

Sustainable Service Supply Chains:

How ready are you?

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Executive Summary

The last few years have seen sustainability and our impact on the environment rise to the very top of corporate board agendas, not least due to mounting pressure from employees, shareholders, customers, and legislators, but also because many senior executives simply want to do something about it. As a result, the focus has inevitably turned to supply chains and what can be done to reduce their environmental impact. Embedding environmental sustainability into the management of those supply chains has become a key goal for many organizations, emphasizing the reduction of greenhouse gas (GHG) emissions and other pollutants, water consumption, waste generation as well as biodiversity and habitat loss.

Achieving sustainability goals requires a deep understanding of the key drivers of environmental impact throughout the value chain, assessing your organization's readiness, and building a collective vision across supply chain partners as to how transforming towards goals such as 'net zero' and 'circular' supply chains' can be achieved. In particular Reverse Logistics divisions have a key role and opportunity to significantly impact sustainability initiatives due to the nature of the work as recovering products from consumption and instilling circular product and material loops can:

- Prevent the need for new product manufacturing, reducing resource depletion and associated emissions from virgin resource extraction and associated manufacturing cycles
- Reduce waste volumes and pollution risks from landfills and waste leakage
- Reduce unnecessary transportation-related emissions

A recent study by the Blumberg Advisory Group asked participants various questions about their current and future sustainability goals, market maturity, organizational readiness, and industry best practices. Overall, the results told us that organizations are committed to sustainability. However, the lack of consensus identified that there is much work needed to ensure accurate tracking, facilitate measurement, define clarity in roles and objectives, and gather and interpret real-time data.

The study results will help Aftermarket Service professionals evaluate, influence, plan, or lead their organization's sustainability strategy.



What is Service Supply Chain Sustainability

Service supply chain sustainability refers to managing environmental impact categories related to every part of a service event – from Planning what service inventory will be needed and where (to support service level agreements), Delivering those parts efficiently when a service event needs them (according to SLAs) and Recovering as much value from no longer needed parts from the field, which might include refurbishment, recycling, and disposal of those service parts. Given that in many industries the revenues and associated environmental footprints can be several multiples of those associated with the original sale, service supply chain sustainability should be considered a key means to achieving overall corporate sustainability goals.

In addition to environmental impact, sustainability considers social and economic effects such as supplier diversity and inclusion, human rights protection, and fair trade/fair pay policies.

For reverse logistics, there are four key focus areas when it comes to environmental sustainability:

- Reduce the mass volume (and associated emissions) of new product and component manufacturing through repair, remanufacturing, refurbishment and remarketing activities
- Divert waste materials from landfill via high-quality recycling and enable reintroduction of secondary raw materials
- Eliminate pollution arising from waste streams leaking into terrestrial, atmospheric and aquatic ecosystems
- Reduction of GHG emissions arising from transport activities

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The study results will help Aftermarket Service professionals evaluate, influence, plan, or lead their organization's sustainability strategy.

92%
of total supply chain emissions come from the aftermarket

Director, Supply Chain Sustainability
Fortune 1000OEM

Methodology & Objectives

We conducted this research study in two parts, qualitative and quantitative. The qualitative analysis involved in-depth interviews with Service Supply Chain professionals from global manufacturers such as Dell, Fuji Film, HP, IBM, Intel, Cisco, and Yamaha and discussions with academics from the University of Tennessee Global Supply Chain Institute and the University of Nevada. The goal of the Qualitative Research was to understand the overall trends, directions, experiences, and practices toward sustainability among industry leaders. The quantitative research was a large-scale survey of 112 Service Supply Chain Industry professionals. This research provides valuable insights into the current state of sustainability in the Service Supply Chain industry and the challenges that lie ahead.

The study intends to assess organizational sustainability strategy and readiness. The results will help organizations understand what sustainability means, identify opportunities in both design and execution, and how each role in the organization fits in achieving sustainability goals.

The objectives of the study were to:

- Assess organizational sustainability strategy and readiness
- Understand what sustainability means to organizations
- Understand how service supply chain professionals can contribute to sustainability goals



Key findings:

- Many organizations are still in the early stages of implementing sustainability initiatives, and there is a need for more mature processes and systems.
- While most organizations have recognized the importance of sustainability, there is still a lack of clarity around what it means and how to achieve it.
- The importance of sustainable supply chains has increased over the past few years as companies face mounting pressure from shareholders, customers, employees and legislators to reduce their environmental impact.
- There is a need for real-time data and metrics to help organizations track their progress toward sustainability goals.
- There is a need for more investments in sustainable supply chains and greater collaboration between industry stakeholders.
- Third-party experts who share industry best practices can help organizations move towards more sustainable practices.



Qualitative Research Results

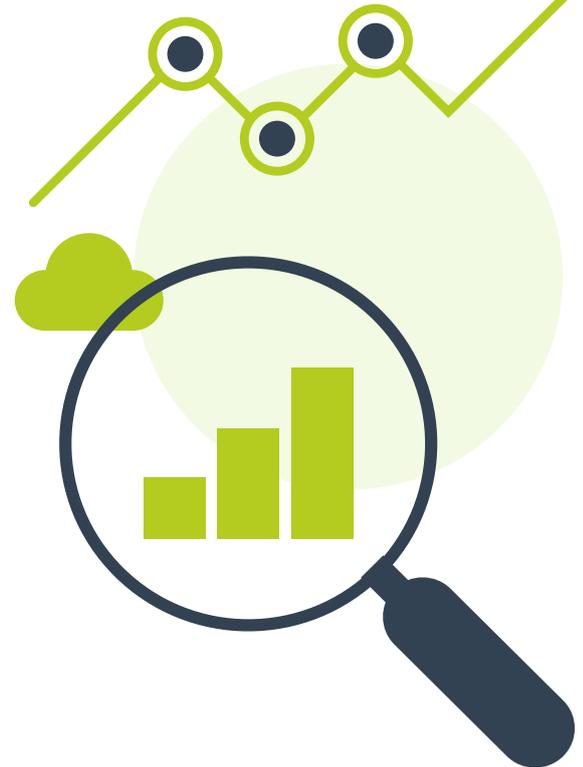
Our Qualitative Research of industry leaders shows that a **lack of data and visibility** is the primary challenge to achieving supply chain sustainability. Without dashboards to view sustainability data or other tools to measure and track real-time performance, it is difficult to identify areas for improvement and make timely course corrections in the near term.

Leadership must come together from all departments to create a collective effort to address this challenge. These departments include Operations, Sales, Marketing, Finance, HR, and Sustainability functions where they exist. Re-examining the current practices across their entire Service Supply Chain, and Reverse Logistics in particular, will help leaders develop a plan to improve their sustainability efforts.

The research also identified the need for **collaboration** as a critical challenge. For companies to succeed in their sustainability efforts, they need to work together across the supply chain. This effort includes upstream suppliers, downstream customers, and other industry partners. Only by working together can companies hope to achieve their sustainability goals.

Qualitative research also spoke about the need for **easy-to-use tools and processes**. Sustainability efforts will only be successful if they are easy for end-users to execute and understand. Additionally, these efforts must not conflict with performance goals. For example, a company cannot reduce waste if it negatively impacts production output.

Despite these challenges, the executives we spoke with remain optimistic about the future of supply chain sustainability. They have put sustainability initiatives in place and are working to make progress. However, action has been slow due to the many challenges in achieving supply chain sustainability. Our survey results indicate that there is much work to achieve supply chain sustainability, but the overall executive sentiment is optimistic.



Sustainability Ownership



Achieving sustainability goals is only accomplished through a collective effort of the entire organization. Qualitative research supports the need for a top-down approach from positions such as Chief Sustainability Officer (CSO), who sets the strategy and communicates it to the organization. Qualitative research suggested that these initiatives still need to be top-down for organizations without a CSO, as well as commitment from the very highest executive levels. In other words, when asked about implementing new sustainability initiatives like Sustainability Impact reporting many respondents indicated that they had too many other priorities and would only work on this type of initiative if mandated by their CEO or CSO.

Interviewees suggested executives “think bigger than just recycling” instead, designing waste out of products or reducing a node in the transportation leg are the most beneficial ways sustainability champions can make a difference. Doing the right thing won’t motivate organizations to pursue sustainability alone. Another interviewee suggested that it will be challenging to influence real change without punitive or compensatory financial incentives at a company level.

Measurement & Performance



Overall Qualitative Research supports a lack of visibility when it comes to measuring the performance of sustainability initiatives. The lack of visibility of sustainability performance is primarily because many companies do not have easy access to relevant data or the dashboards and other tools to either measure the current status or track progress against any stated goals. As a result, it is difficult to identify areas for improvement and make timely course corrections. “There are no proactive or dynamic software applications available to measure what you have done or forecast what you could do with returned materials,” noted one research respondent.

Many executives have management compensation tied to sustainability goals. Their incentives align with the collective desire to make progress on these initiatives. For example, the CEO of IKEA has his pay partially based on how well the company does environmentally. Top-down support creates governance around sustainable practices.

Qualitative research tells us there are varying levels of market maturity in a sustainable supply chain depending on the organization. The newness of these initiatives requires clarity in measurement and performance. Reducing the material footprint and energy consumption of meeting customer needs has a clear environmental impact but also cost-benefit – if operationalized efficiently and embedded in a business model that is engineered to incentivize this. Furthermore, this holds the potential of competitive advantage in guaranteeing customers guilt-free consumption, attracting the greatest talent, securing finance from ESG-orientated capital markets, and anticipating legislation. In short, sustainability initiatives that are good for profits and the planet provide a win-win solution.

Sustainability efforts need to efficiently and profitably strengthen supply chain resilience and should not overwhelm those who have to implement them. However, it may not be easy, and ensuring the right skillsets and knowledge is in place will be critical. The efforts should be real and impactful and never be open to criticism over greenwashing.

Covid-19 Impact

"Sourcing parts became a challenge during the pandemic; we had to settle for generic parts when genius parts weren't available," one respondent stated. The supply chain challenges and increase in eCommerce associated with Covid-19 drove the need for used parts when new parts were unavailable. The pandemic forced organizations to get creative and think outside the box regarding sustainability.

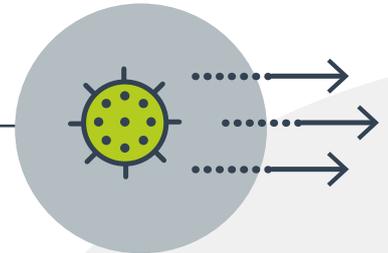
Reverse logistics has been a challenge for many companies during Covid-19. The increase in eCommerce has led to a surge in returns, putting strain on already overstretched resources. The increase in activity has made it difficult for companies to keep up with the demand, leading to a de-prioritization of sustainability goals. The pandemic

Readiness

Many supply chain vulnerabilities have been exposed over the last two years. The pandemic has only served to highlight these weaknesses. The lack of systems and processes to manage a sustainable supply chain has led to a general lack of readiness in terms of tracking the full array of KPIs, reports, and dashboards associated with sustainability success metrics. Although the sentiment is optimistic, much work still needs to be done to achieve sustainability in the supply chain. Establishing scorecards and dashboards to measure and manage performance is a critical step in this process. As one respondent indicated, "sustainability is all about measurement."

Feedback tells the story that there has been a lot of support and attention around sustainability but not a lot of action. There is an understanding of where organizations want to be and what they want to do to mitigate risk and future proof their organizations. However, many still feel they are in the discovery phase of sustainability readiness.

also drove reuse. When parts weren't available, manufacturers turned to local repair companies to fix broken parts, even if it was only temporary.



**“Sustainability
is all about
measurement”**

Director, Reverse Logistics -
Large Technology OEM

Quantitative Study Results

Confidence and clarity in the strategy or execution of supply chain sustainability efforts were evident from the quantitative study. The quantitative results displayed a lack of consensus among respondents on sustainability initiative performance. Respondents acknowledged that programs are in place and that their organizations focus on sustainability efforts. However, many believe there is room for improvement.

Respondents didn't have much confidence when asked about the collective effort to achieve supply chain sustainability. The lack of confidence could be because many organizations don't have a clear strategy or plan. Lack of clarity makes it difficult for everyone involved to move in the same direction. While the organization's sustainability goals may be clear, stakeholders' roles in achieving those goals require more guidance. Another challenge is that the level of autonomy various departments have in attaining sustainability goals may cause conflict.

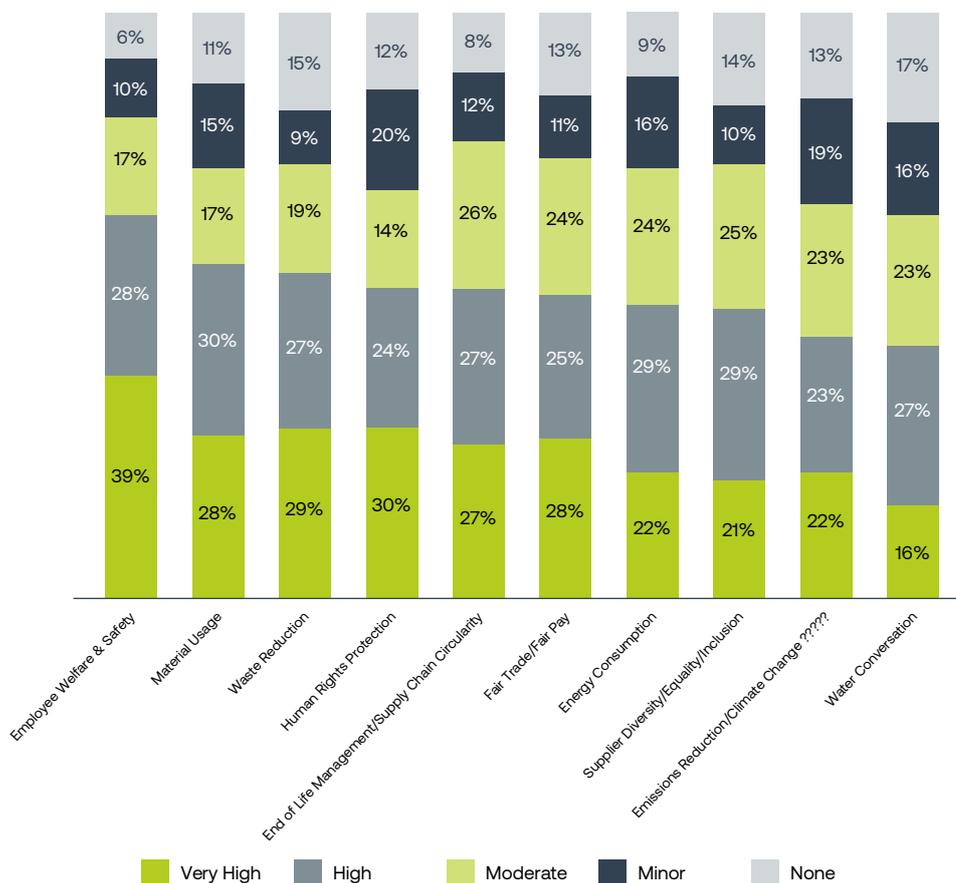
Organizational Goals & Objectives

Approximately three-quarters (75%) of respondents agree that their organization's attention level towards sustainability initiatives is moderate, high, or very high. Organizations surveyed provide the most significant focus on employee welfare & safety(84%), waste reduction(75%), and material usage(75%) sustainability efforts. Human Rights Protection, Emissions Reduction/Climate change mitigation, and Water Conservation receive the least amount of focus, primarily because the organizations find it difficult to measure, not because they are not important. However, the differences between all categories are minimal.



Figure 1

What level of focus/attention do each of these sustainability initiatives have within your organization?

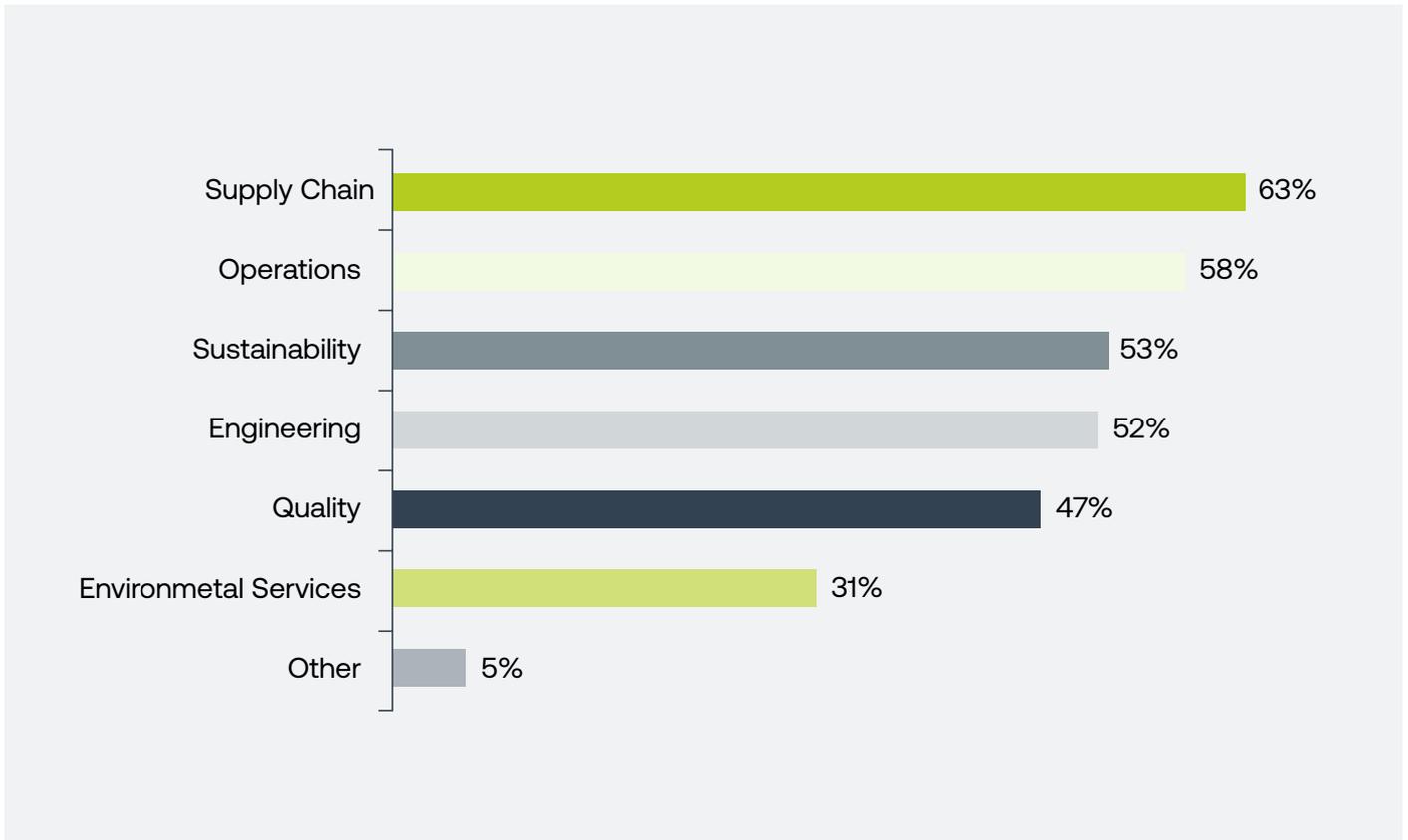


Engagement around sustainability, in general, is high, but when you get to the next layer of specific sustainability goals, organizations lose focus due to everything that sustainability entails. Grouping all of these categories into one sustainability bucket makes it challenging to make significant progress in a short period, especially without proper coordination.

Initiatives are being developed by a variety of business functions within companies, with the majority coming from Supply Chain(63%), Operations(58%), and Engineering(52%). While an organization may have sustainability goals, it may not necessarily have an environmental services department to coordinate and develop initiatives. The responsibility then falls on the Supply Chain function, Operations, and Engineering to develop sustainability initiatives, but which appear to be in silos, adding further confusion and delays.

Figure 2

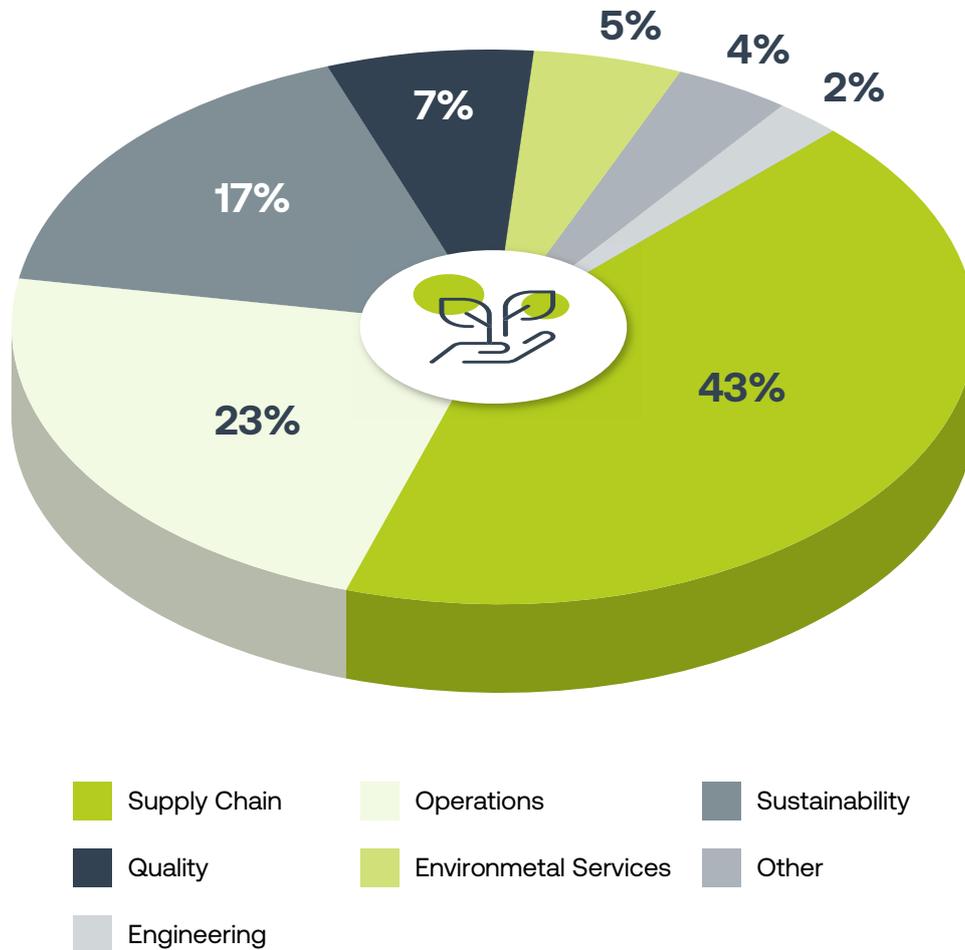
Which business functions within your company are involved in developing Service Supply Chain sustainability initiatives?



Ownership of sustainability is evolving throughout organizations. The Supply chain function holds most of the ownership (43%) for driving sustainability initiatives, followed by operations (23%) and sustainability(53%). Historically, since the supply chain function owns the flow of goods and is where the direct impact of sustainability initiatives will be felt first, it made sense for ownership to lie with the same function.

Figure 3

Which business function within your company has overall responsibility for driving Service Supply Chain sustainability initiatives?

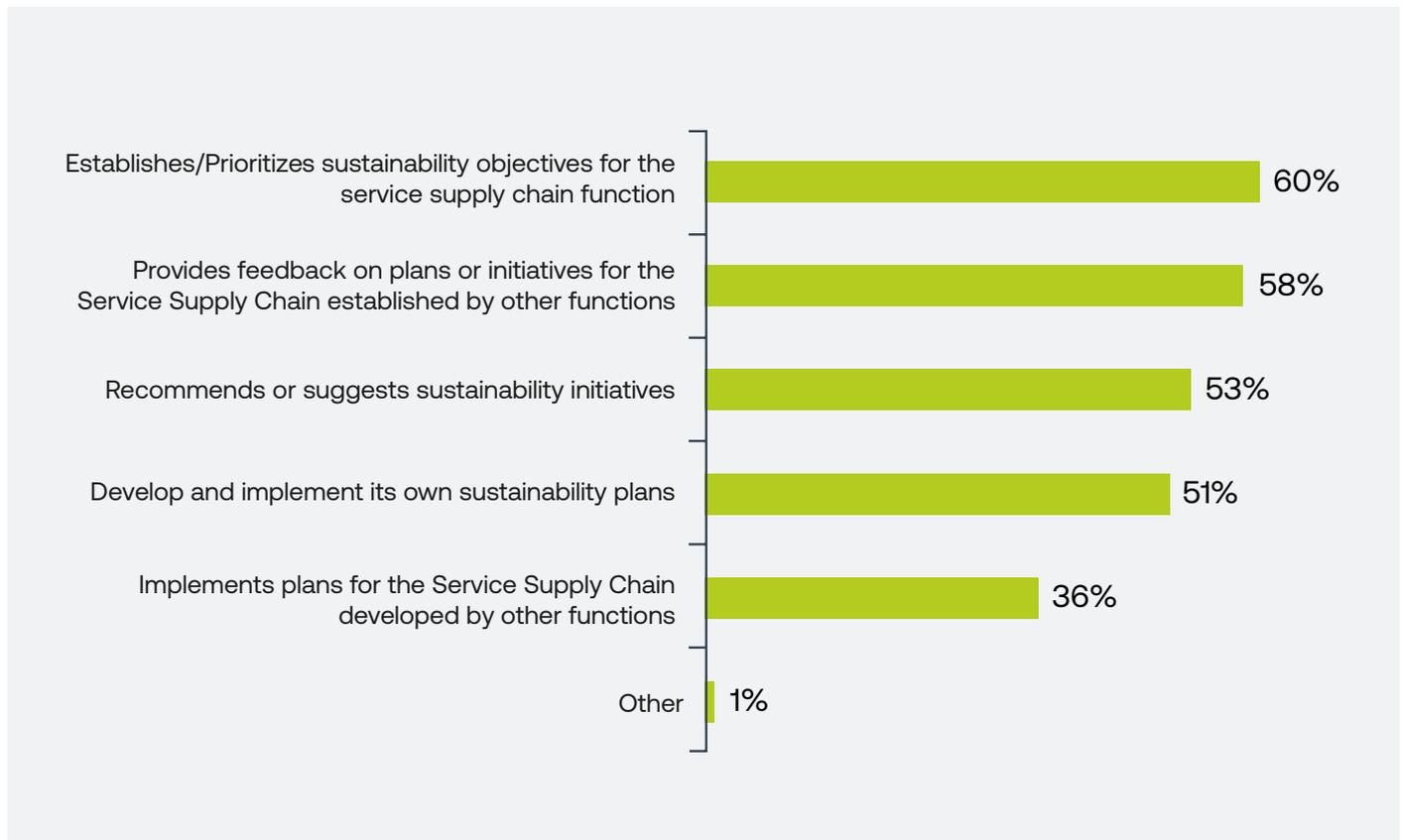


Service Supply Chain professionals wear many hats in establishing and carrying out sustainability initiatives. While they may not be the sole decision-makers for determining what initiatives to put in place, they play a significant role in establishing priorities, providing feedback, and recommendations for sustainability plans.

Establishing priorities and identifying needs are the most prominent roles individuals play in setting and carrying out sustainability initiatives. Most respondents agreed service supply chain played a role in establishing priorities (60%), providing feedback (58%), providing recommendations (53%), and developing sustainability plans (51%).

Figure 4

What role does the Service Supply Chain Function play in establishing and carrying out sustainability initiatives?



Impact of Covid-19 on Service Supply Chain Sustainability Initiatives

According to respondents, Covid-19 has had a minimal impact on the pressure for supply chain sustainability. When asked if pressure increased, stayed the same, or decreased, responses were evenly distributed, with 38% reporting an increase, 32% pressure remained the same, and 29% reporting a decrease in pressure. Interestingly, 75% of respondents felt their organization's commitment to supply chain sustainability either increased or stayed the same since the start of Covid-19. The steadfastness and increase in commitment coincide with increased demand and the need to recover and repurpose used equipment due to supply chain disruptions during the Covid-19 pandemic.

Figure 5

Has the pressure on your firm for Supply Chain sustainability changed during Covid-19?

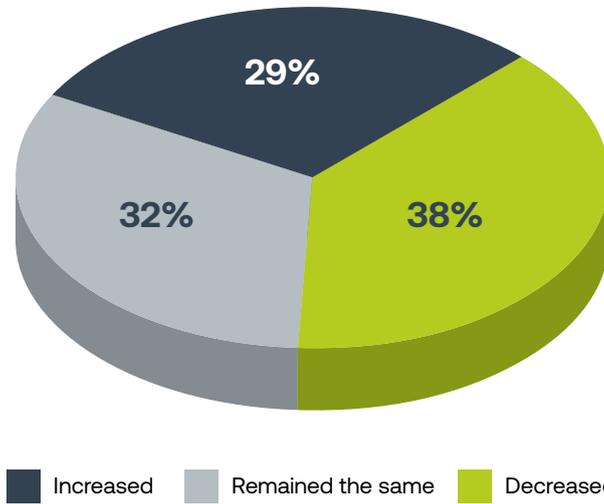
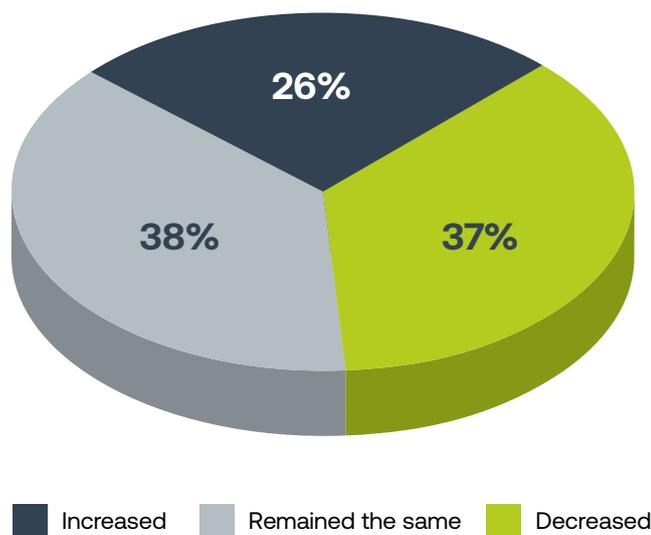


Figure 6

How has your firm's commitment to Supply Chain sustainability changed since the start of Covid - 19?

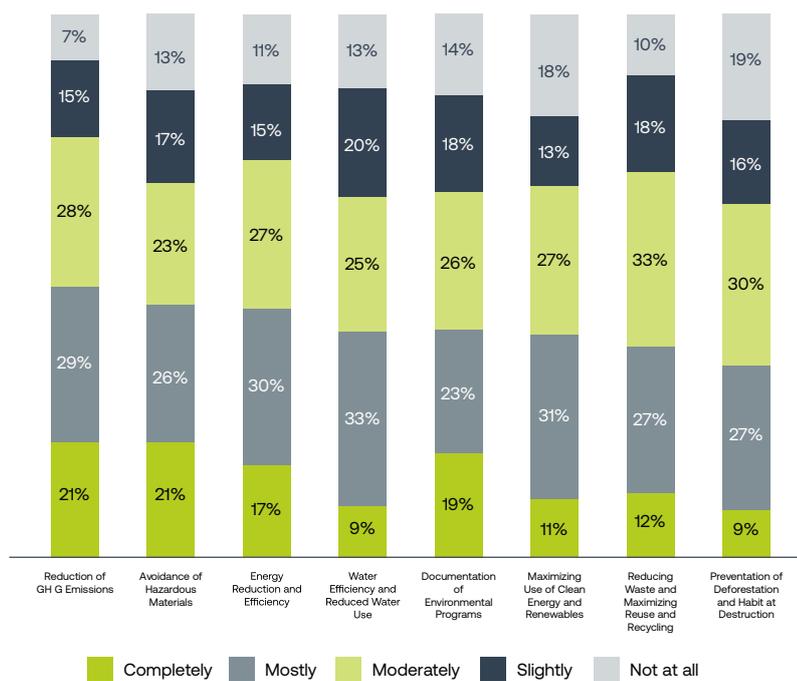


Service Supply Chain Sustainability Readiness

Results convey a lack of overall readiness to meet the environmental objectives. Respondents agreed their Service Supply Chain was most prepared in tackling the reduction of Greenhouse Gasses (GHG), when compared to other sustainability priorities. That said still only half (50%) of the respondents felt either completely or mostly prepared, representing a significant gap of real readiness.

Figure 8

How prepared is your Service Supply Chain to meet each of the following environmental objectives?

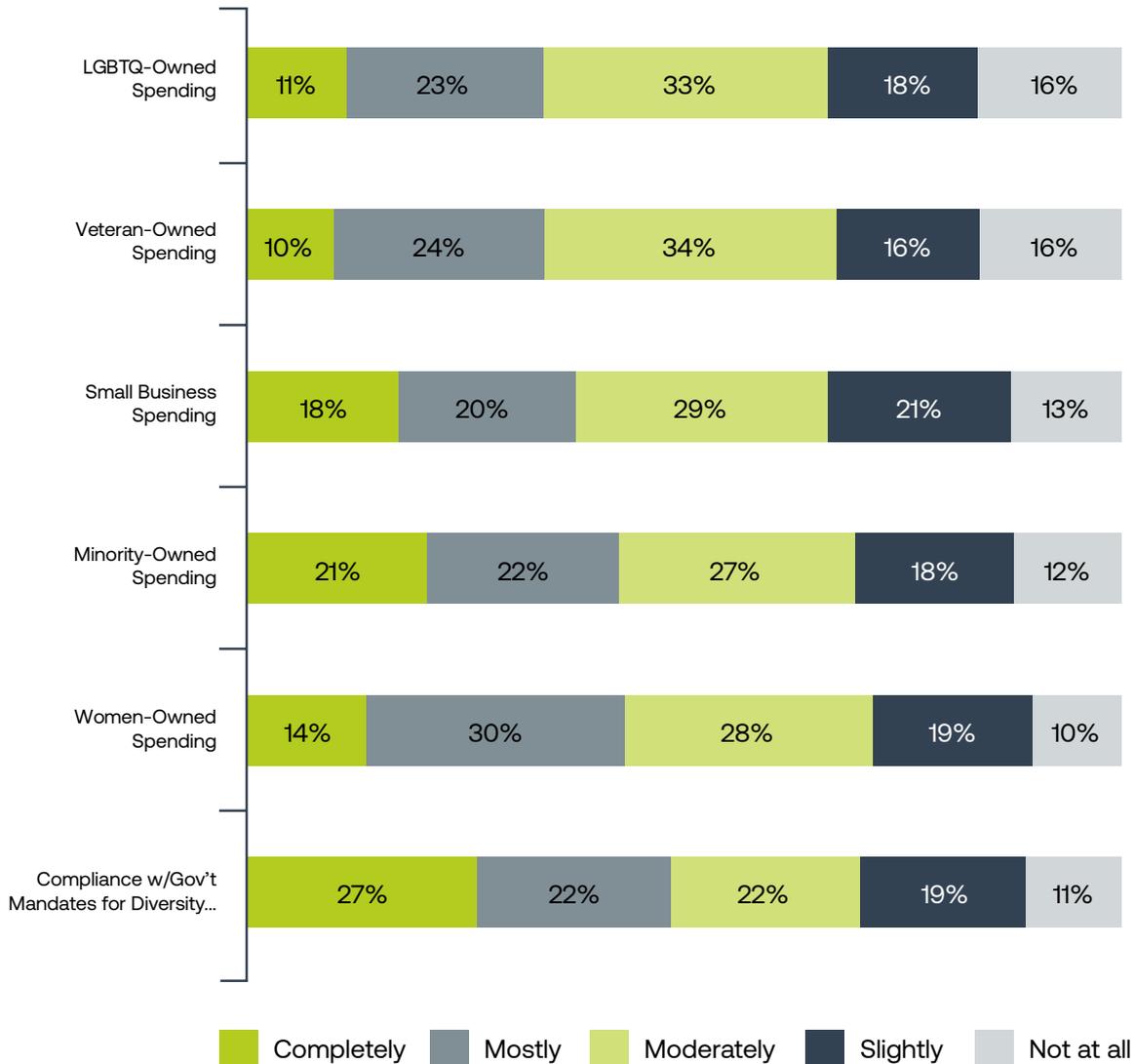


In response to social impact objectives, respondents exhibited much more confidence. More than two-thirds of respondents felt their organization was either moderately, mostly, or completely prepared.

Diversity and Inclusion readiness mirrors the results of environmental and social impact readiness. At least two-thirds of respondents felt their service supply chain organization was at least moderately prepared, but there was no overwhelming evidence to show strong confidence.

Figure 9

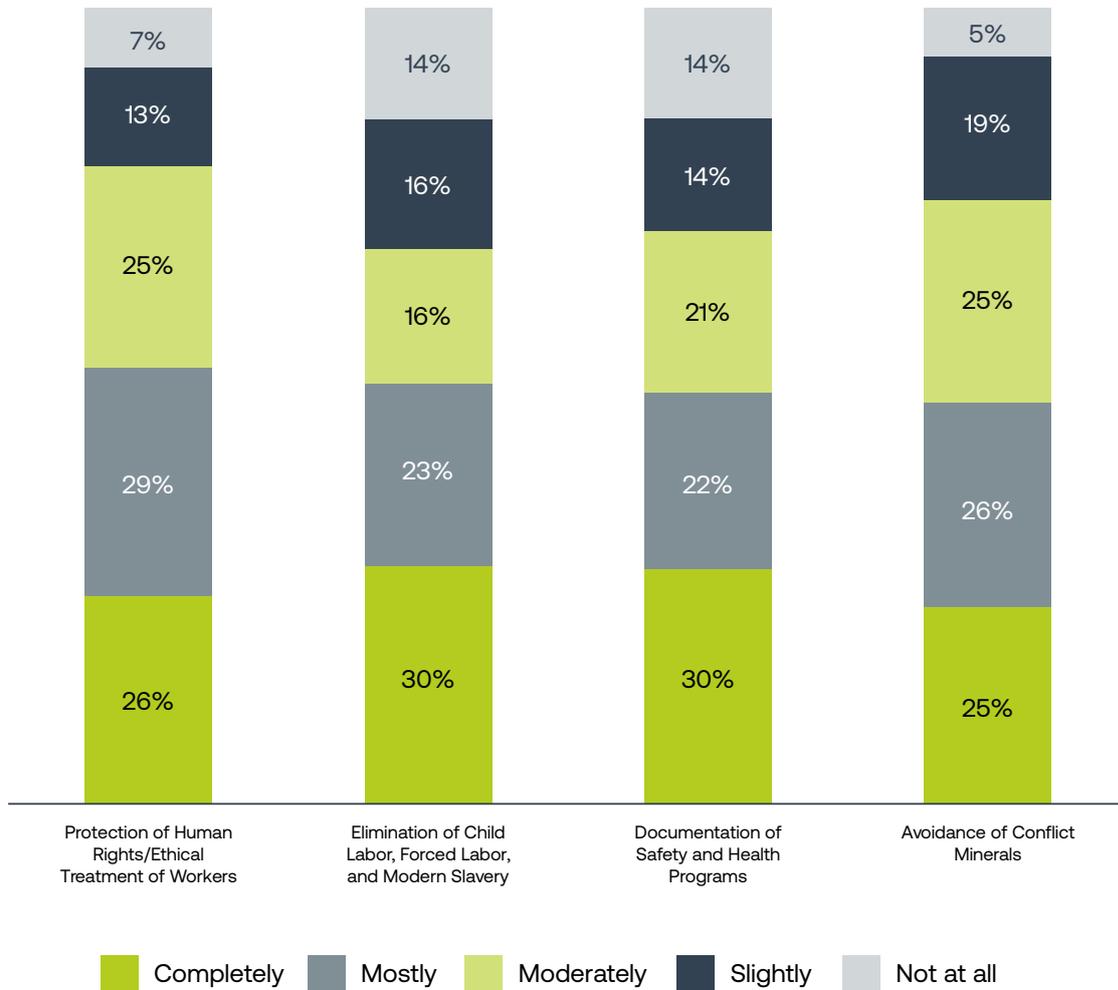
How prepared is your Service Supply Chain organization to meet each of the following diversity and inclusion objectives?



Service supply chain respondents felt mostly confident their organizations' could support effective sustainability codes of conduct throughout supplier tiers. There was also strong sentiment toward readiness for ensuring data privacy and security, followed closely by ethical readiness.

Figure 9

How prepared is your service supply Chain organization to meet each of the following social impact objectives?



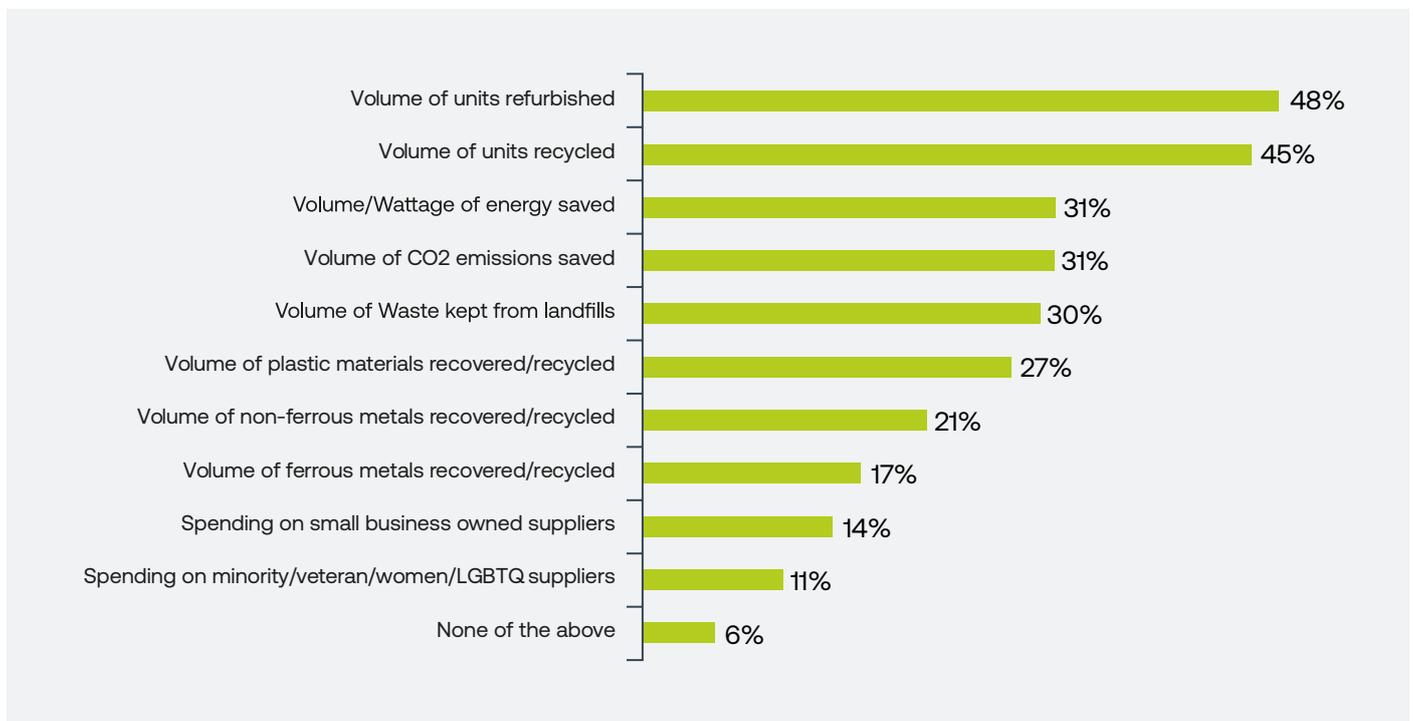
The lack of readiness is a concern for Service Supply Chain professionals who will have to reprioritize initiatives, provide support, and increase collaboration to catch up. All departments must work together to achieve successful readiness for long-term supply chain sustainability. Addressing feedback, reporting, and data needs will also be essential to success. Many organizations are working hard to overcome sustainability challenges to be leaders in this space.

KPIs & Metrics

Many respondents report they have not established clearly defined sustainability performance metrics. The lack of performance metrics is most likely driving the ambiguity in sustainability progress.

Figure 11

Which of the following sustainability metrics does your Service Supply Chain organization currently track?



More than half of the respondents reported that their organization tracks both units refurbished and recycled units. The remaining categories averaged 31%, as tracked by the respondent's organization. The most significant deficiency in tracking is spending with minority/veteran/women/LGBTQ and spending with small businesses suppliers.

Figure 12

Has your Service Supply Chain organization established any performance targets for the following sustainability metrics?

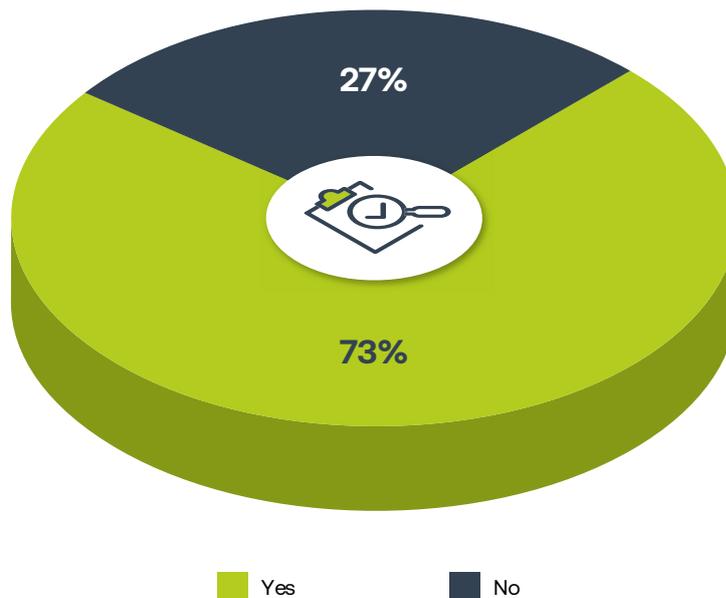


Reporting & Disclosure

Most respondents report supply chain practices to the public through different reporting cadences and reporting methods. The most common method per approximately one-third of respondents is monthly or bi-monthly through Customer Sustainability Reports (CSRs), company websites, shareholder calls, 10Qs, and company newsletters. Other methods include annual reports, 3rd Party compliance reporting, and press releases. Reporting cadences can also vary between annually, quarterly, or upon some major milestone. The lack of consistent reporting formats and cadences is a challenge for many organizations. The lack of clarity on reporting makes it difficult for companies to determine what actions to take to improve sustainability or to compare progress between peers and cohorts.

Figure 12

Does your firm disclose Service Supply Chain sustainability practices to the public?



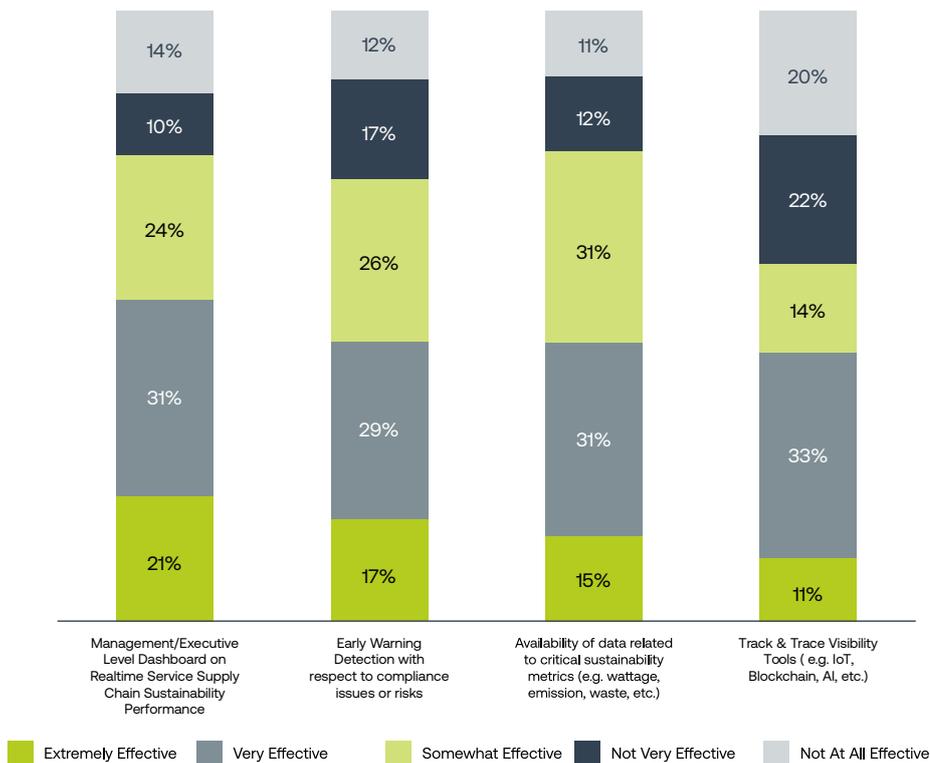
The lack of real-time data prevents decision-makers from having visibility into the performance of their programs. Additionally, it makes it difficult to track and report on progress. To increase transparency and comparability, organizations need to focus on data collection and reporting. This activity will allow for a more accurate assessment of progress and enable better decision-making. Organizations also need to focus on identifying and reporting on KPIs and metrics. The frequency and method of delivery vary with no significant common practice.

System & Processes

Most respondents felt their company's enterprise systems and business processes are at least somewhat effective, with the most significant area of improvement being in tracking and visibility. Executive dashboard performance and availability of critical sustainability showed encouraging support from survey respondents.

Figure 12

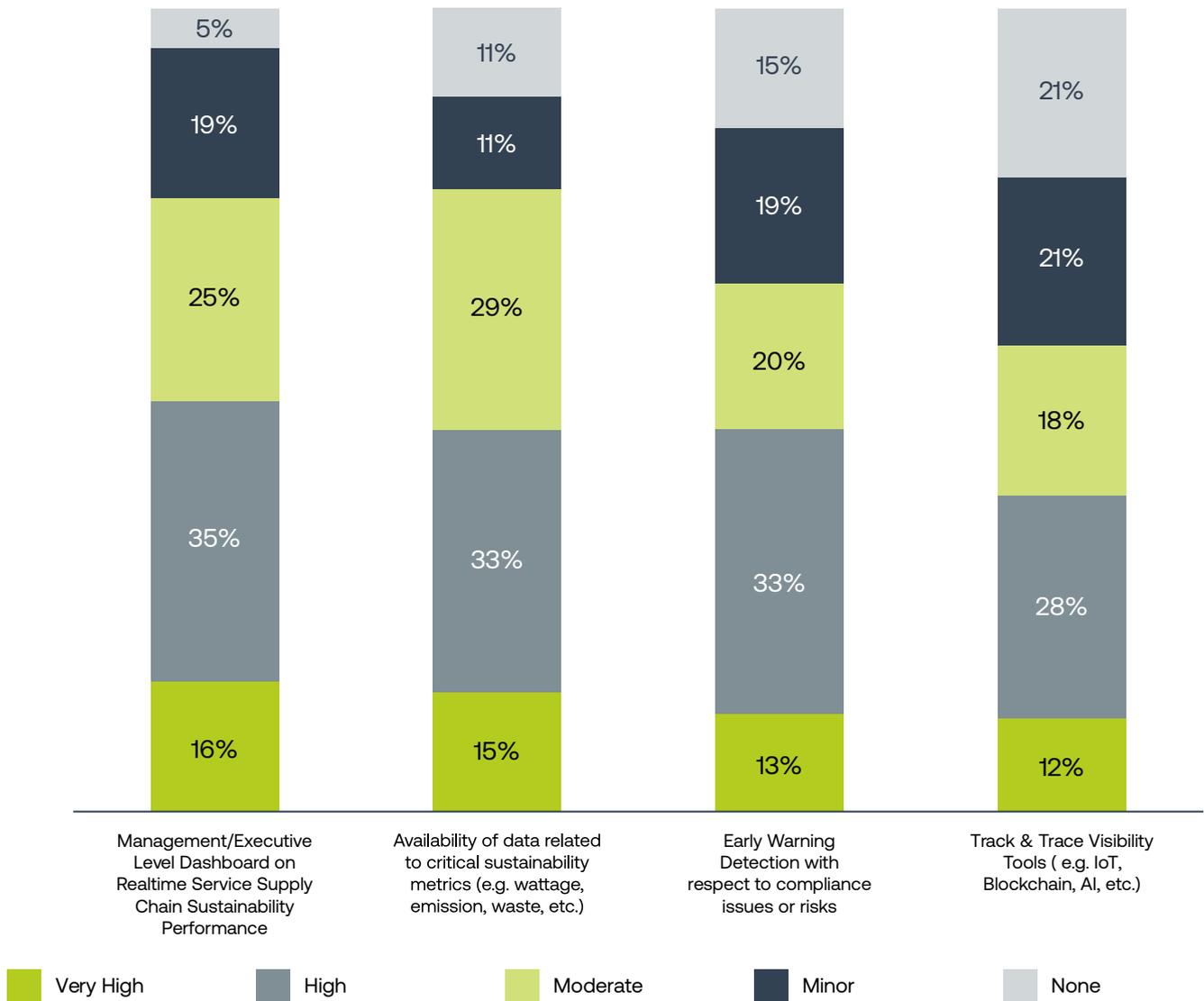
How would you evaluate your company's enterprise systems and business processes with respect to performing the following Service Supply Chain sustainability functions?



Over three-quarters of respondents reported some level of investment has been made in executive dashboards, early warning detection on risks or disruptions, availability of data, and tracking and tracing. Respondents expect Investments to continue over the next 12 months in all of these areas, which speaks to each area's level of opportunity and impact.

Figure 12

What level of investment has your company made to date regarding each of the following Service Supply Chain sustainability functions?

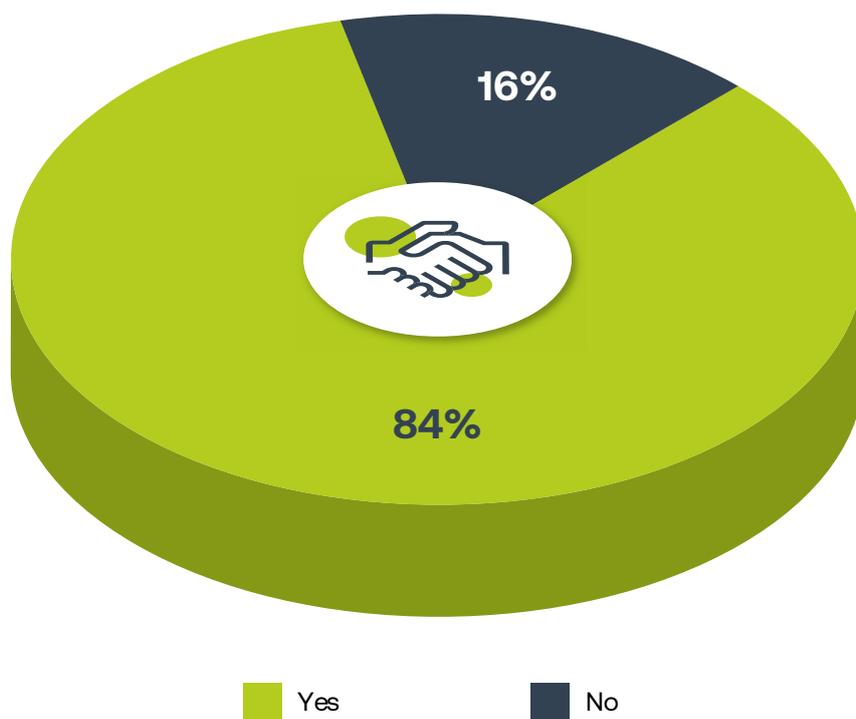


Future of Sustainability

An overwhelming majority (84%) report using a third-party vendor for carrying out or implementing Service Supply Chain sustainability initiatives. Leveraging third-party expertise is seen as the most effective way to overcome a lack of internal knowledge.

Figure 16

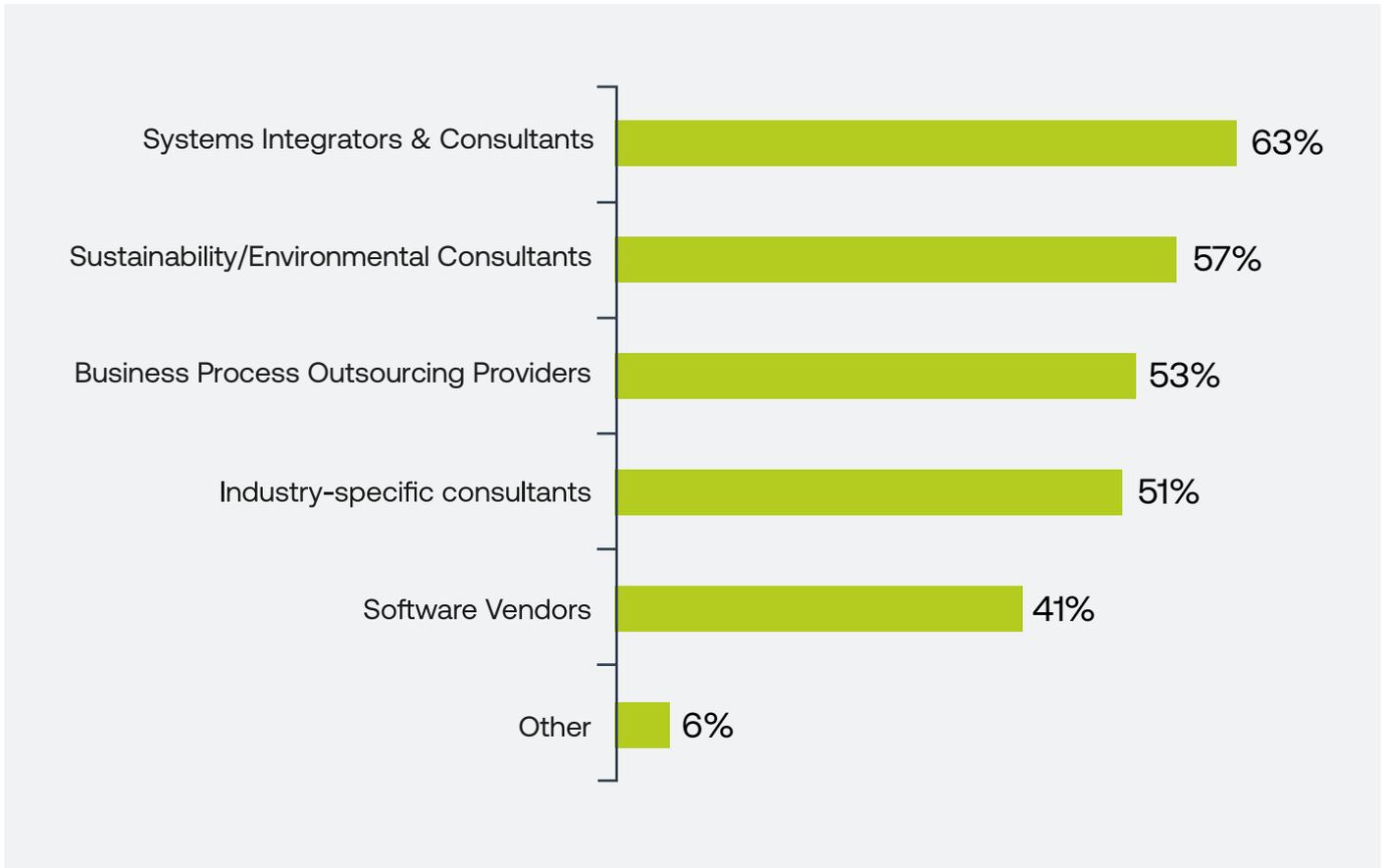
Does your company currently work with any third party service providers in carrying out or implementing Service Supply Chain sustainability initiatives?



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Figure 17

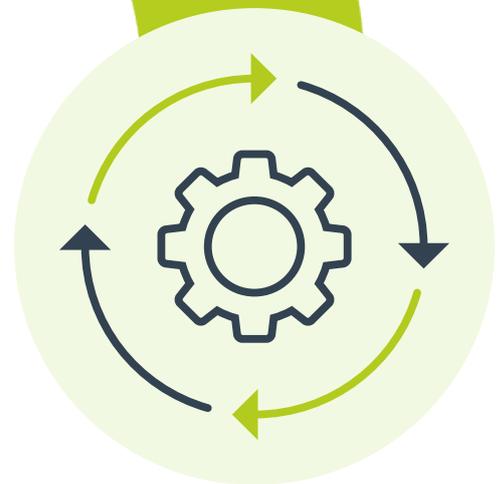
Which categories of vendors has your company utilized to support these initiatives?



Strategic Implications

Overall, lack of consensus and confidence seems to be a common theme for Service Supply Chain sustainability. Without established performance metrics, it won't be easy to show progress and build confidence internally and with other stakeholders. Maturity in the sustainability space is also driving the lack of readiness. This lack of confidence underscores the many categories that make up what sustainability means to an organization, such as environmental, social, and diversity & inclusion objectives. The higher level of confidence in areas of data and privacy security stems from greater market maturity in focusing on these areas.

The study shows reverse logistics professionals understand that they contribute to environmental sustainability best practices through recycling, refurbishment, and remarketing activities. However, we believe there is a gap in their ability to obtain granular, real-time, precise measurements on sustainability-related success metrics related to all aspects of their operation. Our study found that while most respondents were able to track some sustainability metrics, many lacked visibility into the total environmental impact of their operations. We found that respondents were often unable to track key metrics such as carbon emissions or water consumption. To close this gap, we recommend that service supply chain professionals seek tools and technologies that give them a more holistic view of their environmental impact.



Leverage Expertise

Leveraging supply chain sustainability experts will help organizations move beyond lack of confidence and readiness. These experts bring a wealth of knowledge and can help organizations close gaps in their sustainability programs. Industry experts are aware of challenges encountered while establishing sustainability initiatives. They are also aware of possible solutions and lessons shared throughout the implementation process. Furthermore, experts can provide insights into communicating progress to internal and external stakeholders.

Achieving success requires having the right technology, systems, and processes to track progress and benchmark against others. Third-party vendors offer calculating tools that provide relevant data for benchmarking and monitoring progress.



Assess Organizational Sustainability Strategy and Readiness

Preparing for future disruptions requires a robust sustainability strategy that prioritizes resilience. In other words, a supply chain that can persist, adapt, or transform in the face of change. A robust strategy means having a resilient network across the entire service supply chain ecosystem and diversifying suppliers. The way businesses respond to sustainability has changed, and organizations need to be agile to adapt. However, progress has been slow due to the many complexities involved in achieving supply chain sustainability.

There is not a cookie-cutter solution for sustainability for all organizations. Understanding sustainability readiness should allow for quick wins on the sustainability front. These wins create momentum and learning that would enable continued progress towards sustainability goals.

Determining where you are today as an organization will provide a greater understanding of sustainability readiness. In addition, identifying the gap between where your organization is and where they want to be in terms of readiness will uncover gaps in companies' abilities to enact their sustainability goals. Benchmarking to create a Service Supply Chain Sustainability Impact score will help organizations assess their progress and compare themselves against their peers. Leveraging third-party industry experts will facilitate faster adoption of sustainability initiatives.

Set Goals and Objectives

As the study suggested, the desire to be sustainable is present at all levels, but progress has been slow. Having departments or business functions running their sustainability initiatives will lead to a lack of organizational coordination and a siloed approach that may ultimately hurt sustainability initiatives.

As suggested, the top-down approach should address providing clarity of the sustainability strategy for the corporation and the service supply chain specifically, and underlying objectives. Once an organization determines where they are from a sustainability readiness perspective, it can set goals and objectives for enabling its different departments towards more effective and efficient implementation of sustainability efforts. In addition, executive-level support drives sustainability engagement throughout an organization.

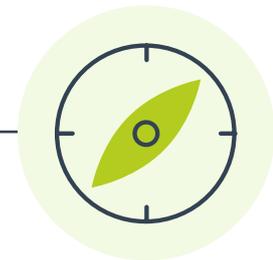


Determining where you are today as an organization in terms of organizational readiness and actual sustainability performance will help better understand how environmental and social sustainability agendas interact with the commercial performance of the organization and the activities of the service supply chain. This will allow for alignment across sustainability efforts and drive synergies between them. The most common method is to focus on the effects of products and services by assessing the life cycle impact on greenhouse gasses, water use, and waste. Tracking sustainability success metrics like GHG emissions, waste, etc. creates a Service Supply Chain Sustainability Impact score which will help organizations assess their progress and compare themselves against their peers. Leveraging third-party industry experts will facilitate faster adoption of sustainability initiatives.



Improve Visibility & Tracking

The lack of visibility and tracking was an evident concern from both the qualitative and quantitative results. The opinion expressed by some respondents was that data currently being shared was selective, smoke and mirrors, or didn't exist in some cases.



Visibility and tracking may require enlisting outside experts instead of trying to develop internal dashboards. In addition, organizations should establish systems and processes for sustainability initiatives. Once dashboards, processes, and procedures are in place, set measurable goals that can be tracked and shared with employees to increase transparency and communication about sustainability efforts. As one respondent indicated, "data is the currency of the future."

**“Data
is the
currency
of the
future”**

Director, Supply Chain
Sustainability Fortune 1000EM

Summary

The Aftermarket Service Industry presents a unique opportunity to improve sustainability. The desire to reduce environmental impact is present, but the lack of systems and processes slows supply chain sustainability and readiness. In addition, there is an opportunity to improve understanding of roles and impacts on sustainability initiatives. The way businesses respond to sustainability has changed, and organizations need to be agile to adapt. Senior leaders should continue to follow a top-down approach to setting sustainability goals and strategies and choose sustainability efforts that are both good for the business and good for the planet.

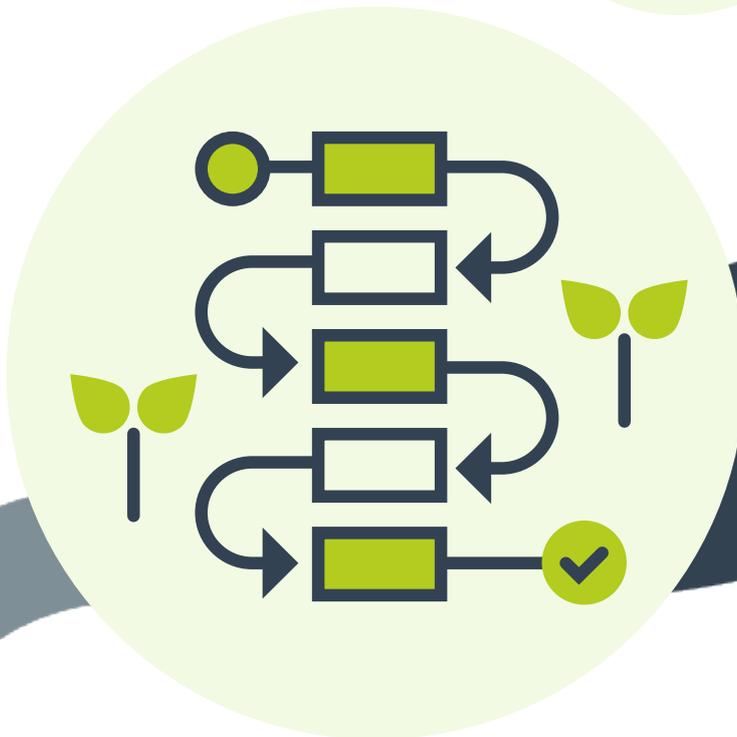
About Blumberg Advisory Group, Inc.

Blumberg Advisory Group, Inc. is a leading research and consulting firm in the Reverse Logistics & Aftermarket Service Industry and a pioneer in helping companies manage service as a strategic profit center. Blumberg works to improve company profits through strategic service, assisting in developing and implementing profitable business strategies based on the principle that service can be a separate, strategic, and profitable business. Through their relationships and experience, Blumberg is uniquely qualified to strategically position its clients to meet current challenges and new growth opportunities and advise clients on mergers and acquisitions. Learn more at blumbergadvisor.com



About OnProcess

OnProcess supplies technology and services that power the world's circular service supply chains. Providing managed services and digital transformation expertise that streamlines processes, maximizes customer lifetime value, and improves 'circular' sustainability goals, OnProcess is a trusted advisor to many of the world's leading computer, networking, med-tech, wireless, telecommunications, and IT companies.



The logo for OnProcess, featuring a green semi-circle to the left of the text "OnProcess" in white. The background includes large, light blue curved shapes and a yellow curved line with dots on the left side.

OnProcess



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