



**KUKA**



**CIS Controlling Insights Steyr**

20 November 2015

**Herausforderungen der  
Wachstumssteuerung**

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# Megatrends Change the World

**MOBILITY**

**GLOBALIZATION**

- World CO2 emissions will increase 16%
  - The average global temperature will rise 0,5-1,5°C
  - Declining biodiversity and extreme weather
- (Roland Berger)

**GLOBAL WARMING**

- The average age worldwide will rise from 27,2 years now to 37,3 years in 2050 (Goethe Institute)
- Average age in Germany will rise to 88 years for women and 82,5 years for men in 2050 (Deutsche Bank)

**OVERAGEING SOCIETY**

- the share of the world population living in urban areas will rise to 53.6% in 2030 (United Nations)
- Large-scale migration from region to region and countryside to urban areas continues in both Asia and the Middle East. (Copenhagen Institute)

**URBANIZATION**

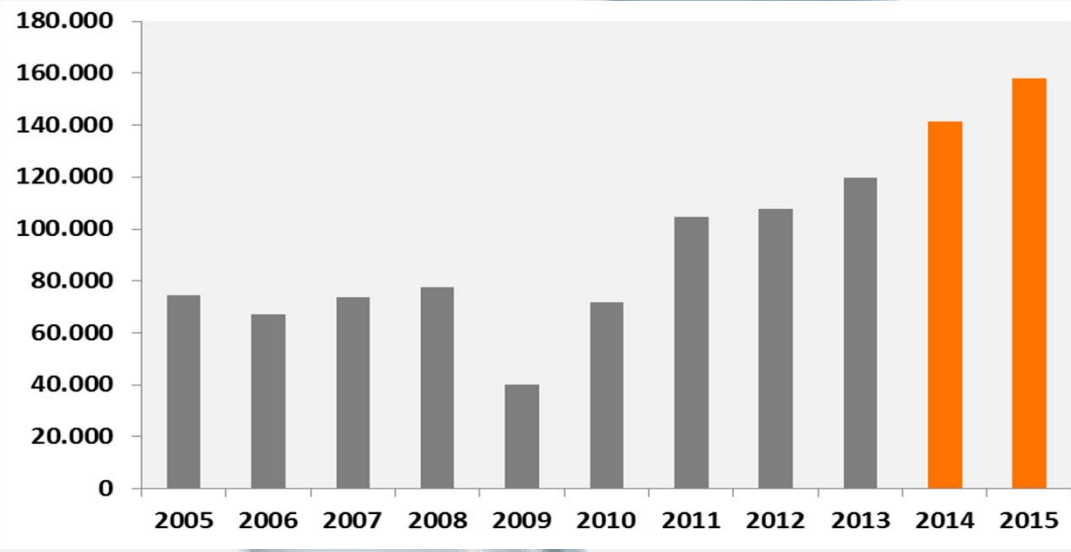
**DIGITAL LIFE  
CONNECTIVITY**

**INDIVIDUALIZATION**

**HEALTH**



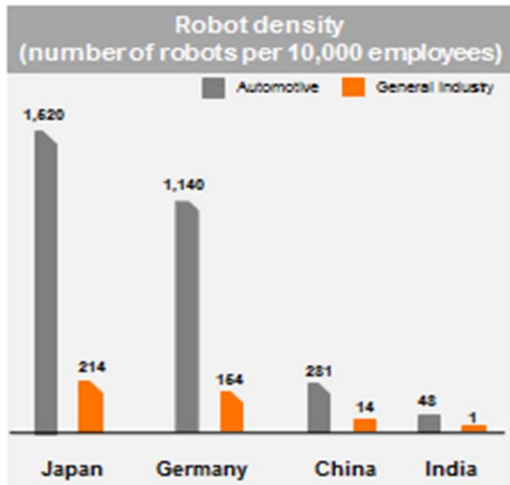
## New Dimension in Robotics Growth



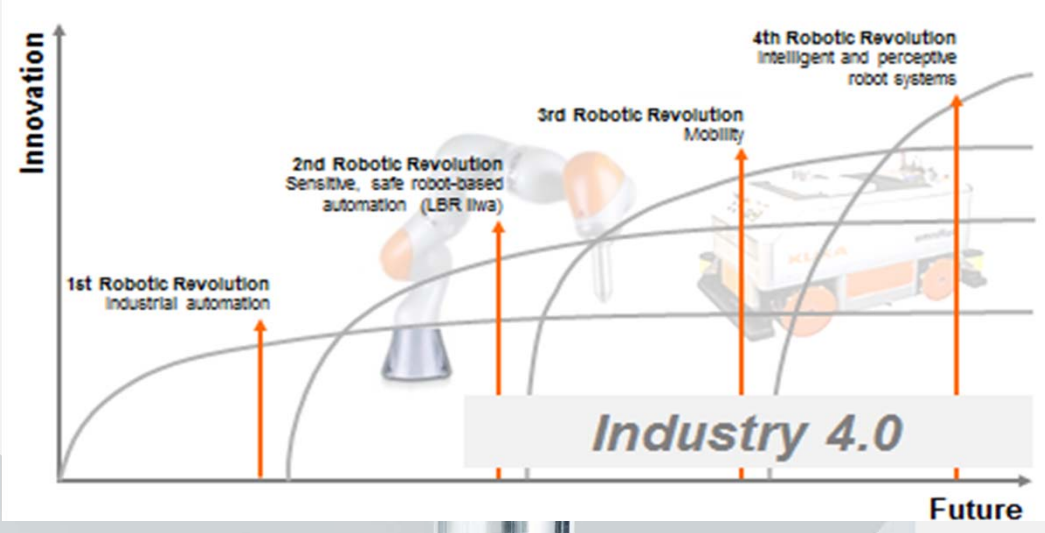
**OUTPERFORMER**

- Wunsch nach voll-automatisierter Fertigung
- Eliminierung des Fehlerfaktors „Mensch“
- Anpassung Design an Prod.-Prozess

- Wachstum >40%
- Treiber für automatisierte Logistik
- Vollautomatische Kommissionierung & Handling von Bestellungen



Source: IFR World Robotics 2019



Schneider Electric

KEBA

Google

SIEMENS



Rockwell Automation



Control manufacturers

BECKHOFF

NEW ROBOTICS

SIGMATEK

New Age of Competition



Established Competition



FANUC Robotics

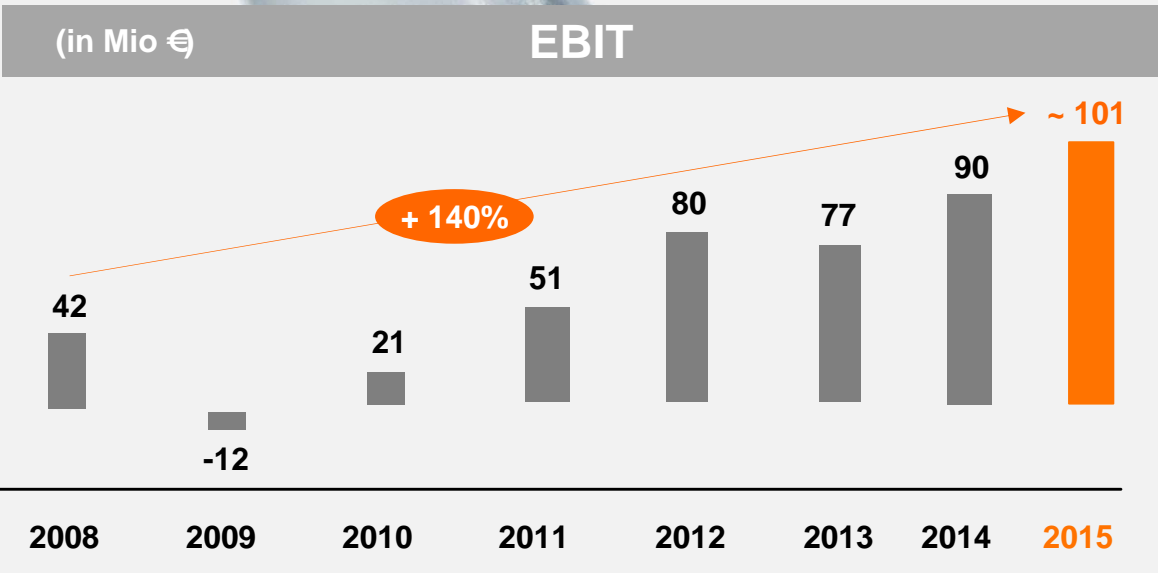
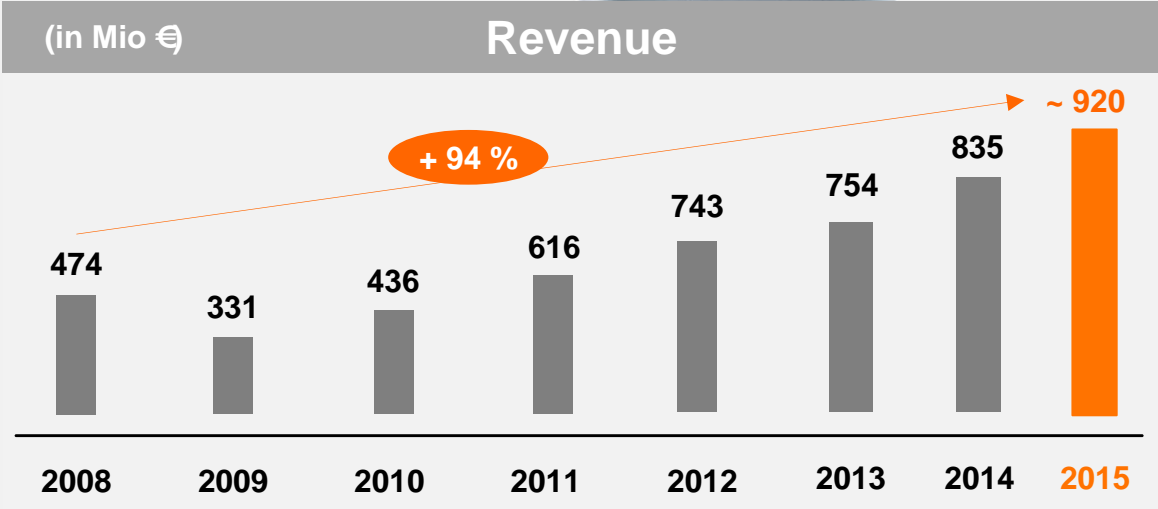


SIASUN

New Chinese Competition



## How is KUKA Robotics doing in this environment?



What are we experiencing if we grow **slower than the market**?

- > loss of market share
- > price / cost pressure
- > decrease in ratings
- > loss of attractiveness for investors
- > high costs for financing
- > loss of attractiveness for business partners
- > loss of attractiveness for talents
- > ...

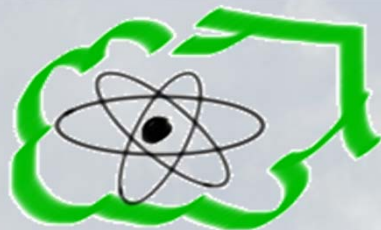
... in contrast: a sustainable growth is a **self-reinforcing process**

- > ...
- > attractiveness for talents
- > media / public interest
- > cash for investments and acquisitions
- > attractiveness for investors
- > higher ratings
- > attractiveness for business partners
- > economies of scale / profitability increase

Big opportunities, hard competition,  
limited resources => focus?

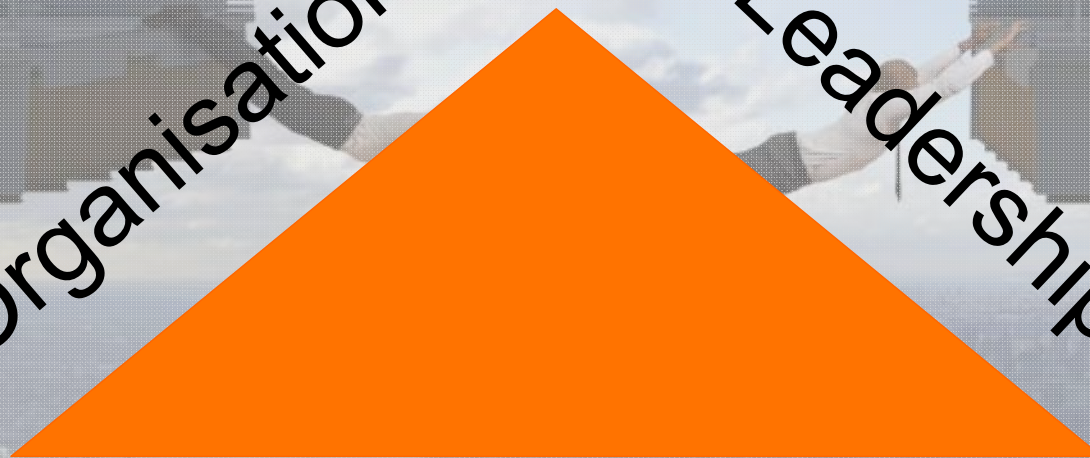


# Internal hurdles and key success factors



Organisation

Leadership



Strategy





# „The purpose of strategy is to implement it“

# KUKA

## Most companies' strategies are surprisingly unclear

Of the executives surveyed ...

**83%** ... said their strategy is not well understood across the organization.

**74%** ... said their strategy is not often enough translated into specific measures.

**78%** ... said their company does not have the capabilities required to win.

## A majority of companies allocate time and resources without using a strategic perspective

Of the executives surveyed ...

**66%** ... said that lower-priority initiatives receive more than their fair share of funding.



**81%** ... said management's time allocation is often driven by forces other than the company's strategic objectives.



**49%** ... said their company cuts costs in reaction to external events or pressure, not because they have a culture of continuous improvement.

## Organizational issues make the problem harder to solve

Of the executives surveyed ...

**75%** ... said that funding gets channeled to critical initiatives in an ad hoc or informal manner.

**26%** ... said their organization's culture is at odds with their strategic imperatives.

**81%** ... said the appraisal process has no clear consequences for managers who fail to support the company's strategic objectives.





Take strategy from paper to pavement

UTILIZATION OF ROBOTS

APPLICATION KNOW HOW

CUSTOMER CLOSENESS

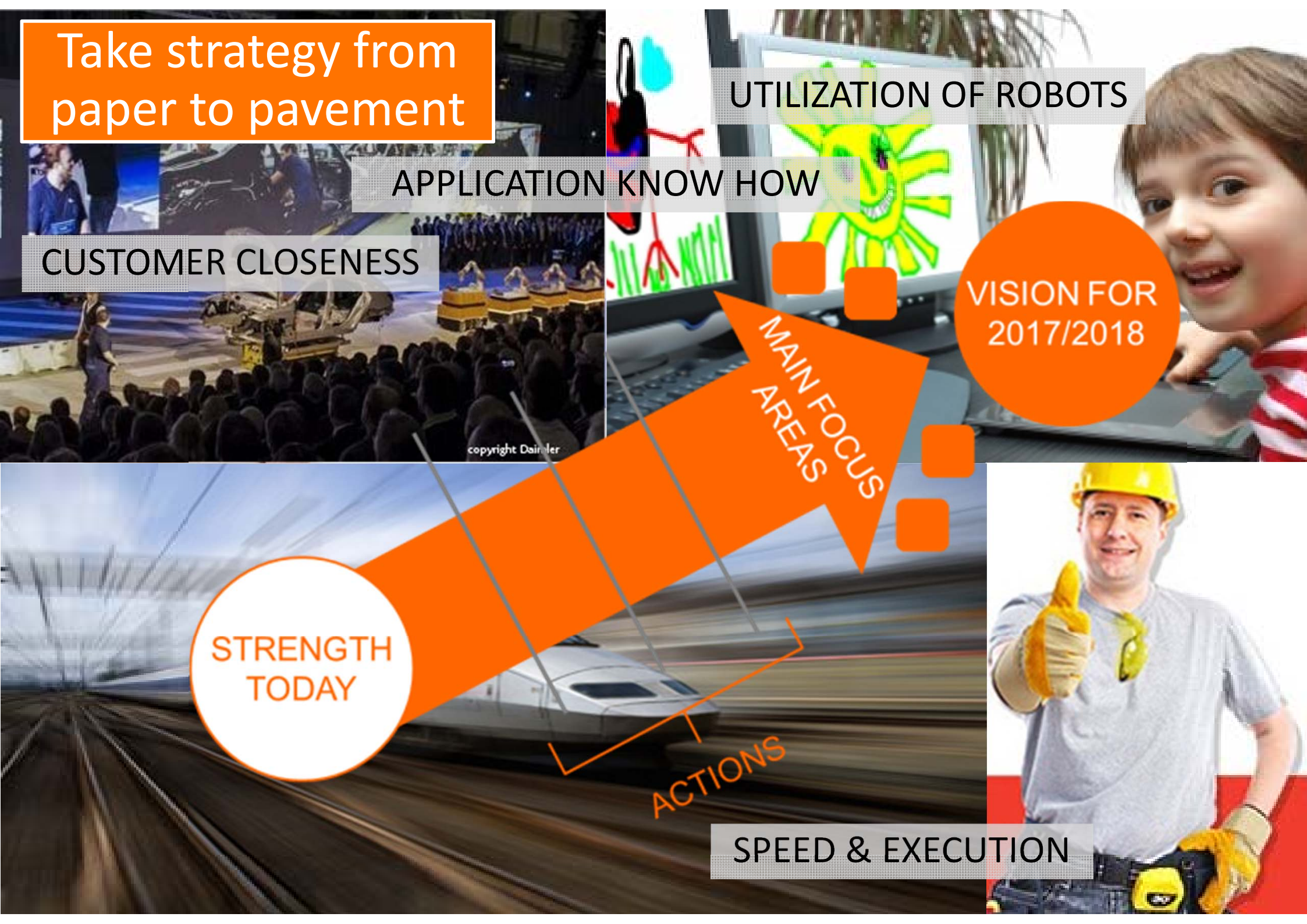
VISION FOR 2017/2018

MAIN FOCUS AREAS

STRENGTH TODAY

ACTIONS

SPEED & EXECUTION







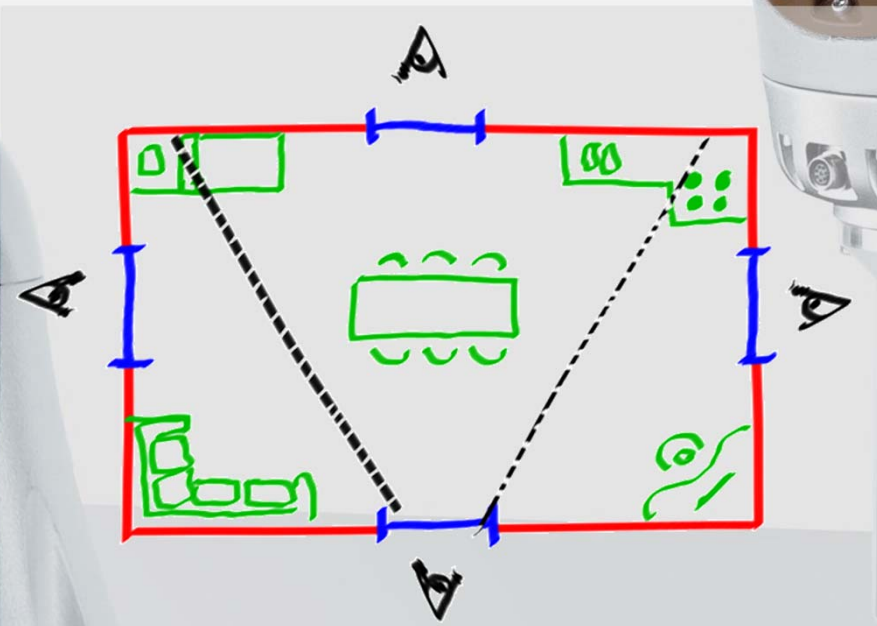
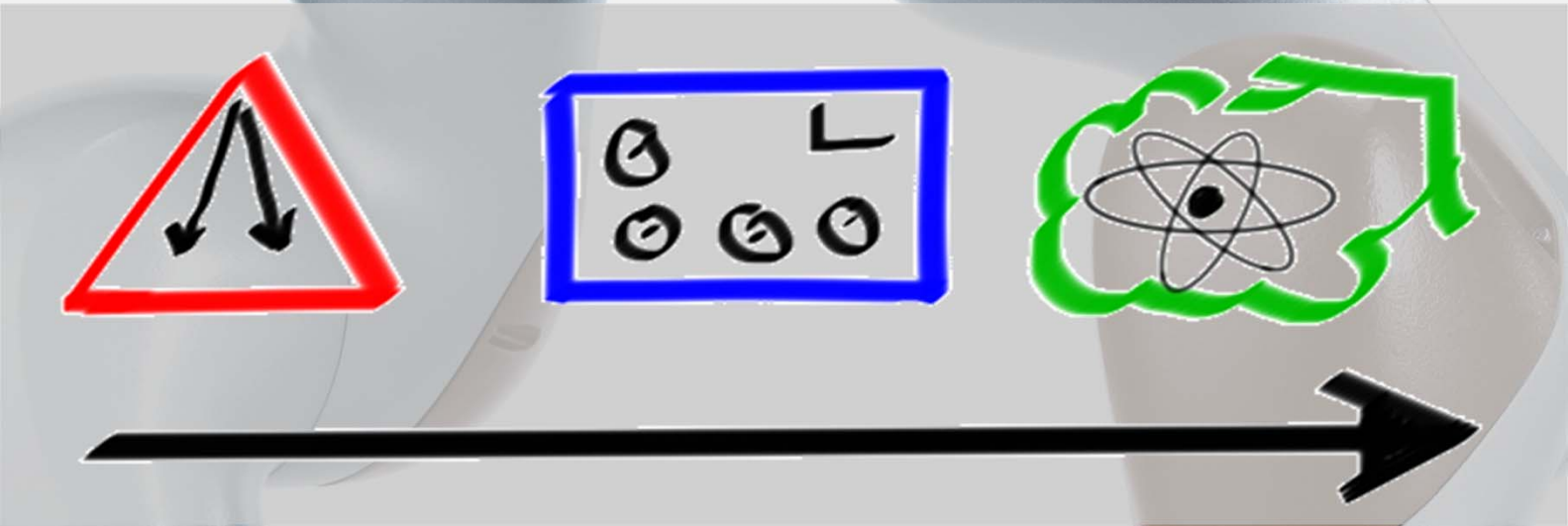
... and orgcharts





# New leadership style & collaboration culture

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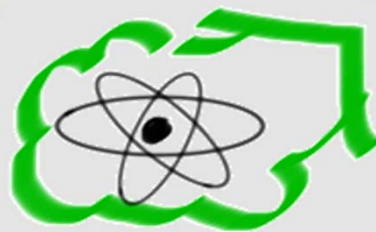




$R = Q \times I$   
Result = Quality x Involvement

# CFO & Controller Rolle = Business Steering & Support

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Organisation

Leadership



Strategy



# ... *gemeinsam* auf die besten Geschäftsoptionen setzen

## Strategie

- Optionen
- Priorisierung
- Ressourcen
- Ziele

VISION FOR 2017/2018

MAIN FOCUS AREAS

define IOT-Maps for every team

criticise, and manage projects / programs, communicate

Structures  
Processes  
Products

- AKV, Organisation, conceptual framework, ...
- Processes, methods, tools, infrastructure
- Products, solutions, services

Knowledge  
Ability  
Behaviour

- Expertise, learning
- Communication skills
- Implementation, Empowerment

Thoughts  
Feelings  
Mind set

- Readiness to change
- Motivation
- The will to create, to lead

Innensicht  
Kerngeschäft  
Vorhandene Ressourcen  
Individuelle Ziele

Außensicht  
Neue Produkte, Märkte  
Ressourcenaufbau  
Teamziele

action plan

what	how	who	when

Identify gaps and define countermeasures

**ACTION NOW!**

...Strategie *gemeinsam* zum Tagesgeschäft machen

# Organisation

- Steuerungsmodelle
- Planung
- Prozesse
- Systeme, Tools
- Operational excellence

Richtlinien  
Jahresplanung, FC  
All-in-One Systeme  
Support

Freiräume  
Rollierende Planung, FC  
Agil einführbare Tools  
Self service





... sich *gegenseitig* fordern & fördern

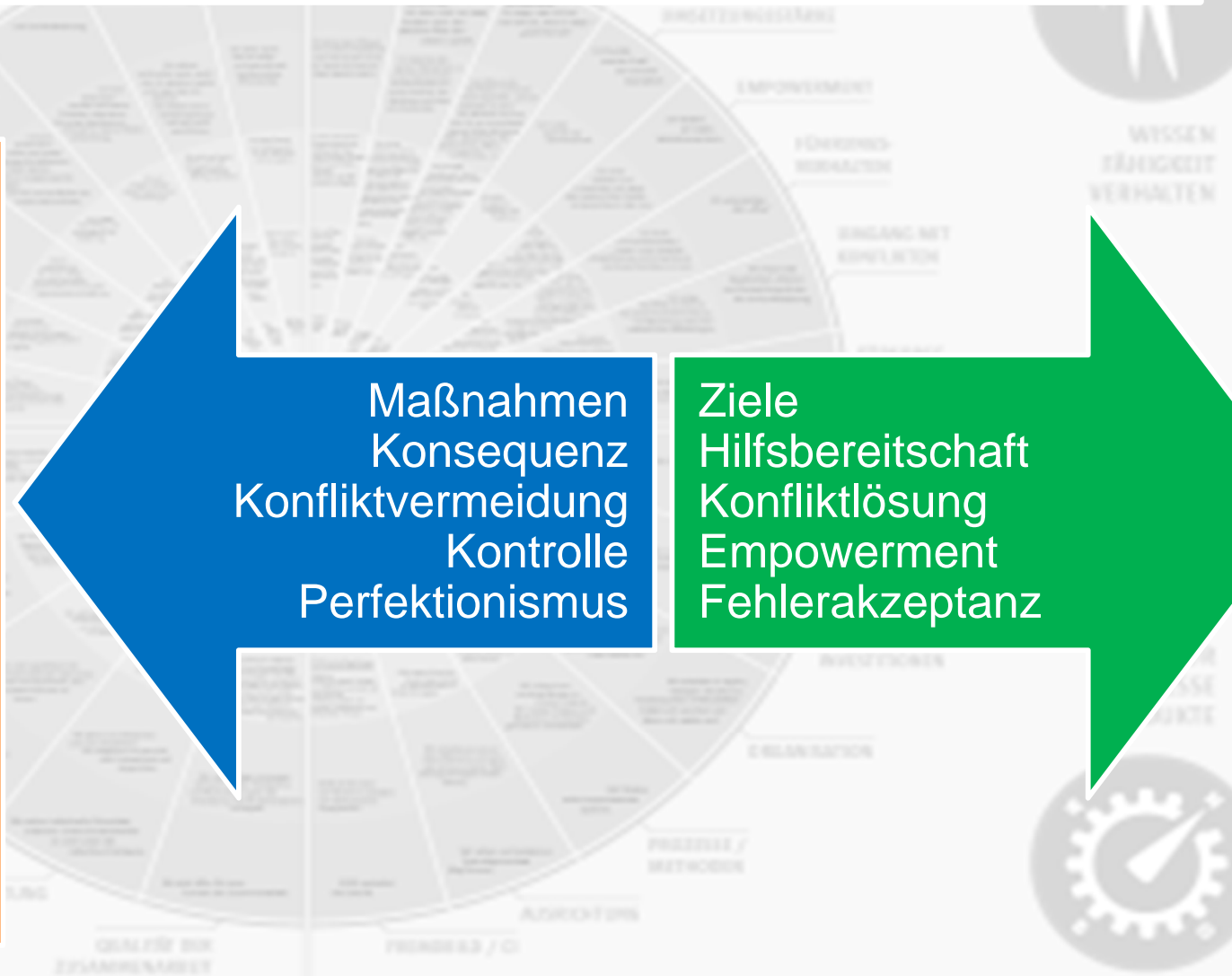
Leadership

→ Kommunikation

- Ergebnisorientierung
- Verantwortung
- Engagement
- Konfliktfähigkeit
- Vertrauen

Maßnahmen  
Konsequenz  
Konfliktvermeidung  
Kontrolle  
Perfektionismus

Ziele  
Hilfsbereitschaft  
Konfliktlösung  
Empowerment  
Fehlerakzeptanz



# Industrie 4.0: Zukunftsvisionen und Chancen / Notwendigkeiten



“Die Maschinen der *Zukunft* laufen nicht mit Öl, sie laufen mit *Daten*. Es ist nicht die Technologie, die die Welt verändert, es sind Träume hinter der Technologie”  
*Jack Ma, Key Note CeBIT 2015*

# SMART FACTORY

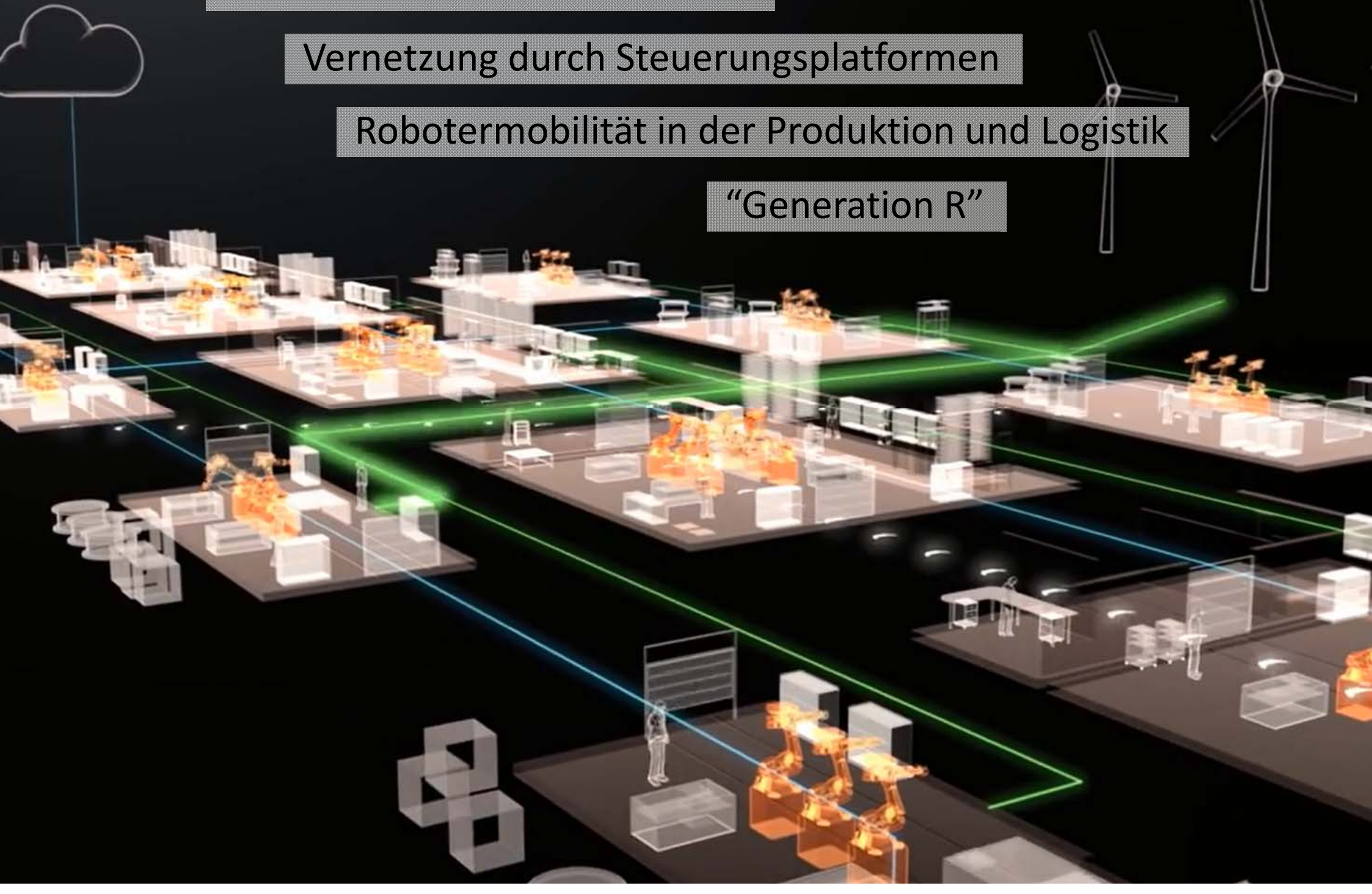


Mensch-Roboter-Kollaboration

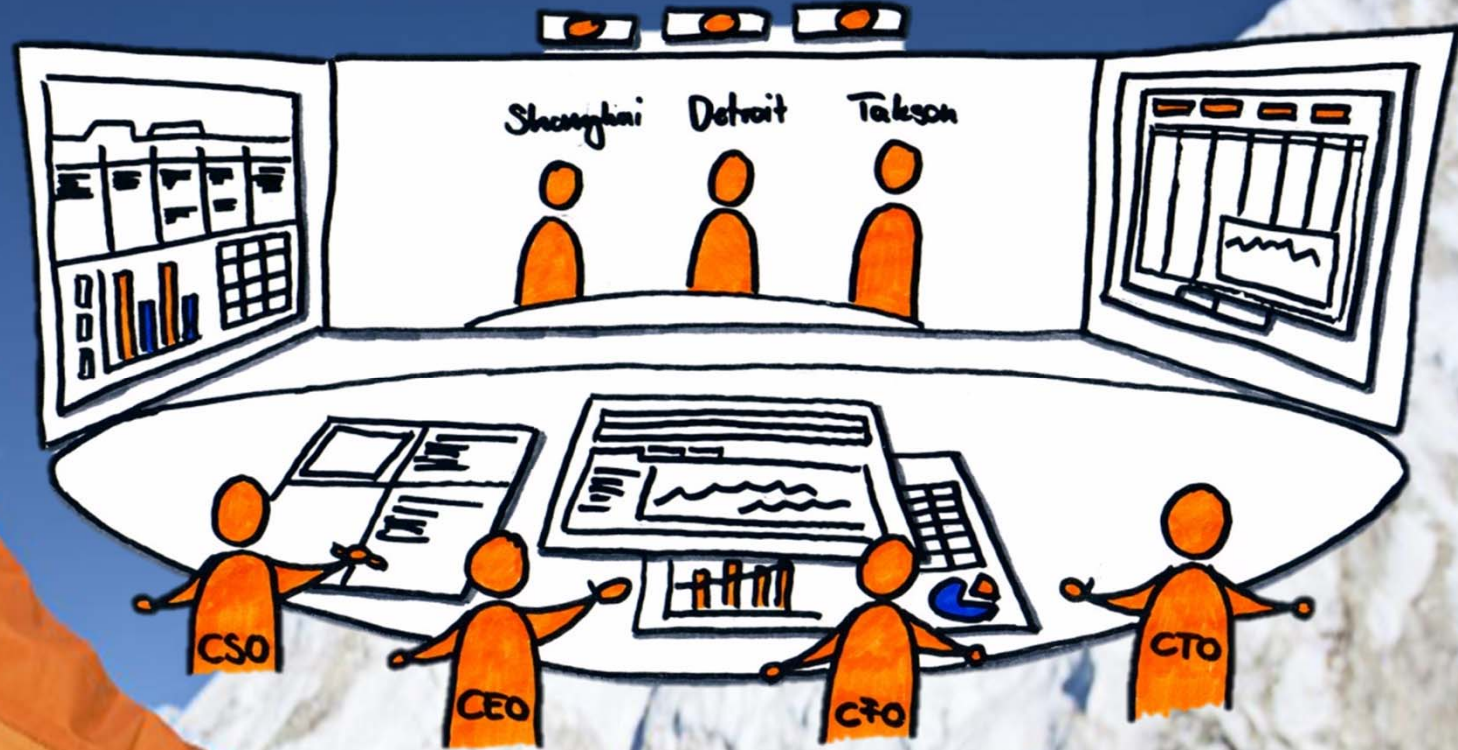
Vernetzung durch Steuerungsplattformen

Robotertermobilität in der Produktion und Logistik

“Generation R”



... communication live, facts at the finger tips...

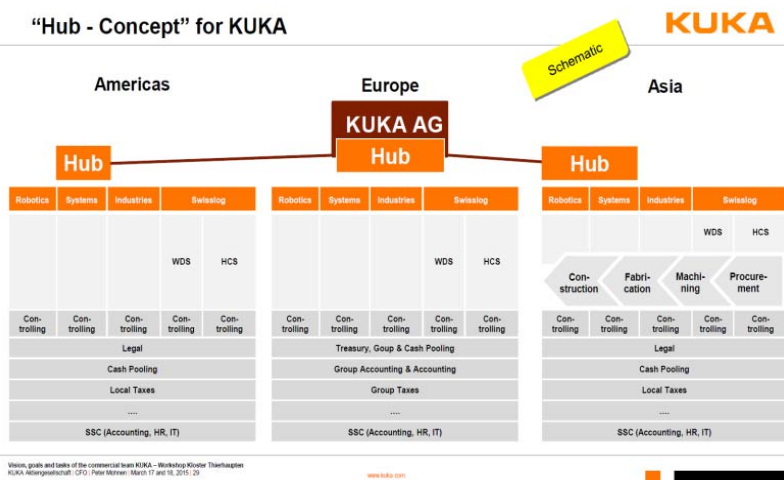


...fast decisions, based on best available information...

# Setting up the structures for global business steering & support

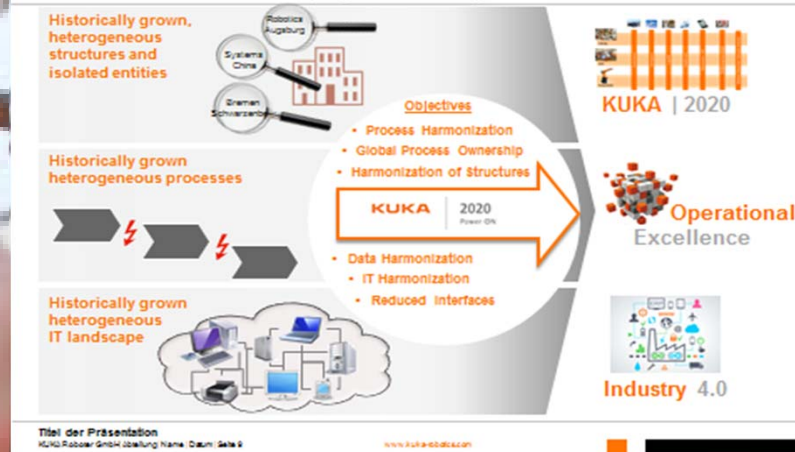
Customer oriented regional HUBs for support functions: reliability, efficiency, speed

"Hub - Concept" for KUKA



Efficient & easy to use IT systems & tools based on redesigned processes

PowerON KUKA 2020 – Our program to manage this transformation




Empowerment: adjust guidelines, align global / local strategy & execution



Visit us on youtube!

KUKA



„A dream doesn't become reality through magic; it takes sweat, determination and hard work.“ *Colin Powell*