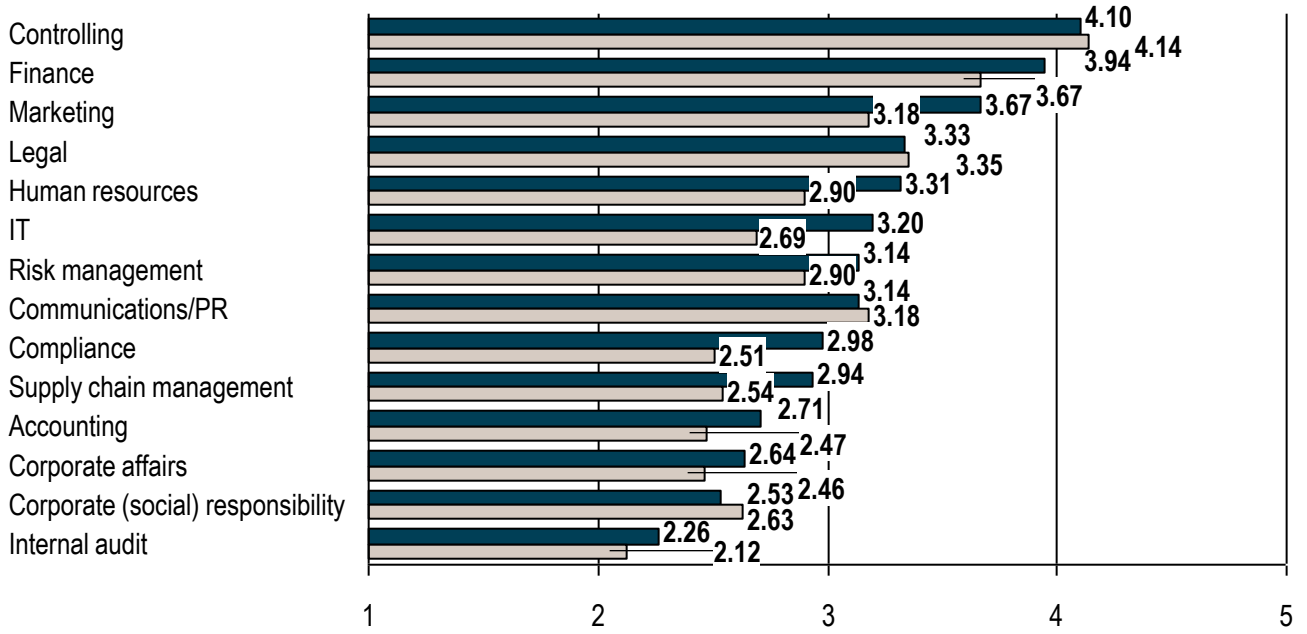
Average importance of CSO activity cluster 2012



Cross-functional collaboration: All Firms

For each of the following centralized corporate-level functions, please indicate (a) their importance for your firm's value creation and (b) the extent of collaboration on strategic projects of your department with them:

Importance of and collaboration with centralized corporate-level functions 2012



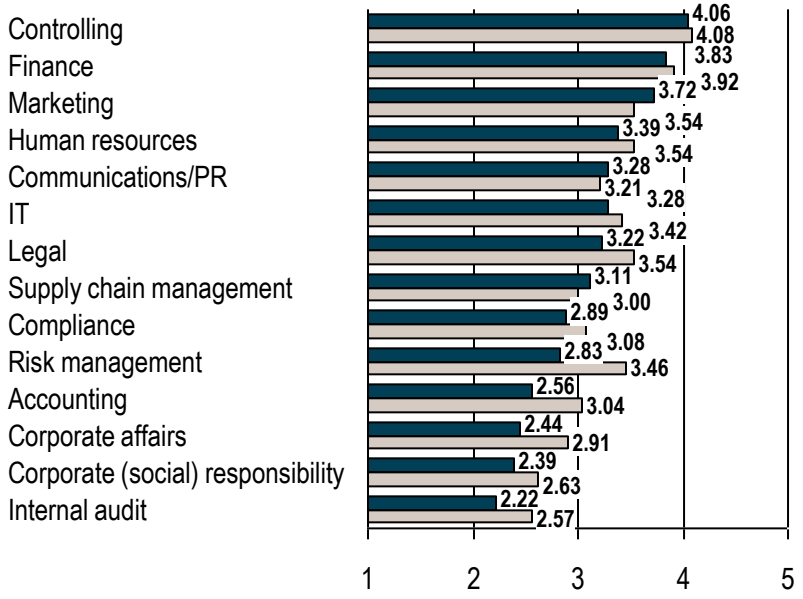
Importance | Collaboration

Mean values; 1: to no extent, 5: to a very great extent

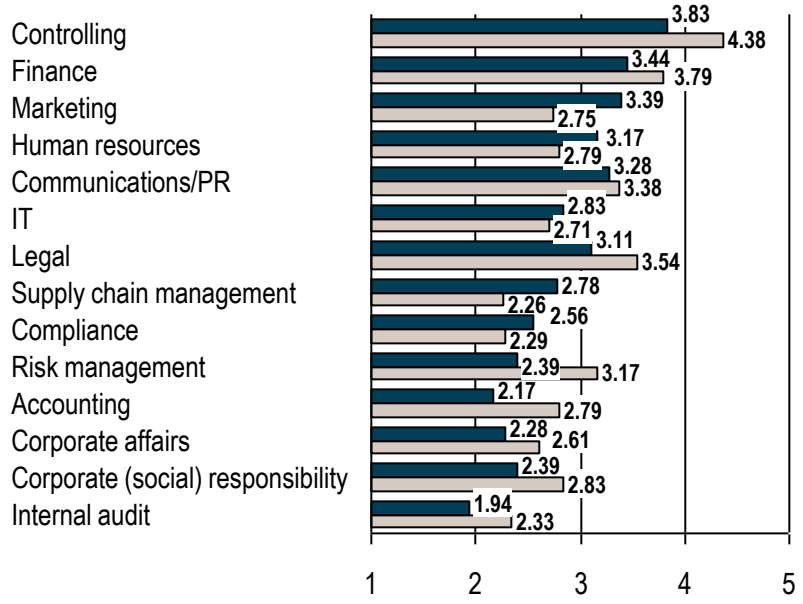
Cross-functional collaboration: High vs. Low Performer

For each of the following centralized corporate-level functions, please indicate (a) their importance for your firm's value creation and (b) the extent of collaboration on strategic projects of your department with them:

Importance of centralized corporate-level functions 2012



Collaboration with centralized corporate-level functions 2012

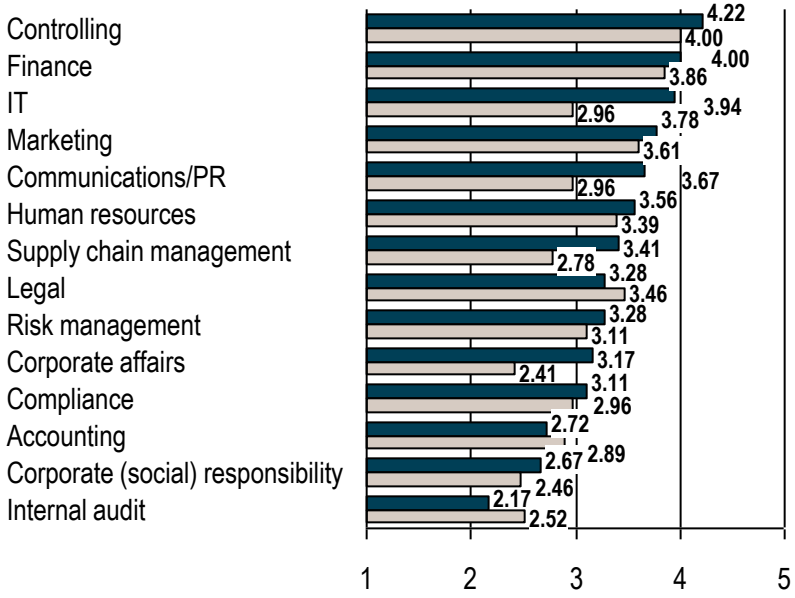


High Low Mean values; 1: to no extent, 5: to a very great extent

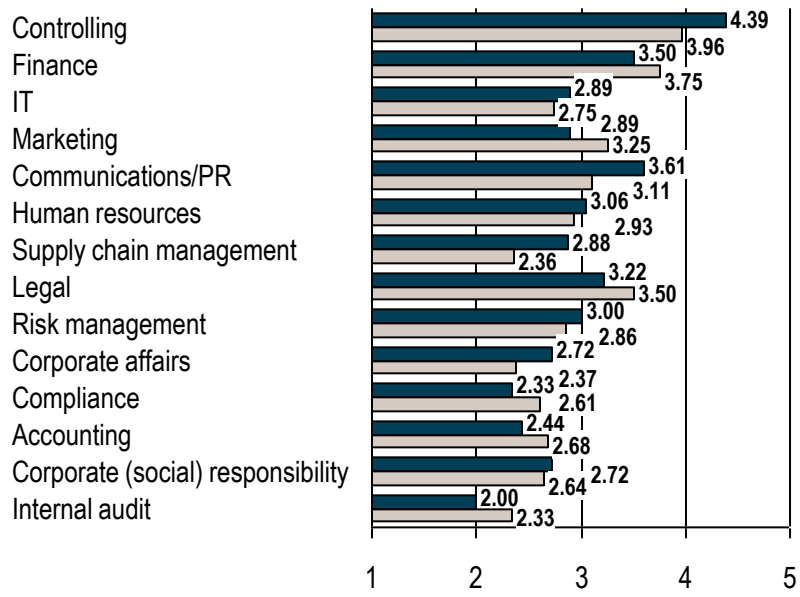
Cross-functional collaboration: Quality of strategic decisions

For each of the following centralized corporate-level functions, please indicate (a) their importance for your firm's value creation and (b) the extent of collaboration on strategic projects of your department with them:

Importance of centralized corporate-level functions 2012



Collaboration with centralized corporate-level functions 2012

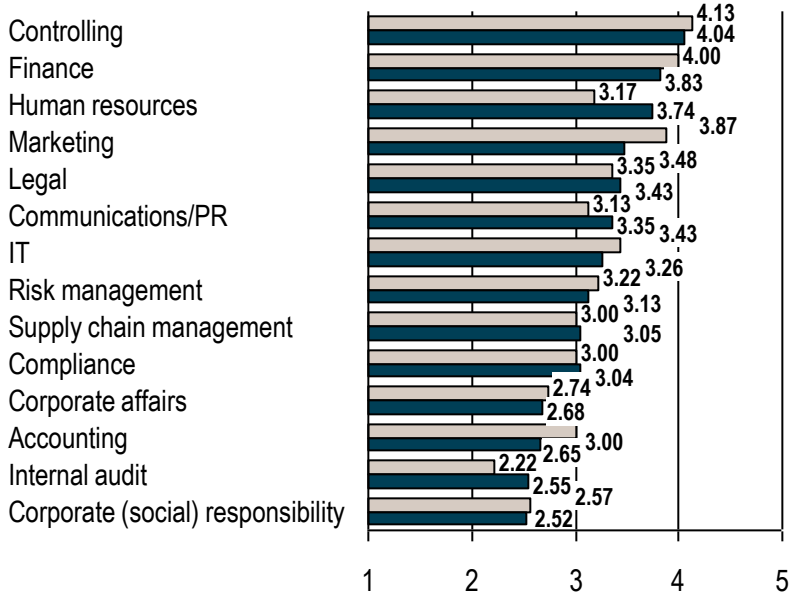


High Low Mean values; 1: to no extent, 5: to a very great extent

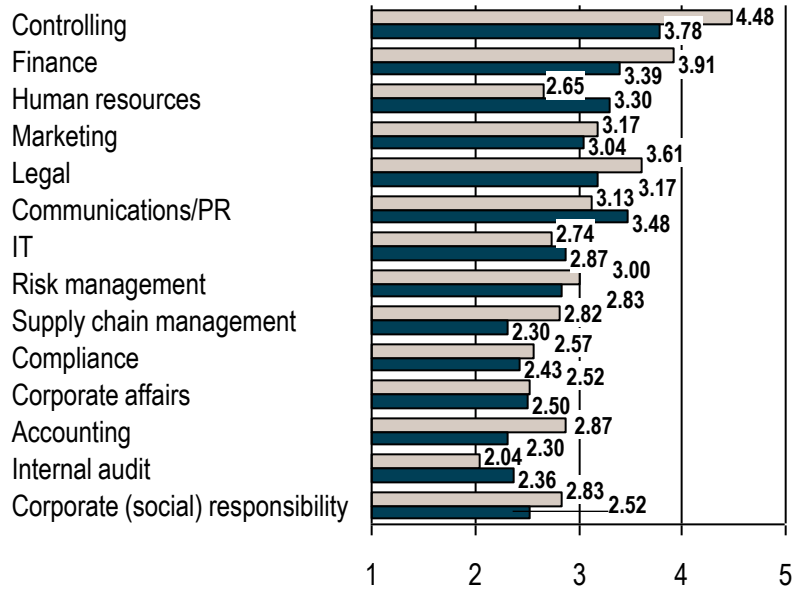
Cross-functional collaboration: Organization design

For each of the following centralized corporate-level functions, please indicate (a) their importance for your firm's value creation and (b) the extent of collaboration on strategic projects of your department with them:

Importance of centralized corporate-level functions 2012



Collaboration with centralized corporate-level functions 2012

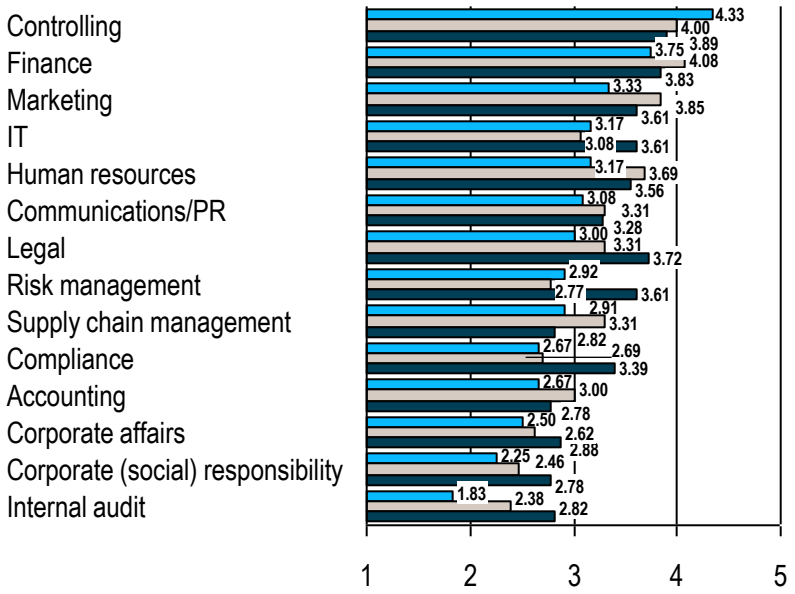


Decentralized Centralized Mean values; 1: to no extent, 5: to a very great extent

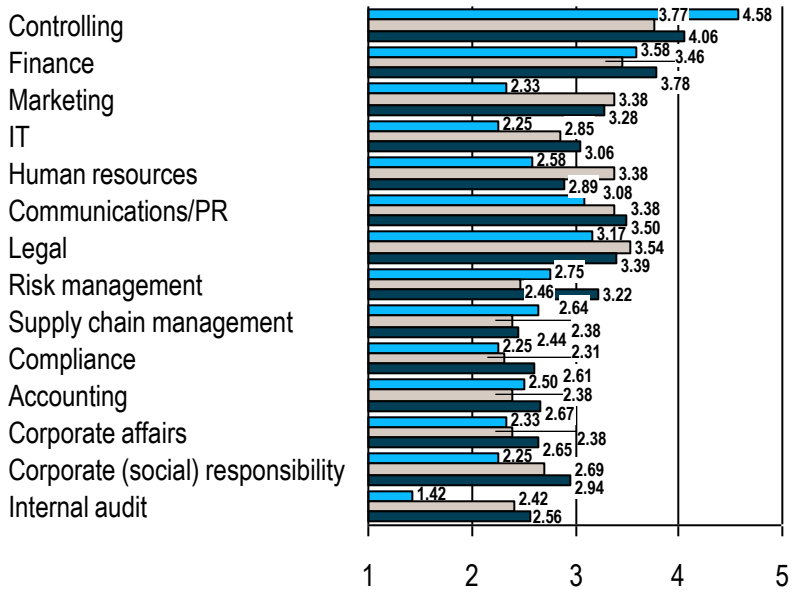
Cross-functional collaboration: Firm size

For each of the following centralized corporate-level functions, please indicate (a) their importance for your firm's value creation and (b) the extent of collaboration on strategic projects of your department with them:

Importance of centralized corporate-level functions 2012



Collaboration with centralized corporate-level functions 2012

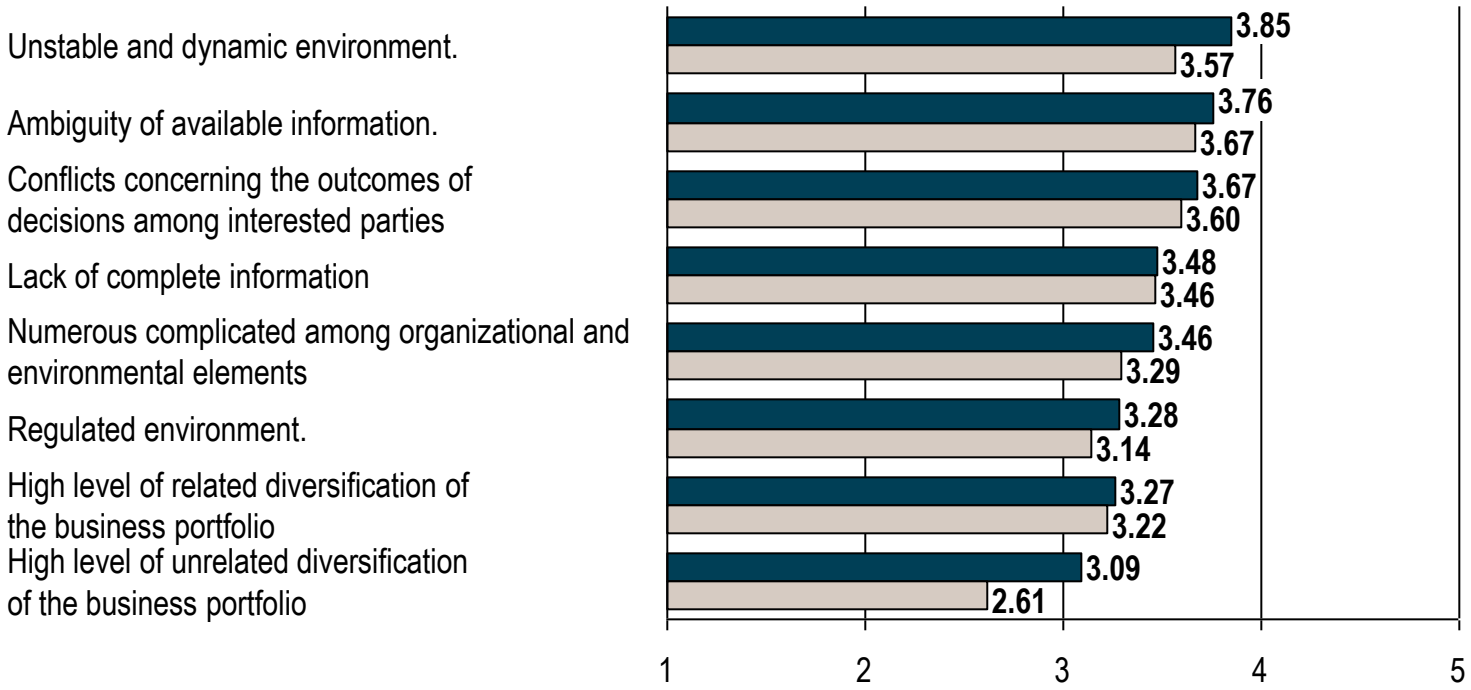


Large Medium Small Mean values; 1: to no extent, 5: to a very great extent

Factors affecting strategic decisions: All Firms

Please assess the extent to which the following aspects increase your strategic decisions' complexity:

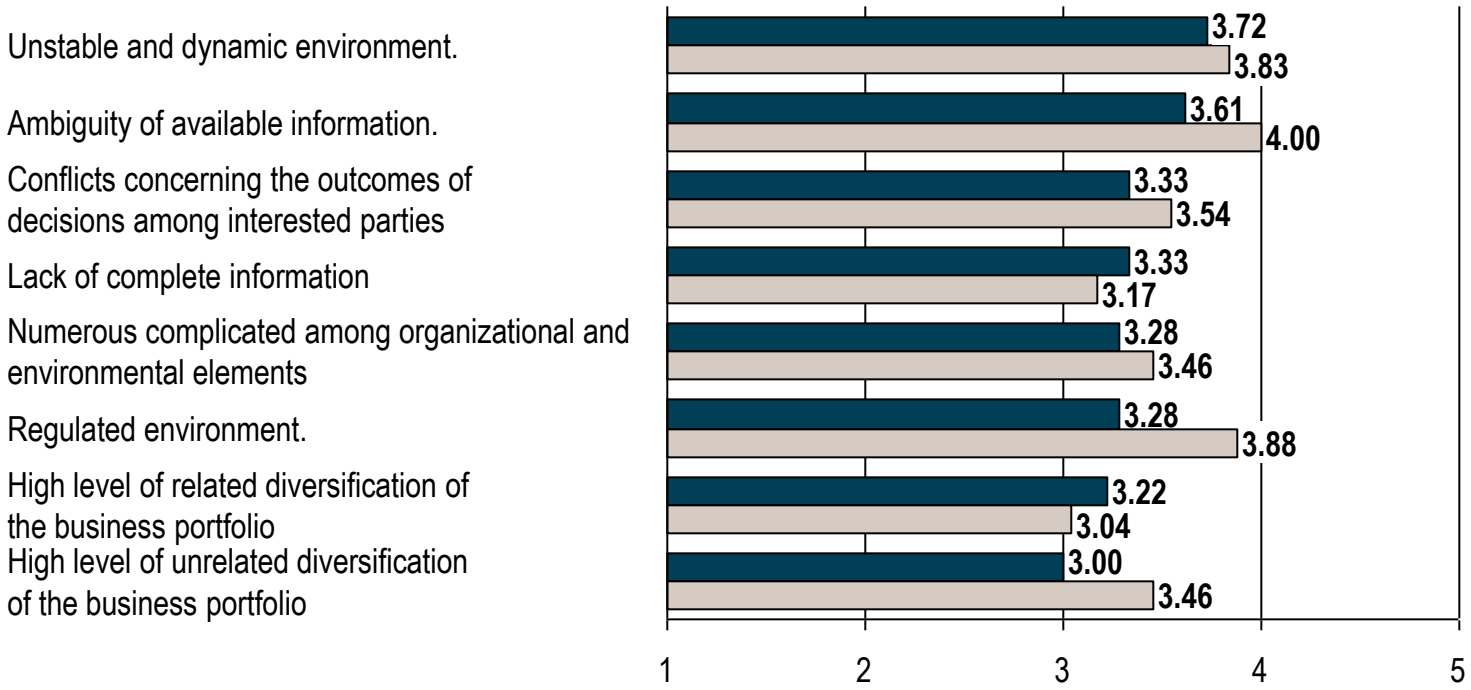
Factors affecting strategic decisions



Factors affecting strategic decisions: High vs. Low Performer

Please assess the extent to which the following aspects increase your strategic decisions' complexity:

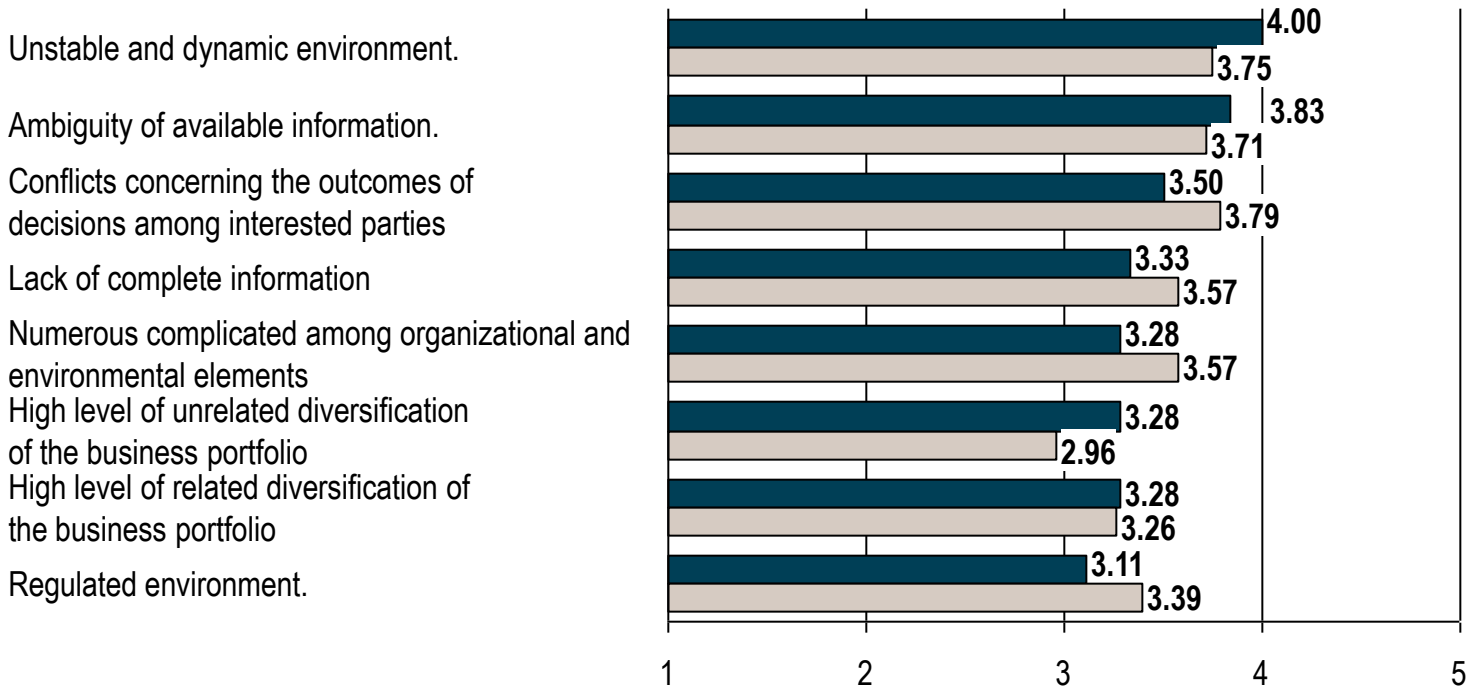
Factors affecting strategic decisions 2012



Factors affecting strategic decisions: Quality of strategic decisions

Please assess the extent to which the following aspects increase your strategic decisions' complexity:

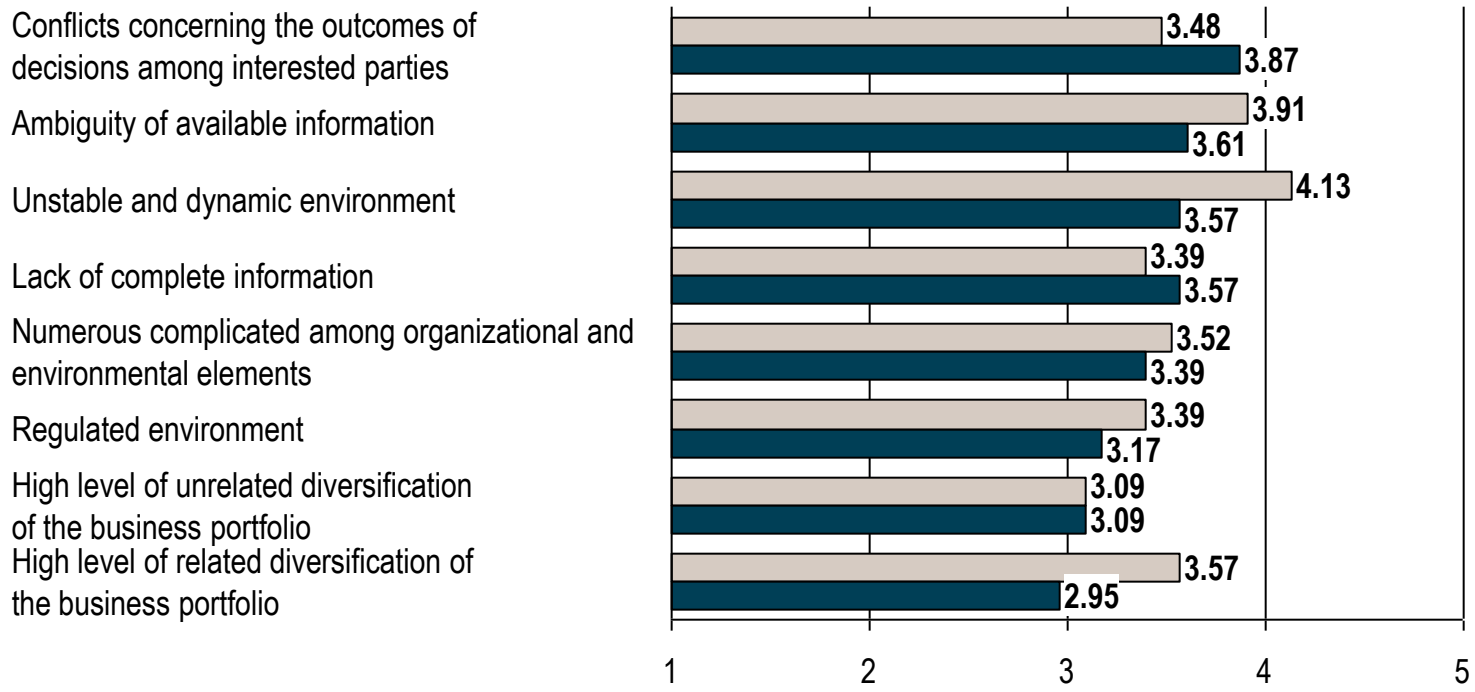
Factors affecting strategic decisions 2012



Factors affecting strategic decisions: Organization design

Please assess the extent to which the following aspects increase your strategic decisions' complexity:

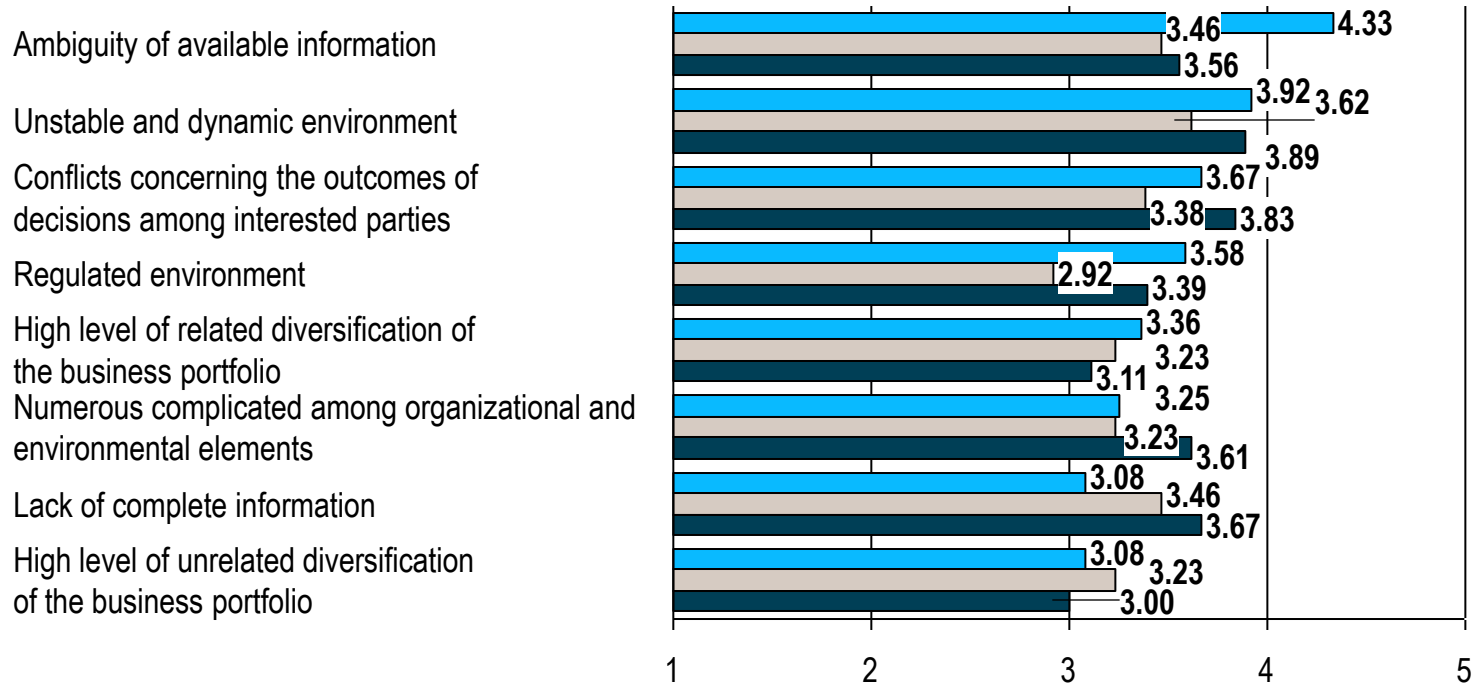
Factors affecting strategic decisions 2012



Factors affecting strategic decisions: Firm size

Please assess the extent to which the following aspects increase your strategic decisions' complexity:

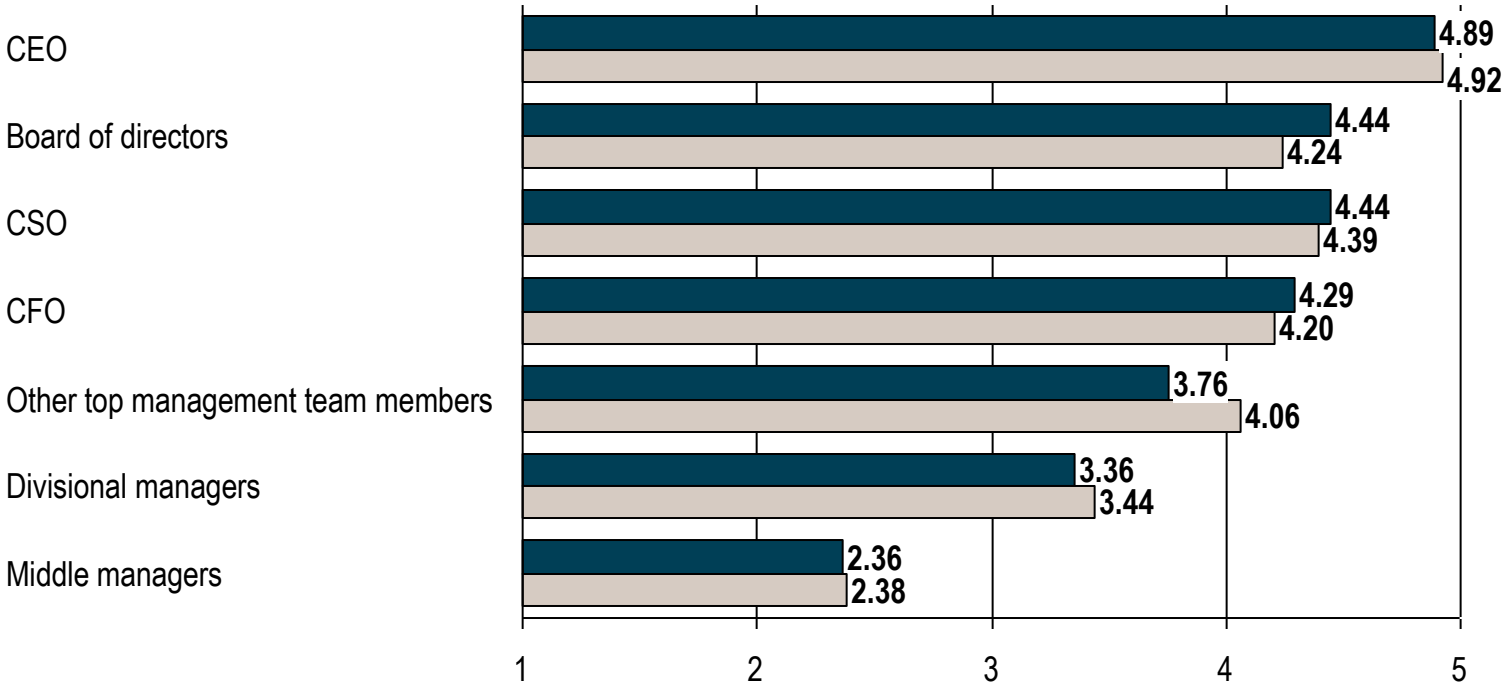
Factors affecting strategic decisions 2012



Involvement in strategic decisions: All Firms

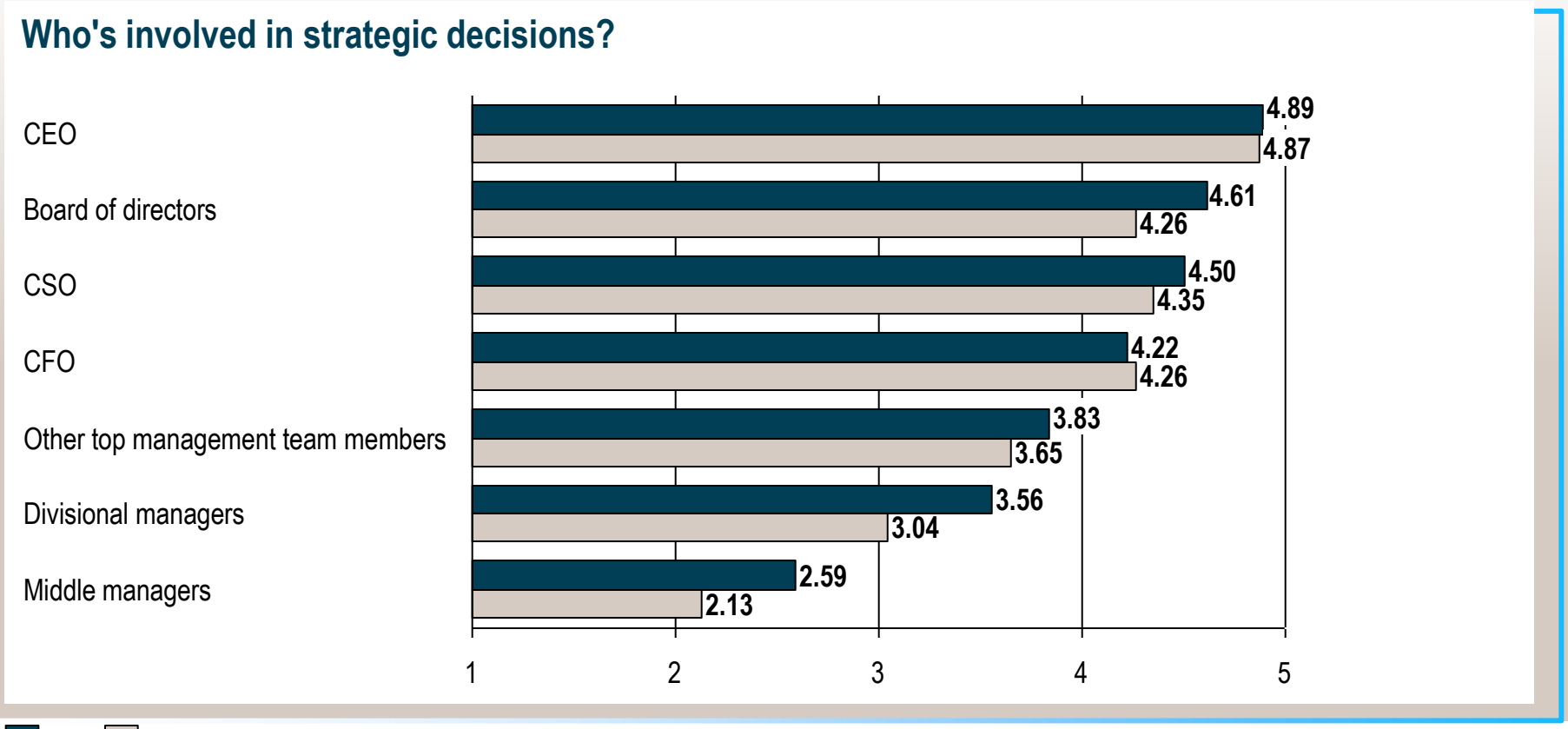
Please indicate the extent to which the following persons/groups are involved in strategic decisions of your firm:

Who's involved in strategic decisions?



Involvement in strategic decisions: High vs. Low Performer

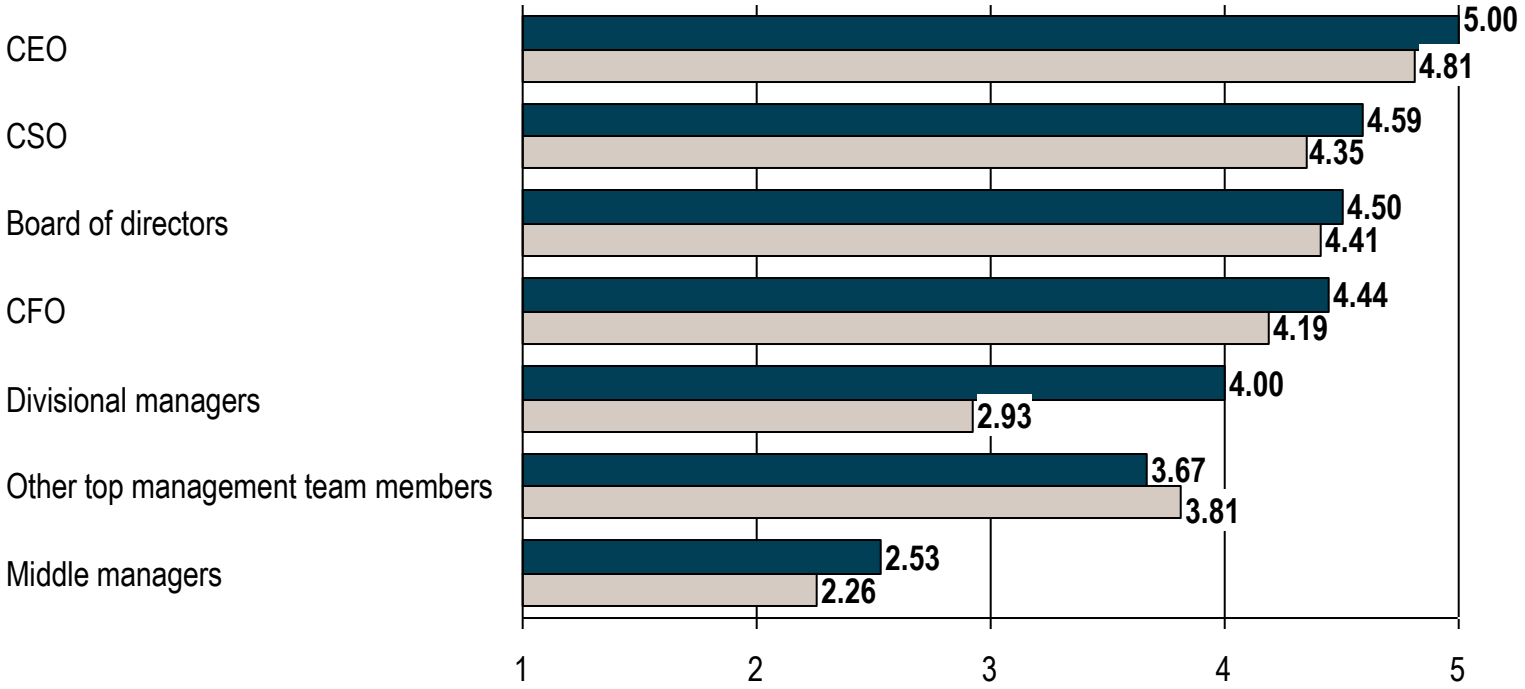
Please indicate the extent to which the following persons/groups are involved in strategic decisions of your firm:



Involvement in strategic decisions: Quality of strategic decisions

Please indicate the extent to which the following persons/groups are involved in strategic decisions of your firm:

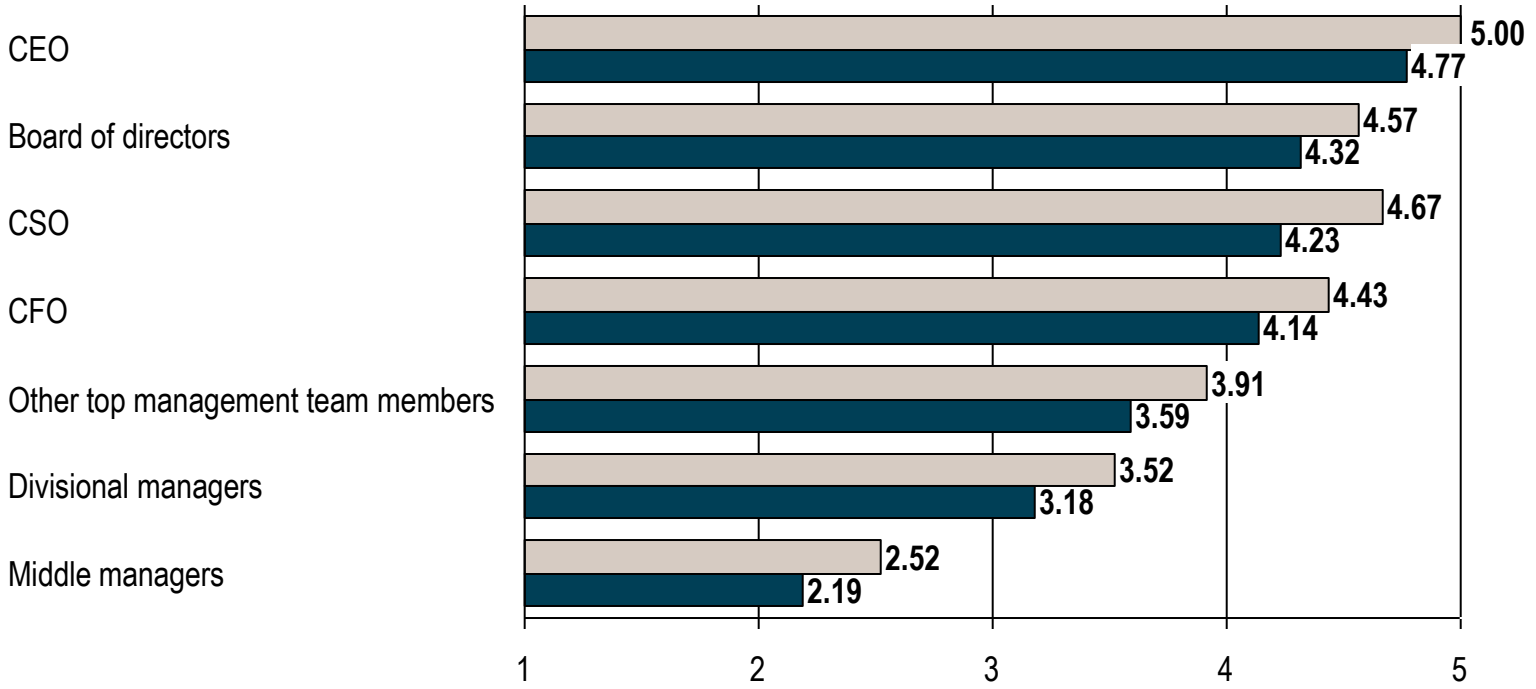
Who's involved in strategic decisions?



Involvement in strategic decisions: Organization design

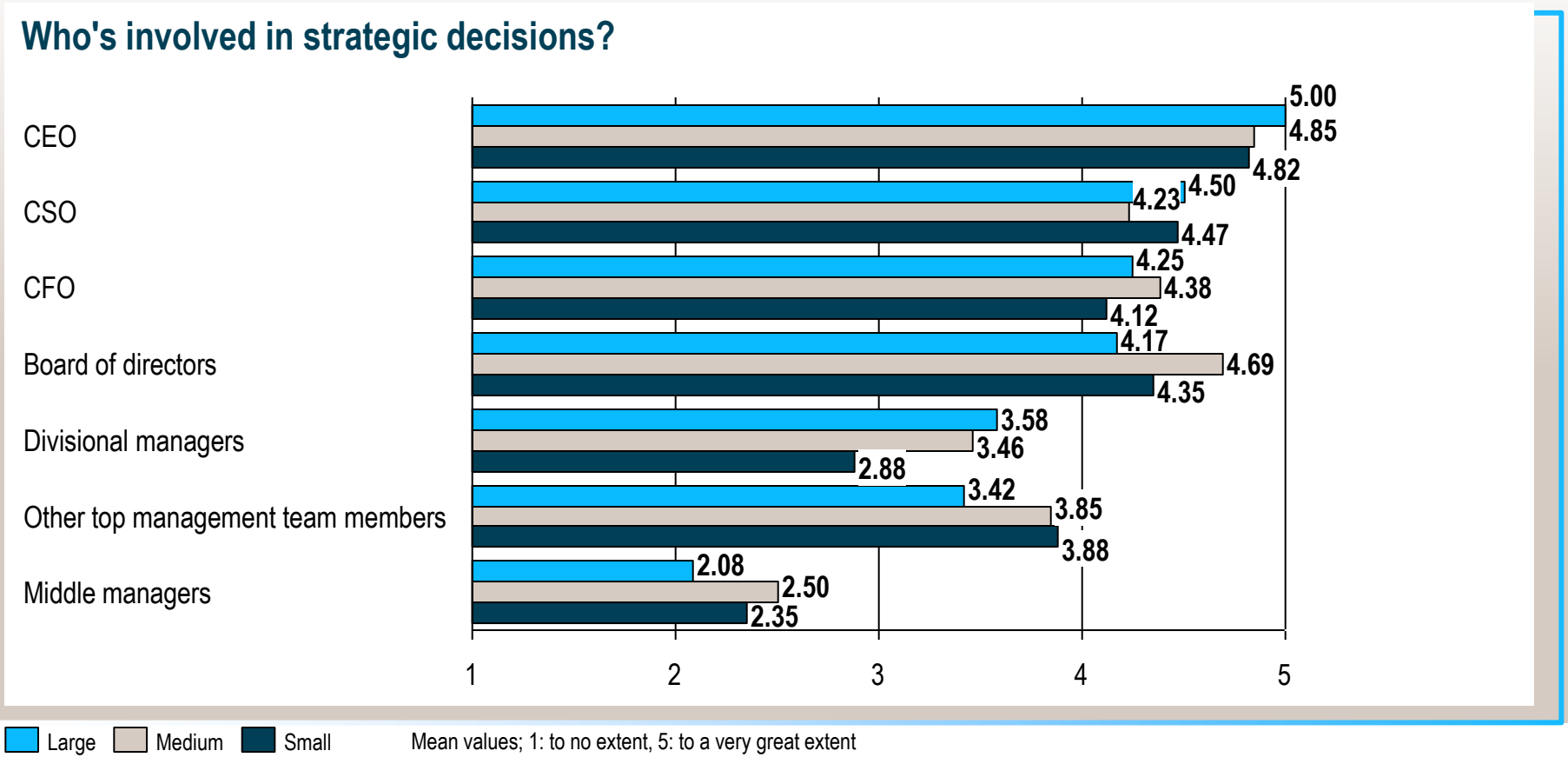
Please indicate the extent to which the following persons/groups are involved in strategic decisions of your firm:

Who's involved in strategic decisions?



Involvement in strategic decisions: Firm size

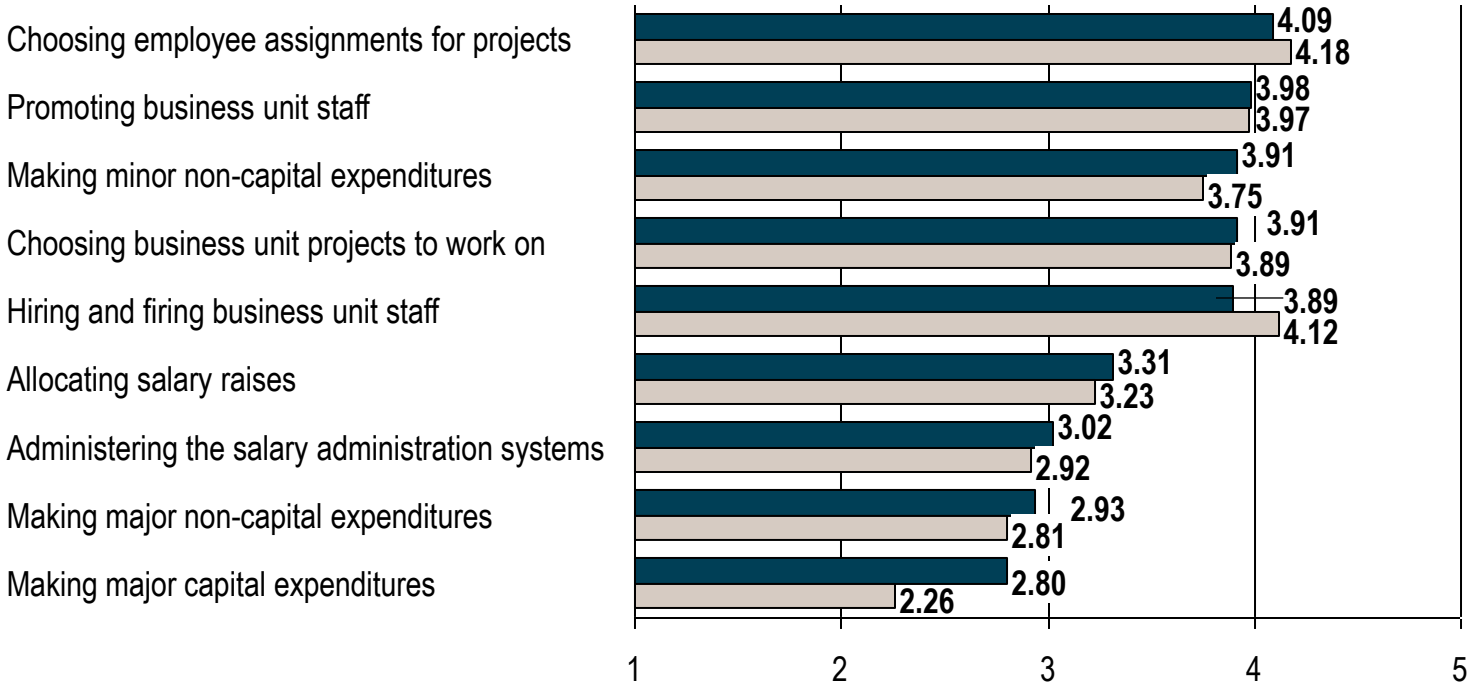
Please indicate the extent to which the following persons/groups are involved in strategic decisions of your firm:



Centralization of strategic decision-making: All Firms (I/II)

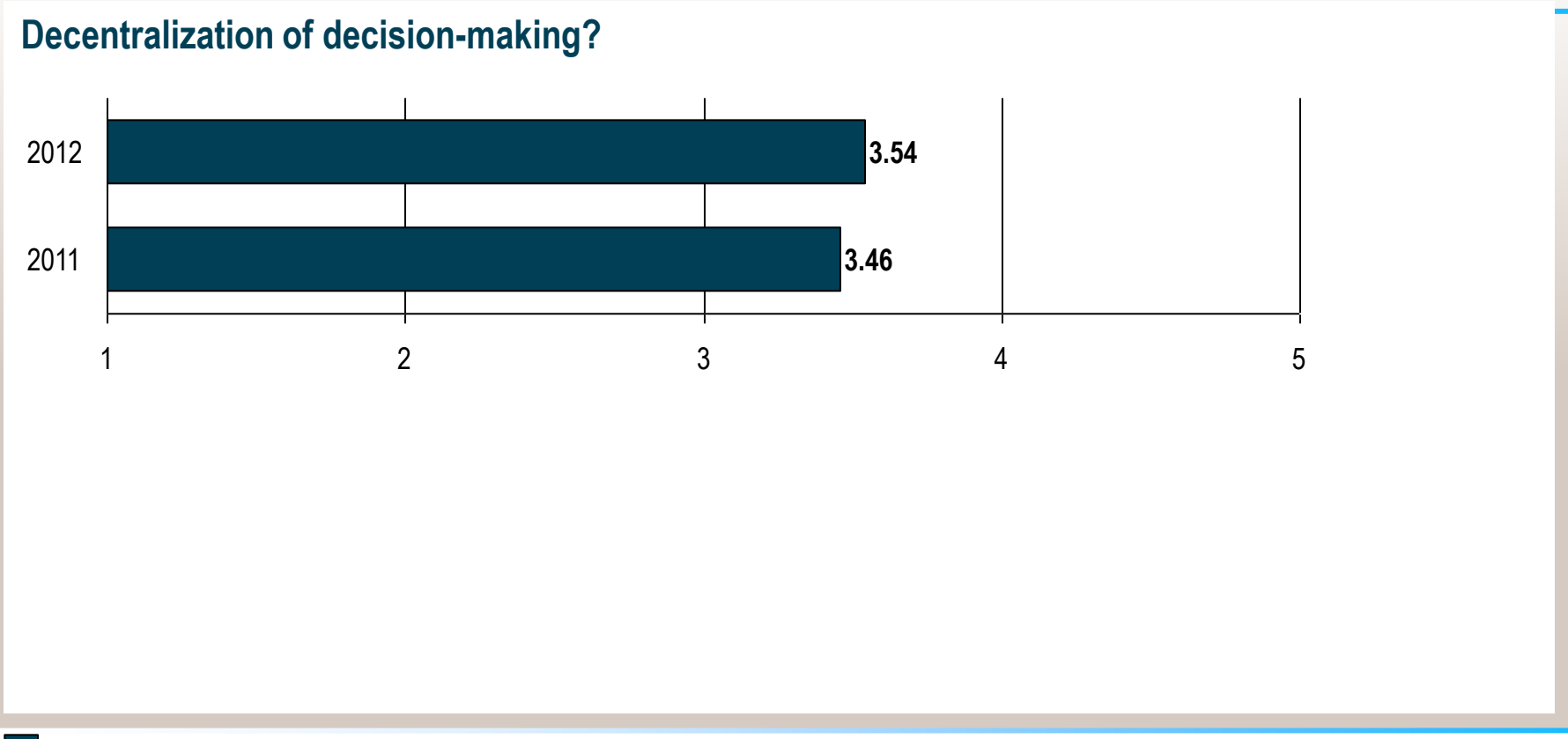
Please indicate the extent to which your firm delegates strategic decision-making authority to the business units concerning the following issues:

Decentralization of decision-making?



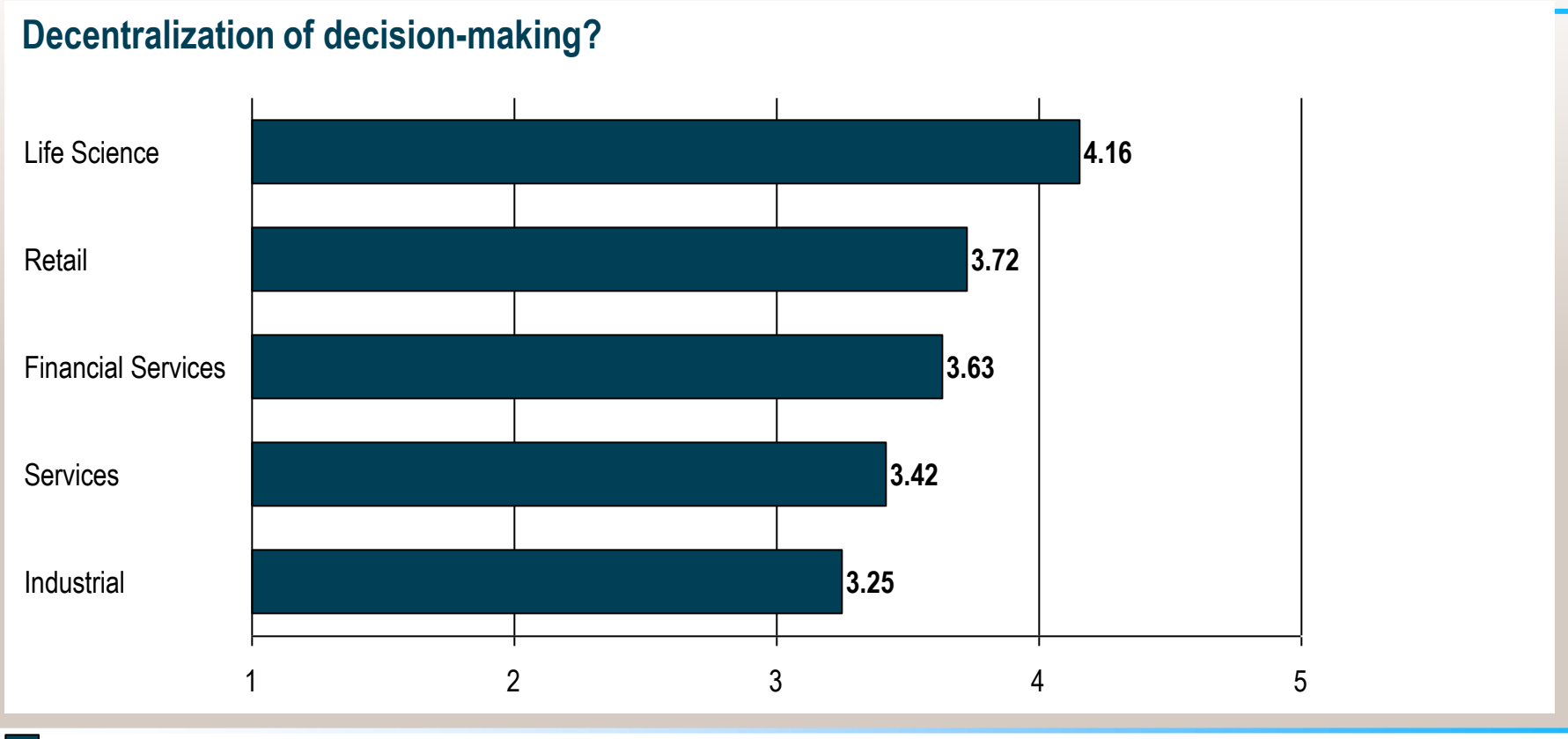
Centralization of strategic decision-making: All Firms (II/II)

Please indicate the extent to which your firm delegates strategic decision-making authority to the business units concerning the following issues:



Centralization of strategic decision-making: Various industries

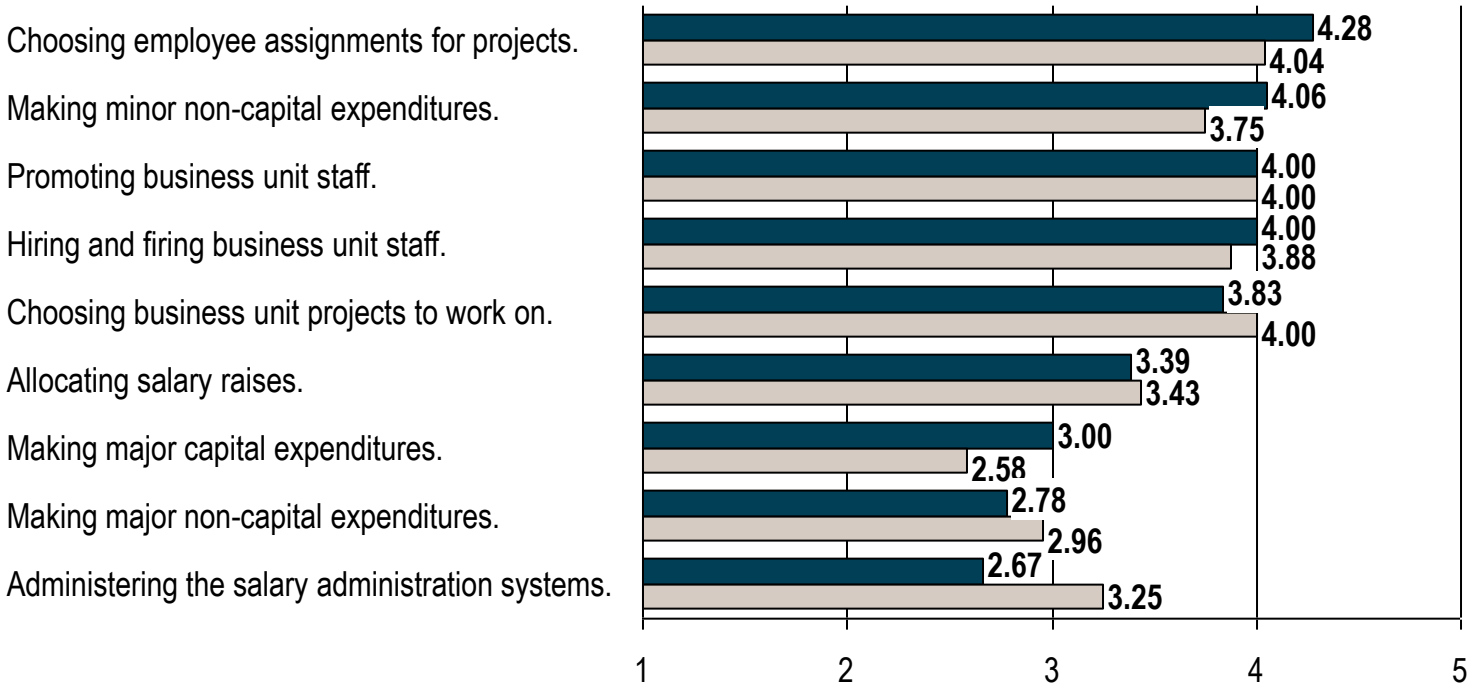
Please indicate the extent to which your firm delegates strategic decision-making authority to the business units concerning the following issues:



Centralization of strategic decision-making: High vs. Low Performer

Please indicate the extent to which your firm delegates strategic decision-making authority to the business units concerning the following issues:

Decentralization of decision-making?

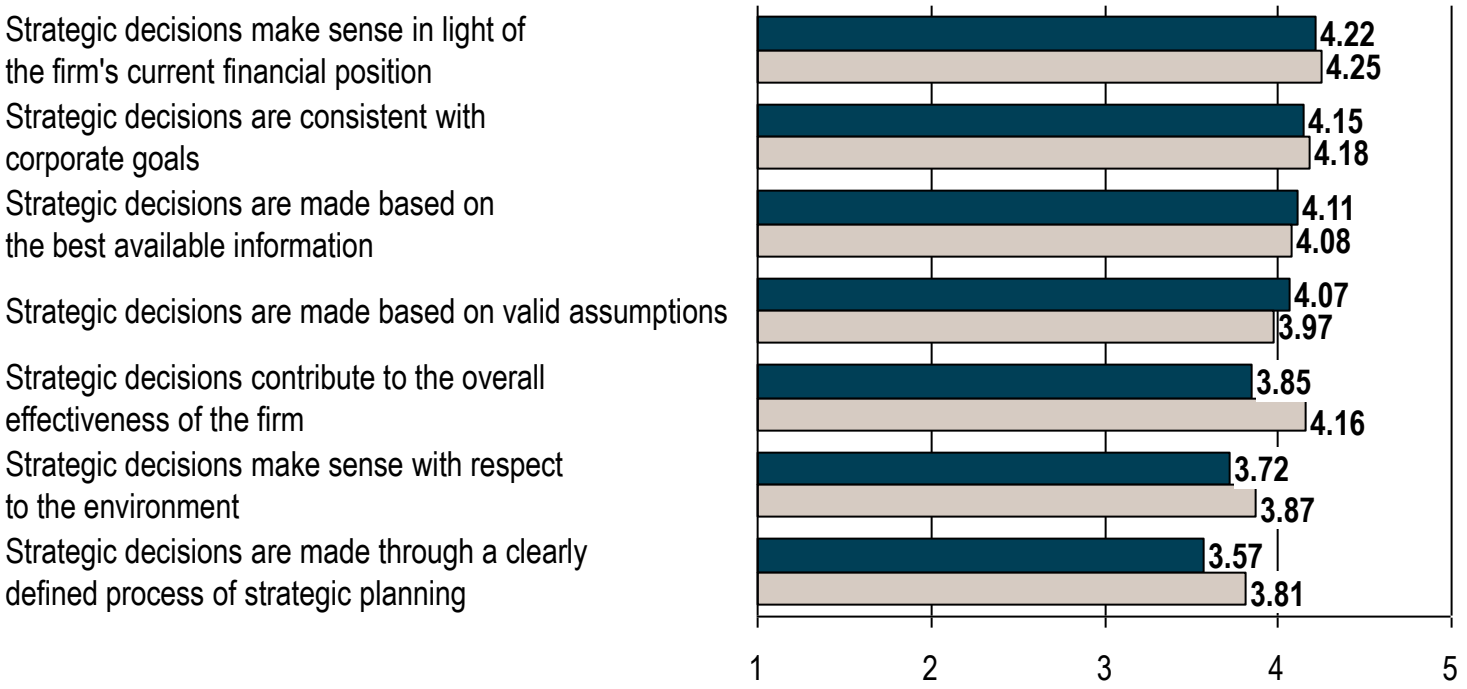


High Low Mean values; 1: to no extent, 5: to a very great extent

Quality of strategic decisions: All Firms (I/II)

Please indicate the extent to which the following is true for your firm's strategic decisions

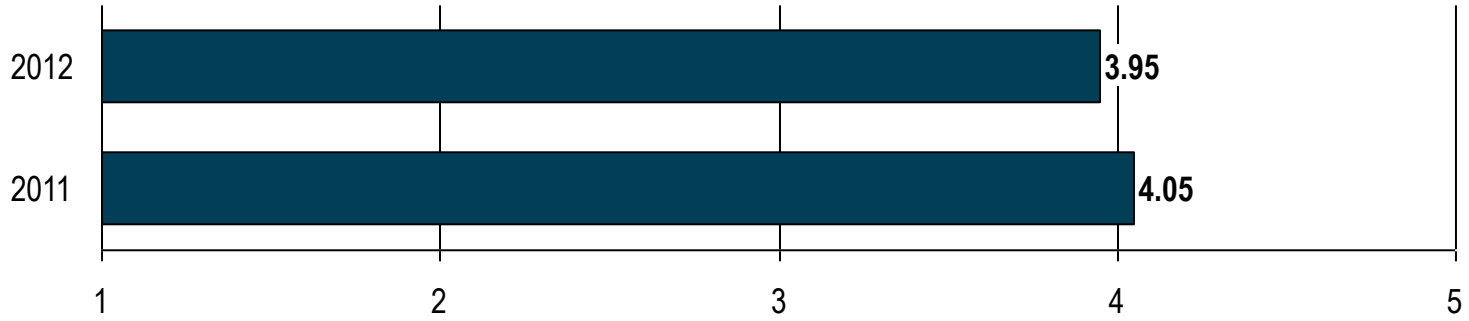
Quality of strategic decisions



Quality of strategic decisions: All Firms (II/II)

Please indicate the extent to which the following is true for your firm's strategic decisions

Overall high quality of strategic decisions

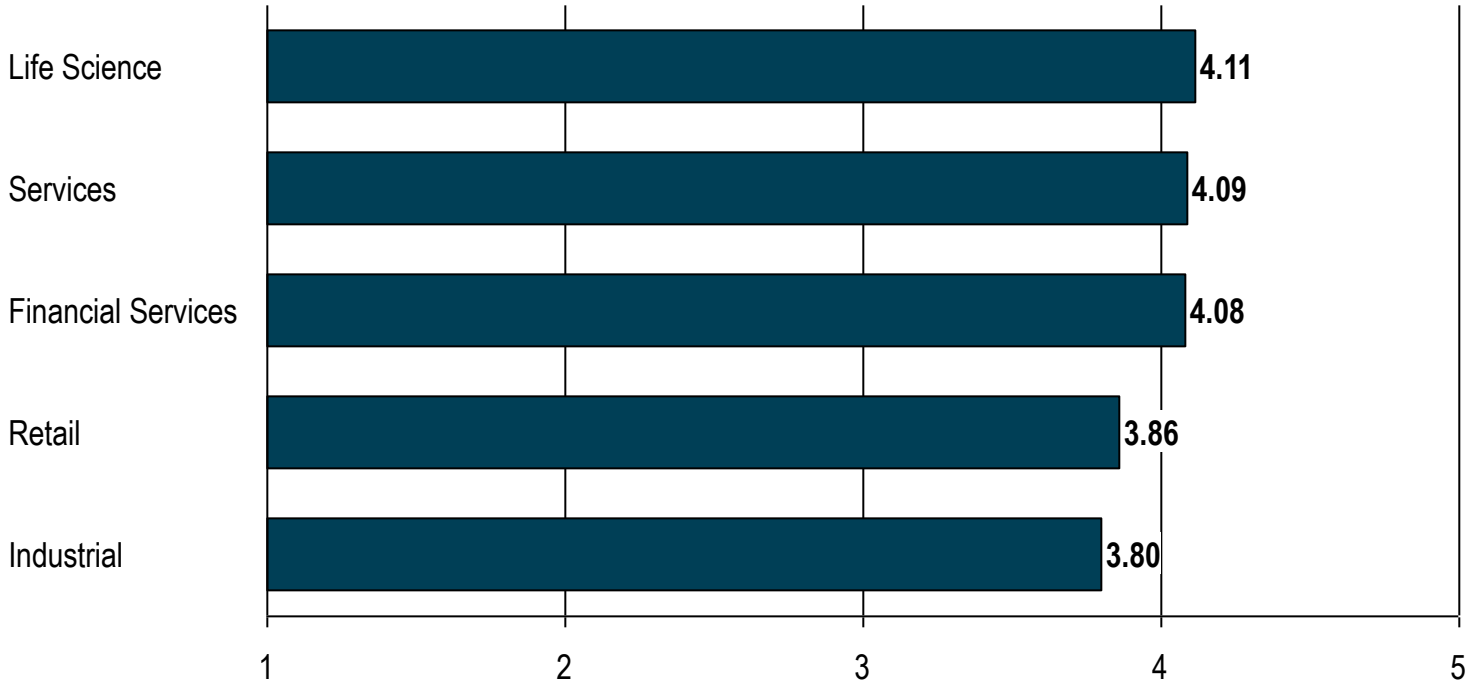


Mean Mean values; 1: to no extent, 5: to a very great extent

Quality of strategic decisions: Various industries

Please indicate the extent to which the following is true for your firm's strategic decisions

Overall high quality of strategic decisions

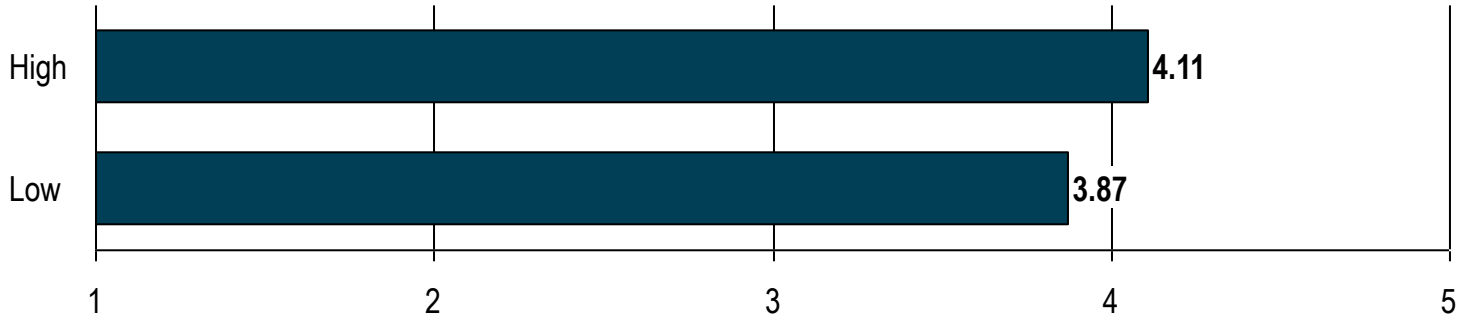


Mean Mean values; 1: to no extent, 5: to a very great extent

Quality of strategic decisions: High vs. Low Performer

Please indicate the extent to which the following is true for your firm's strategic decisions

Overall high quality of strategic decisions

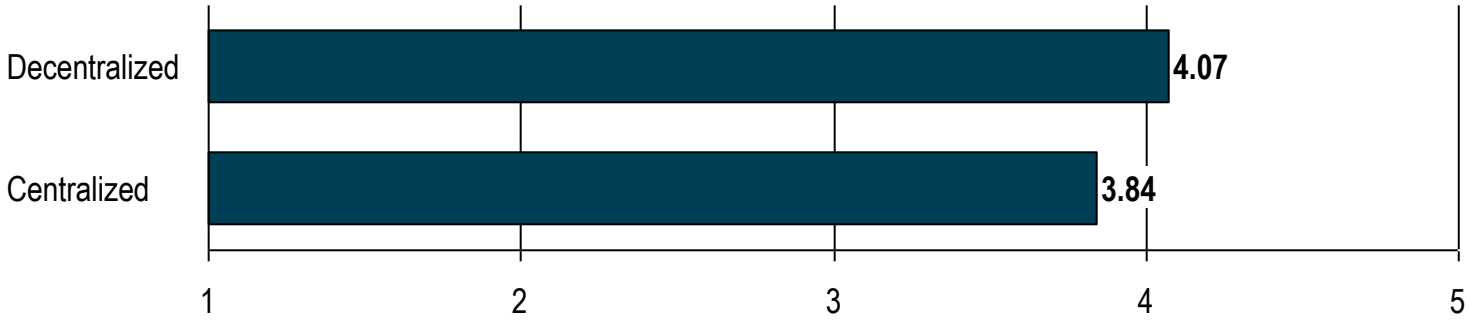


Mean Mean values; 1: to no extent, 5: to a very great extent

Quality of strategic decisions: Organization design

Please indicate the extent to which the following is true for your firm's strategic decisions

Overall high quality of strategic decisions

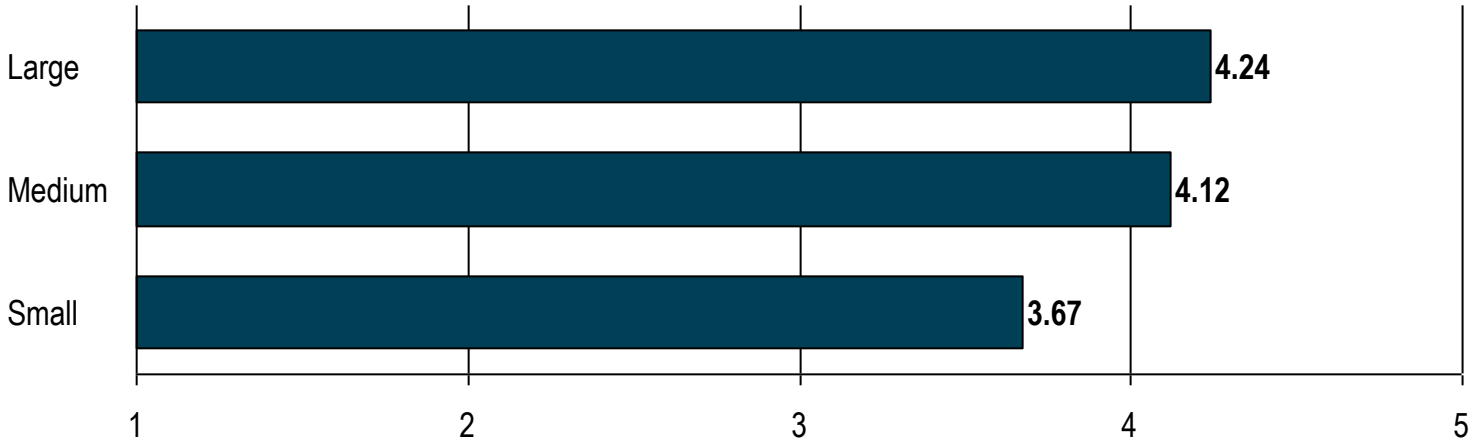


Mean Mean values; 1: to no extent, 5: to a very great extent

Quality of strategic decisions: Firm size

Please indicate the extent to which the following is true for your firm's strategic decisions

Overall high quality of strategic decisions



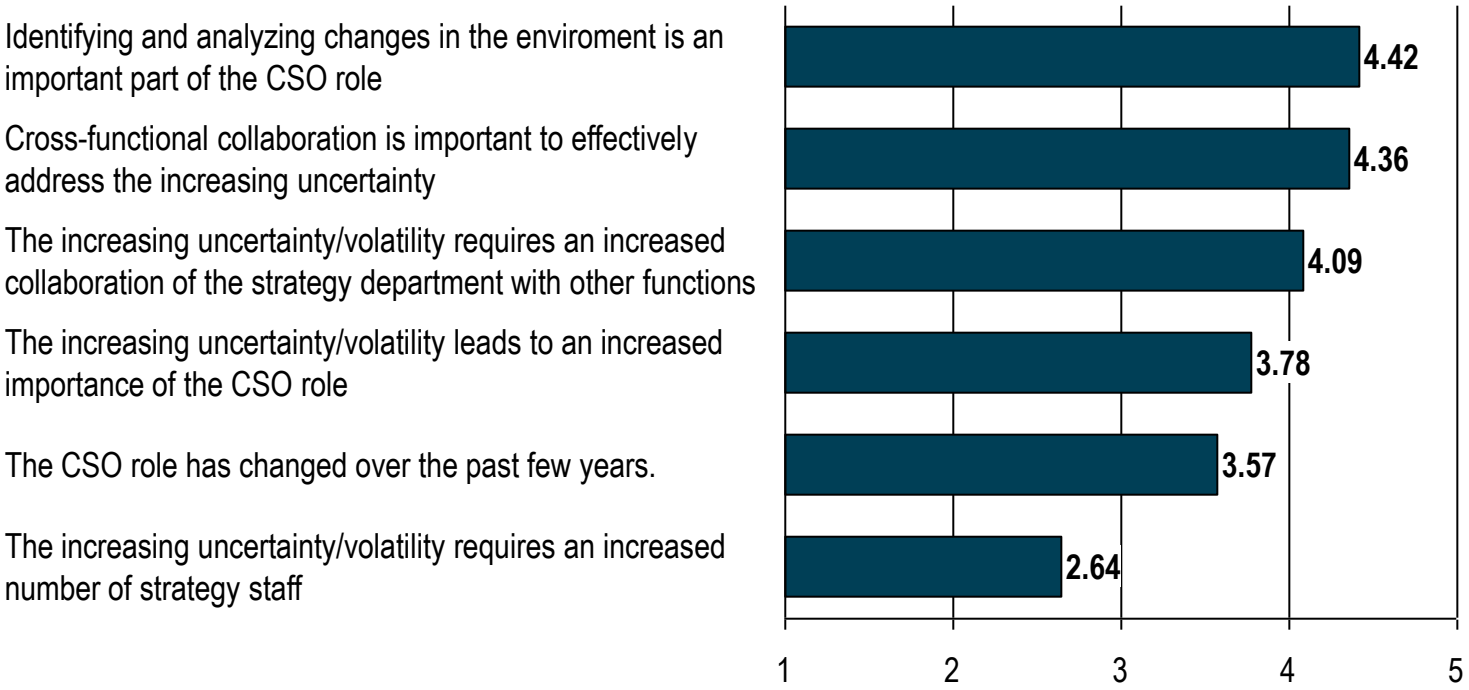
Mean

Mean values; 1: to no extent, 5: to a very great extent

Uncertainty and the CSO role: All Firms

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your role:

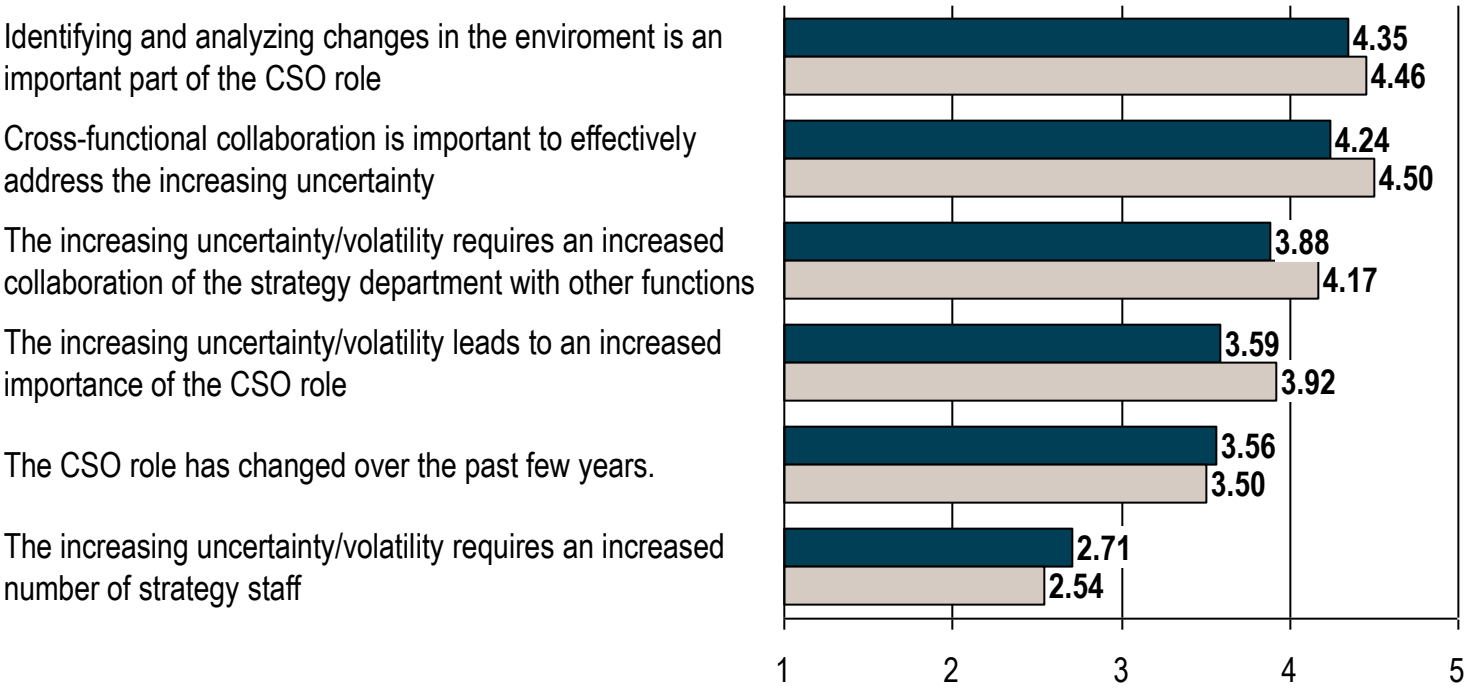
Uncertainty's effect on the CSO role



Uncertainty and the CSO role: High vs. Low Performer

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your role:

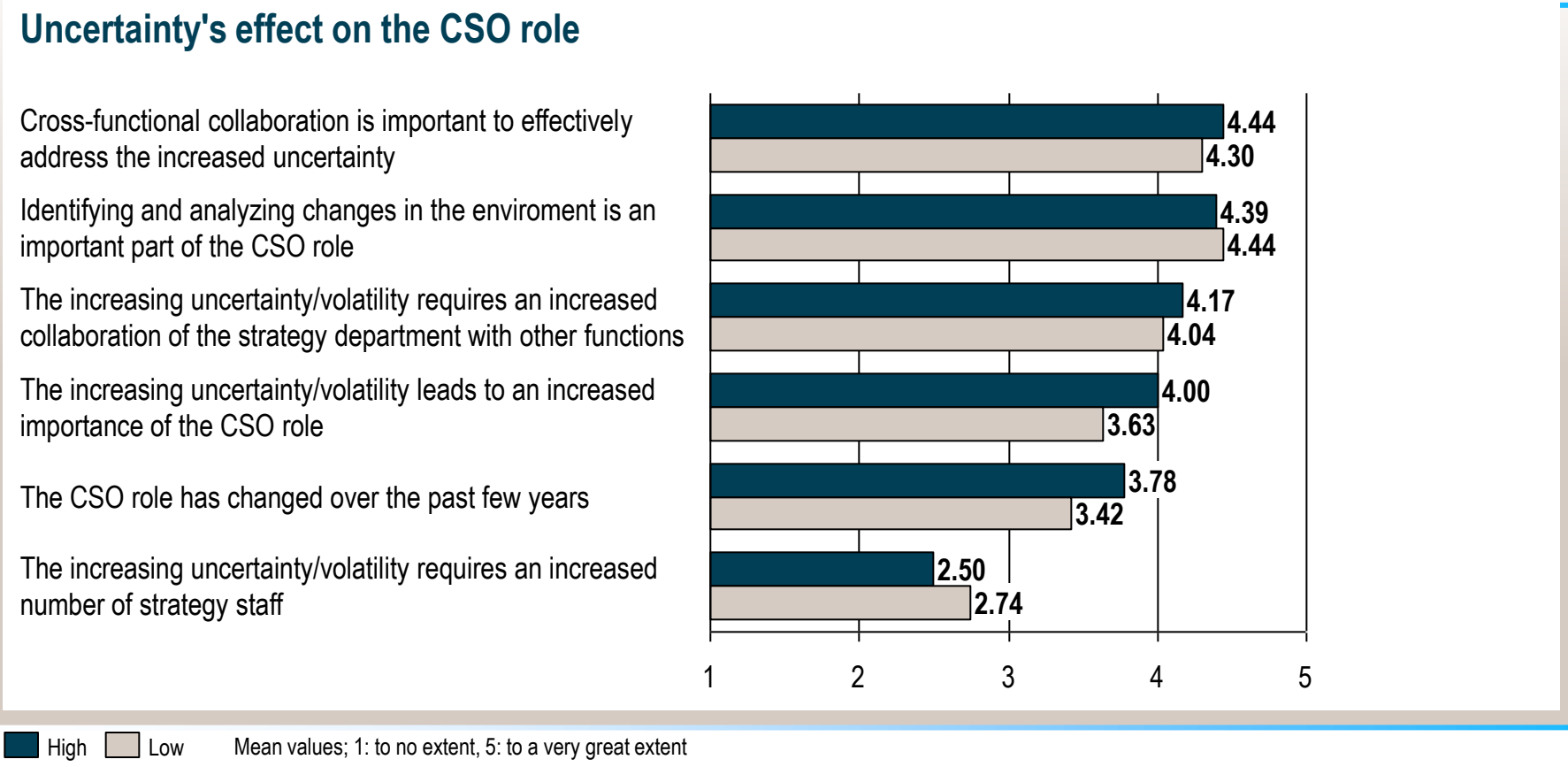
Uncertainty's effect on the CSO role



Uncertainty and the CSO role: Quality of strategic decisions

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your role:

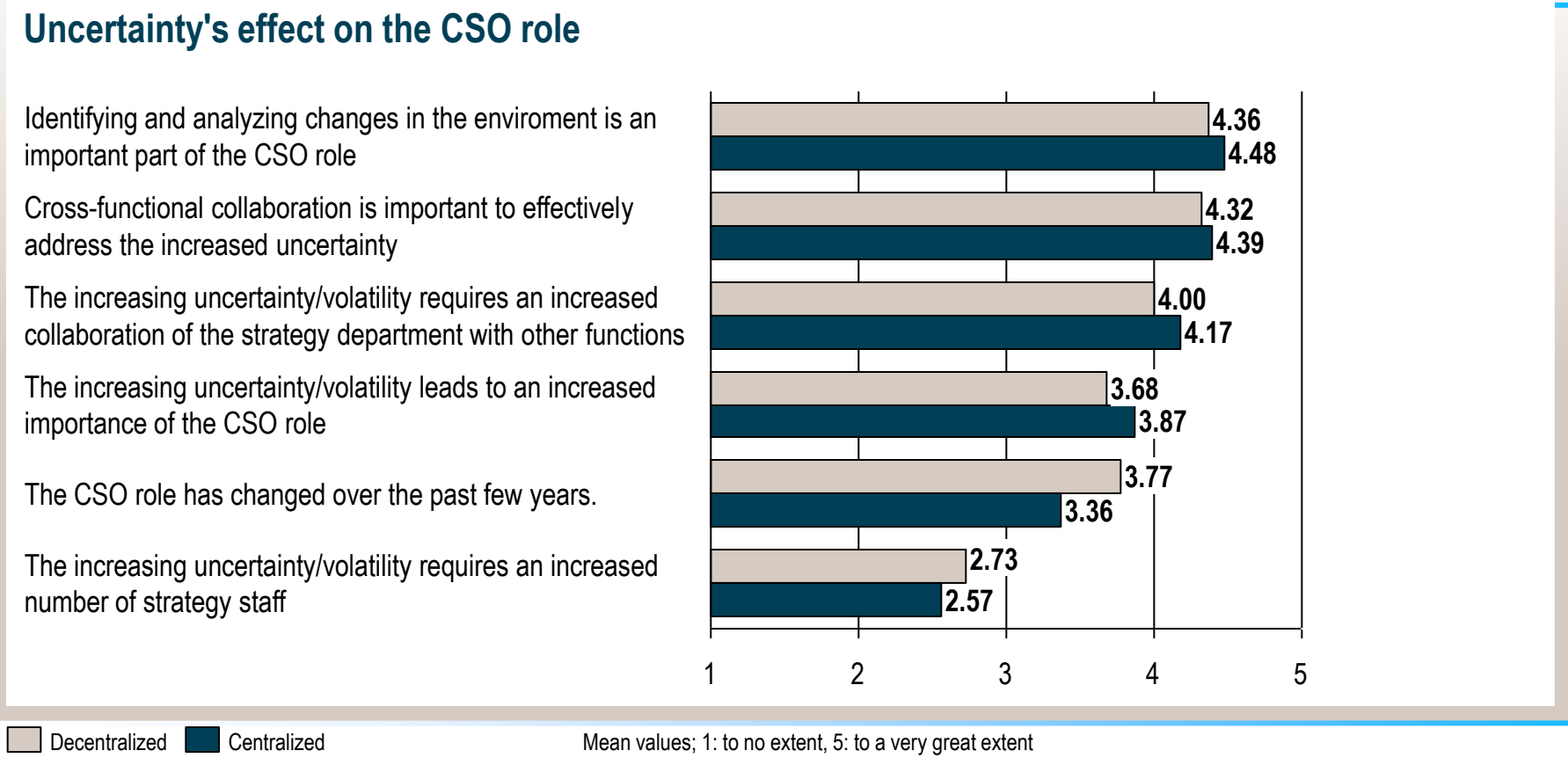
Uncertainty's effect on the CSO role



Uncertainty and the CSO role: Organization design

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your role:

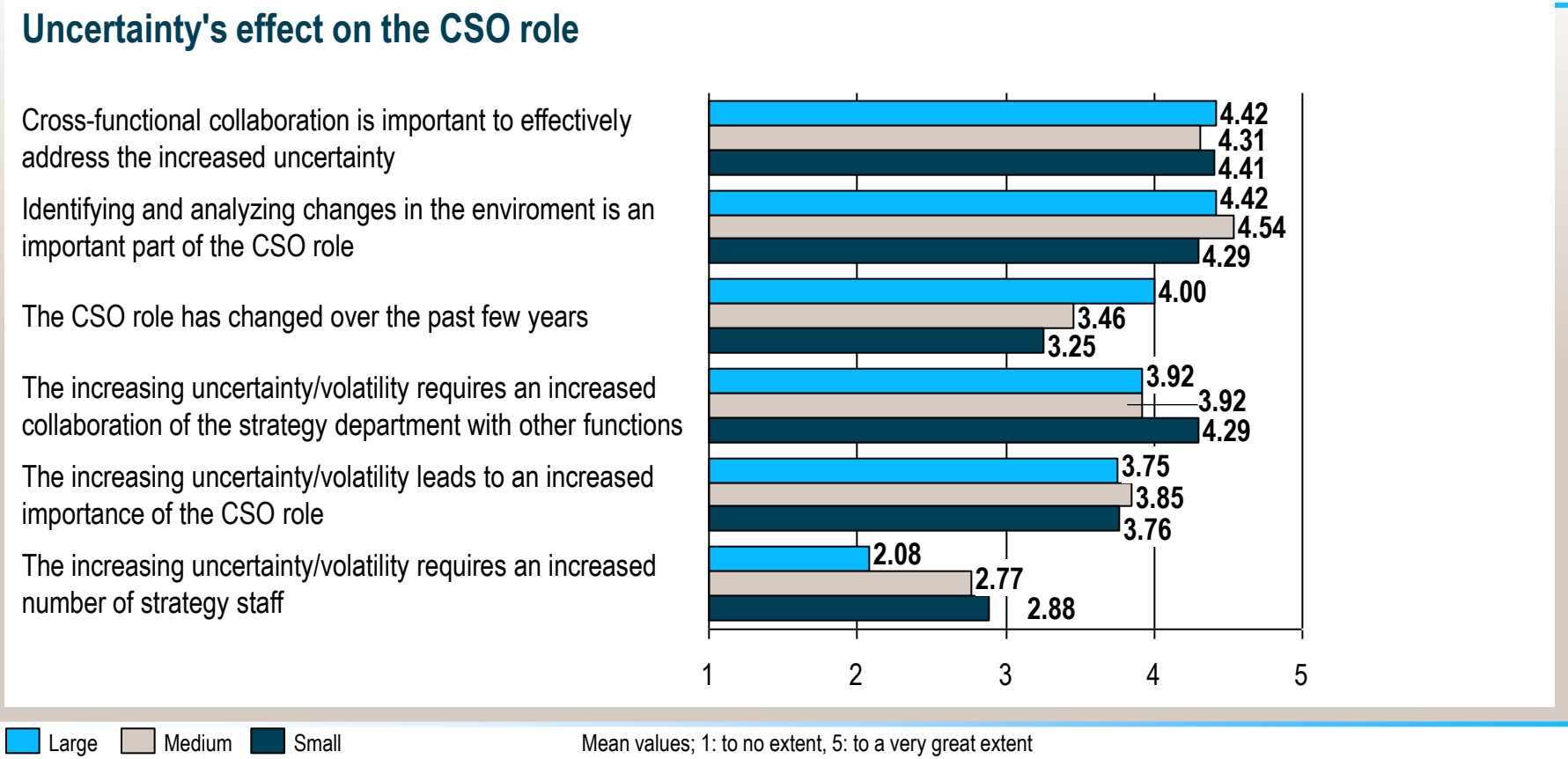
Uncertainty's effect on the CSO role



Uncertainty and the CSO role: Firm size

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your role:

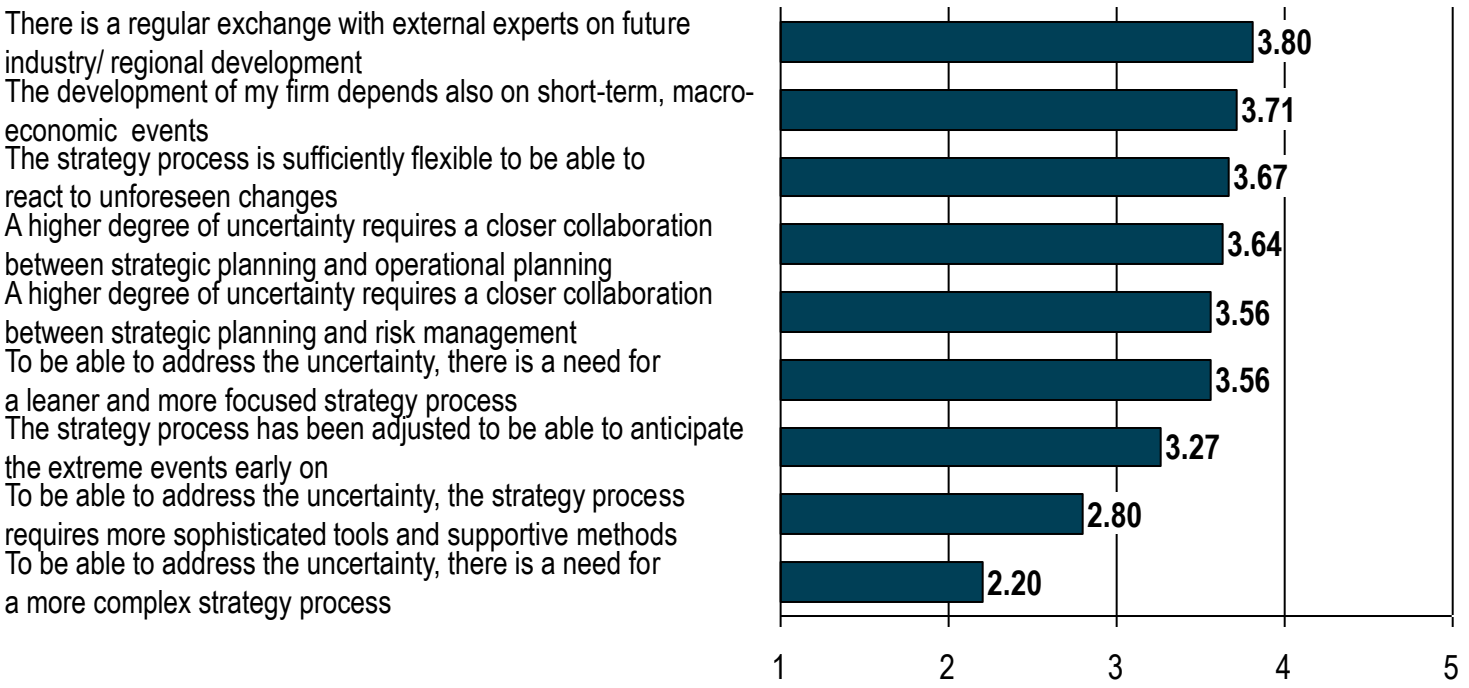
Uncertainty's effect on the CSO role



Uncertainty's effect on the strategy process: All Firms

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your firm's strategy process:

Uncertainty's effect on the strategy process

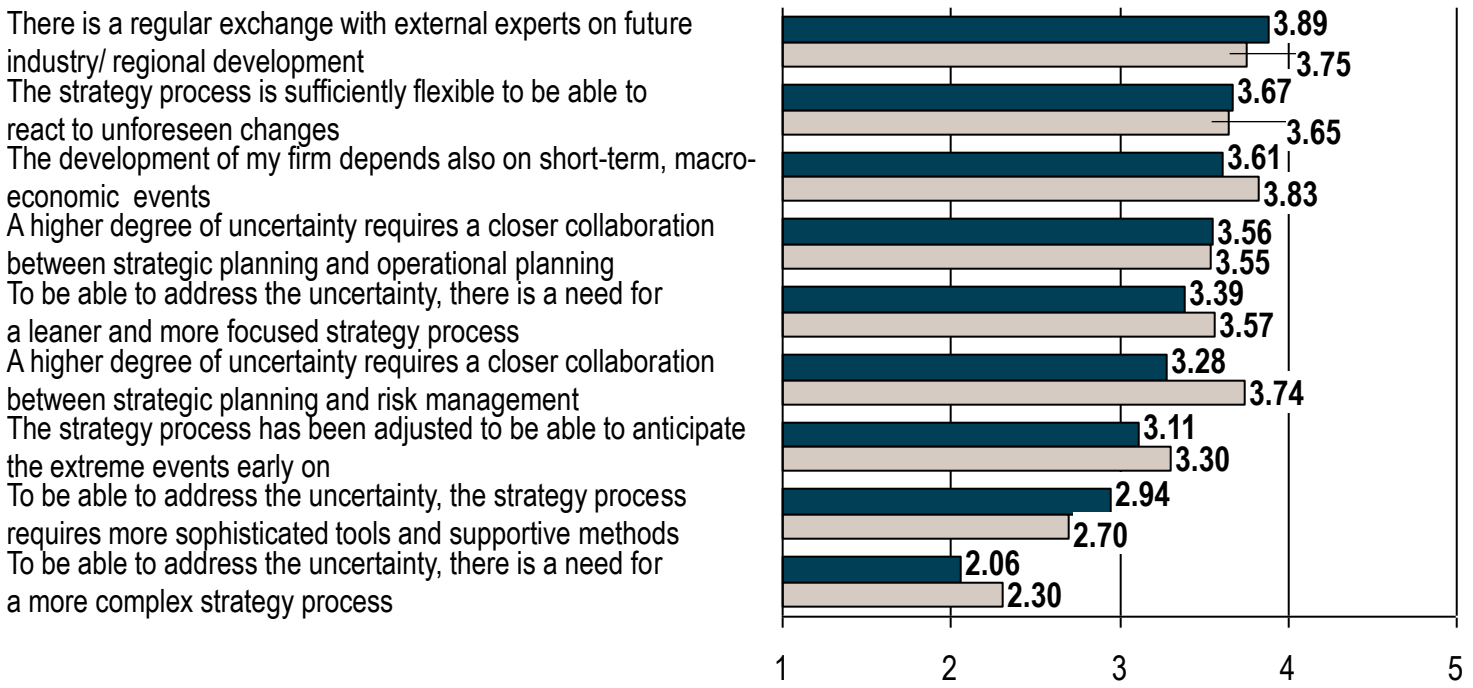


Mean Mean values; 1: to no extent, 5: to a very great extent

Uncertainty's effect on the strategy process: High vs. Low Performer

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your firm's strategy process:

Uncertainty's effect on the strategy process

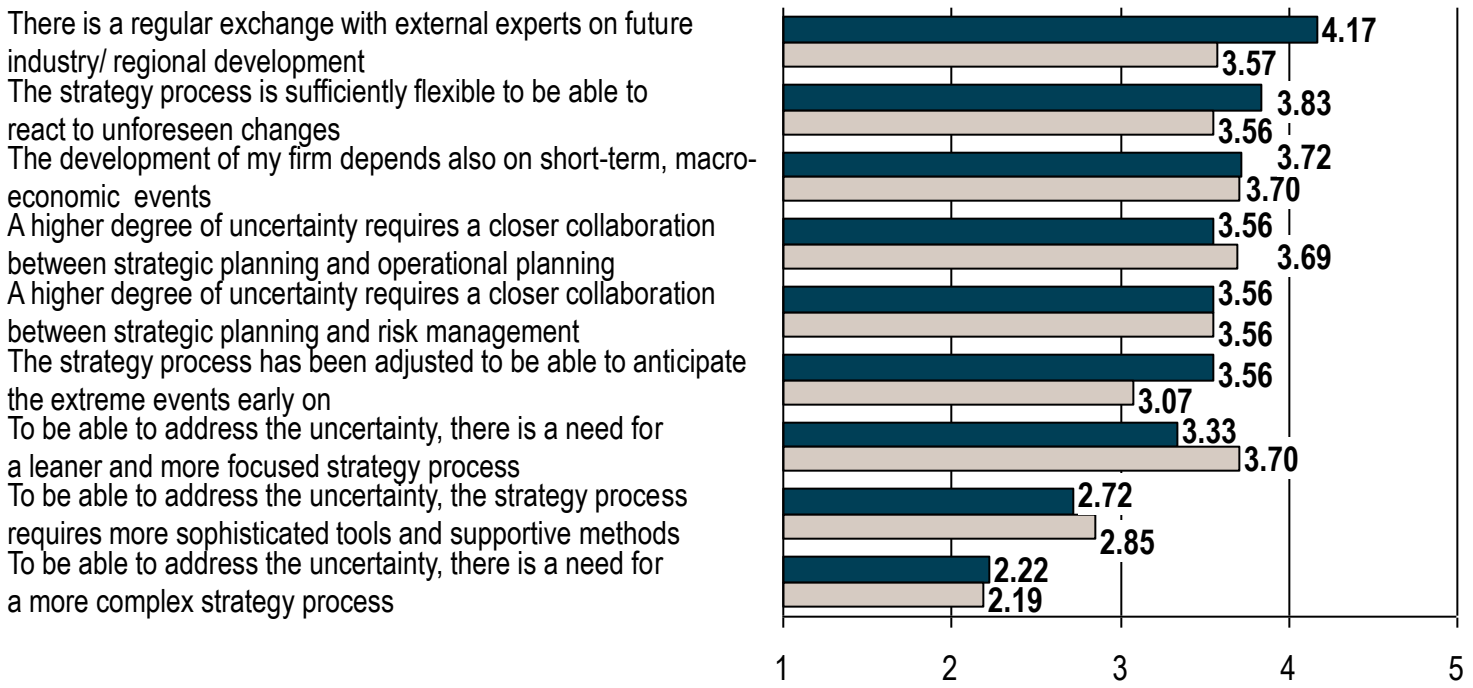


High Low Mean values; 1: to no extent, 5: to a very great extent

Uncertainty's effect on the strategy process: Quality of strategic decisions

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your firm's strategy process:

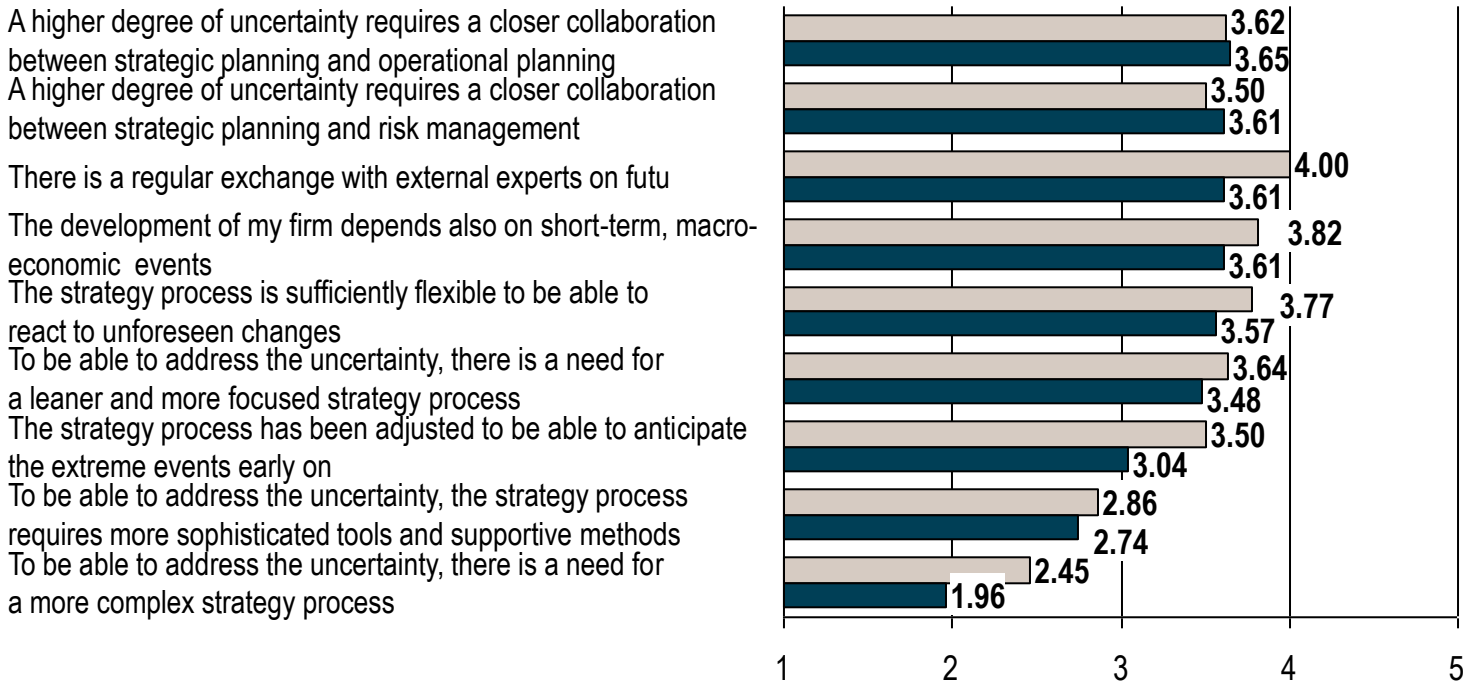
Uncertainty's effect on the strategy process



Uncertainty's effect on the strategy process: Organization design

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your firm's strategy process:

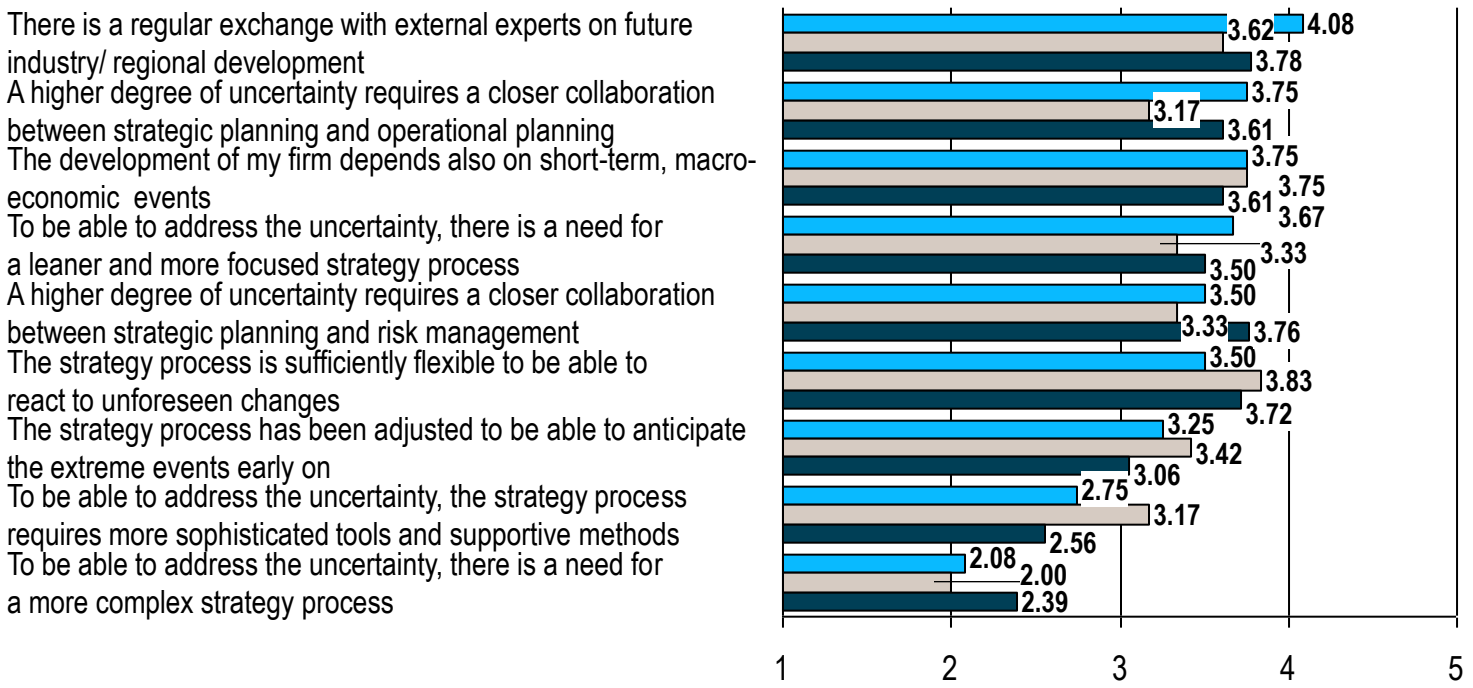
Uncertainty's effect on the strategy process



Uncertainty's effect on the strategy process: Firm size

Please indicate the extent to which you agree with the following statements regarding the uncertainty's effect on your firm's strategy process:

Uncertainty's effect on the strategy process

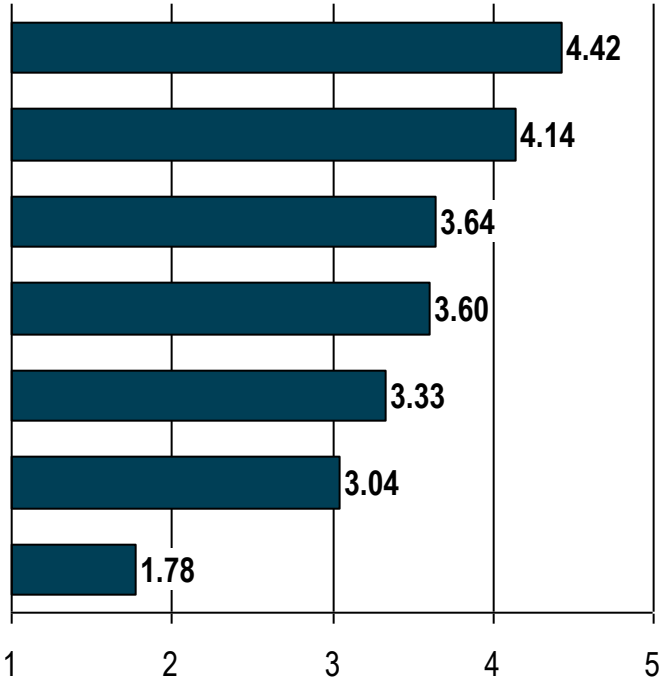


Mean values; 1: to no extent, 5: to a very great extent

Megatrends and the strategy process: All Firms

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process:

The influence of megatrends on the strategy process

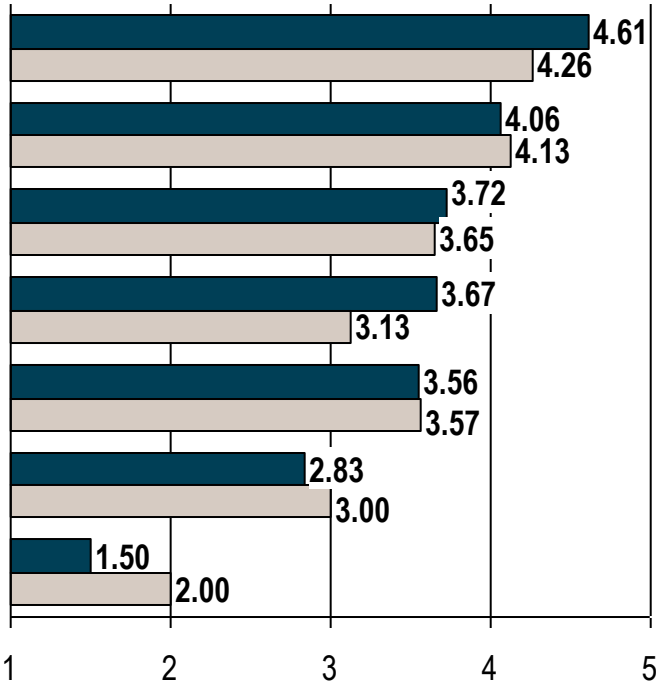


Mean Mean values; 1: to no extent, 5: to a very great extent

Megatrends and the strategy process: High vs. Low Performer

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process:

The influence of megatrends on the strategy process

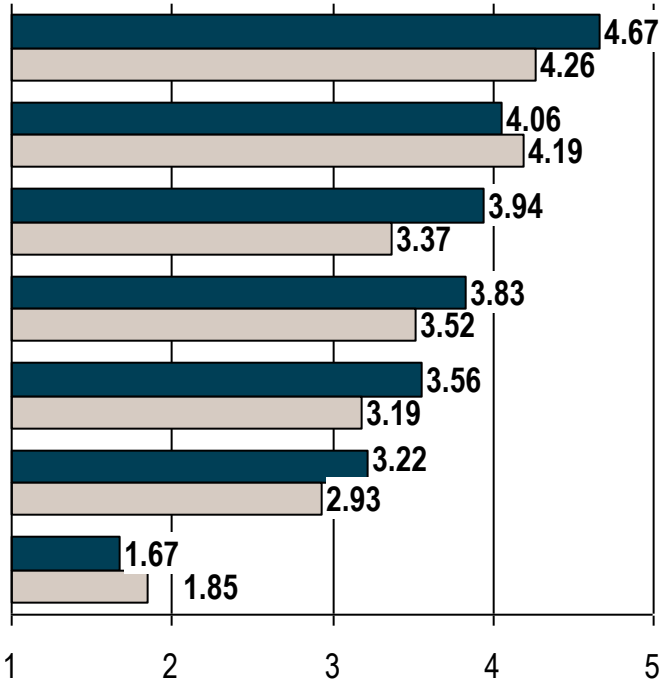


High Low Mean values; 1: to no extent, 5: to a very great extent

Megatrends and the strategy process: Quality of strategic desicions

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process:

The influence of megatrends on the strategy process

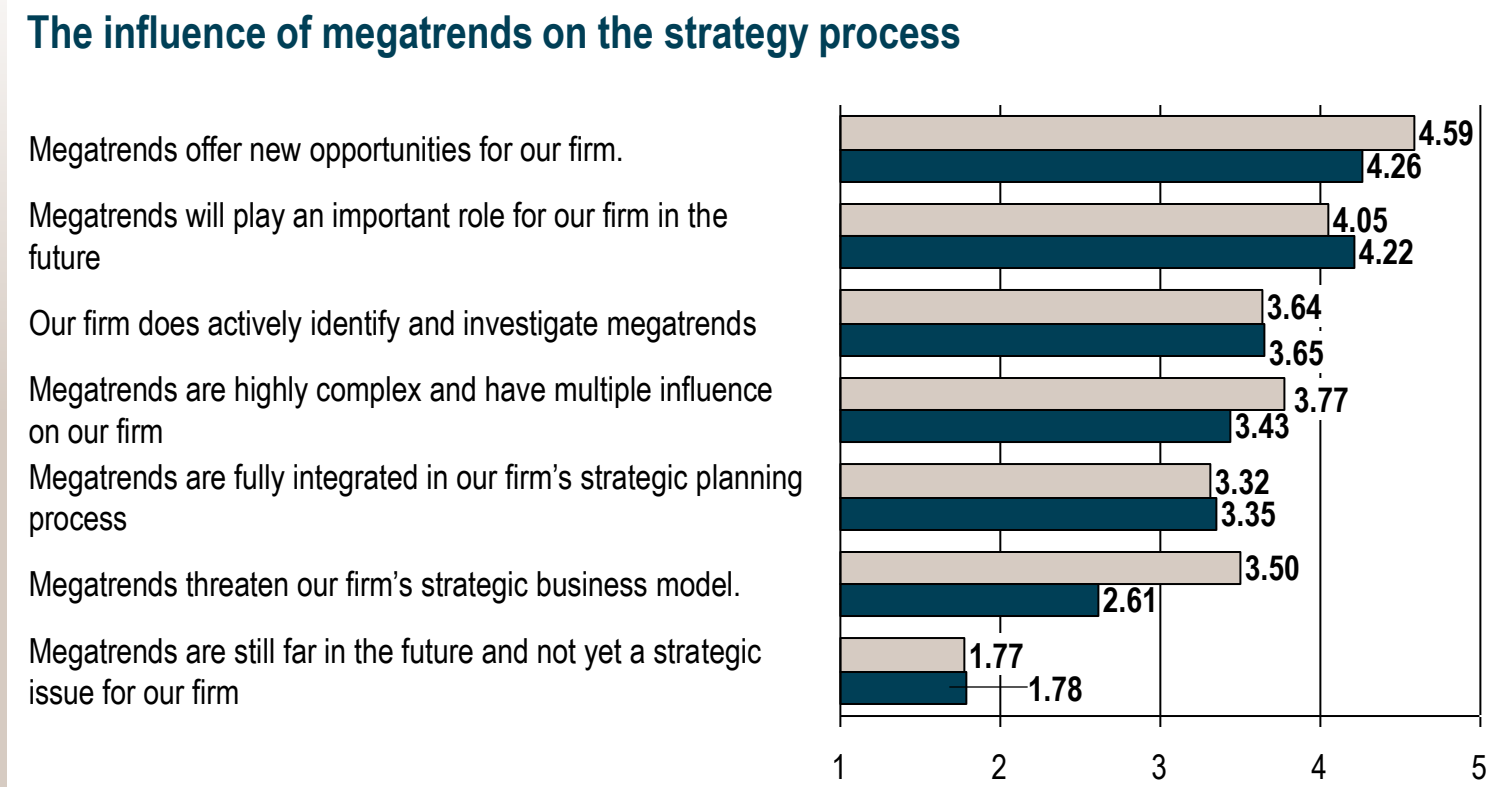


High Low Mean values; 1: to no extent, 5: to a very great extent

Megatrends and the strategy process: Organization design

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process:

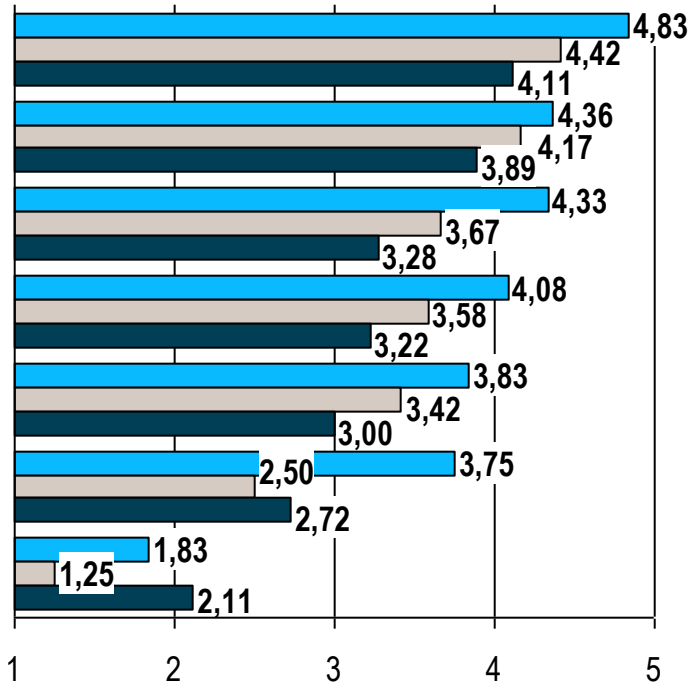
The influence of megatrends on the strategy process



Megatrends and the strategy process: Firm size

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process:

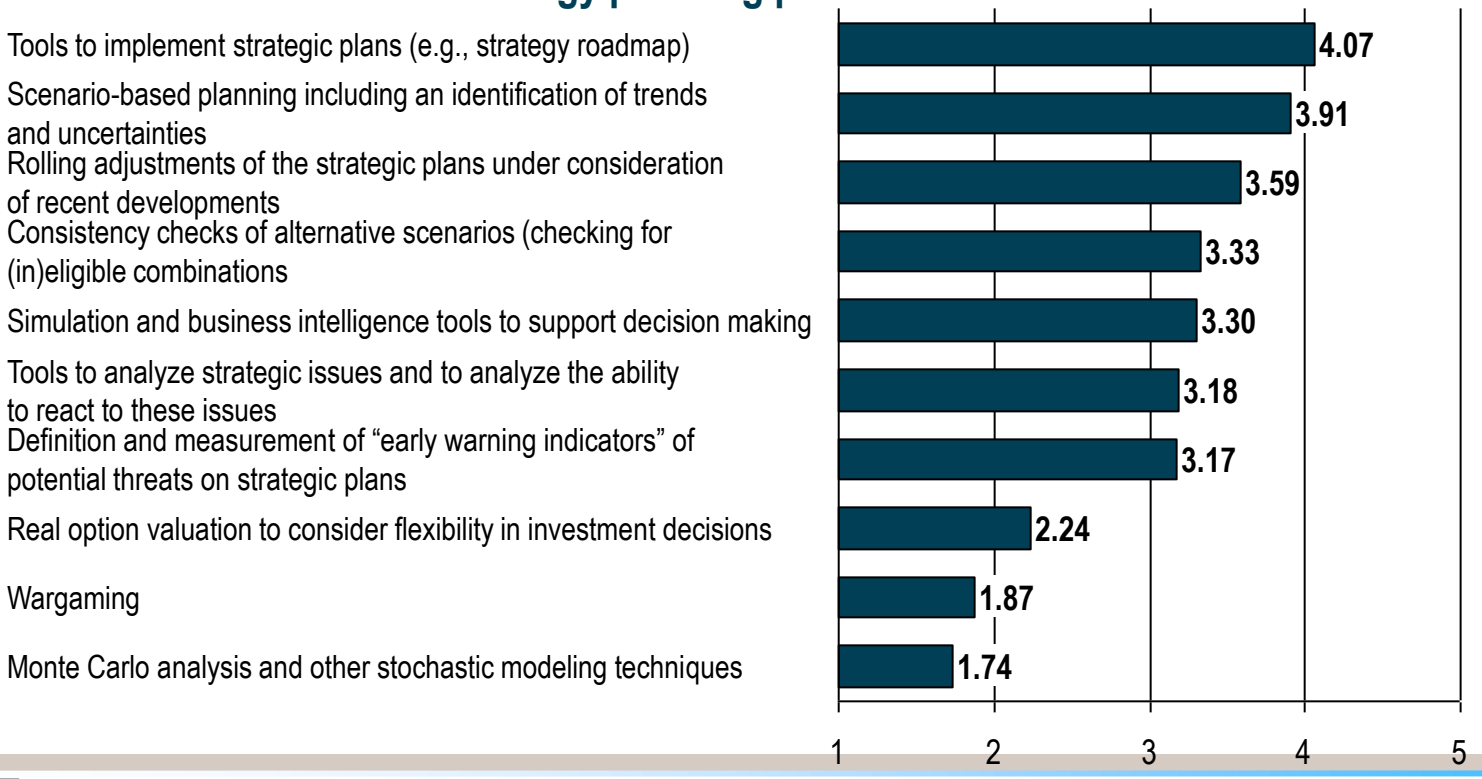
The influence of megatrends on the strategy process



Tools/methods in the strategic planning process: All Firms

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process:

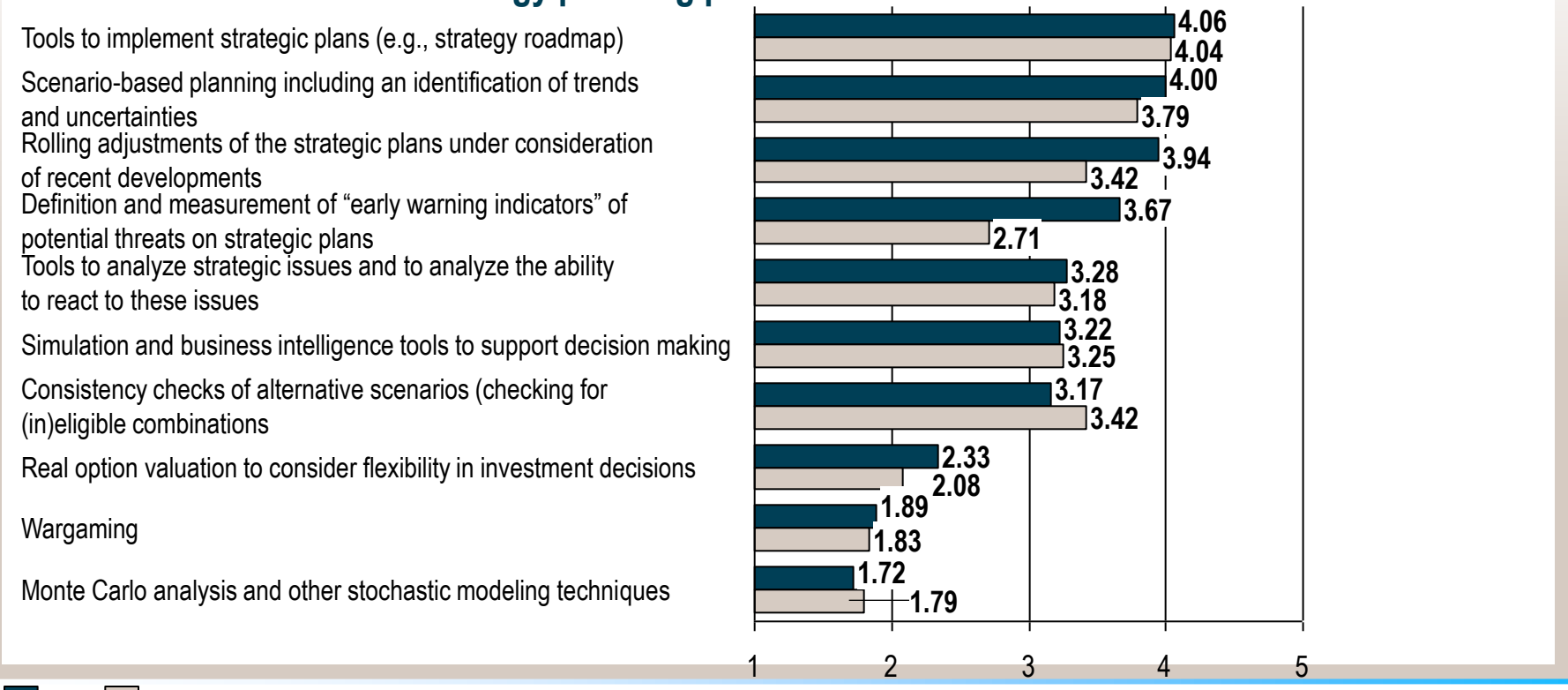
Tools and methods in the strategy planning process



Tools/methods in the strategic planning process: High vs. Low Performer

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process:

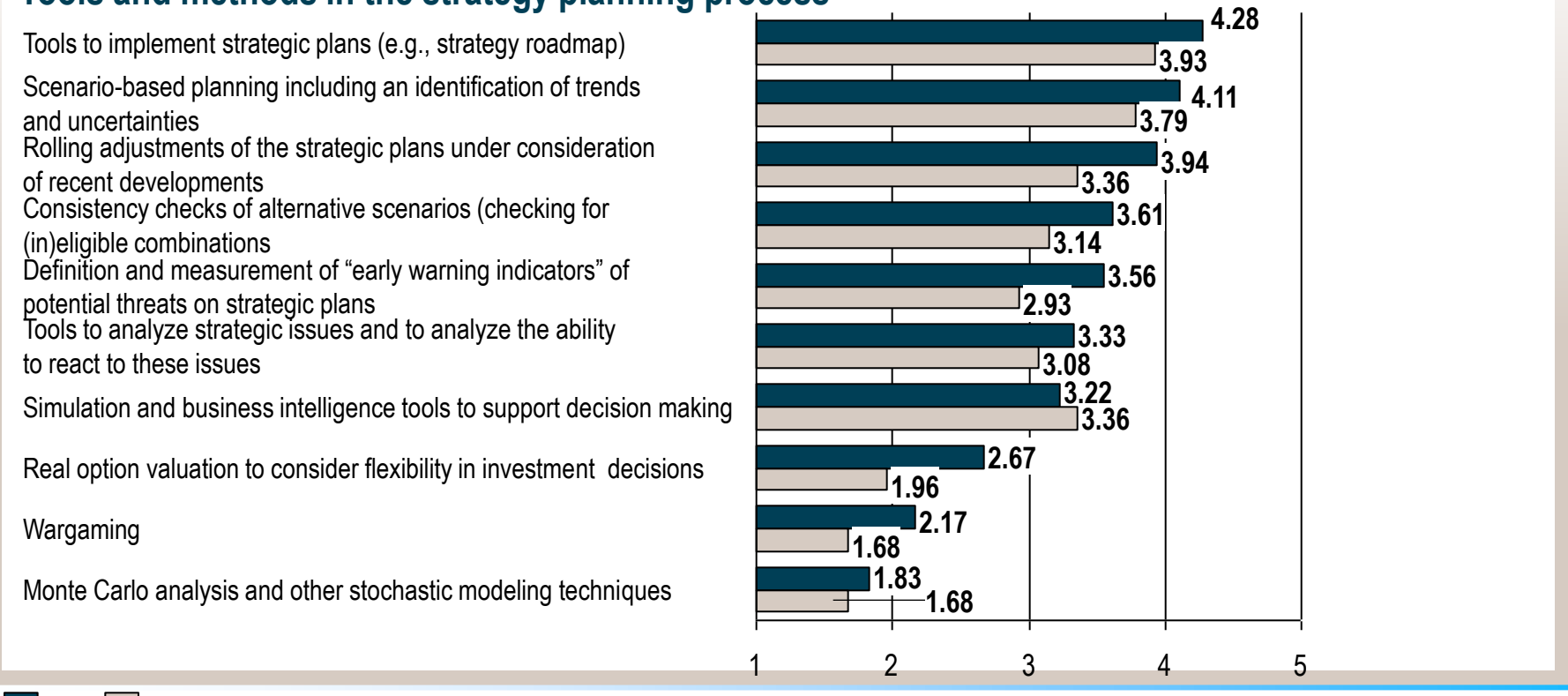
Tools and methods in the strategy planning process



Tools/methods in the strategic planning process: Quality of strategic decisions

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process

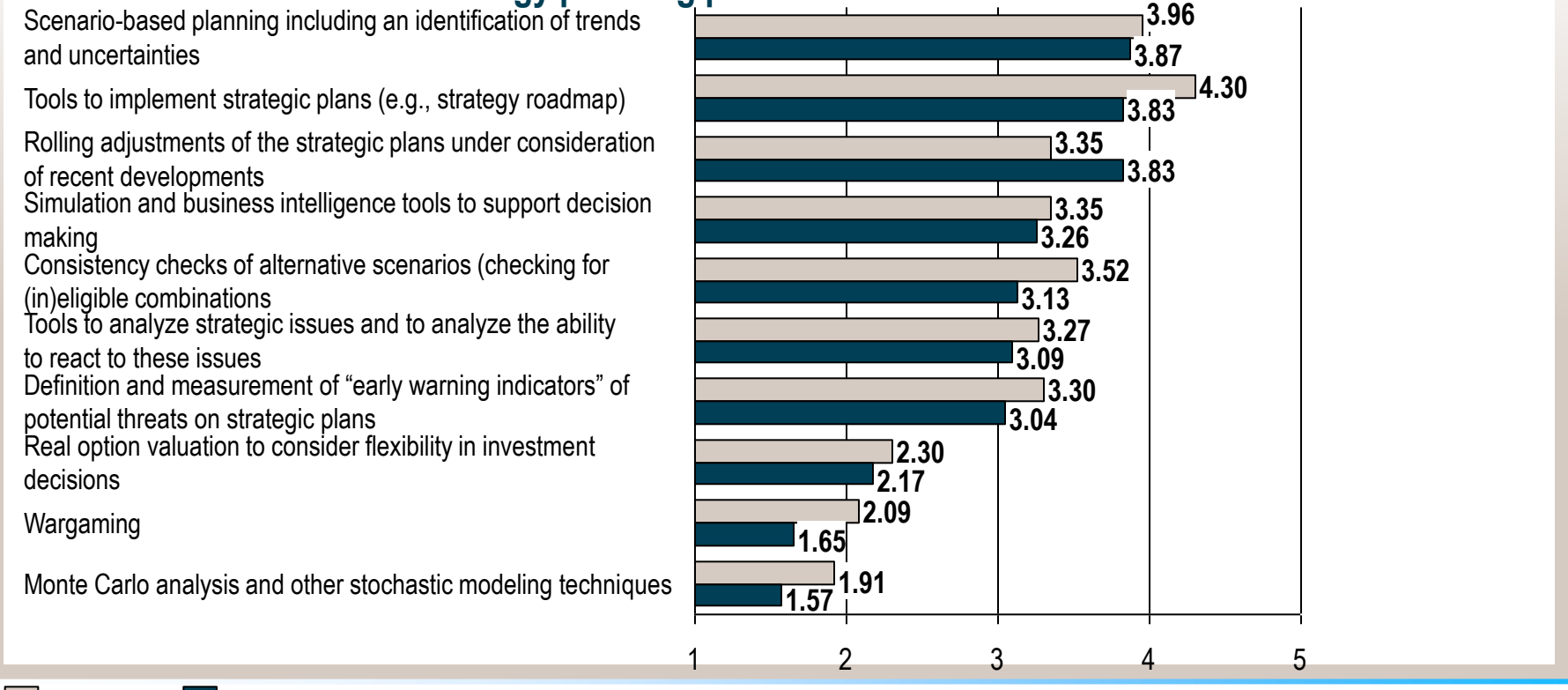
Tools and methods in the strategy planning process



Tools/methods in the strategic planning process: Organization design

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process

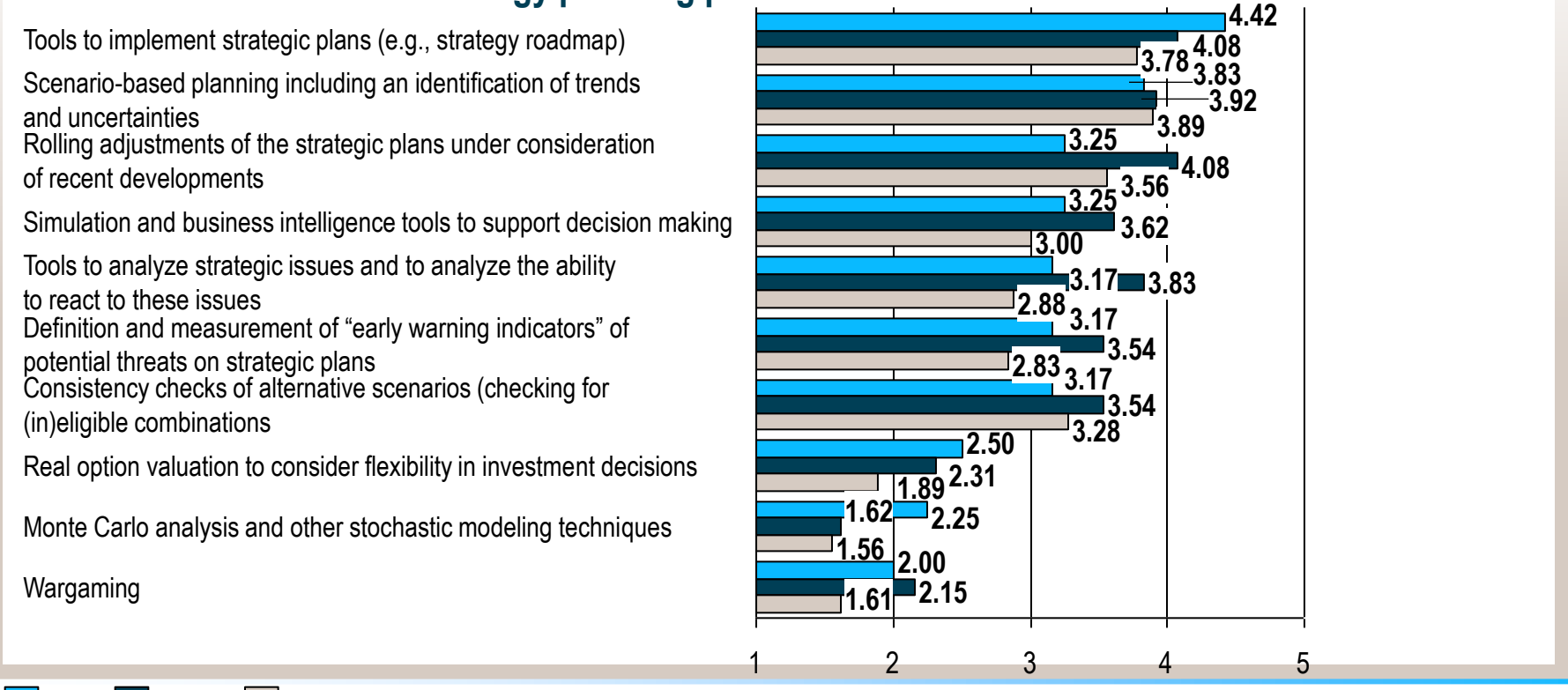
Tools and methods in the strategy planning process



Tools/methods in the strategic planning process: Firm size

Please indicate the extent to which you agree with the following statements regarding the management of megatrends as part of your firm's strategy process

Tools and methods in the strategy planning process



Managing strategic initiatives and programs: All Firms

Please indicate the extent to which you agree with the following statements regarding your firm's strategic initiatives and programs activity:

Management of strategic initiatives and programs



Mean Mean values; 1: to no extent, 5: to a very great extent

Managing strategic initiatives and programs: High vs. Low Performer

Please indicate the extent to which you agree with the following statements regarding your firm's strategic initiatives and programs activity:

Management of strategic initiatives and programs



Managing strategic initiatives and programs: Quality of strategic decisions

Please indicate the extent to which you agree with the following statements regarding your firm's strategic initiatives and programs activity:

Management of strategic initiatives and programs



Managing strategic initiatives and programs: Organization design

Please indicate the extent to which you agree with the following statements regarding your firm's strategic initiatives and programs activity:

Management of strategic initiatives and programs



Managing strategic initiatives and programs: Firm size

Please indicate the extent to which you agree with the following statements regarding your firm's strategic initiatives and programs activity:

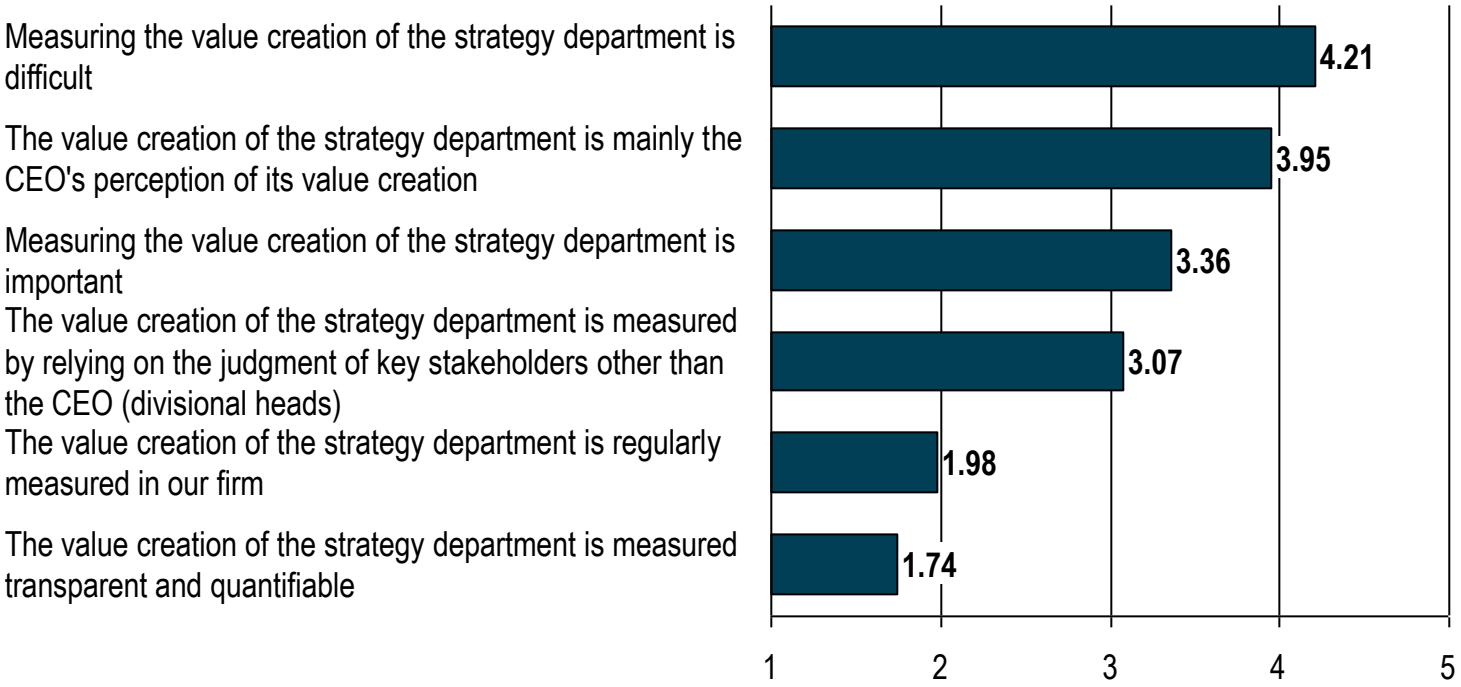
Management of strategic initiatives and programs



Measuring strategic impact: All Firms

Please indicate the extent to which you agree with the following statements regarding your department's value creation (if no strategy department, please refer to your individual role):

Measurement of the department's value creation



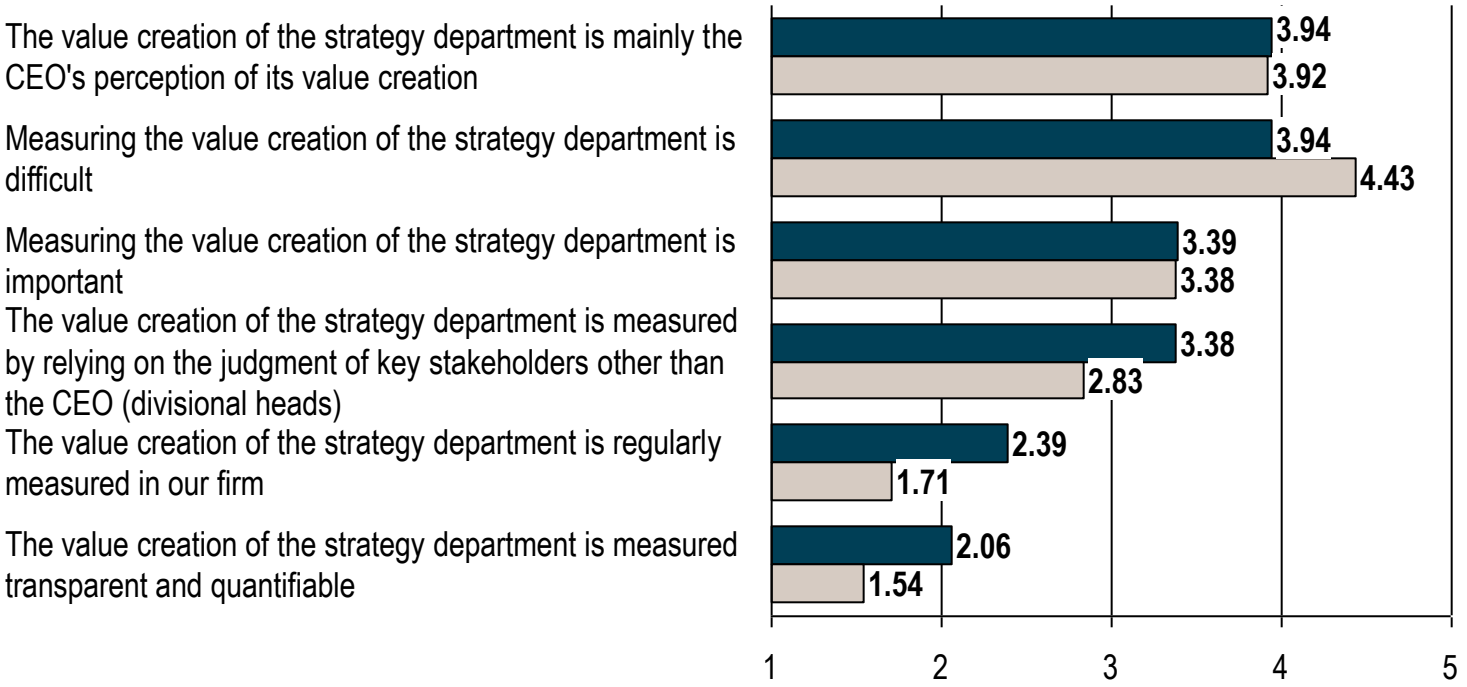
Mean

Mean values; 1: to no extent, 5: to a very great extent

Measuring strategic impact: High vs. Low Performer

Please indicate the extent to which you agree with the following statements regarding your department's value creation (if no strategy department, please refer to your individual role):

Measurement of the department's value creation

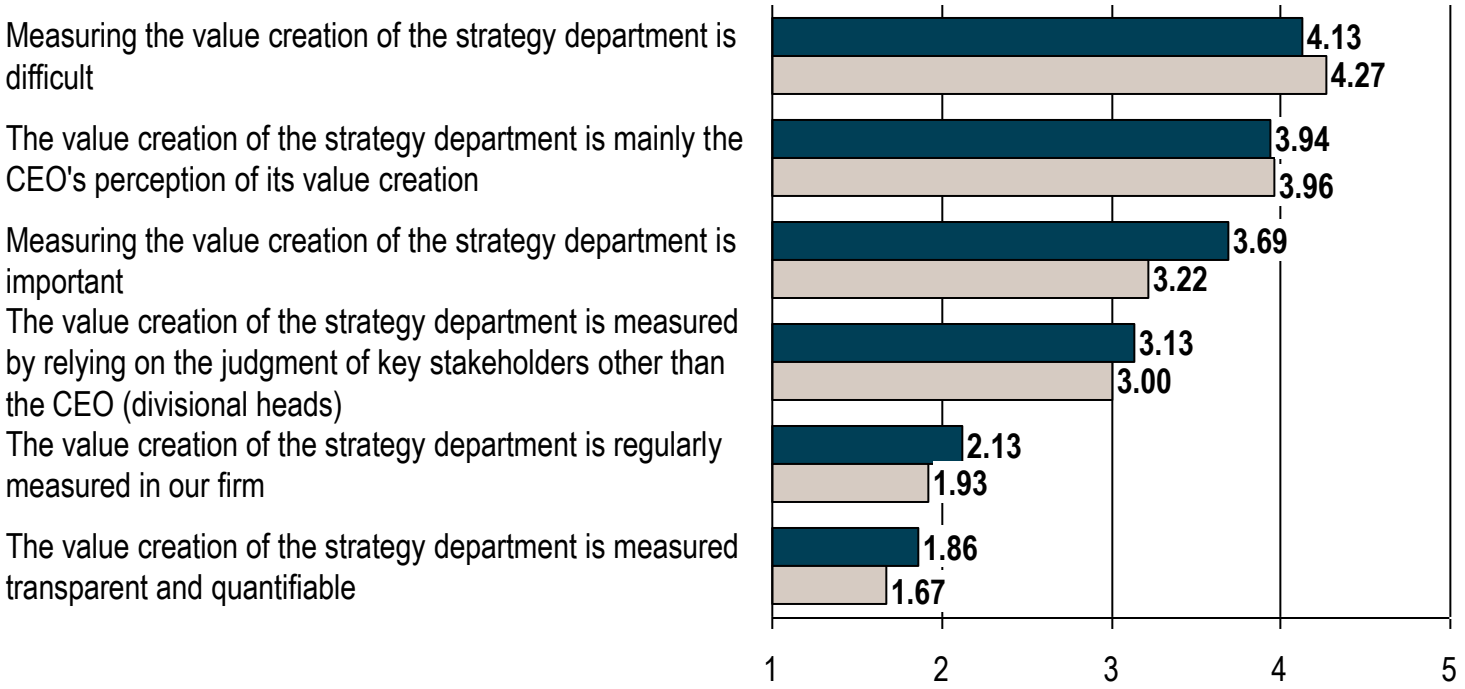


High Low Mean values; 1: to no extent, 5: to a very great extent

Measuring strategic impact: Quality of strategic decisions

Please indicate the extent to which you agree with the following statements regarding your department's value creation (if no strategy department, please refer to your individual role):

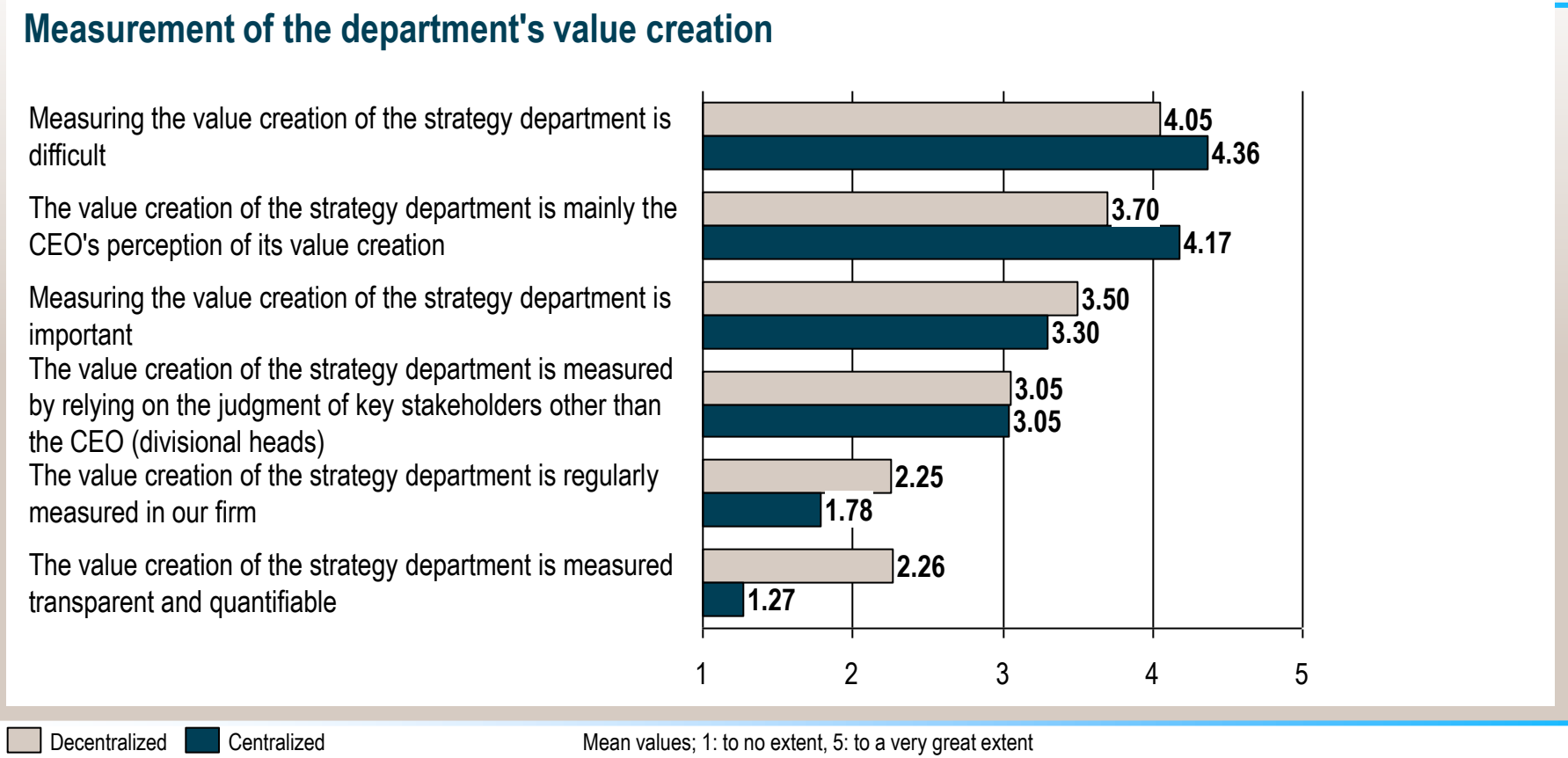
Measurement of the department's value creation



Measuring strategic impact: Organizational design

Please indicate the extent to which you agree with the following statements regarding your department's value creation (if no strategy department, please refer to your individual role):

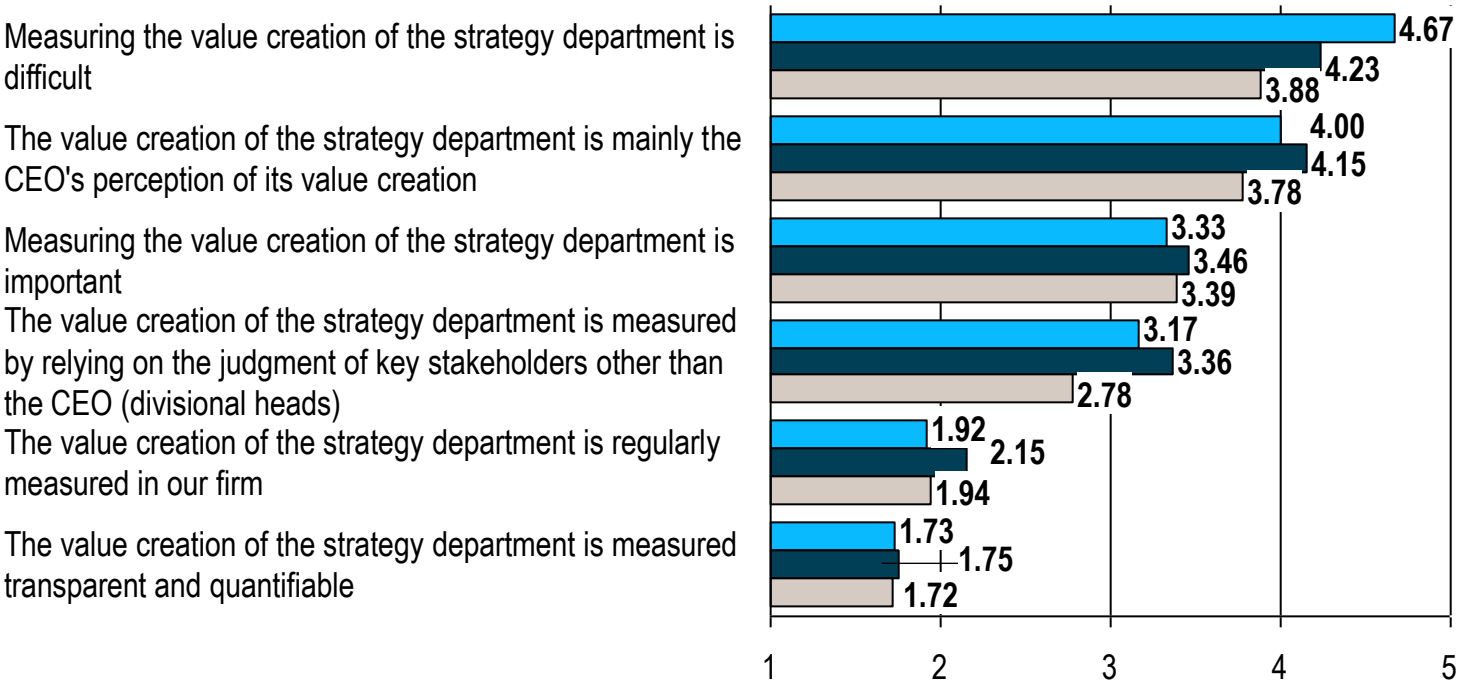
Measurement of the department's value creation



Measuring strategic impact: Firm size

Please indicate the extent to which you agree with the following statements regarding your department's value creation (if no strategy department, please refer to your individual role):

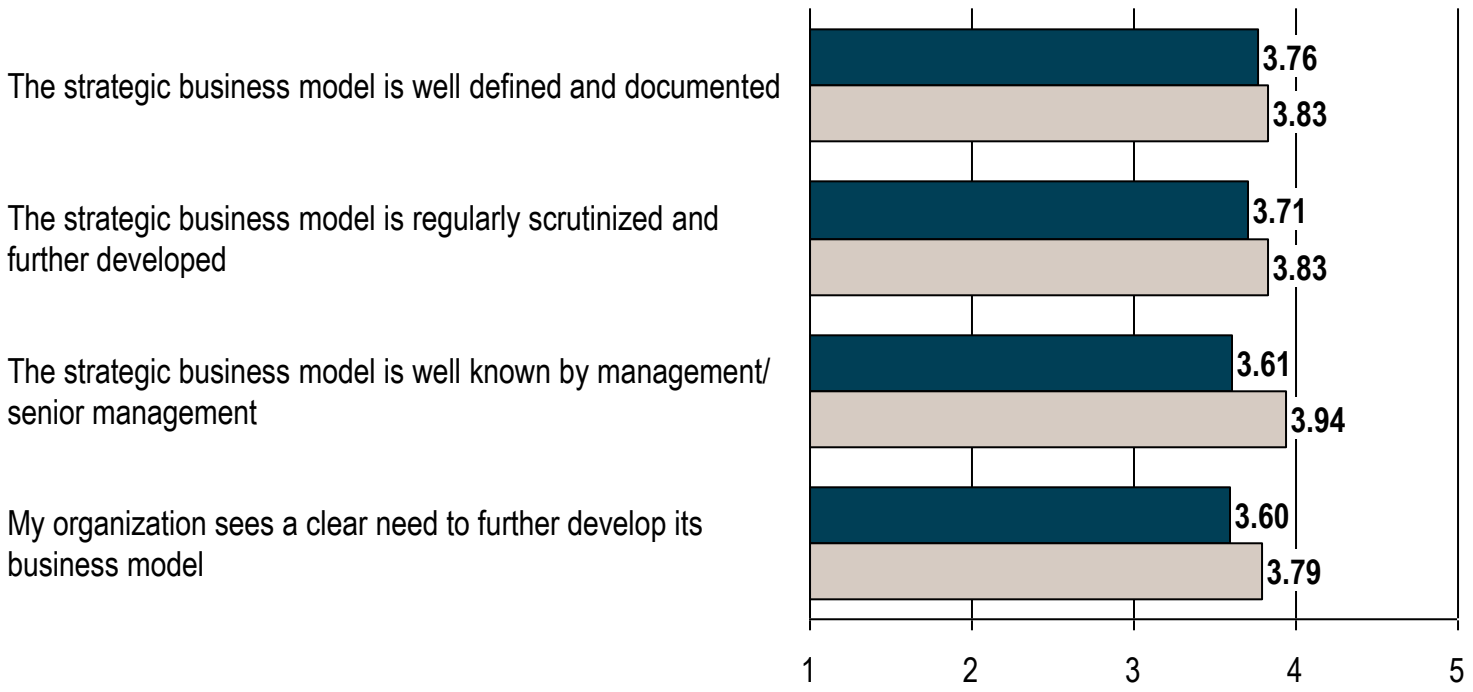
Measurement of the department's value creation



Relevance of strategic business model: All Firms

Please indicate the extent to which you agree with the following statements concerning your firm's strategic business model:

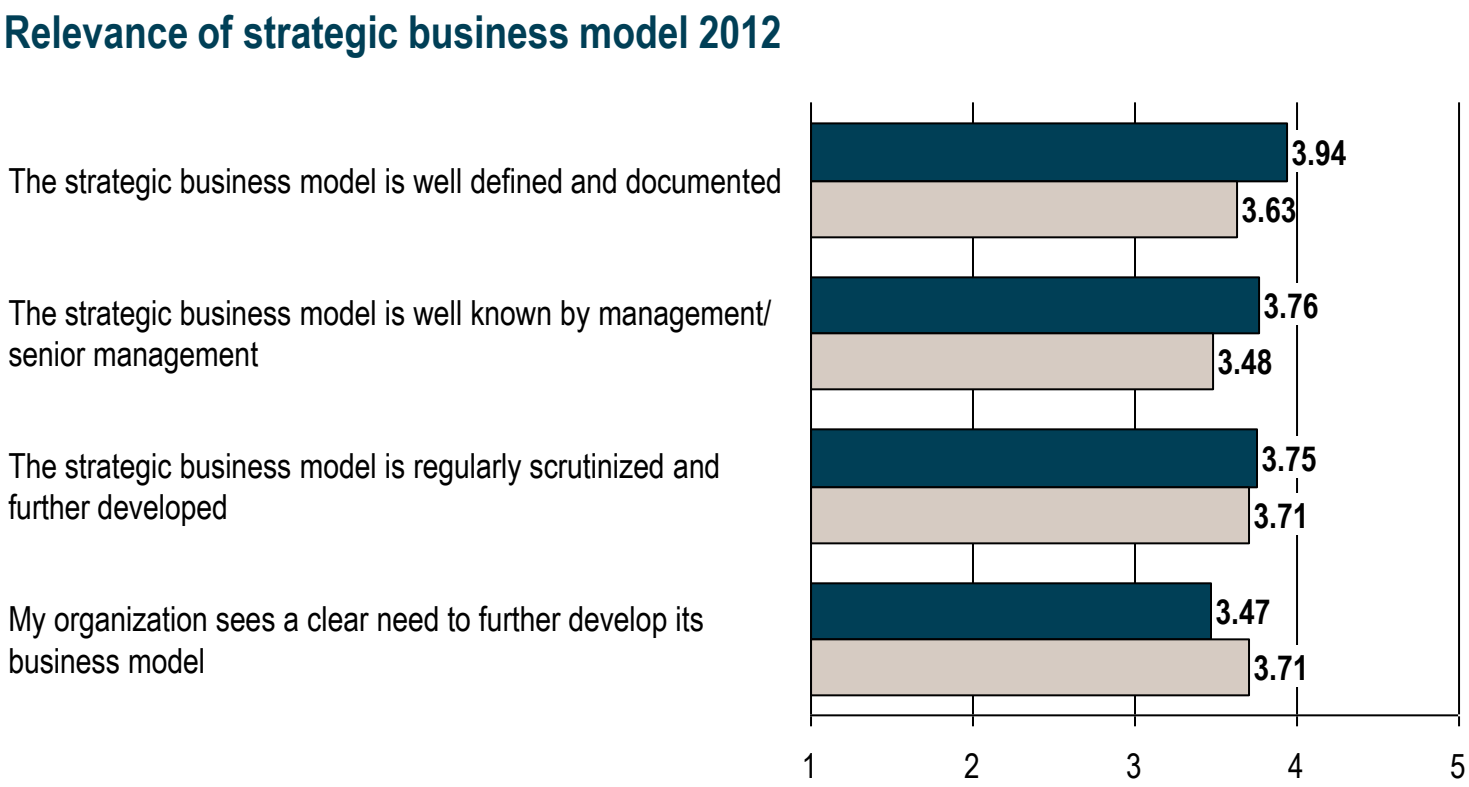
Relevance of strategic business model



Relevance of strategic business model: High vs. Low Performer

Please indicate the extent to which you agree with the following statements concerning your firm's strategic business model:

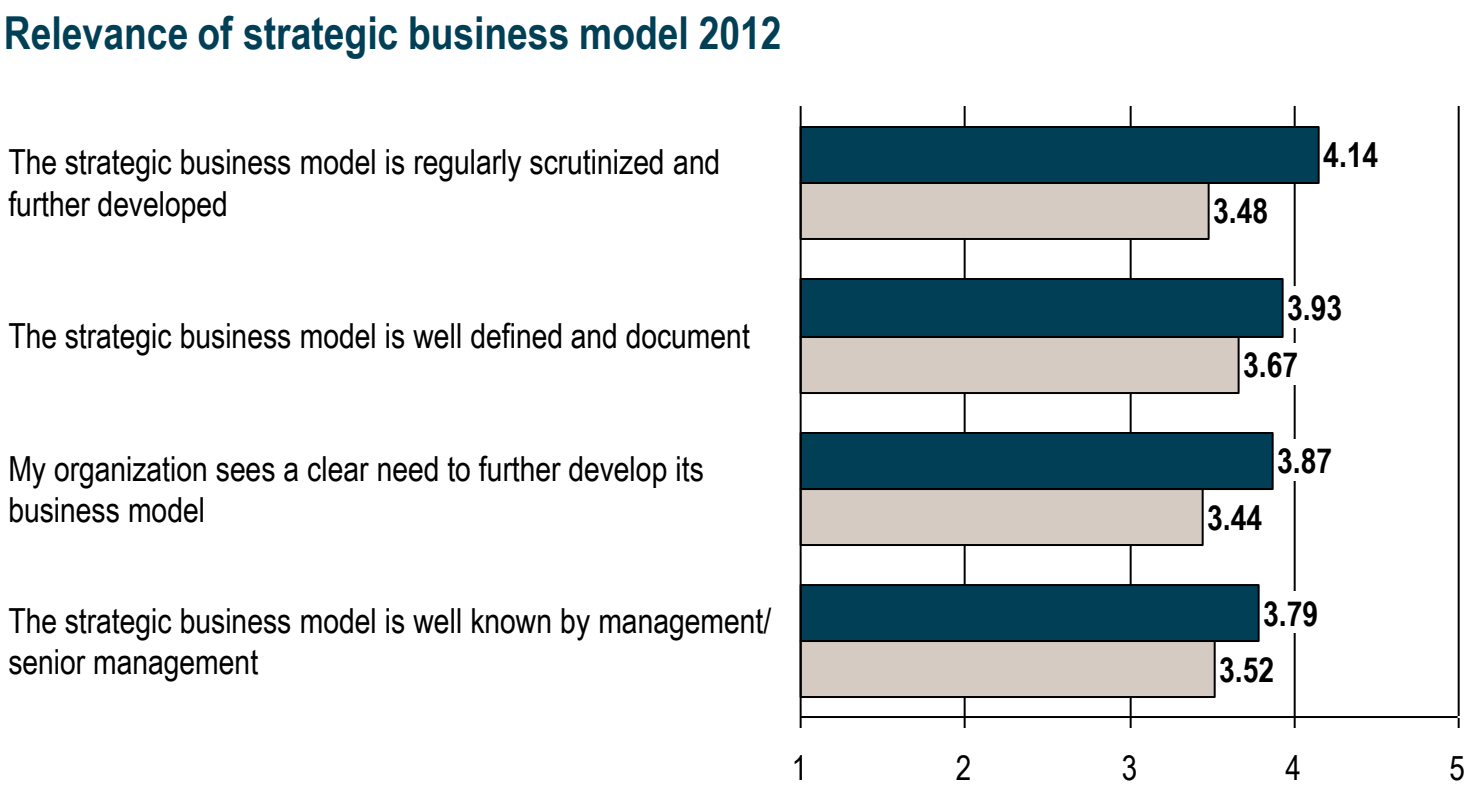
Relevance of strategic business model 2012



Relevance of strategic business model: Quality of strategic decisions

Please indicate the extent to which you agree with the following statements concerning your firm's strategic business model:

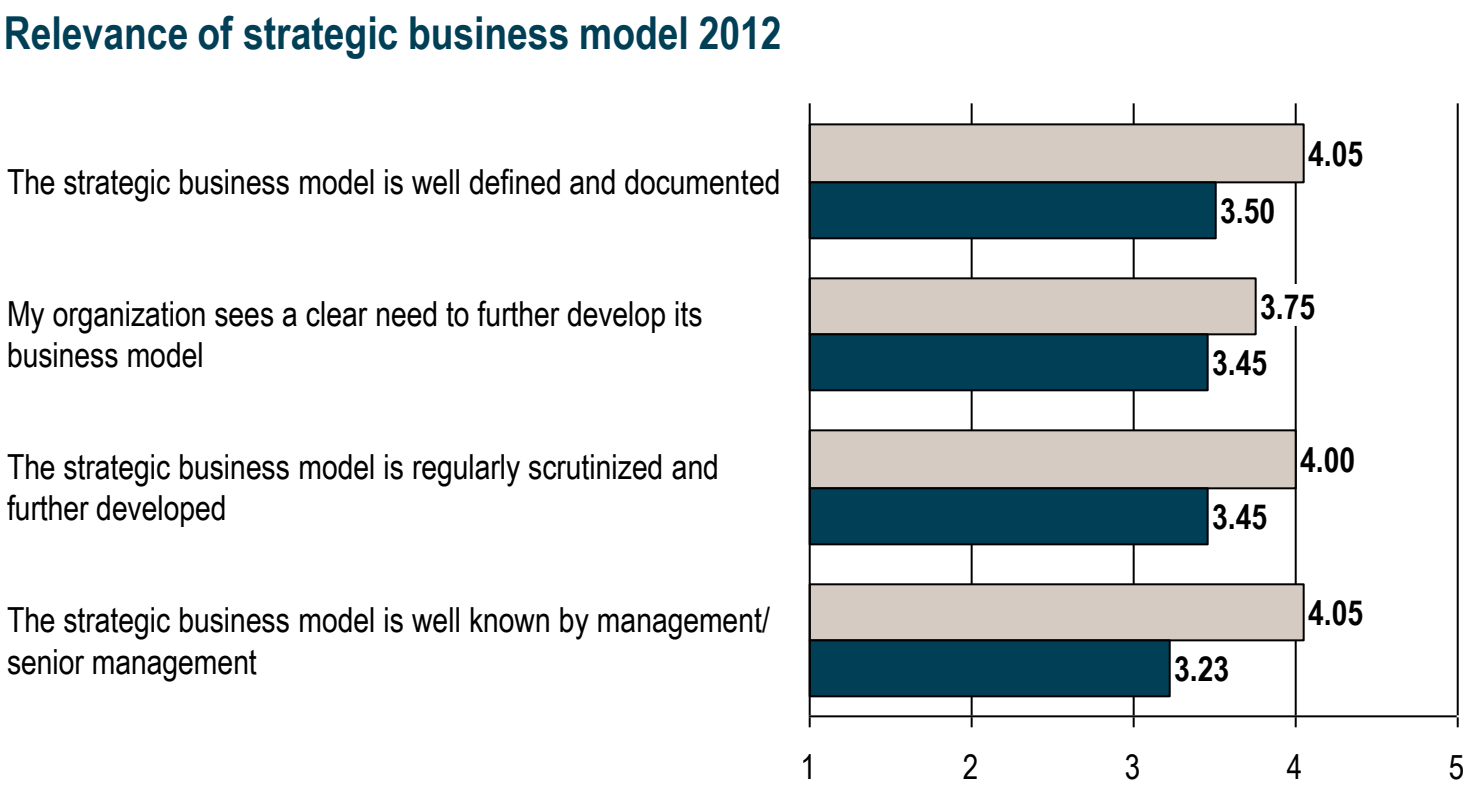
Relevance of strategic business model 2012



Relevance of strategic business model: Organizational design

Please indicate the extent to which you agree with the following statements concerning your firm's strategic business model:

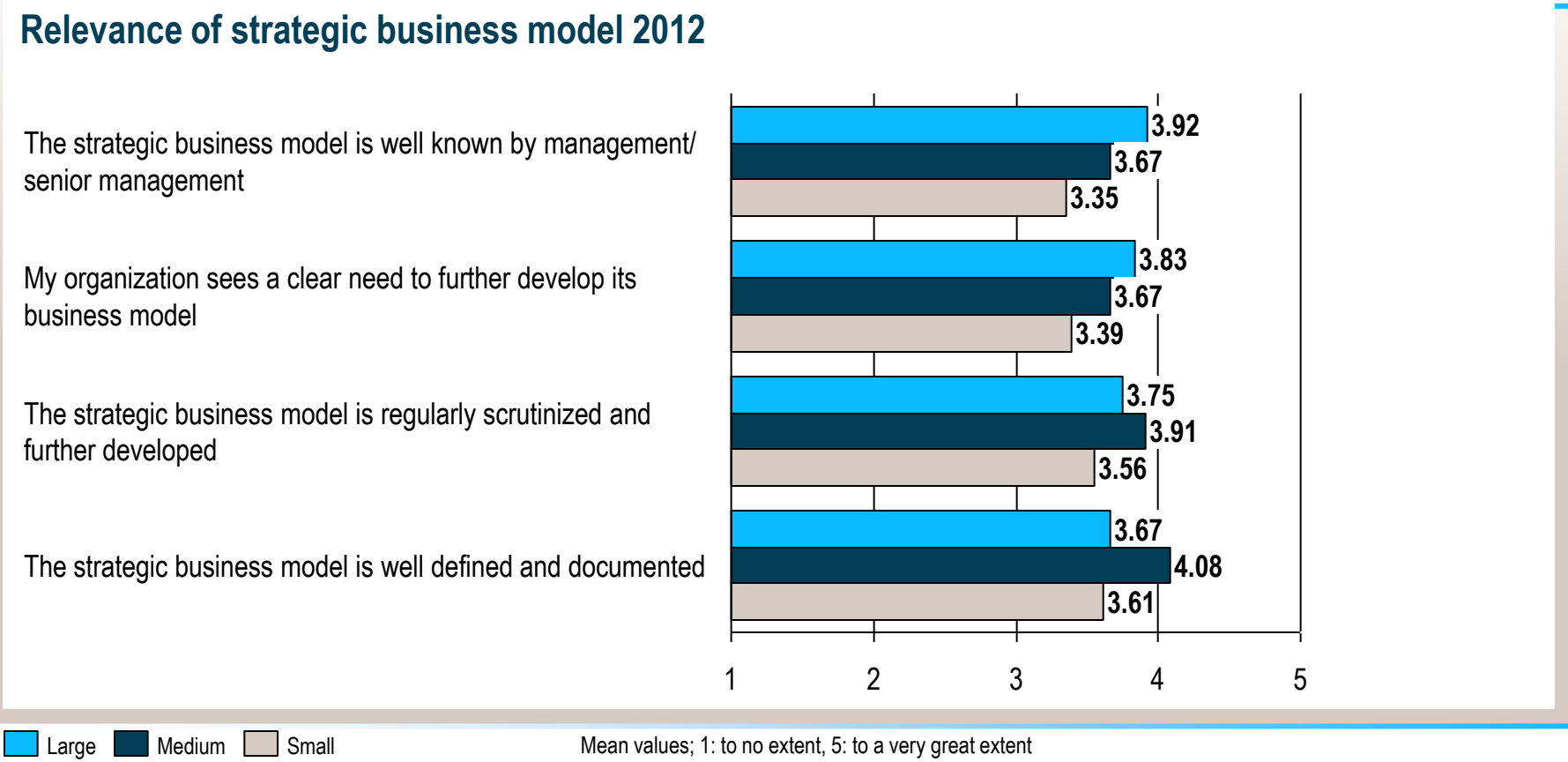
Relevance of strategic business model 2012



Relevance of strategic business model: Firm size

Please indicate the extent to which you agree with the following statements concerning your firm's strategic business model:

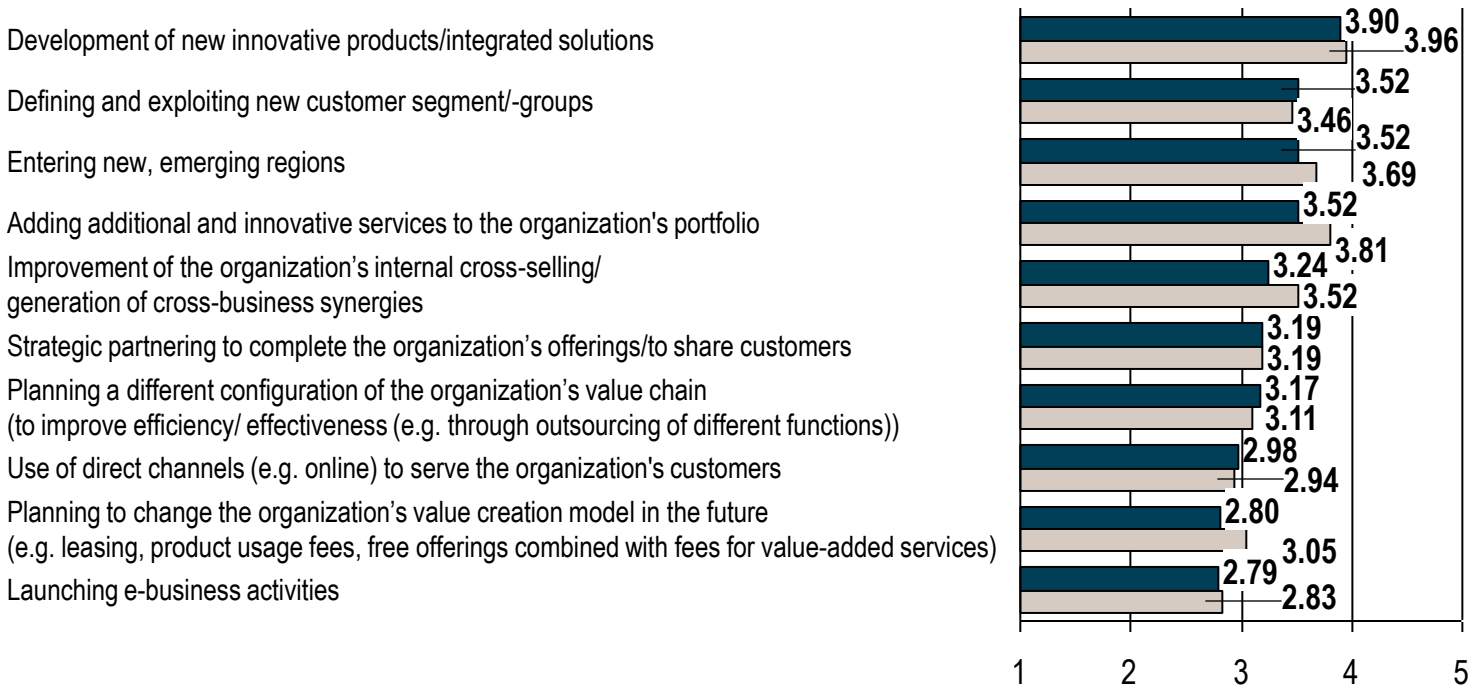
Relevance of strategic business model 2012



Hot topics related to the strategic business model: All Firms

Please indicate the extent to which the following expresses the focus/goals of your firm's strategic business model:

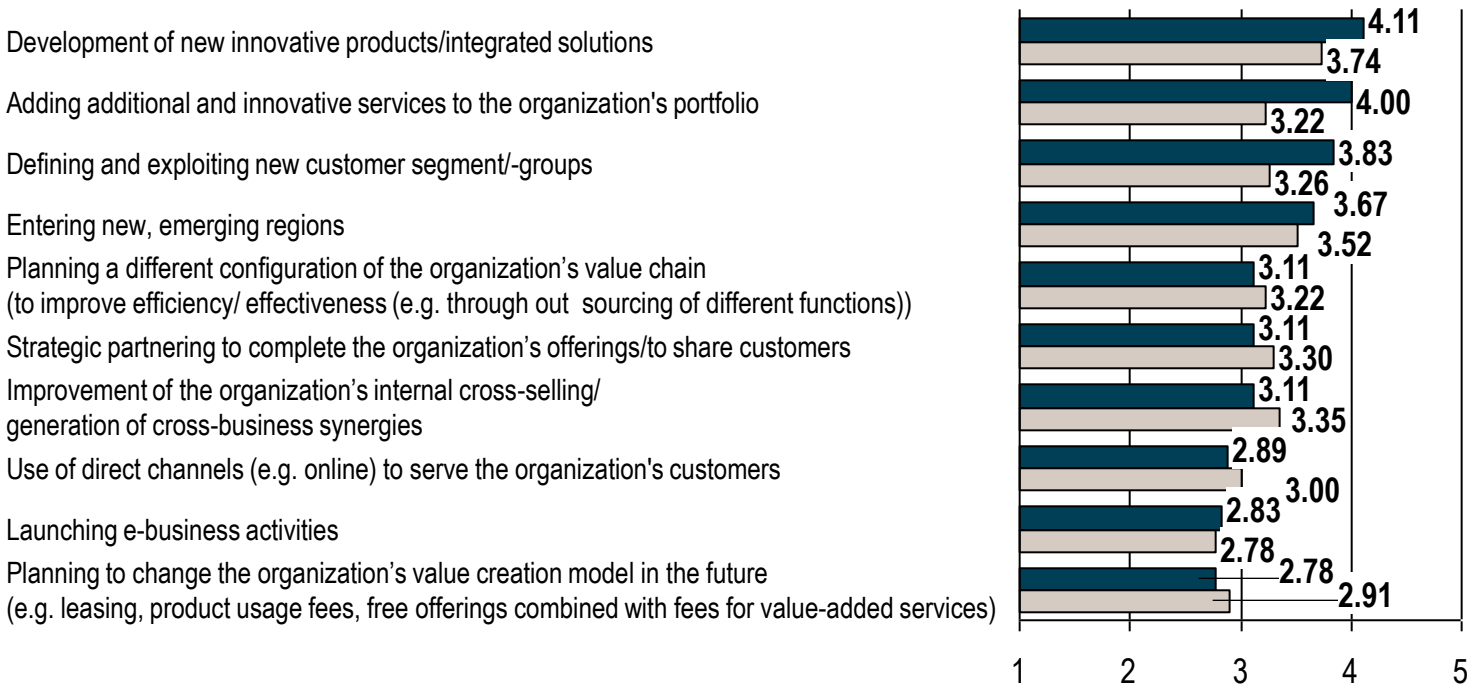
Hot topics related to the strategic business model



Hot topics related to the strategic business model: High vs. Low Performer

Please indicate the extent to which the following expresses the focus/goals of your firm's strategic business model:

Hot topics related to the strategic business model

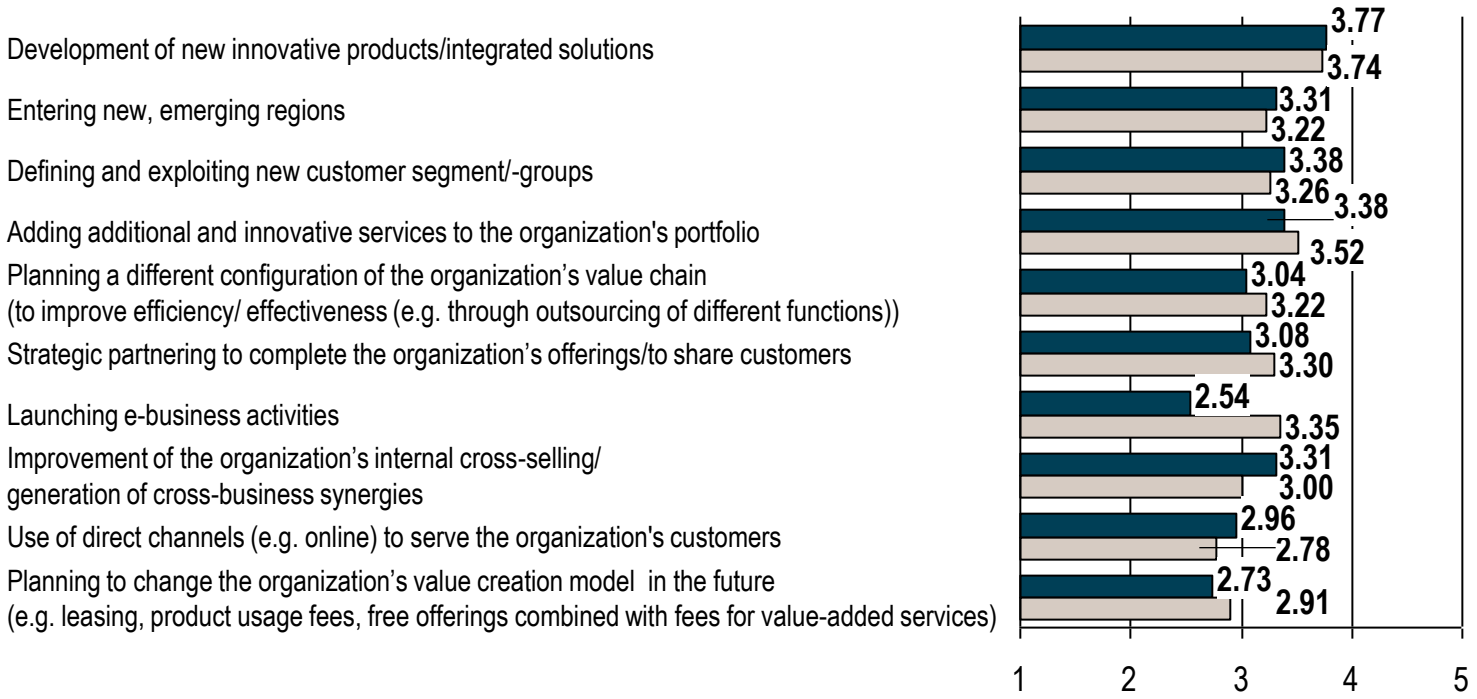


High Low Mean values; 1: to no extent, 5: to a very great extent

Hot topics related to the strategic business model: Quality of strategic decisions

Please indicate the extent to which the following expresses the focus/goals of your firm's strategic business model:

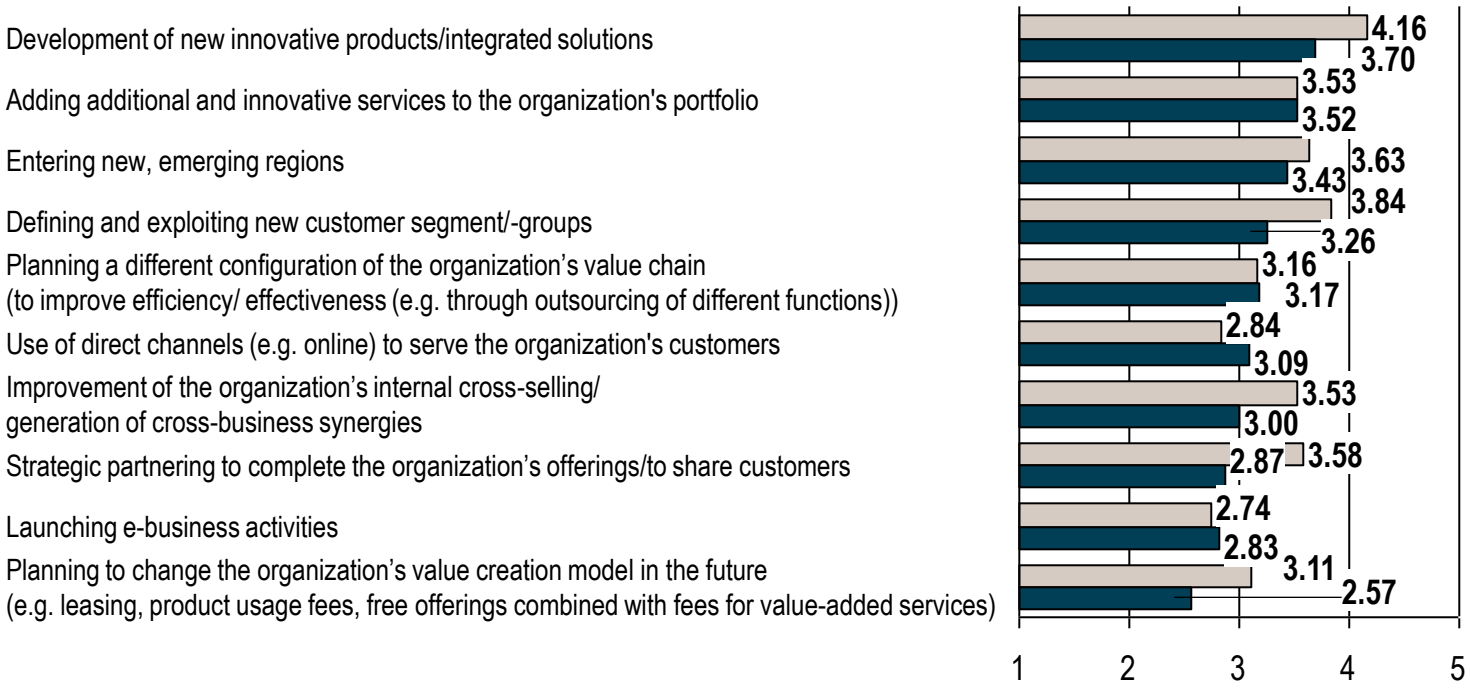
Hot topics related to the strategic business model



Hot topics related to the strategic business model: Organizational design

Please indicate the extent to which the following expresses the focus/goals of your firm's strategic business model:

Hot topics related to the strategic business model

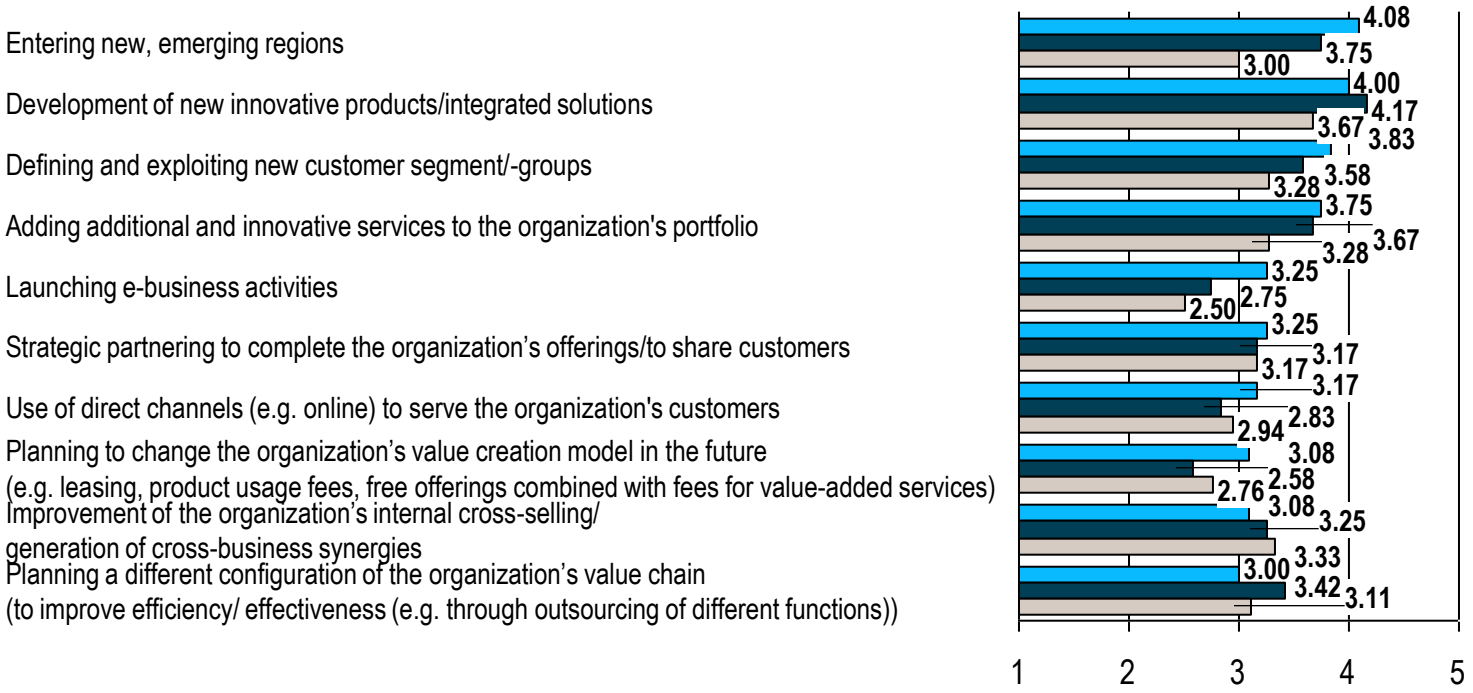


Mean values; 1: to no extent, 5: to a very great extent

Hot topics related to the strategic business model: Firm size

Please indicate the extent to which the following expresses the focus/goals of your firm's strategic business model:

Hot topics related to the strategic business model



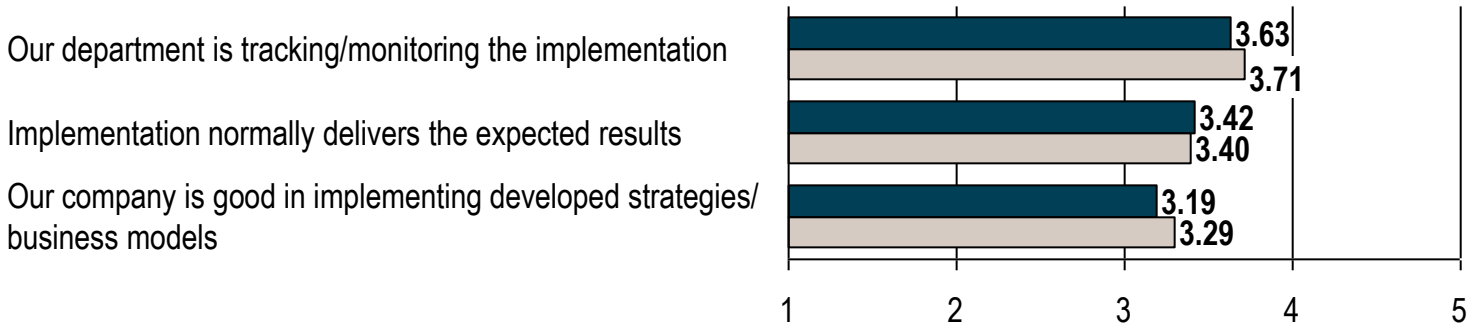
Large Medium Small

Mean values; 1: to no extent, 5: to a very great extent

Implementation of hot topics: All Firms

Please indicate the extent to which your firm uses the following means to secure the implementation of the hot topics / of the strategic business model elements:

Implementation of hot topics

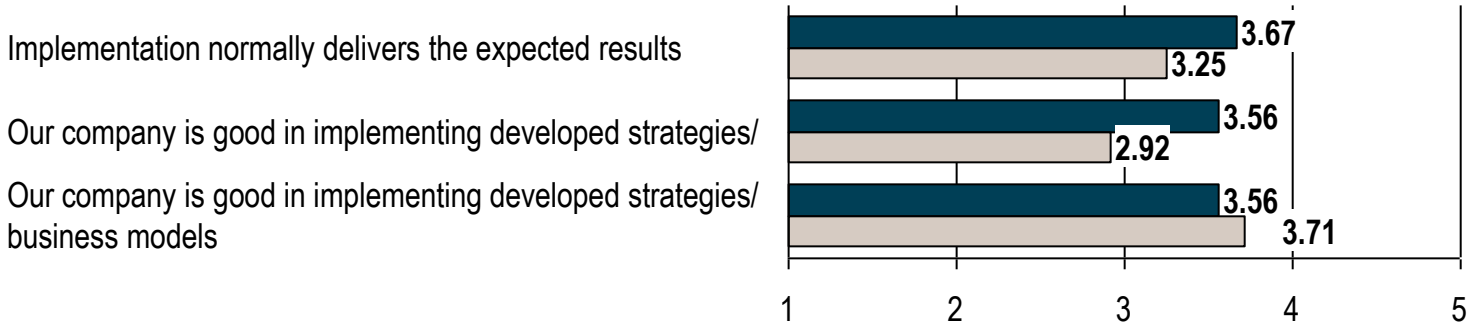


2012 2011 Mean values; 1: to no extent, 5: to a very great extent

Implementation of hot topics: High vs. Low Performer

Please indicate the extent to which your firm uses the following means to secure the implementation of the hot topics / of the strategic business model elements:

Implementation of hot topics

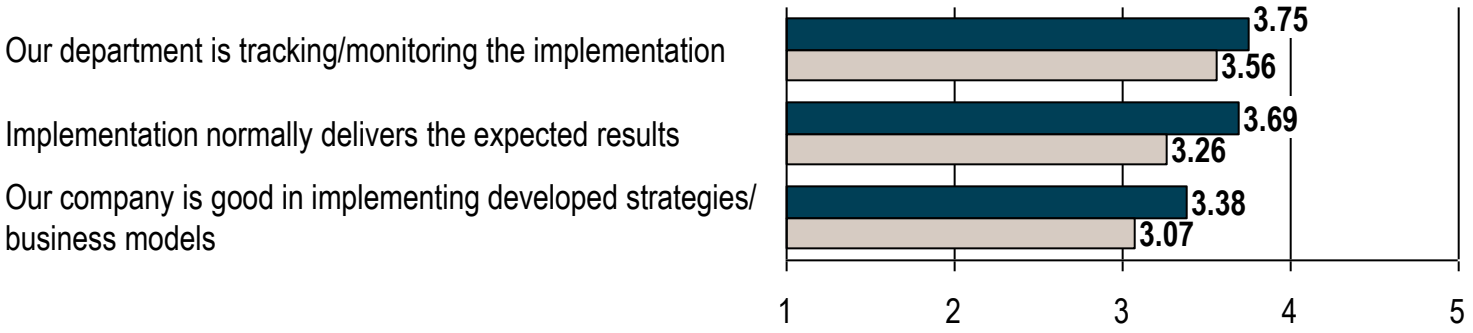


High Low Mean values; 1: to no extent, 5: to a very great extent

Implementation of hot topics: Quality of strategic decisions

Please indicate the extent to which your firm uses the following means to secure the implementation of the hot topics / of the strategic business model elements:

Implementation of hot topics

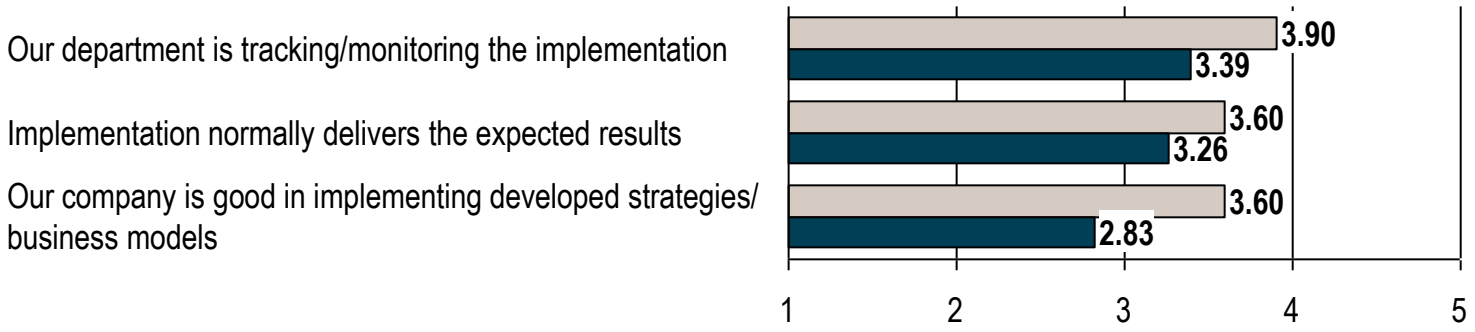


High Low Mean values; 1: to no extent, 5: to a very great extent

Implementation of hot topics: Organization Design

Please indicate the extent to which your firm uses the following means to secure the implementation of the hot topics / of the strategic business model elements:

Implementation of hot topics



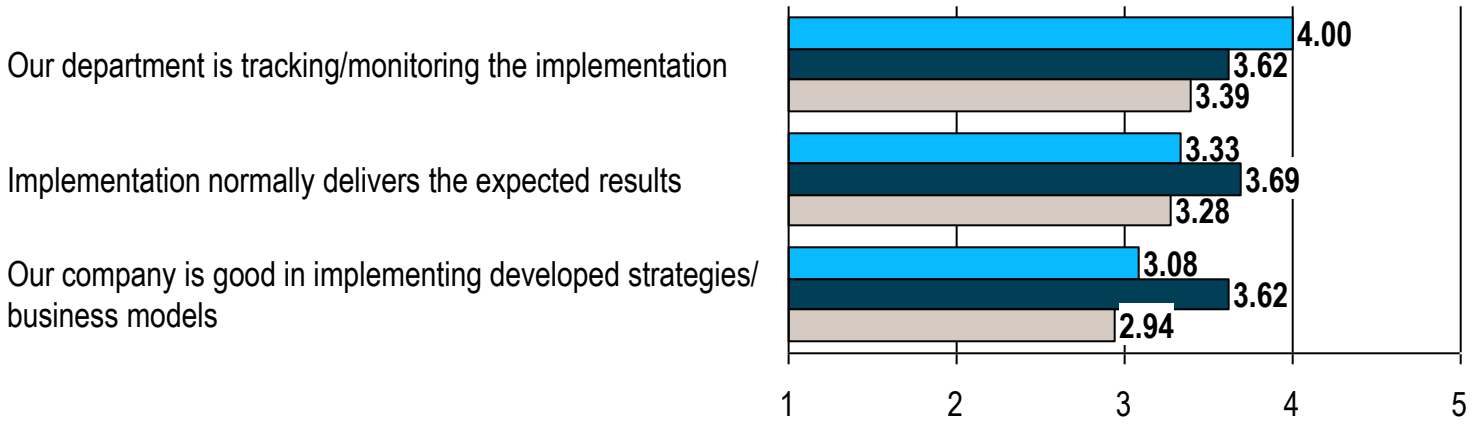
Decentralized Centralized

Mean values; 1: to no extent, 5: to a very great extent

Implementation of hot topics: Firm size

Please indicate the extent to which your firm uses the following means to secure the implementation of the hot topics / of the strategic business model elements:

Implementation of hot topics



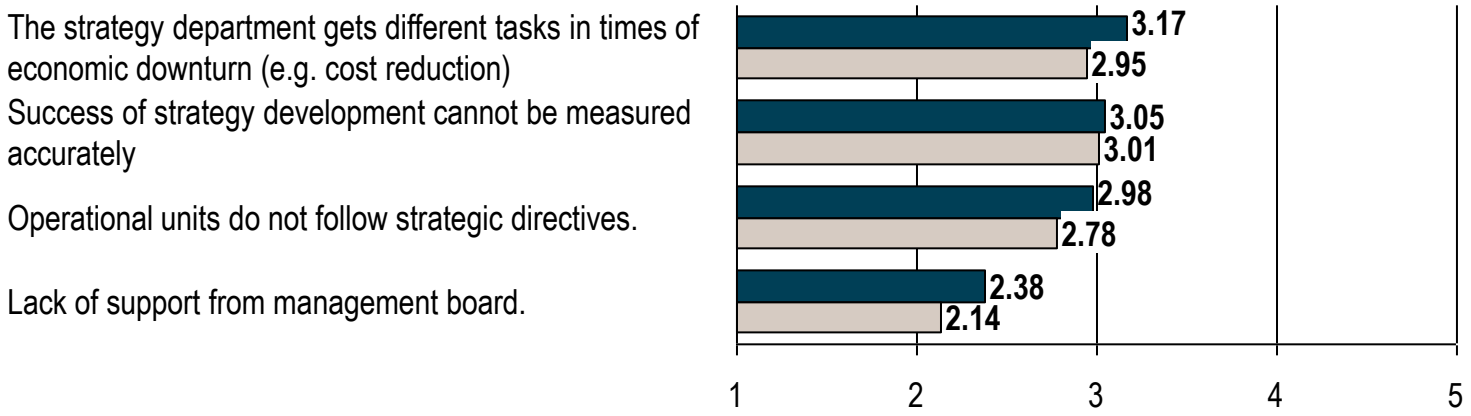
Large Medium Small

Mean values; 1: to no extent, 5: to a very great extent

Hurdles and pain points: All Firms

Please indicate the extent to which the following aspects challenge your strategy work

Hurdles and pain points

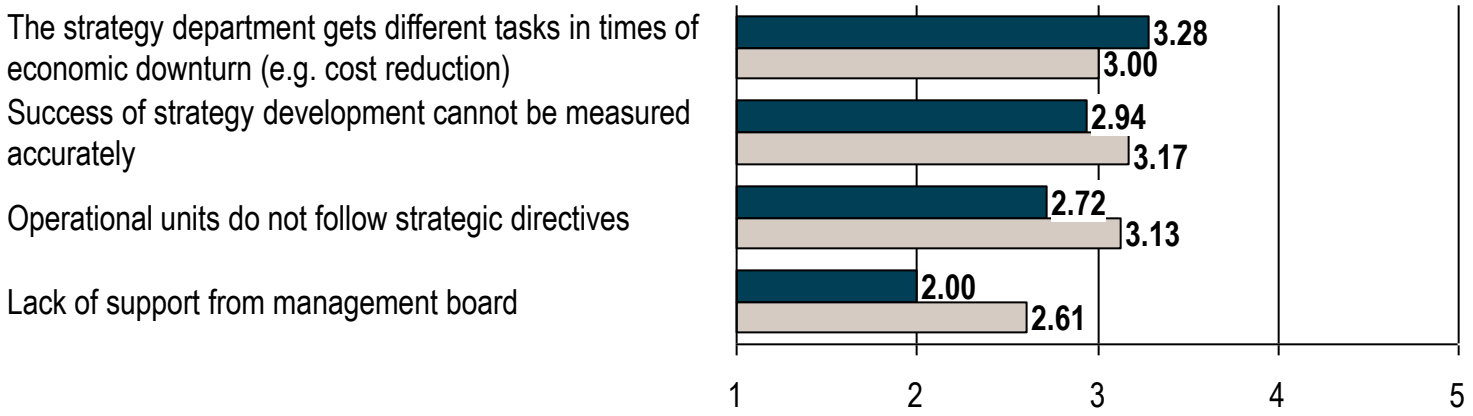


2012 2011 Mean values; 1: to no extent, 5: to a very great extent

Hurdles and pain points: High vs. Low Performer

Please indicate the extent to which the following aspects challenge your strategy work

Hurdles and pain points 2012

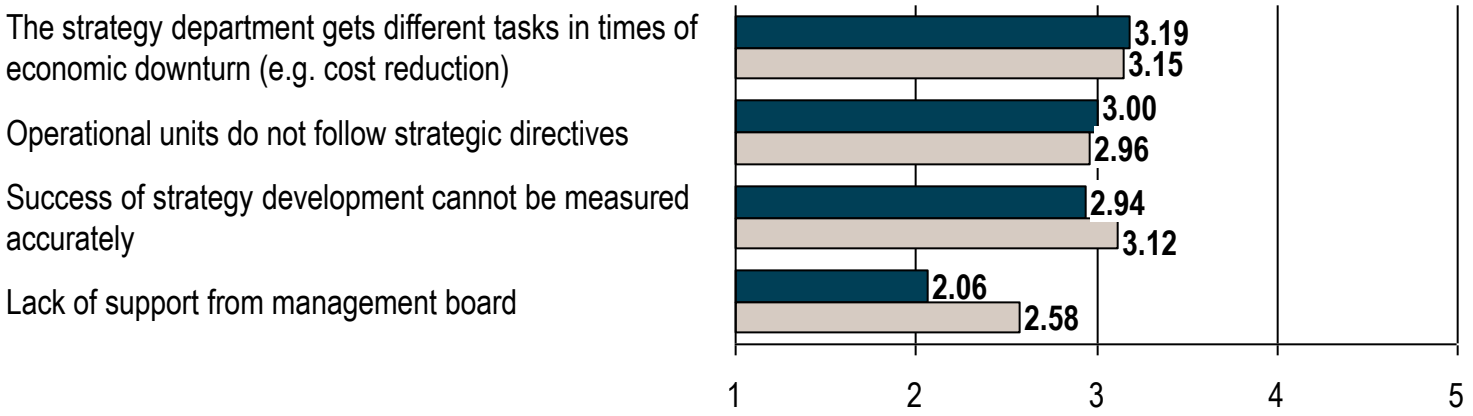


High Low Mean values; 1: to no extent, 5: to a very great extent

Hurdles and pain points: Quality of strategic decisions

Please indicate the extent to which the following aspects challenge your strategy work

Hurdles and pain points 2012

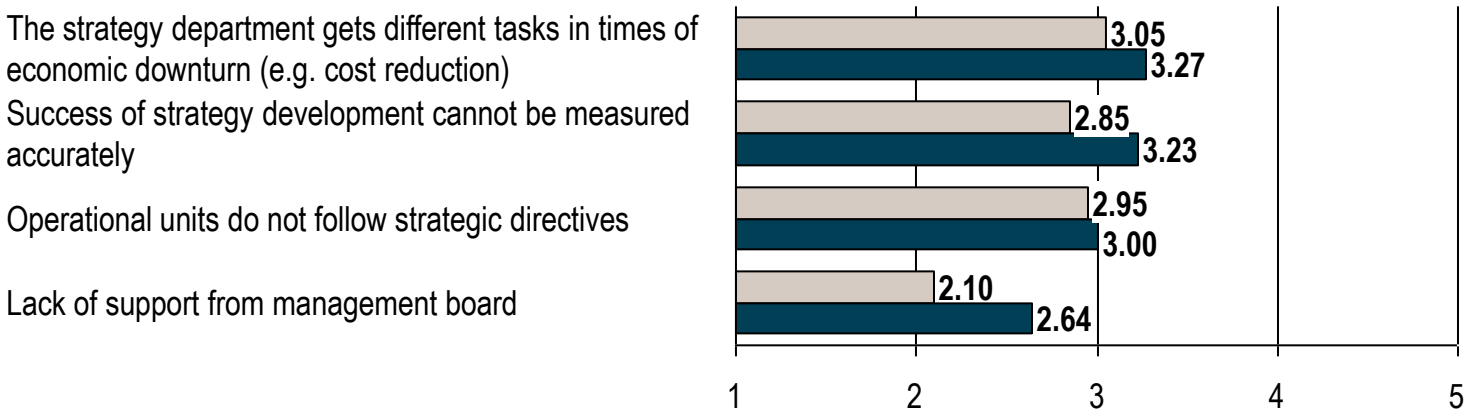


High Low Mean values; 1: to no extent, 5: to a very great extent

Hurdles and pain points: Organizational design

Please indicate the extent to which the following aspects challenge your strategy work

Hurdles and pain points 2012

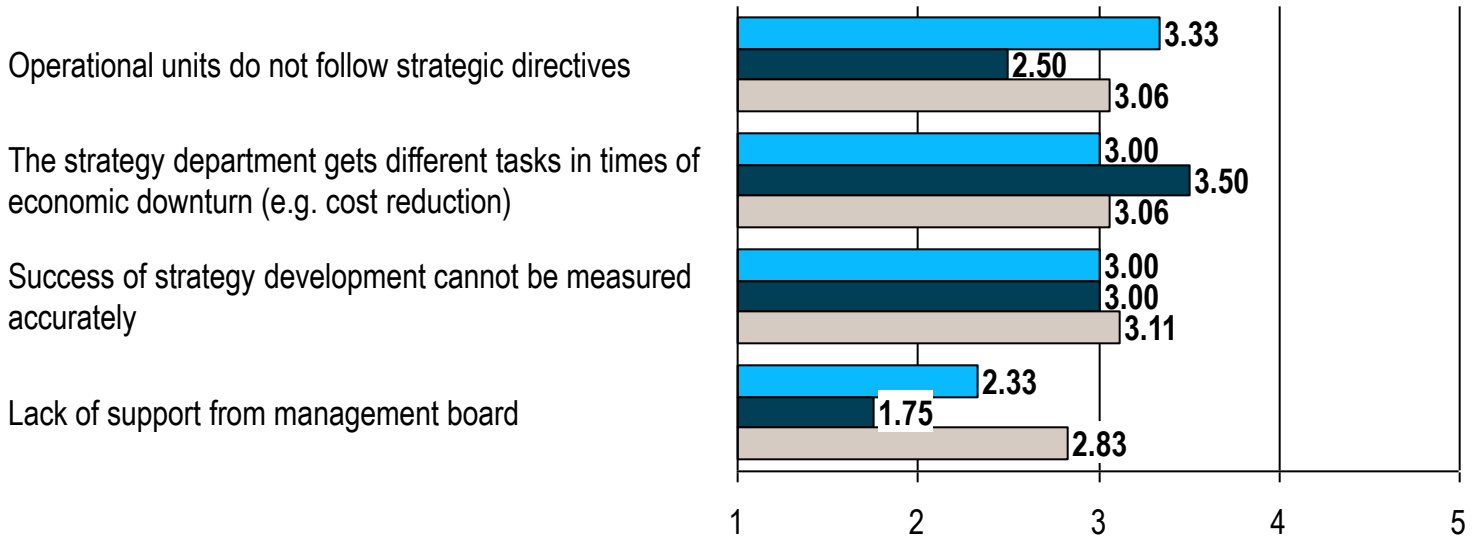


Mean values; 1: to no extent, 5: to a very great extent

Hurdles and pain points: Firm size

Please indicate the extent to which the following aspects challenge your strategy work

Hurdles and pain points 2012



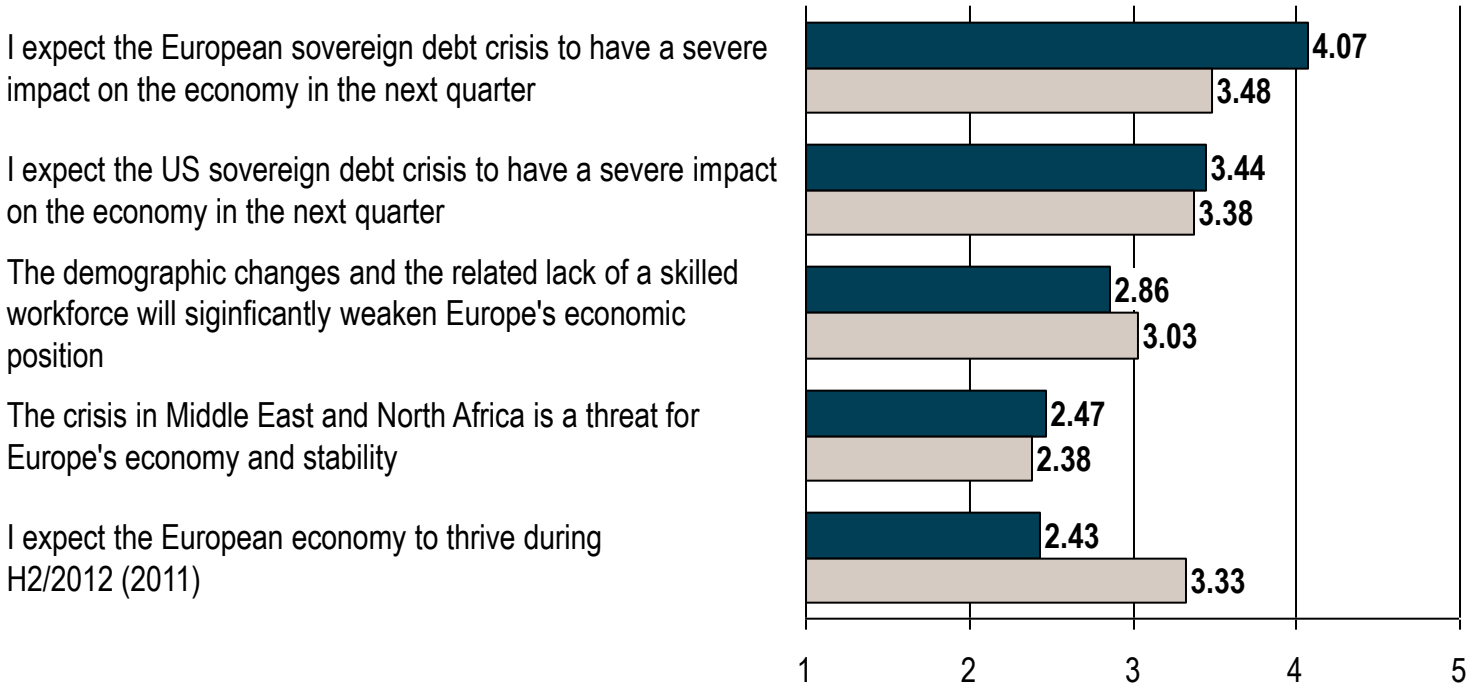
Large Medium Small

Mean values; 1: to no extent, 5: to a very great extent

Assessment of overall economic situation: All Firms

Please indicate the extent to which you agree with the following statements concerning the development of the economy:

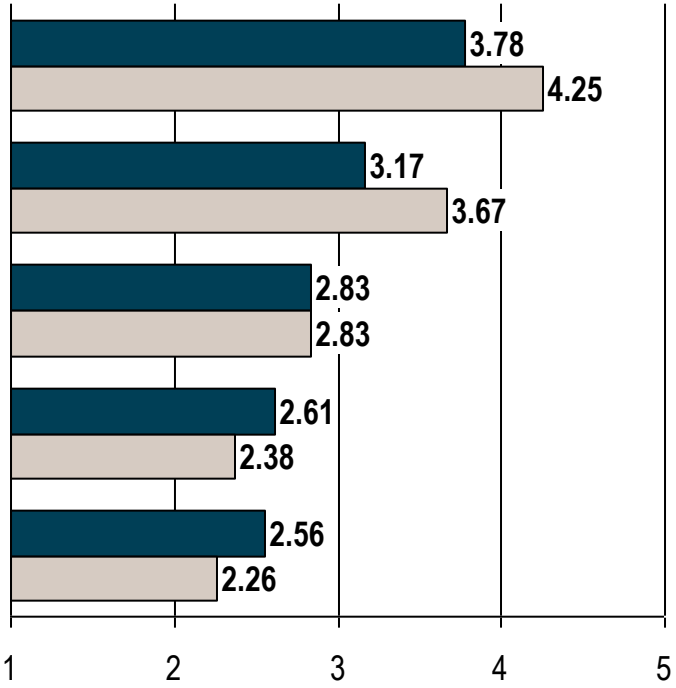
Assessment of overall economic situation



Assessment of overall economic situation: High vs. Low Performer

Please indicate the extent to which you agree with the following statements concerning the development of the economy:

Assessment of overall economic situation 2012

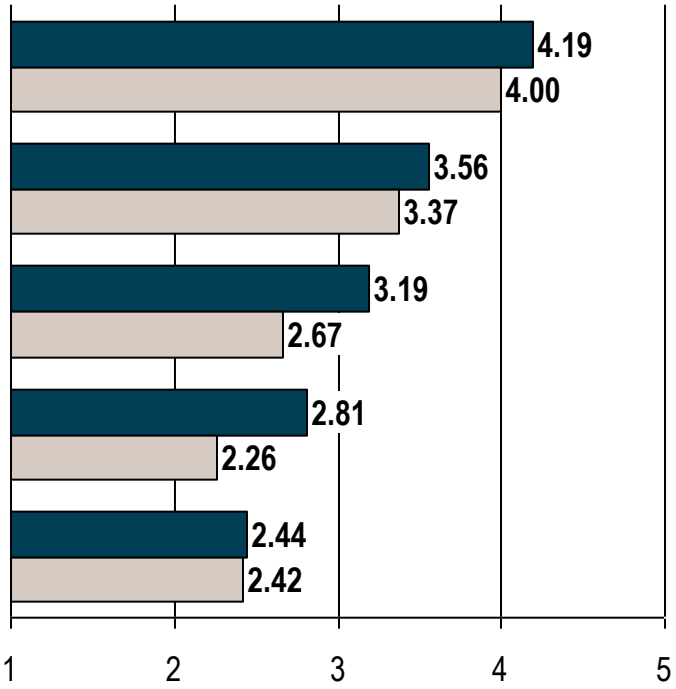


High Low Mean values; 1: to no extent, 5: to a very great extent

Assessment of overall economic situation: Quality of strategic decisions

Please indicate the extent to which you agree with the following statements concerning the development of the economy:

Assessment of overall economic situation 2012

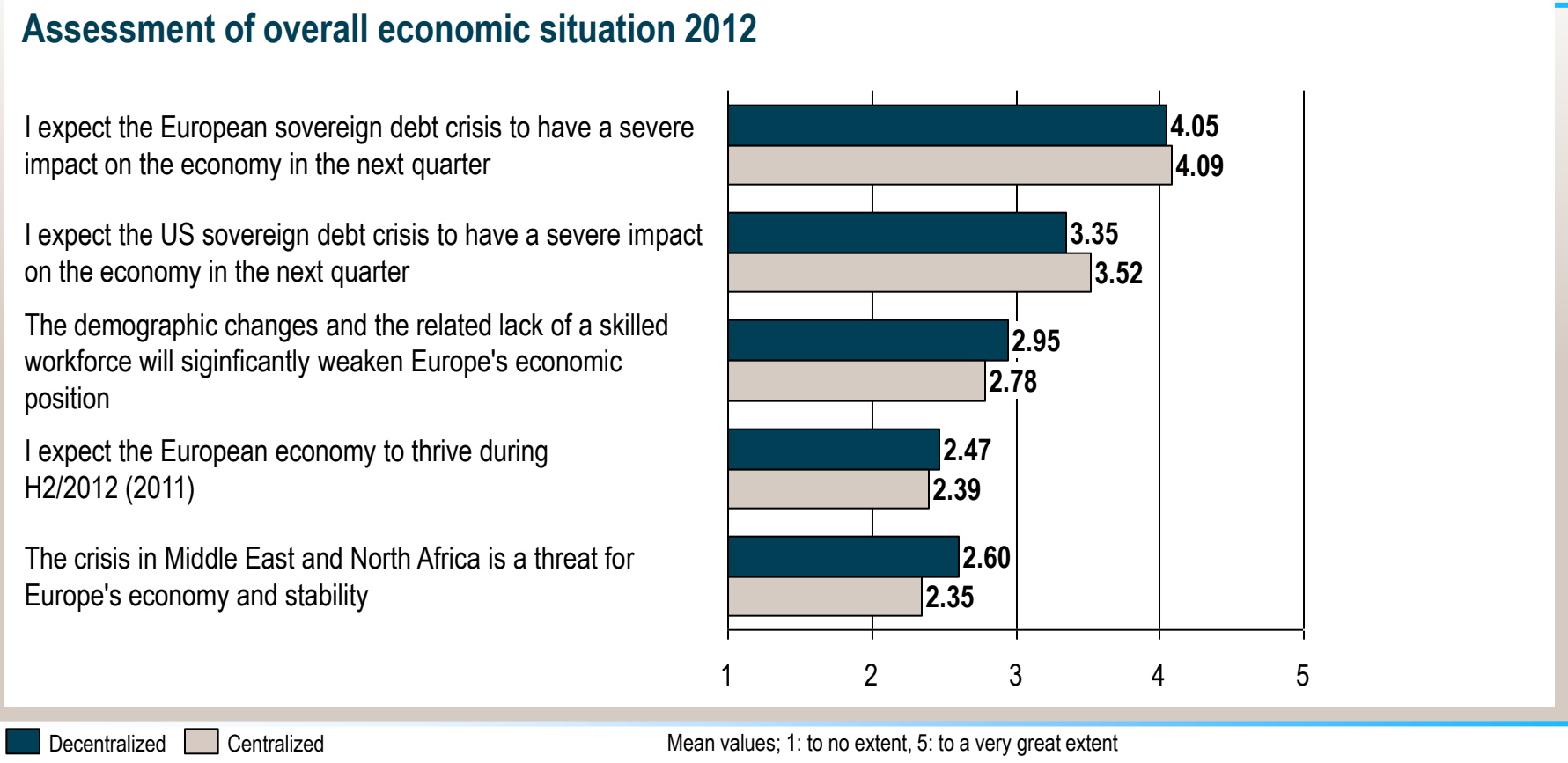


High Low Mean values; 1: to no extent, 5: to a very great extent

Assessment of overall economic situation: Organizational design

Please indicate the extent to which you agree with the following statements concerning the development of the economy:

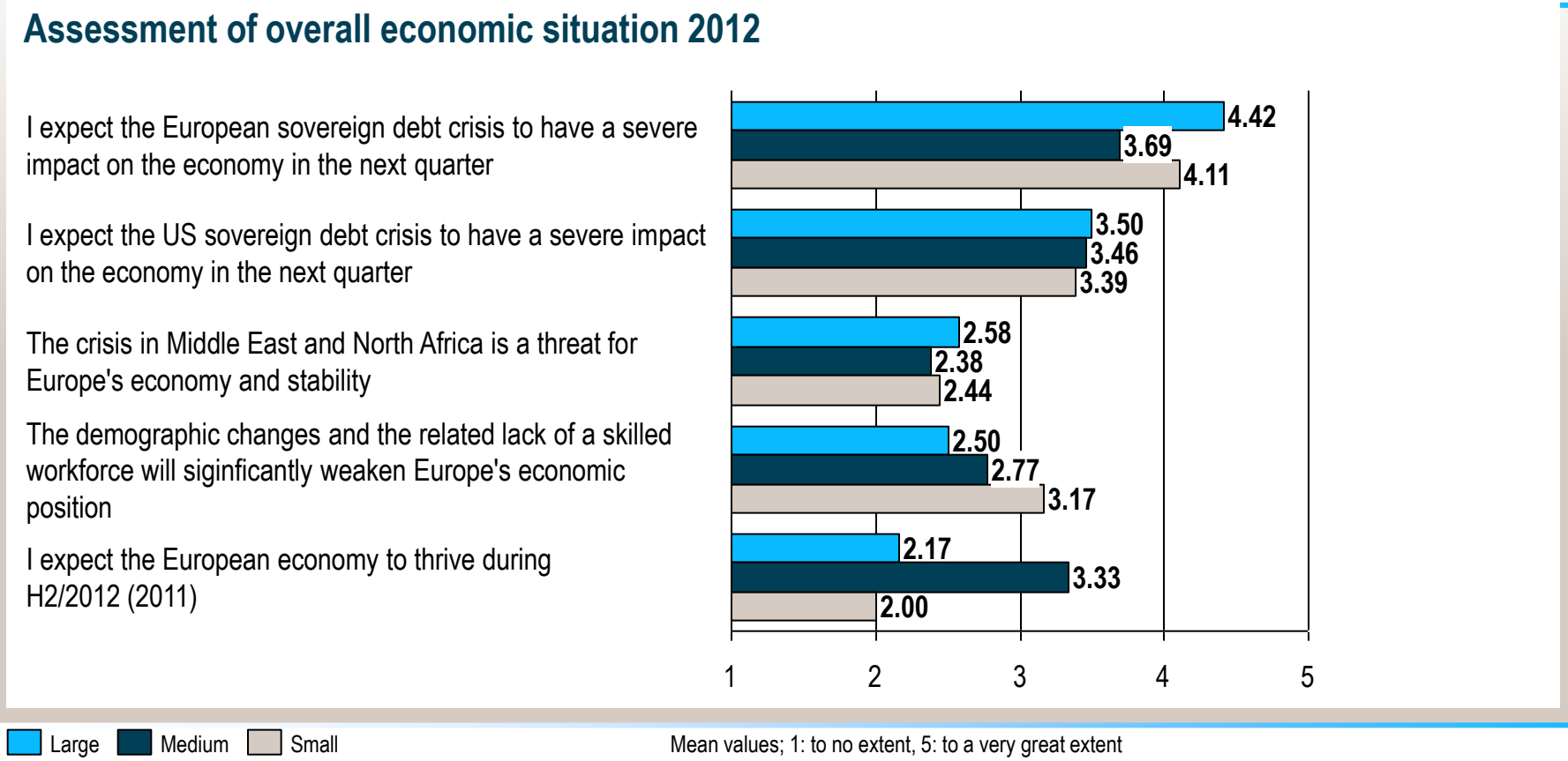
Assessment of overall economic situation 2012



Assessment of overall economic situation: Firm size

Please indicate the extent to which you agree with the following statements concerning the development of the economy:

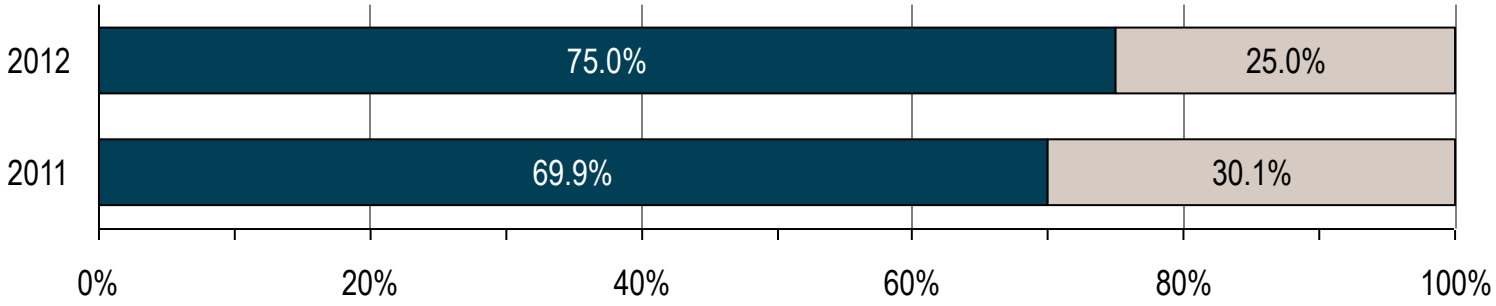
Assessment of overall economic situation 2012



Firm information: All Firms

Is your firm publicly listed?

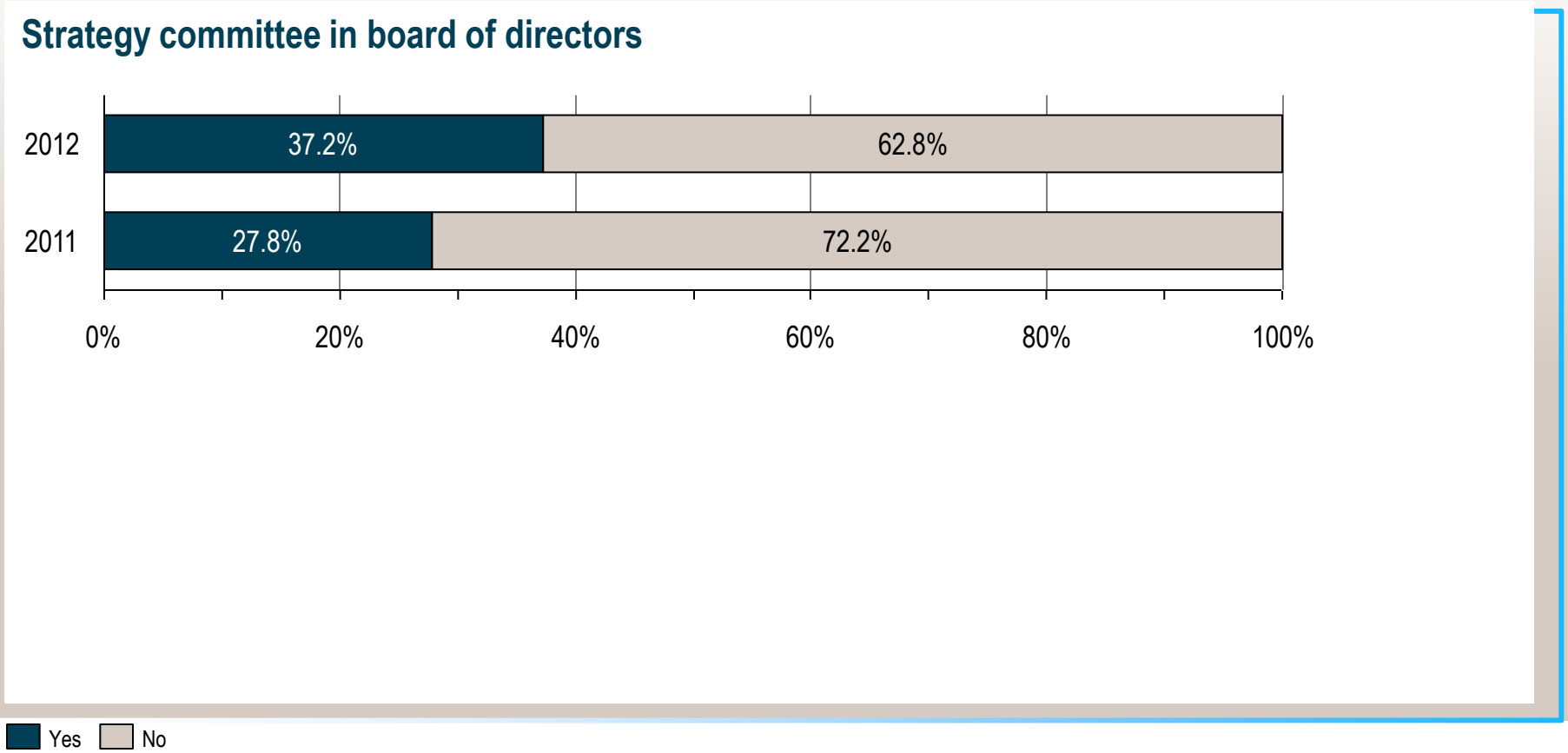
Publicly listed companies



Yes No

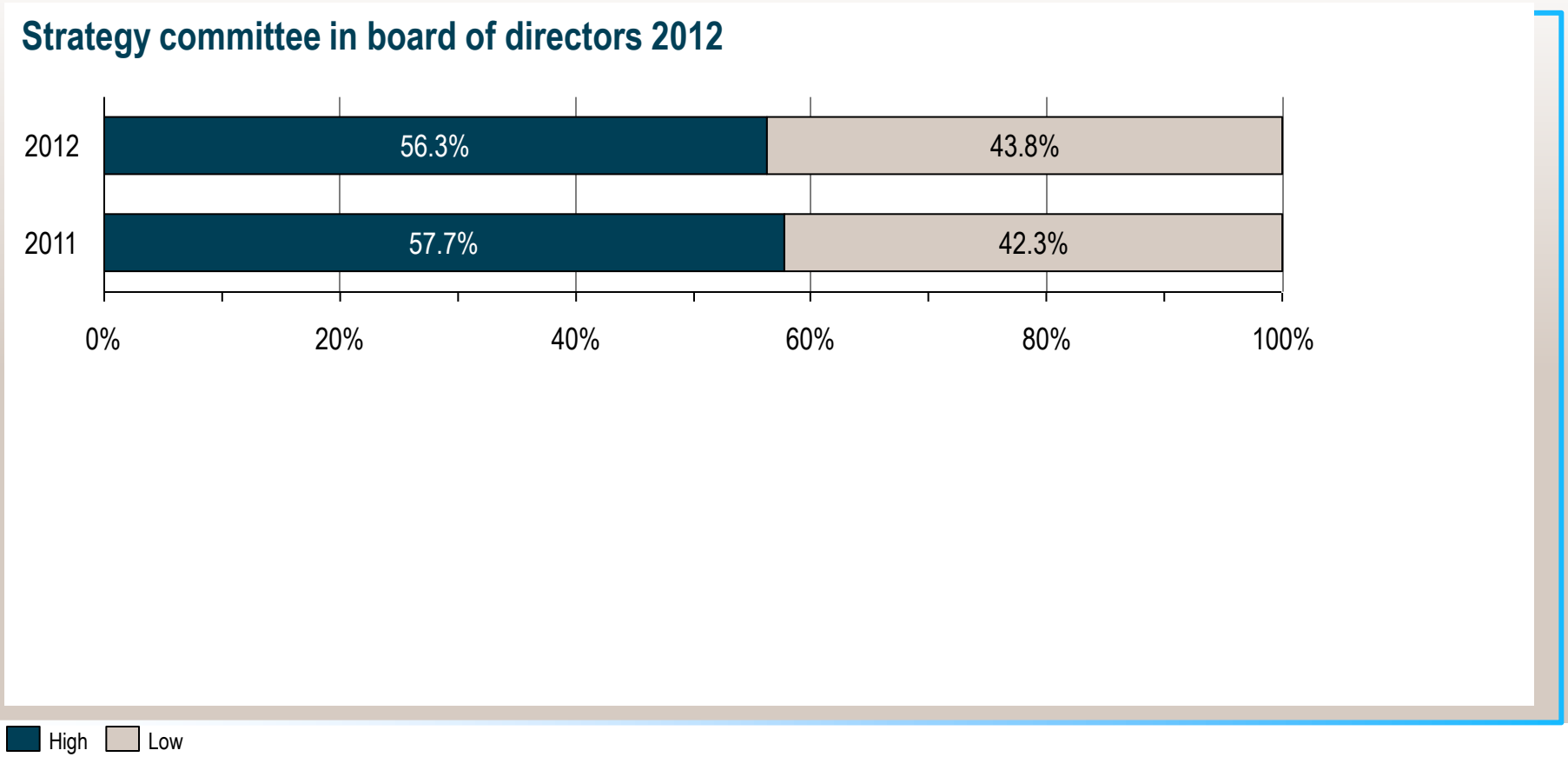
Firm information: All Firms

Does your firm's board of directors have a strategy committee?



Firm information: High vs. Low Performer

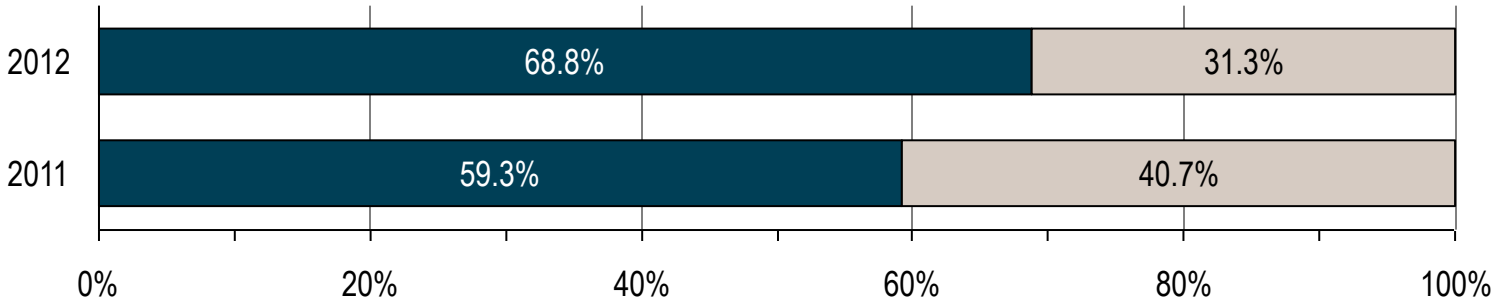
Does your firm's board of directors have a strategy committee?



Firm information: Quality of strategic decisions

Does your firm's board of directors have a strategy committee?

Strategy committee in board of directors 2012

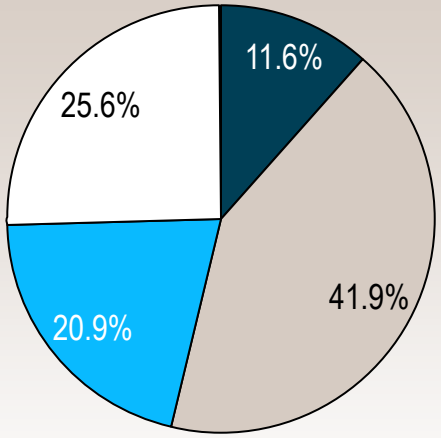


High Low

Firm information: All Firms

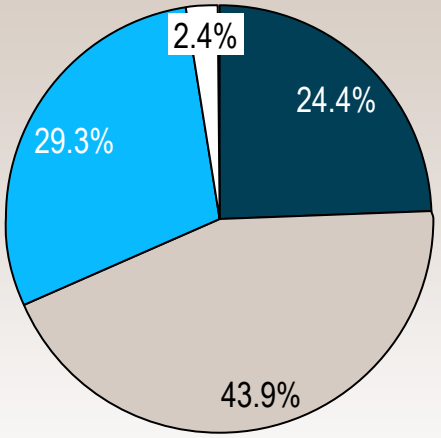
How many acquisitions did your firm perform over the past three years?/
In how many strategic alliances did your firm engage over the past three years?

No. of recent acquisitions



0 1-3 4-10 More than 10

No. of recent strategic alliances



0 1-3 4-10 More than 10