

TAKING THE **RIGHT** TURNS

WOOD • PAPER • PACKAGING



 **StepChange**
Consulting

Driving Change to Deliver Results

OUR SERVICE PORTFOLIO

FROM STRATEGY DEVELOPMENT TO OPERATIONAL IMPROVEMENT

STAKEHOLDER SERVICES

- Merger & Acquisition
- Industry Studies
- Investment Decision Support
- Benchmarking & Performance Assessment
- Market Research

INDUSTRY SERVICES



- Strategy Definition
 - Operational Performance Improvement
 - Turnaround Management
 - Post-Merger Integration
 - Supply Chain Transformation
 - Restructuring & Organizational Design
 - Sales Strategy and Effectiveness
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HELPING OUR CLIENTS MANAGE INDUSTRY CHALLENGES

Choosing the right turns is not easy for executives in our industry. The interdependencies between the many factors influencing overall business performance require continuous management attention and selection of the right route to success.

Companies are exposed to high volatility both on the supply and the demand side. Every year provides new challenges – managing costs of raw materials or other input costs, managing demand and capacities, or reassessing the overall strategy. Developing and keeping a clear vision is essential in order not to lose sight in the jungle of intersections and to take the right turns.

StepChange will help you define and implement the best road to success for your company. As Industry committed and specialized consultants we provide you with pragmatic, results-oriented and yet innovative, tailor-fit solutions. Being a part of this industry we understand and take on your challenges. You can rely on our global and proven industry expertise to help you take the right turns and drive change to deliver business results.



“With StepChange I don’t need to spend time to explain what my industry is about. We can get right to the issues and develop solutions.”

Divisional CEO for Global Paper and Packaging Company



“They worked with our people to develop and implement - they really get things done.”

Finance Executive, Publication Paper Producer

Strategy Development

StepChange can help you develop the best fit strategy. Our broad experience in nearly all segments and functional areas of the global industry enables us to provide you with the relevant top level advice. We will work with your leadership teams in a fact driven strategy process to define the strategies for your future success.

Supply Chain Strategy & Transformation

StepChange has the transformational and strategic expertise to support you in developing your supply chain capabilities across functions, sites and divisions. We perform supply chain assessments to quickly identify potentials. Our proven approach and experience can help you capture these potentials and develop a transformational plan to achieve supply chain excellence. Reference projects have helped clients define and transform their supply chain strategies to achieve increased performance at lower costs.

Performance Improvement and Turnaround Management

StepChange has long standing experience in conducting transformation and turnaround projects. Our turnaround methodology focuses on rapid and sustained profit improvement through data analytics, benchmarking, application of best practices, collaborative solution development and implementation of process improvements. We work with your teams encompassing all functional and operational areas. Reference projects have resulted in annual bottom & top-line improvements of 3-8% with a multiple return on consulting spend.

Wood and Fiber Supply

StepChange supports you in defining your fiber supply strategy to secure the raw material supply and to operationally improve the supply chain. Benefits are captured through an operational focus on sourcing, transport, handling, quality, and usage of fiber in the production process. The implementation of new processes and accompanying performance metrics, lead to increased transparency, a cost reduction in the overall fiber supply chain and an improvement of yield.

Sourcing

With our extensive industry experience we can help you reduce your input costs through operational and strategic sourcing. Because of our specialization we can quickly analyze all your spend categories and assess improvement potentials taking material specifications, supply chain requirements and usage patterns into consideration. Savings typically yield 3-15% in cost reduction.

Working Capital Management

StepChange assists you to achieve sustainable working capital improvements across multiple sites. Our structured methodology targets all working capital levers in inventories, receivables and payables management. StepChange supported initiatives have yielded improvements of 20-30% in working capital reduction.

OUR SUCCESS IS BASED ON FIRST HAND AND FRONT LINE INDUSTRY EXPERTISE

Revenue Improvements and Sales Effectiveness

Accurate and up-to-date customer insight is required to retain customers, manage economic risk and improve margins. StepChange supports you to develop an improved decision platform to align sales strategies, deploy the appropriate tactical measures and improve sales force effectiveness. Projects have helped clients capture 0.5-1.5% in margin improvements and reduce the risks of bad debt and customer churn.

M&A, Post Merger Integration

StepChange helps investment firms and industry players to identify and assess acquisition targets and supports the due diligence. We have a strong track record with post merger projects on corporate and site level. We help you integrate and restructure the acquired companies to capture targeted synergy value.

Stakeholder Services

Based on our broad industry exposure and expertise, StepChange provides industry stakeholders, such as investors and financial institutions, with market research, industry studies, and benchmarking reports.





Since our foundation in 2006 StepChange Consulting has been continuously growing its client base and geographic coverage. We are proud to support our global customers through our Operations in Europe and the United States.

Our strategy to provide specialized, pragmatic and hands-on advice is reconfirmed by the continuously increasing client demand for our services.

Working with us you will quickly discover that we understand your challenges and the industry issues at hand. Our expertise enables us to hit the ground running, placing an emphasis on delivering measurable business results.



“I chose StepChange over a big strategy firm for reasons of expertise, value created and time required”

Director of Global Private Equity Firm

DRIVING CHANGE TO DELIVER RESULTS

Specialized on wood, paper, packaging

Operations in Europe and the United States

Management consultant of choice for top tier companies

> 50 % Annual growth

> 30 Countries with completed projects

> 4000 Client executives and employees engaged

> 98 % of post project client feedback recommends StepChange

> 650M \$ in bottom and top line improvements delivered

> 260M \$ in Working Capital reductions implemented

> 600M \$ in M&A deals

> 400M \$ Post Merger Integration synergies captured

STEP CHANGE

SIGNIFICANT **CHANGE** IN
DIRECTION OR A SHIFT
IN **PARADIGM** THAT
LEADS TO INCREASED **VALUE**



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