



Operations and Workflow: BDC *ViewPoints* study

January 2012





Executive summary

Business orientation: Product versus service

- > Panel members tend to be slightly more **service oriented** than product oriented.
- > The two coastal regions (**Atlantic and West**) are more **service oriented** than the central provinces (Ontario and Quebec) are.

Most relevant aspects to improve

- > **Marketing and sales** and **human resources** were the two main aspects believed to positively affect operations and workflow.
- > **Smaller companies** and **product-oriented** companies expect improvements in **marketing and sales** to prove most beneficial.
- > Conversely, **larger entities** and **service-oriented** firms believe those benefits reside in human resources improvements.

Other factors in operations and workflow

- > The most prevalent negative factors affecting Canadian entrepreneurs are **difficulties accessing additional funding** and **government regulations and requirements**.
- > **Only one third** of respondents use some kind of **project management software**, as some businesses regard its benefits as doubtful.
- > To deal with **fluctuating workloads**, entrepreneurs provided some great suggestions, such as developing a **pool of temporary staff**, offering **flexible hours**, keeping a **list of low priorities** to be handled during slower periods and **cross-training** employees.
- > Coping with **information overload**, according to entrepreneurs, is best done by **prioritizing**—by determining what is urgent **and** important.

Actual improvements highlighted

- > Over half of entrepreneurs reported improvements in their **marketing and sales**, **human resources**, and **equipment or information and communications technologies (ICT)**.
- > The best marketing and sales improvements include **promoting the brand**, **product and services more effectively**, as well as **developing new products and services**, **accessing new markets** and further **developing the firm's competitive advantage**.
- > Given the current strength of the Canadian dollar, it is a good time to purchase **imported equipment or machinery**. Nearly half of those who improved at least one aspect of their equipment or ICT purchased machinery and/or equipment. A slightly greater number **invested in ICT**, which, along with innovation and managerial skills, can improve productivity tremendously. Most often, investments in equipment and ICT were **self-financed**.
- > The top human resources improvements pertain to **retention of good employees**, **recruitment of better employees**, and **training or coaching for employees**.
- > Six out of 10 entrepreneurs who reported **finance improvements** mentioned that they have **reduced the delays on their accounts receivable** and/or **managed their working capital more efficiently**.

Background and survey methodology



Background and survey methodology

Background

- > The BDC Market Intelligence team continues its ongoing research among Canadian entrepreneurs. The topic of this study was **operations and workflow**. In this study, the team wanted to determine:
 - the proportion of entrepreneurs who are product oriented versus service oriented
 - the aspects entrepreneurs feel would be most beneficial to their overall operation, as well as those they actually addressed that were beneficial to their organization
 - the external factors that most affect their company
 - the level of responsiveness and adaptation of their management team
 - the level of flexibility and innovativeness of their operations team
 - the ways entrepreneurs deal with fluctuating workloads and information overload
 - the overall use of project management software

Survey methodology

- > We surveyed **entrepreneurs** who were members of the *ViewPoints* panel as of January 17, 2012. Panellists received an e-mail invitation to participate in the online survey, which was conducted between **January 17 and 27, 2012**.
- > BDC's Marketing Intelligence team analyzed the survey results.
- > A total of **439 entrepreneurs** completed the survey. Details pertaining to distribution are provided in the "Respondent Profile" section of this report.
- > Entrepreneurial results were **weighted** according to the **size of the firm** and **region**.

Detailed results



Orientation of the service offering

What proportion of your total offering is product oriented versus service oriented?

Average
product vs. service

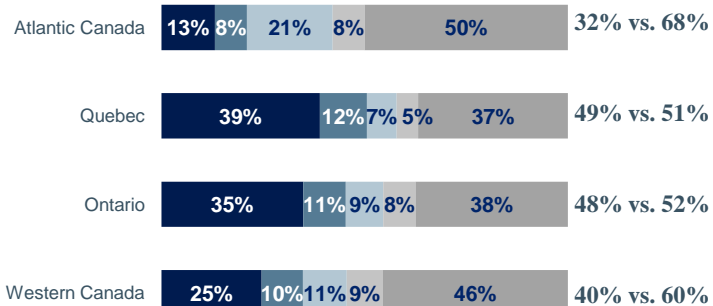
Entrepreneurs who are members of the BDC ViewPoints panel tend to be slightly more service oriented than product oriented.

> On average, the service offering is 56% service oriented and 44% product oriented.

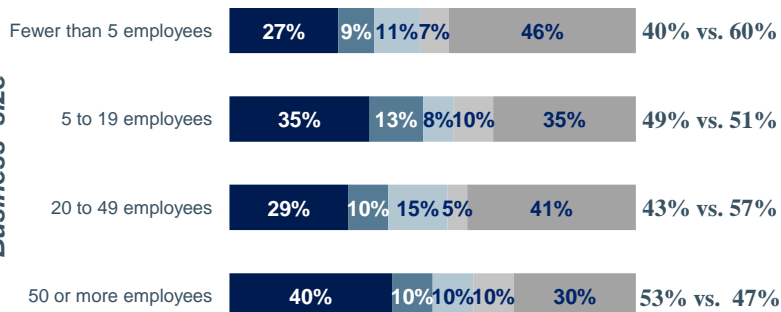
> However, some important differences can be seen:

- From a regional perspective, respondents in Atlantic Canada (68%) and Western Canada (60%) tend to be **more service oriented** than those in Quebec and Ontario. In fact, half of the respondents in Atlantic Canada indicated that 75% or more of their total offering is service oriented. This is the case for 46% of Western respondents.
- Quebec and Ontario have the greatest proportion of **manufacturers** in Canada. Furthermore, manufacturers constitute an important percentage of respondents in this survey. These two factors combined explain, in part, the overall lower service offering averages for these two provinces.
- Unsurprisingly, the proportion of product-oriented firms is significant among **manufacturers** (70%) and **wholesalers** (67%).

Region



Business size



Product oriented
 Mostly product oriented
 Split product vs. service
 Mostly service oriented
 Service oriented



Aspects where improvements would be beneficial to overall operations and workflow

Over one third of respondents said that marketing and sales would be the aspect where improvements would be most beneficial to their company's overall operation. A nearly equal proportion ranked human resources as the number-one aspect for improvements.

- > Entrepreneurs were asked to rank the top three aspects where improvements would be the most beneficial to their organization from the list of seven presented to them. Two thirds of respondents identified **marketing and sales** (35%) or **human resources** (32%) as the aspects where improvements would prove **most beneficial** for their company.
- > **Marketing and sales** is the number-one or -two aspect for nearly two thirds of respondents (63%).
 - Marketing and sales is the aspect that, if improved, would be the most beneficial, according to respondents in **Quebec** (41% ranked it first) and **Ontario** (37% ranked it first). Marketing and sales is also the major aspect for **smaller businesses** (ranked first by 39% of businesses with fewer than five employees and 34% of those with five to 19 employees) and **product-oriented businesses** (41% ranked it first).
- > Nearly half of all entrepreneurs (47%) ranked **human resources** as the first or second aspect where improvements would prove most beneficial to their company.
 - From a regional perspective, human resources is the most important aspect for entrepreneurs in the **Atlantic** (50%) and in the **West** (35%). **Companies with 20 or more employees** (42%) also believe improving their human resources would be the most beneficial, a feeling shared by a high percentage of **service-oriented businesses** (40%).

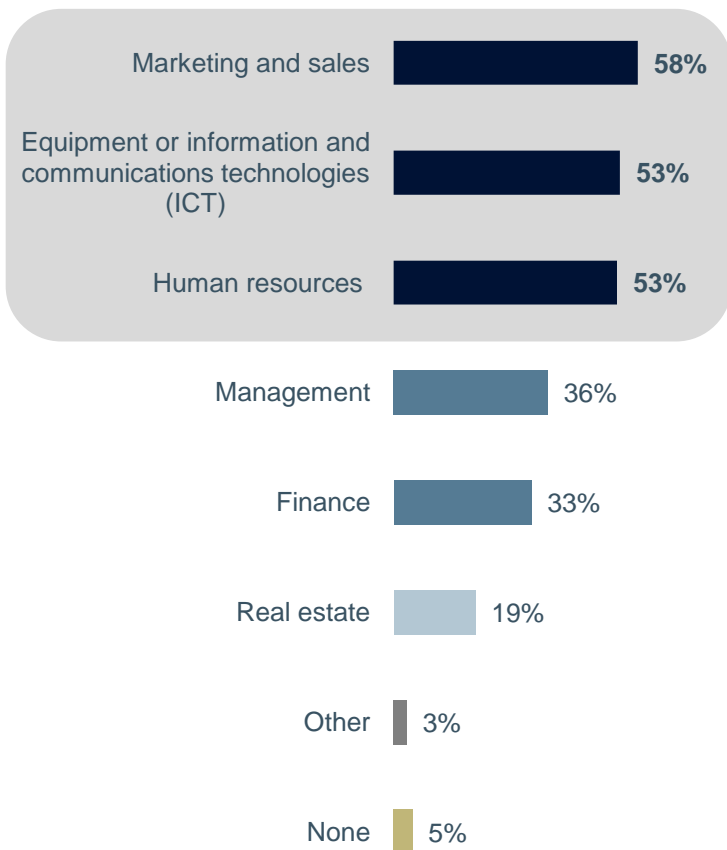
*In your opinion, improving which of the following aspects would be most beneficial to your company's overall operation and workflow?
Please rank your top three aspects.*

Aspect	Rank 1	Rank 2	Rank 3
Marketing and sales	35%	28%	16%
Human resources	32%	15%	19%
Finance	13%	14%	21%
Equipment or information and communications technologies (ICT)	11%	22%	19%
Management	6%	16%	16%
Real estate	4%	4%	4%
Other	1%	1%	4%



Actual improvements that were beneficial to operations and workflow

Which aspects have you actually addressed and improved that were particularly beneficial to your company's overall operations and workflow?



When asked which aspects entrepreneurs had actually addressed and improved, over half of them mentioned marketing and sales, equipment or ICT, and human resources.

- > Nearly **three out of five** entrepreneurs (58%) actually addressed and improved their **marketing and sales**, which benefited their overall operation and workflow.
 - Marketing and sales is the main aspect that entrepreneurs in **Quebec** (65%) and **Ontario** (57%) benefited from addressing.
- > About **half** of the respondents (53%) benefited from improving their **equipment** or information and communications technologies (**ICT**).
- > About **half** of entrepreneurs (53%) benefited from improving their **human resources**.
 - Human resources improvements were cited most often by entrepreneurs in the **Atlantic** (60%), in the **West** (60%) and in companies with **20 or more employees** (66% to 75%).
- > Although less important, proportionally speaking, just over one third of entrepreneurs benefited from improving their **management** (36%) or their **finances** (33%).
 - A significant proportion of respondents in the **West** (42%) and in companies with **20 to 49 employees** (59%) said they had benefited from addressing managerial issues.
- > Finally, one in five respondents (19%) had benefited from improving some aspect of their **real estate**.

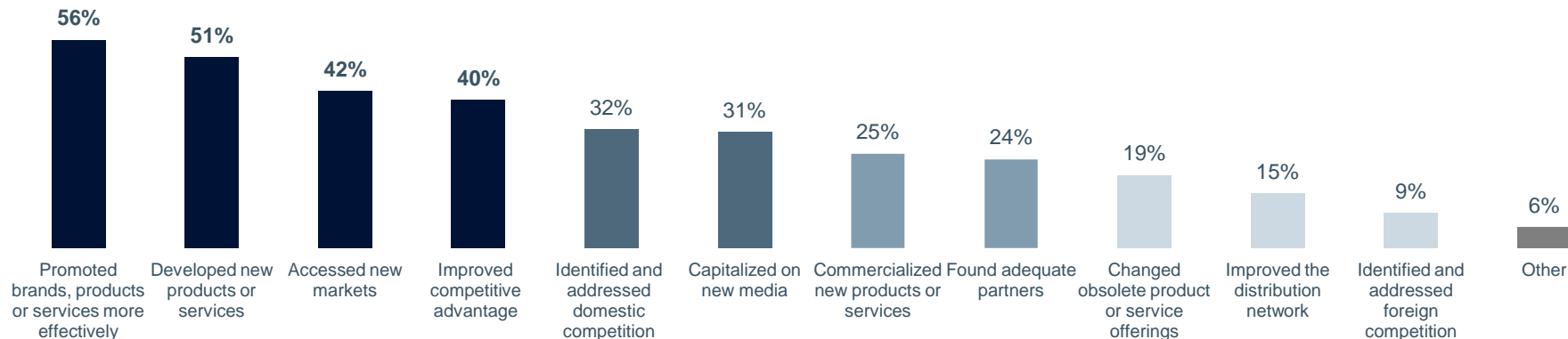


Marketing improvements that were beneficial to operations and workflow

More effective promotion, developing new products or services, and accessing new markets are the main marketing initiatives that proved most beneficial to entrepreneurs' overall operation.

- > Over half of entrepreneurs (56%) who said they had benefited from marketing improvements said that **promoting their brand, products or services more effectively** was the most beneficial marketing improvement to their overall operations.
 - Service-oriented businesses seem to have benefited the most from promoting their services more effectively (63%).
- > Half of respondents also indicated that **developing new products or services** (51%) was a definite advantage for their business.
- > Given the current economic context, many entrepreneurs need to look beyond their initial market in order to prosper. It is very encouraging to see that two out of five businesses (42%) mentioned that their overall operation had benefited from **access to new markets**.
- > Many respondents also said one of the main ways to remain relevant in the market is to emphasize and improve a company's **competitive advantage** (40%). Clear differentiation between a company and its competitors enables potential clients to understand the benefits of dealing with company A rather than its competitors.

What specific improvements to your company's marketing and sales benefited your overall operations and workflow?

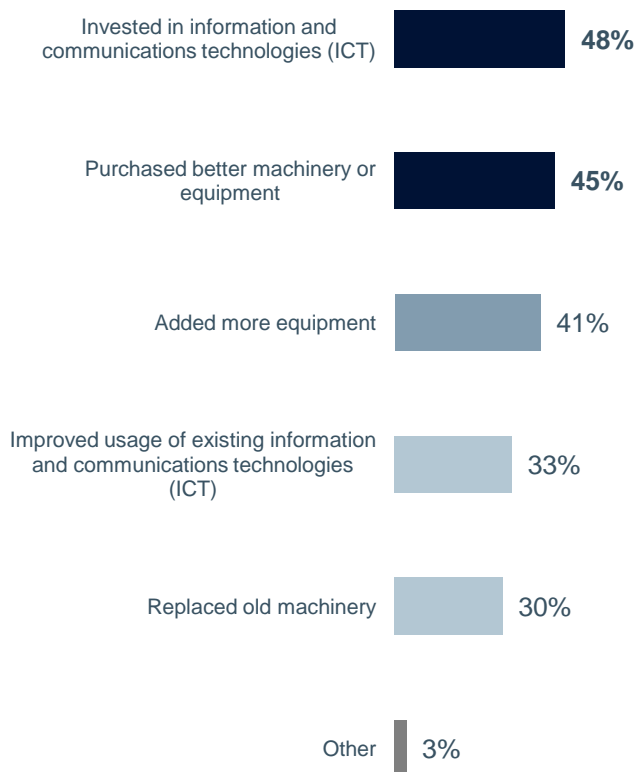


Base: Respondents who reported marketing improvements. Respondents who responded "I prefer not to answer" were excluded from the total base (n=240).



Improvements to equipment or ICT that were beneficial to operations and workflow

What specific improvements to your company's equipment or ICT benefited your overall operations and workflow?

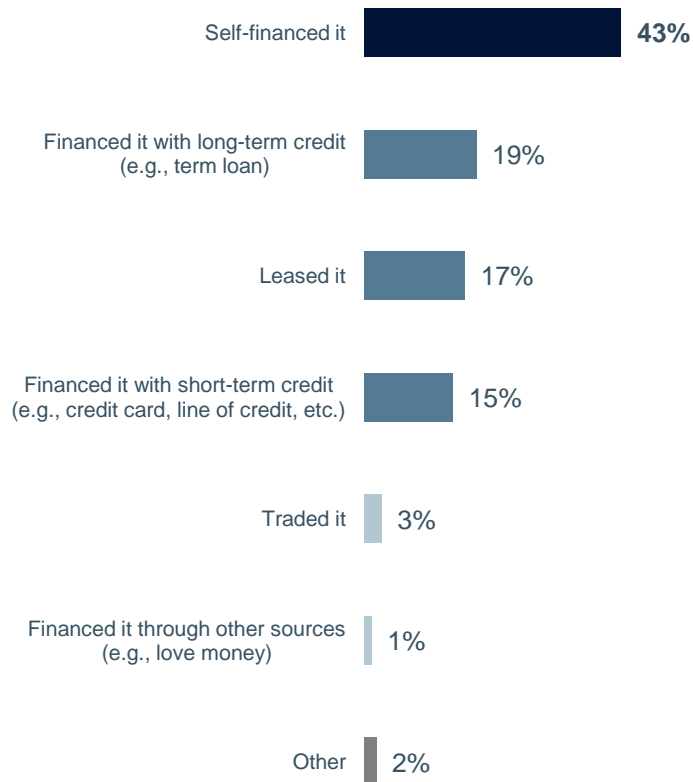


About half of entrepreneurs surveyed improved their equipment or their information and communications technologies. For the most part, they invested in ICT and/or purchased better machinery or equipment.

- > Nearly half of entrepreneurs (48%) said they had invested in **ICT**.
- > More than four out of 10 respondents (45%) mentioned that they had **purchased better machinery or equipment**.
 - This is the case for a significant percentage of entrepreneurs in **Atlantic Canada** (71%) and in businesses with **20 to 49 employees** (67%).
- > Two out of five entrepreneurs (41%) said that **adding more equipment** benefited their overall operation.
- > One third of entrepreneurs (33%) improved **current usage of existing ICT**.
 - Improved usage of existing ICT seems to have benefited entrepreneurs who are **mostly product oriented** (54%).

Financing equipment purchase or machinery

What was the main type of financing used for this piece of equipment or machinery?



Many entrepreneurs who invested in machinery or equipment financed the purchase themselves.

- > An important proportion of respondents said their investment in equipment was **self-financed** (43%).
 - Three out of five entrepreneurs in **Ontario** financed their equipment purchase themselves (60%).
 - Proportionally speaking, **twice as many small businesses** as larger companies self-financed their equipment purchase.
- > One in five entrepreneurs (19%) used **long-term credit** to finance their equipment purchase.
 - A significant percentage of **larger firms** financed their investment with long-term credit (40% of firms with more than 50 employees vs. 11% of those with fewer than five employees).
- > **Leasing** (17%) is also an important way to obtain new equipment.
 - Half of all entrepreneurs in **Atlantic Canada** who acquired new equipment did so by leasing it.

Base: Respondents who reported equipment-related improvements, such as “Replaced old machinery,” “Purchased better machinery or equipment” or “Added more equipment.” Respondents who responded “I prefer not to answer” were excluded from the total base (n=179).

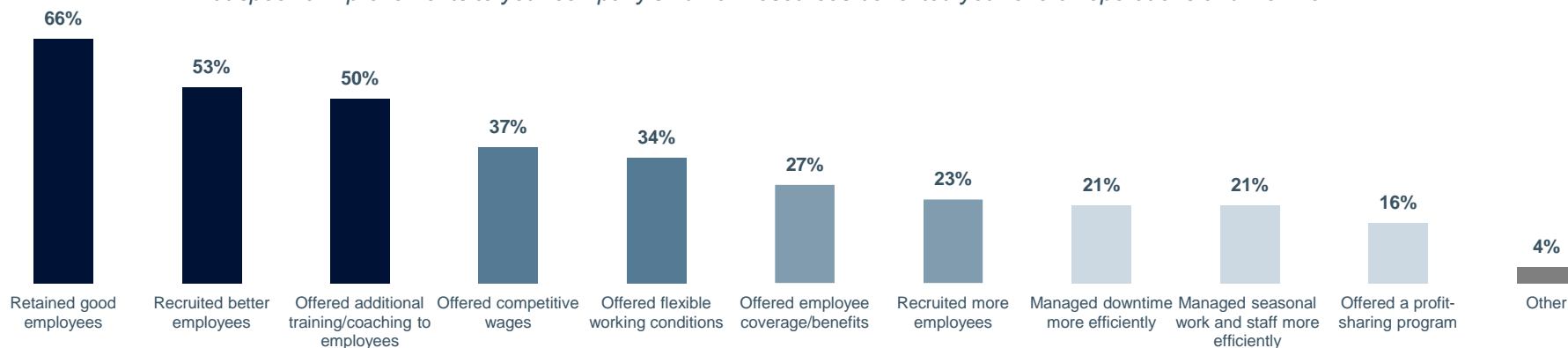


Improvements to human resources that were beneficial to operations and workflow

Retaining good employees, recruiting better employees, and offering additional training and coaching to employees are the main human resources improvements that proved most beneficial to entrepreneurs.

- > High employee turnover is quite costly for an organization, in terms of both time and money. **Retaining good employees** not only speaks volumes about an organization but also enables the company to offer superior service to its clients because knowledge is retained. Entrepreneurs can have the greatest idea in the world, but if they don't have the right people to carry their vision forward, the idea will never fully materialize!
- > **Recruiting better employees** is a critical component of human resources. It is important for entrepreneurs to clearly establish their needs prior to recruitment. Although it may be tempting to hire employees, especially when faced with a personnel shortage, it may be wise to hold off and make sure that the employees recruited match the specified needs and that they fit well with the company culture. It is important to remain consistent throughout the interview process to be able to evaluate all candidates on the same basis.
- > **Offering additional training and coaching to employees** was mentioned by half of those who improved at least one specific aspect of their human resources. Training and coaching touches upon one fundamental component of employee motivation: mastery. On a daily basis, most people would like to improve or at least have the chance to learn something new. Providing additional training or coaching to employees is not only a great motivator for the recipient but can also be quite rewarding for those providing the training or coaching.

What specific improvements to your company's human resources benefited your overall operations and workflow?



Base: Respondents who reported human resources improvements. Respondents who responded "I prefer not to answer" were excluded from the total base (n=250).



Improvements to management that were beneficial to operations and workflow

What specific improvements to your company's management benefited your overall operations and workflow?



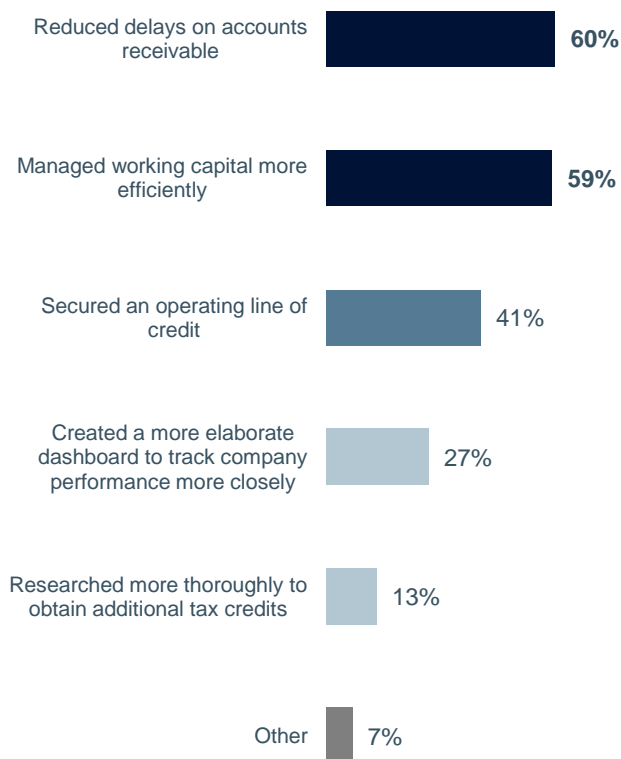
Improved internal leadership paves the way for management improvements.

- > An impressive two thirds of entrepreneurs (67%) who benefited from managerial improvements said they did so by improving their **internal leadership**.
- > Improving the **overall environment within the business** can also prove quite beneficial. In fact, 47% of respondents indicated that one of the improvements to their overall operation stems from addressing existing management and employee issues.
 - Management and employee issues were cited by a greater percentage of entrepreneurs with **50 or more employees** (73%) , those in **Atlantic Canada** (71%) and those in the **West** (56%).
- > **Developing or clarifying the mission statement or vision** helped a significant number of businesses (42%).
 - This percentage climbs to 50% in **Western Canada**.
- > One in four companies significantly improved productivity by bringing in **skilled and experienced managers** (27%).
 - This is the case for a significant percentage of companies with **50 or more employees** (55%).
- > Uncertainty can cause tremendous harm. One quarter of respondents said they benefited from addressing **succession planning** issues.
 - A larger percentage of respondents from Atlantic Canada (53%) and among companies with more than 50 employees (55%) benefited from addressing succession planning issues.



Improvements to finance that were beneficial to operations and workflow

What specific improvements to your company's finance benefited your overall operations and workflow?



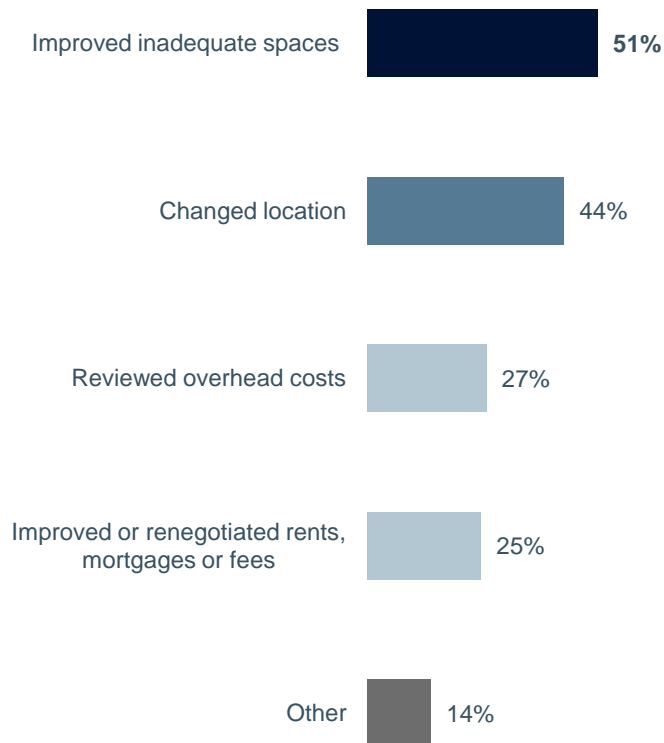
Better access to liquidity is at the root of most financial improvements.

- > “Cash is king”: Three out of five respondents indicated having benefited from **reduced delays on accounts receivable** (60%).
 - This figure climbs to 93% among businesses that are mostly **product oriented**.
- > Another key improvement pertains to more efficient management of **working capital** (59%).
 - A greater percentage of respondents from **Quebec** (72%) said they benefited from managing their working capital more efficiently.
- > **Securing a operating line of credit** was beneficial for two out of five entrepreneurs (41%).
 - A significant proportion of **product-oriented** businesses benefited from securing an operating line of credit.
- > One quarter of respondents benefited from creating a **more elaborate dashboard** to track company performance (27%). It is critical that companies establish key performance indicators to monitor their business operations. Doing so will enable decision-makers to act proactively rather than reactively.
 - Improving their dashboards has benefited a greater proportion of entrepreneurs in **Quebec** (45%) and those with **20 to 49 employees** (44%)
- > One in 10 respondents (13%) researched more thoroughly to obtain **additional tax credits**.
 - Companies with **20 to 49 employees** seem to be the most common beneficiaries of additional tax credits (28%).



Improvements to real estate that were beneficial to operations and workflow

What specific improvements to your company's real estate benefited your overall operations and workflow?



Improving inadequate spaces and/or changing location are the two main improvements made from a real estate perspective.

- > Half of the entrepreneurs who improved at least one aspect of their real estate improved **inadequate spaces** (51%).
 - This figure is statistically more significant among respondents in **Atlantic Canada** (85%).
- > Many businesses (44%) benefited their overall operation by **changing location** (44%).
- > For one quarter of these respondents, **reviewing overhead costs** (27%) was beneficial for their organization.
- > Another quarter of respondents indicated that their real estate improvements occurred when they **improved or renegotiated their rent, mortgage or fees** (25%).
 - This is the case for 32% of businesses with **fewer than five employees**.
 - This figure increases as we move from companies with a split product-service offering (31%) to mostly product-oriented (33%) and **product-oriented** (38%) firms. All these results are statistically more significant than those of service-oriented businesses.



Negative external factors impeding entrepreneurs' overall operations and workflow

Difficulty accessing additional funding, and government regulations and requirements, are the main external factors impeding entrepreneurs' overall operations and workflow.

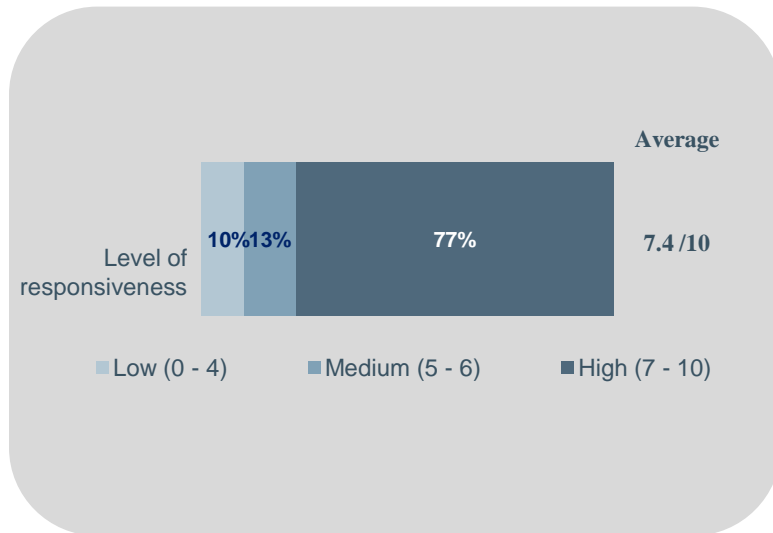
- > One third of entrepreneurs (33%) cited **difficulty accessing additional funding** as the main external factor that negatively affects their overall operations and workflow.
 - This figure climbs to 45% among respondents in **Quebec**.
- > For one in five businesses (21%), the primary negative external factor is **government regulations and requirements**.
 - Government regulations are a greater issue for entrepreneurs in **Atlantic Canada** (38%) and for businesses with **50 or more employees** (37%).
- > Although mentioned to a lesser extent, **taxation** negatively affects an important proportion of Canadian businesses.
 - This is the case for one fifth of businesses with **fewer than five employees** (19%) and **service-oriented businesses** (23%).
- > The **value of the Canadian dollar** has been a source of headaches for many Canadian companies, especially exporters. What was once an economic advantage has turned into an economic drawback businesses must learn to deal with.
 - With a higher concentration of manufacturers, **Quebec** (12%) and **Ontario** (15%) seem to be the most affected by a strong loonie.
- > Insurance, interest rates and legal issues were mentioned by a relatively small proportion of respondents.

Among the following external factors, which three most affect your company's overall operations and workflow?

External factors	Rank 1	Rank 2	Rank 3
Difficulty accessing additional funding	33%	17%	12%
Government regulations and requirements	21%	24%	19%
Taxation	15%	26%	12%
Value of the Canadian dollar	11%	9%	9%
Insurance	5%	9%	12%
Interest rates	3%	7%	11%
Legal issues	2%	3%	7%
Other	10%	5%	20%

Management team: Evaluation of “responsiveness”

How would you rate the level of responsiveness within your management team?



Most entrepreneurs surveyed feel that their management team exhibits relatively high levels of responsiveness.

> The idea behind this question stems from David S. Albert’s book, *The Agility Advantage*. In it, the author discusses six components of agility that can help entrepreneurs further develop a competitive advantage: responsiveness, flexibility, adaptation, innovativeness, resilience and versatility. Although all six components could apply to the various business units of an organization, it was decided to focus on just a few of them in this survey.

Definition: “Responsiveness” is related to the time it takes to recognize and respond to a change or anticipated change in circumstances. A change in circumstances may adversely affect the ability of an entity to perform. On the other hand, it may be an opportunity for the entity to improve performance or effectiveness, or maintain performance or effectiveness at a lower cost and/or with less risk.

> On average, respondents gave their management team a score of 7.4 out of 10 with three quarters of entrepreneurs (77%) allocating a score of seven or more out of 10.

- Generally speaking, owners of companies with fewer than five employees were more likely to see themselves as responsive than owners of larger entities.
- Based on a self-evaluation, service-oriented companies (7.8/10) tend to perceive themselves as having a relatively high level of responsiveness.



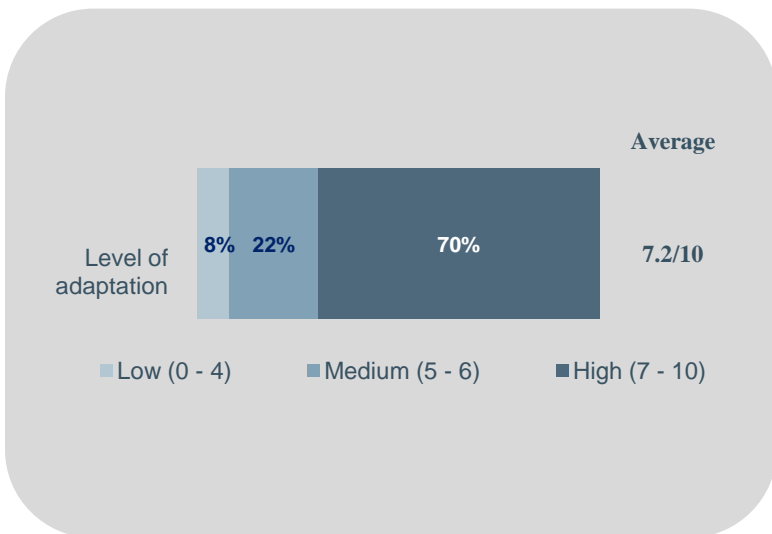
Management team: Evaluation of “adaptation”

How would you rate the level of adaptation within your management team?

The relative level of adaptation of most management teams is good.

Definition: “Adaptation” permits an entity to change itself—that is, to change its organization, processes and/or structure—to better meet a challenge.

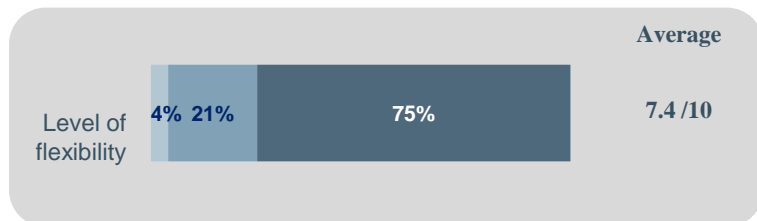
- > On average, respondents gave their management team a score of 7.2 out of 10 with regard to the level of adaptation of their management team.
- > Although intuitive to a certain extent, it is nice to see that owners of smaller firms are in fact more likely to believe they can adapt rapidly than are owners of larger firms.





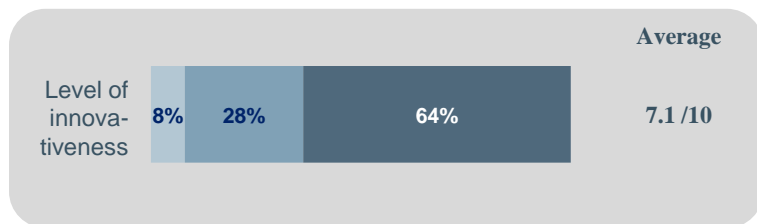
Operations team: Evaluation of “flexibility” and “innovativeness”

How would you rate the level of flexibility within your operations team?



Base: Respondents who responded “I prefer not to answer” were excluded from the total base (n=427).

How would you rate the level of innovativeness within your operations team?



■ Low (0 - 4) ■ Medium (5 - 6) ■ High (7 - 10)

Most entrepreneurs surveyed feel that their management team exhibits relatively high levels of responsiveness.

Definition: “Flexibility” provides an entity with more than one way of accomplishing a given task. This permits the entity to try another response instead of having to stick with an ineffectual, unfeasible or pre-emptive response. The less-preferred option or alternate response may not yield the same results as the preferred option would have (had it been successful), may have some undesirable side effects that the preferred option did not have or may not be as cost effective as the preferred approach. Nevertheless, having one or more alternatives is better than not being able to do anything but continue with a doomed-to-failure course of action.

- > Presented with the definition of flexibility, entrepreneurs gave their operations team an average score of 7.4 out of 10. Moreover, three quarters of entrepreneurs (75%) allocated a score of seven or more out of 10.
- Businesses with a 50-50 split between service and product offerings had the lowest average relative score.

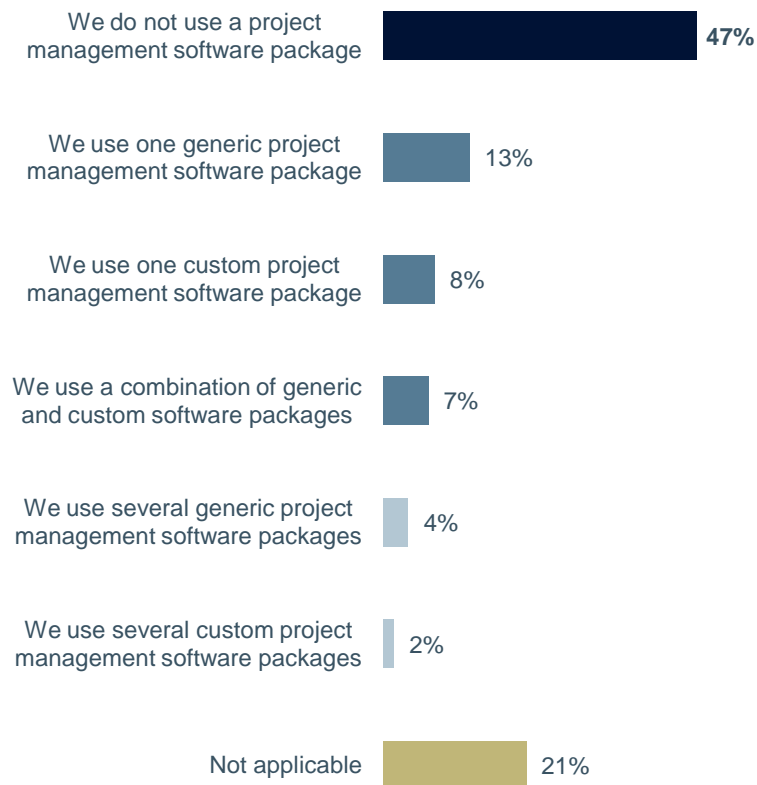
Definition: “Innovativeness” permits an entity to develop a new tactic or way of accomplishing something—a discovery or invention.

- > We have tested the level of innovativeness among panel members before and results tend to concur with those obtained in this wave. In sum, two thirds of respondents (64%) believe their company to be quite innovative. The average score is 7.1/10.



Using project management software

Do you use project management software to manage your projects and teams?



A large proportion of entrepreneurs do not use project management software.

- > More than four out of 10 respondents said that they do not use project management software (47%) and another one in five entrepreneurs (21%) indicated that project management software is not applicable in their business context.
- > Ultimately, one third of respondents (32%) use at least one project management software package, whether it be custom or generic.
 - Use of project management software tends to be greater among entrepreneurs in Ontario and Quebec (41% and 37%, respectively, use at least one project management software package).
- > Although project management software may seem relevant to only a few companies, the fact of the matter is that many businesses could benefit from implementing project management software in their operations to track their service offering more efficiently.



Using an operations workflow or diagram

Do you have a detailed operations workflow or diagram? In your opinion, which employees refer to it, and how regularly do they do so?



Few entrepreneurs have a detailed operations workflow or diagram.

- > A detailed operations workflow or diagram enables users to visualize the service offering process. A detailed workflow can also help identify areas for improvements or inefficiencies.
- > Permitting all employees to view the workflow or diagram enables them to participate in identifying areas of improvement.
- > A majority of respondents (61%) asserted they **do not have** an operations workflow. One in five (21%) claimed that is because it is not applicable to their situation.
- > Some respondents (15%) said their operations workflow is **used mostly by the management team**.
- > A nearly identical proportion (14%) said their **employees** refer to the operations workflow **when joining the company**.
- > Fewer than one in 10 entrepreneurs (7%) indicated that **all employees** refer to the operations workflow **regularly**.



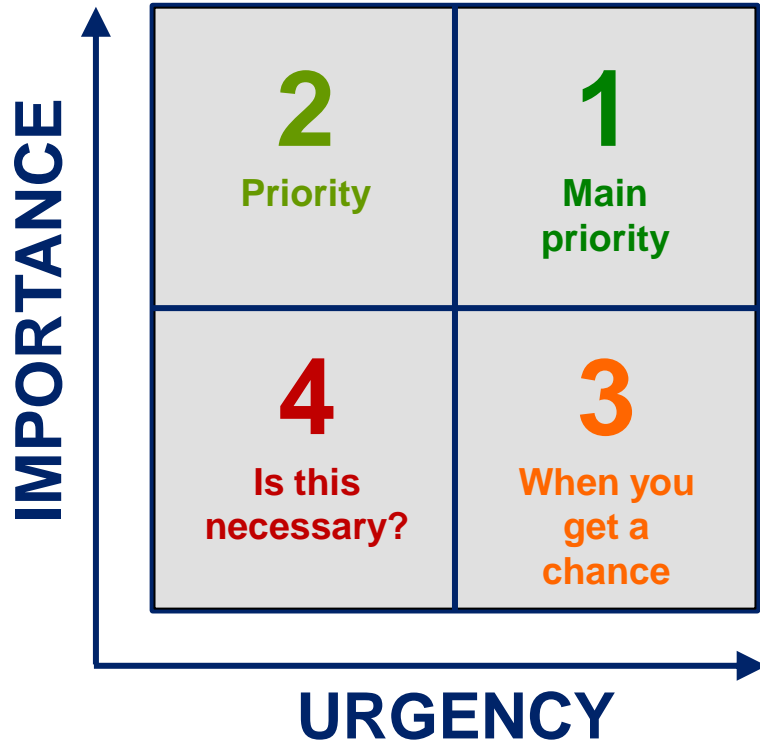
Dealing with fluctuating workloads: Suggestions and tips provided by entrepreneurs

Entrepreneurs offered some great suggestions regarding fluctuating workloads.

- > The following is a list of suggestions that entrepreneurs provided for dealing with fluctuating workloads. The suggestions are organized based on the number of times they were mentioned.
 1. Develop a **pool of temporary staff** or contract workers you can call when needed (e.g., temporary staff, students, interns).
 2. Offer **flexible hours and shifts**. Furthermore, let employees **accumulate hours** that they can redeem during slower periods.
 3. Keep a list of **low priorities** to be completed during **slow times**.
 4. Offer employee training, cross-training and job sharing so that employees can be **moved around more easily**.
 5. **Do longer term budgeting** to meet salary demands during slower periods. This can be done with or without management software.
 6. **Partner** with other companies to employ staff or for outsourcing purposes.
 7. Move certain staff from a yearly salary to **hourly pay**.
 8. Ask other employees, such as managers, to be **more involved** in production when necessary.
 9. Implement **forced vacations**.
 10. Get a **line of credit** to cover expenses during slower periods.



Dealing with information overload



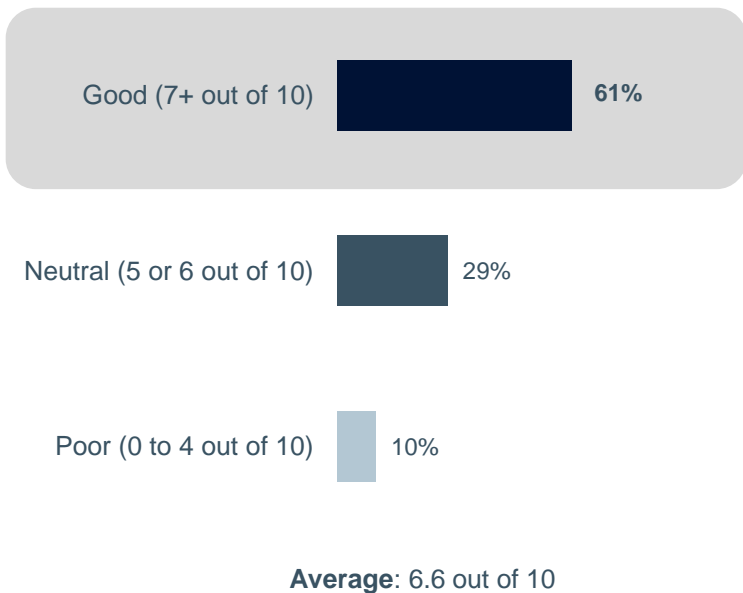
The main advice that entrepreneurs give for dealing with information overload is to have everyone prioritize their work.

- > We asked entrepreneurs to share their insights with us and other entrepreneurs regarding the constant stream of information most workers face, whether it comes from phone calls, e-mails or other sources. What the vast majority of entrepreneurs told us is that it is important that everyone in the extended team understand what the priorities are—for example, tasks over e-mails, or in-person meetings over calls or e-mails. **The main thing is to determine what is important and what is urgent.** The graph on the left may help as a guideline.
- > Many entrepreneurs highlighted the need for **policies to guide employees.** For example, several entrepreneurs said they have a cellular phone policy that stipulates there should be no personal calls except for emergencies. Certain manufacturers have banned cell phones completely in their shops for productivity and security reasons. Entrepreneurs in office environments said they had implemented policies regarding Internet use and social media. The idea is not to control everything but to **convey to employees what is expected of them during working hours.**



Survey evaluation

Overall, how would you rate the survey you just completed on a scale of 0 to 10, where 0 means “poor” and 10 means “excellent”?



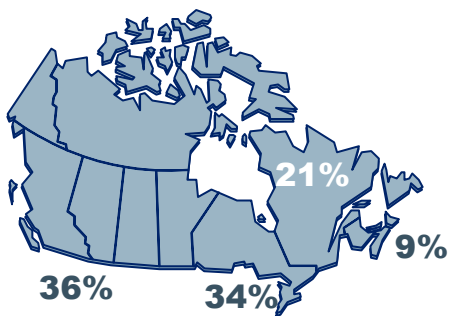
Respondents were quite divided with regard to this questionnaire.

- > Although the majority of respondents (61%) found the survey relatively good, the average score is 6.6 out of 10. This indicates that it was not up to par for an important proportion of respondents.
- > From comments provided by respondents, it appears that several entrepreneurs found it useful while others did not feel they got much from the questionnaire.
- > The BDC *ViewPoints* team will take these comments into account when preparing future surveys.

Respondent profile

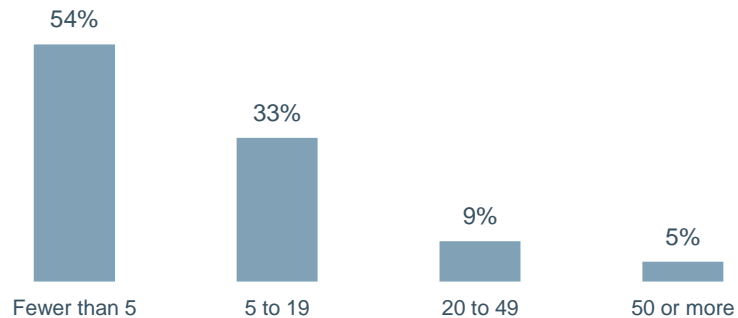


Respondent profile

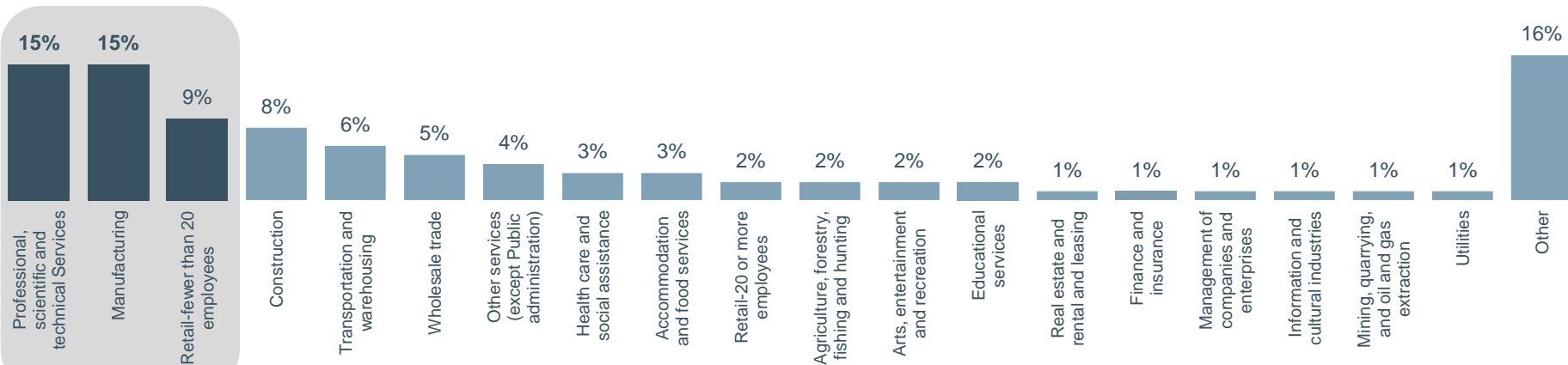


Region

n=439



Firm size



Sector/industry

Appendix:
Results, by region and business size



Orientation of the service offering, by region and business size

Product oriented	Total (n=439)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=147)	Western Canada (n=141)
Product oriented	30%	13%	39%	35%	25%
Mostly product oriented	10%	8%	12%	11%	10%
Split product and service oriented	10%	21%	7%	9%	11%
Mostly service oriented	8%	8%	5%	8%	9%
Service oriented	41%	50%	37%	38%	46%
Average, product vs. service oriented	44% vs. 56%	32% vs. 68%	49% vs. 51%	48% vs. 52%	40% vs. 60%

Product oriented	Total (n=439)	Fewer than 5 employees (n=113)	5 to 19 employees (n=197)	20 to 49 employees (n=83)	50 or more employees (n=46)
Product oriented	30%	27%	34%	29%	40%
Mostly product oriented	10%	9%	13%	10%	10%
Split product and service oriented	10%	11%	8%	15%	10%
Mostly service oriented	8%	7%	10%	5%	10%
Service oriented	41%	46%	35%	41%	30%
Average product vs. service oriented	44% vs. 56%	40% vs. 60%	49% vs. 51%	43% vs. 57%	53% vs. 47%

Base: All respondents. **Green** and **red** indicate a statistically significant difference between categories.



Orientation of the service offering, by region and business size (cont'd)

Service oriented	Total (n=439)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=147)	Western Canada (n=141)
Service oriented	41%	50%	37%	38%	46%
Mostly service oriented	8%	8%	5%	8%	9%
Split service and product oriented	10%	21%	7%	9%	11%
Mostly product oriented	10%	8%	12%	11%	10%
Product oriented	30%	13%	39%	35%	25%
Average service vs. product oriented	56% vs. 44%	68% vs. 32%	51% vs. 49%	52% vs. 48%	60% vs. 40%

Service oriented	Total (n=439)	Fewer than 5 employees (n=113)	5 to 19 employees (n=197)	20 to 49 employees (n=83)	50 or more employees (n=46)
Service oriented	41%	46%	35%	41%	30%
Mostly service oriented	8%	7%	10%	5%	10%
Split service and product oriented	10%	11%	8%	15%	10%
Mostly product oriented	10%	9%	13%	10%	10%
Product oriented	30%	27%	34%	29%	40%
Average service vs. product oriented	56% vs. 44%	60% vs. 40%	51% vs. 49%	57% vs. 43%	47% vs. 53%

Base: All respondents. Green and red indicate a statistically significant difference between categories.



Aspects that would be beneficial to overall operations and workflow, by region

Aspect	Ranking	Total (n=439)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=147)	Western Canada (n=141)
Marketing and sales	1	35%	14%	41%	37%	34%
	2	28%	35%	25%	25%	30%
	3	16%	16%	18%	22%	10%
Human resources	1	32%	50%	32%	25%	35%
	2	15%	11%	15%	18%	14%
	3	19%	18%	23%	17%	19%
Finance	1	13%	18%	9%	13%	13%
	2	14%	11%	17%	16%	11%
	3	21%	16%	21%	18%	24%
Equipment or information and communications technologies (ICT)	1	10%	5%	11%	14%	8%
	2	22%	21%	24%	19%	25%
	3	19%	16%	16%	25%	16%

Base: All respondents. **Green** and **red** indicate a statistically significant difference between categories.



Aspects that would be beneficial to overall operations and workflow, by region (cont'd)

Aspect	Ranking	Total (n=439)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=147)	Western Canada (n=141)
Management	1	6%	5%	2%	8%	5%
	2	16%	16%	17%	18%	14%
	3	16%	26%	12%	11%	21%
Real estate	1	4%	5%	2%	3%	4%
	2	4%	8%	3%	3%	6%
	3	4%	5%	3%	3%	6%
Other	1	1%	0%	2%	0%	1%
	2	1%	0%	0%	1%	0%
	3	4%	0%	6%	4%	4%



Aspects that would be beneficial to overall operations and workflow, by business size

Aspect	Ranking	Total (n=439)	Fewer than 5 employees (n=113)	5 to 19 employees (n=197)	20 to 49 employees (n=83)	50 or more employees (n=46)
Marketing and sales	1	35%	39%	34%	18%	21%
	2	28%	26%	28%	28%	37%
	3	16%	15%	18%	18%	11%
Human resources	1	32%	31%	29%	41%	42%
	2	15%	14%	17%	15%	21%
	3	19%	20%	18%	27%	11%
Finance	1	13%	12%	12%	20%	5%
	2	14%	13%	17%	12%	11%
	3	21%	24%	17%	10%	32%
Equipment or information and communications technologies (ICT)	1	10%	9%	14%	8%	10%
	2	22%	28%	16%	18%	10%
	3	19%	20%	18%	18%	14%

Base: All respondents. **Green** and **red** indicate a statistically significant difference between categories.



Aspects that would be beneficial to overall operations and workflow, by business size (cont'd)

Aspect	Ranking	Total (n=439)	Fewer than 5 employees (n=113)	5 to 19 employees (n=197)	20 to 49 employees (n=83)	50 or more employees (n=46)
Management	1	6%	3%	6%	10%	20%
	2	16%	13%	18%	25%	20%
	3	16%	13%	18%	23%	25%
Real estate	1	4%	5%	3%	0%	5%
	2	5%	5%	5%	2%	5%
	3	5%	3%	7%	5%	5%
Other	1	1%	1%	1%	3%	0%
	2	1%	1%	0%	0%	0%
	3	4%	5%	3%	3%	0%



Actual improvements that were beneficial to operations and workflow, by region

Aspect	Total (n=439)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=147)	Western Canada (n=141)
Marketing and sales	58%	50%	65%	57%	56%
Equipment or information and communications technologies (ICT)	53%	45%	56%	51%	56%
Human resources	53%	60%	54%	43%	60%
Management	36%	40%	28%	35%	42%
Finance	33%	40%	31%	29%	35%
Real estate	19%	32%	13%	17%	23%
Other	3%	5%	4%	3%	2%
None	5%	5%	3%	3%	6%

Base: All respondents. **Green** and **red** indicate a statistically significant difference between categories.



Actual improvements that were beneficial to operations and workflow, by business size

Aspect	Total (n=439)	Fewer than 5 employees (n=113)	5 to 19 employees (n=197)	20 to 49 employees (n=83)	50 or more employees (n=46)
Marketing and sales	58%	61%	54%	48%	60%
Equipment or information and communications technologies (ICT)	53%	51%	56%	59%	55%
Human resources	53%	47%	55%	66%	75%
Management	36%	30%	38%	59%	55%
Finance	33%	28%	34%	45%	53%
Real estate	19%	17%	19%	27%	40%
Other	3%	2%	6%	2%	0%
None	5%	6%	3%	3%	0%

Base: All respondents. **Green** and **red** indicate a statistically significant difference between categories.



Marketing improvements that were beneficial to operations and workflow, by region

Type of improvement	Total (n=240)	Atlantic Canada (n=18*)	Quebec (n=66)	Ontario (n=79)	Western Canada (n=77)
Promoted brands, products or services more effectively	56%	56%	52%	49%	64%
Developed new products or services	51%	63%	50%	43%	56%
Accessed new markets	42%	32%	36%	48%	43%
Improved competitive advantage	40%	42%	34%	40%	42%
Identified and addressed domestic competition	32%	6%	34%	24%	42%
Capitalized on new media	31%	28%	18%	31%	39%
Commercialized new products or services	25%	0%	49%	20%	19%
Found adequate partners	24%	0%	27%	27%	22%
Changed obsolete product or service offerings	19%	11%	23%	14%	24%
Improved the distribution network	15%	26%	13%	15%	12%
Identified and addressed foreign competition	9%	11%	12%	13%	5%
Other	6%	0%	7%	5%	8%

Base: Respondents who reported marketing improvements. Respondents who responded "I prefer not to answer" were excluded. *Due to the small sample size, results for Atlantic Canada should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Marketing improvements that were beneficial to operations and workflow, by business size

Type of improvement	Total (n=240)	Fewer than 5 employees (n=69)	5 to 19 employees (n=104)	20 to 49 employees (n=39)	50 or more employees (n=28*)
Promoted brands, products or services more effectively	56%	52%	62%	47%	62%
Developed new products or services	51%	49%	53%	50%	58%
Accessed new markets	42%	40%	42%	42%	58%
Improved competitive advantage	40%	36%	40%	47%	62%
Identified and addressed domestic competition	32%	31%	33%	25%	42%
Capitalized on new media	31%	29%	35%	37%	25%
Commercialized new products or services	25%	27%	22%	26%	33%
Found adequate partners	24%	26%	22%	21%	17%
Changed obsolete product or service offerings	19%	19%	19%	21%	25%
Improved the distribution network	15%	13%	15%	21%	17%
Identified and addressed foreign competition	9%	10%	8%	11%	8%
Other	6%	3%	10%	5%	0%

Base: Respondents who reported marketing improvements. Respondents who responded "I prefer not to answer" were excluded. *Due to the small sample size, results for businesses with 50 or more employees should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Improvements to equipment or ICT that were beneficial to operations and workflow, by region and business size

Type of improvement	Total (n=240)	Atlantic Canada (n=19*)	Quebec (n=64)	Ontario (n=79)	Western Canada (n=78)
Invested in information and communications technologies (ICT)	48%	65%	44%	51%	44%
Purchased better machinery or equipment	45%	71%	42%	39%	48%
Added more equipment	41%	35%	45%	41%	40%
Improved usage of existing ICT	33%	39%	28%	30%	38%
Replaced old machinery	30%	53%	36%	27%	25%
Other	3%	0%	4%	4%	2%

Type of improvement	Total (n=240)	Fewer than 5 employees (n=57)	5 to 19 employees (n=109)	20 to 49 employees (n=48)	50 or more employees (n=26*)
Invested in ICT	48%	45%	46%	65%	58%
Purchased better machinery or equipment	45%	36%	52%	67%	55%
Added more equipment	41%	36%	45%	50%	55%
Improved usage of existing ICT	33%	31%	30%	46%	46%
Replaced old machinery	30%	26%	27%	54%	46%
Other	3%	3%	5%	0%	0%

Base: Respondents who reported equipment or ICT improvements. Respondents who responded "I prefer not to answer" were excluded. *Due to the small sample sizes, results for Atlantic Canada and businesses with 50 or more employees should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Financing equipment or machinery purchase, by region

Type of financing	Total (n=179)	Atlantic Canada (n=16*)	Quebec (n=46)	Ontario (n=56)	Western Canada (n=61)
Self-financed it	43%	0%	34%	60%	45%
Financed it with long-term credit	19%	17%	24%	14%	21%
Leased it	17%	50%	18%	14%	10%
Financed it with short-term credit	15%	25%	13%	8%	18%
Traded it	3%	8%	5%	4%	0%
Financed it through other sources	1%	0%	5%	0%	0%
Other	2%	0%	0%	0%	6%

Base: Respondents who reported ICT improvements, such as “Replaced old machinery,” “Purchased better machinery or equipment” or “Added more equipment.” Respondents who responded “I prefer not to answer” were excluded. *Due to the small sample size, results for Atlantic Canada should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Financing equipment or machinery purchase, by business size

Type of financing	Total (n=179)	Fewer than 5 employees (n=37)	5 to 19 employees (n=82)	20 to 49 employees (n=39)	50 or more employees (n=21*)
Self-financed it	43%	49%	46%	24%	20%
Financed it with long-term credit	19%	11%	21%	29%	40%
Leased it	17%	16%	16%	29%	0%
Financed it with short-term credit	15%	14%	15%	19%	20%
Traded it	3%	5%	0%	0%	10%
Financed it through other sources	1%	3%	0%	0%	0%
Other	2%	3%	2%	0%	10%

Base: Respondents who reported ICT improvements, such as “Replaced old machinery,” “Purchased better machinery or equipment” or “Added more equipment.” Respondents who responded “I prefer not to answer” were excluded. *Due to the small sample size, results for businesses with 50 or more employees should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Improvements to human resources that were beneficial to operations and workflow, by region

Type of improvement	Total (n=250)	Atlantic Canada (n=24*)	Quebec (n=66)	Ontario (n=70)	Western Canada (n=90)
Retained good employees	66%	78%	48%	63%	75%
Recruited better employees	53%	64%	51%	48%	55%
Offered additional training/coaching to employees	50%	55%	53%	40%	53%
Offered competitive wages	37%	74%	37%	25%	35%
Offered flexible working conditions	34%	27%	33%	28%	40%
Offered employee coverage/benefits	27%	50%	25%	19%	27%
Recruited more employees	23%	5%	17%	26%	27%
Managed downtime more efficiently	21%	14%	26%	20%	22%
Managed seasonal work and staff more efficiently	21%	14%	17%	23%	22%
Offered a profit-sharing program	16%	9%	17%	14%	19%
Other	4%	9%	2%	3%	5%

Base: Respondents who reported human resources improvements. Respondents who responded "I prefer not to answer" were excluded. *Due to the small sample size, results for Atlantic Canada should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Improvements to human resources that were beneficial to operations and workflow, by business size

Type of improvement	Total (n=250)	Fewer than 5 employees (n=53)	5 to 19 employees (n=108)	20 to 49 employees (n=56)	50 or more employees (n=33)
Retained good employees	66%	55%	74%	85%	67%
Recruited better employees	53%	42%	58%	70%	80%
Offered additional training/coaching to employees	50%	46%	48%	65%	60%
Offered competitive wages	37%	38%	31%	48%	36%
Offered flexible working conditions	34%	32%	36%	30%	40%
Offered employee coverage/benefits	27%	13%	35%	44%	47%
Recruited more employees	23%	21%	25%	22%	27%
Managed downtime more efficiently	21%	21%	19%	27%	27%
Managed seasonal work and staff more efficiently	21%	19%	21%	26%	27%
Offered a profit-sharing program	16%	12%	18%	19%	40%
Other	4%	2%	9%	4%	0%

Base: Respondents who reported human resources improvements. Respondents who responded "I prefer not to answer" were excluded. **Green** and **red** indicate a statistically significant difference between categories.



Improvements to management that were beneficial to operations and workflow, by region and business size

Type of improvement	Total (n=183)	Atlantic Canada (n=18*)	Quebec (n=44)	Ontario (n=57)	Western Canada (n=64)
Improved internal leadership	67%	79%	63%	59%	73%
Addressed existing management and employee issues	47%	71%	33%	35%	56%
Developed or clarified the mission statement or vision	42%	20%	44%	37%	50%
Hired skilled and experienced managers	27%	36%	26%	26%	27%
Addressed succession planning issues	25%	53%	26%	19%	23%
Other	6%	0%	0%	2%	12%

Type of improvement	Total (n=183)	Fewer than 5 employees (n=34)	5 to 19 employees (n=75)	20 to 49 employees (n=48)	50 or more employees (n=26*)
Improved internal leadership	67%	71%	61%	71%	58%
Addressed existing management and employee issues	47%	39%	49%	54%	73%
Developed or clarified the mission statement or vision	42%	50%	35%	33%	36%
Hired skilled and experienced managers	27%	21%	24%	42%	55%
Addressed succession planning issues	25%	18%	26%	29%	55%
Other	6%	10%	4%	0%	0%

Base: Respondents who reported management improvements. Respondents who responded "I prefer not to answer" were excluded. *Due to the small sample sizes, results for Atlantic Canada and businesses with 50 or more employees should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Improvements to finance that were beneficial to operations and workflow, by region and business size

Type of improvement	Total (n=160)	Atlantic Canada (n=17*)	Quebec (n=38)	Ontario (n=51)	Western Canada (n=54)
Reduced delays on accounts receivable	60%	57%	66%	56%	62%
Managed working capital more efficiently	59%	67%	72%	62%	48%
Secured an operating line of credit	41%	53%	48%	40%	35%
Created a more elaborate dashboard to track company performance more closely	27%	13%	45%	29%	18%
Researched more thoroughly to obtain additional tax credits	13%	27%	14%	9%	13%
Other	7%	0%	3%	4%	13%

Type of improvement	Total (n=160)	Fewer than 5 employees (n=31)	5 to 19 employees (n=69)	20 to 49 employees (n=37)	50 or more employees (n=23*)
Reduced delays on accounts receivable	60%	62%	57%	61%	60%
Managed working capital more efficiently	59%	58%	58%	63%	70%
Secured an operating line of credit	41%	42%	36%	44%	40%
Created a more elaborate dashboard to track company performance more closely	27%	20%	27%	44%	40%
Researched more thoroughly to obtain additional tax credits	13%	9%	14%	28%	9%
Other	7%	6%	8%	0%	9%

Base: Respondents who reported finance improvements. Respondents who responded "I prefer not to answer" were excluded. *Due to the small sample size, results for Atlantic Canada and businesses with 50 or more employees should be interpreted with caution. Green and red indicate a statistically significant difference between categories.



Improvements to real estate that were beneficial to operations and workflow, by region and business size

Type of improvement	Total (n=91)	Atlantic Canada (n=13*)	Quebec (n=17*)	Ontario (n=28*)	Western Canada (n=33)
Improved inadequate spaces	51%	85%	33%	50%	47%
Changed location	44%	25%	58%	42%	46%
Reviewed overhead costs	27%	50%	25%	23%	23%
Improved or renegotiated rents, mortgages or fees	25%	17%	9%	23%	34%
Other	14%	8%	0%	12%	20%

Type of improvement	Total (n=91)	Fewer than 5 employees (n=19*)	5 to 19 employees (n=36)	20 to 49 employees (n=19*)	50 or more employees (n=17*)
Improved inadequate spaces	51%	46%	54%	64%	50%
Changed location	44%	48%	37%	55%	38%
Reviewed overhead costs	27%	25%	31%	27%	25%
Improved or renegotiated rents, mortgages or fees	25%	32%	27%	0%	13%
Other	14%	15%	11%	9%	25%

Base: Respondents who reported real estate improvements. Respondents who responded "I prefer not to answer" were excluded. *Due to the small sample size, these results should be interpreted with caution. **Green** and **red** indicate a statistically significant difference between categories.



Negative external factors impeding entrepreneurs' overall operations and workflow, by region

Factor	Ranking	Total (n=439)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=147)	Western Canada (n=141)
Difficulty accessing additional funding	1	33%	18%	45%	37%	27%
	2	17%	26%	9%	12%	25%
	3	12%	3%	9%	14%	13%
Government regulations and requirements	1	21%	38%	13%	24%	19%
	2	24%	32%	34%	21%	19%
	3	19%	11%	21%	16%	21%
Taxation	1	15%	16%	19%	10%	18%
	2	26%	18%	36%	26%	21%
	3	12%	18%	7%	14%	12%
Value of the Canadian dollar	1	11%	0%	12%	15%	9%
	2	9%	5%	6%	13%	8%
	3	9%	0%	9%	6%	13%

Base: All respondents. **Green** and **red** indicate a statistically significant difference between categories.



Negative external factors impeding entrepreneurs' overall operations and workflow, by region (cont'd)

Factor	Ranking	Total (n=439)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=147)	Western Canada (n=141)
Insurance	1	5%	13%	2%	3%	6%
	2	9%	8%	3%	10%	10%
	3	12%	8%	9%	16%	10%
Interest rates	1	3%	11%	0%	1%	4%
	2	7%	8%	7%	8%	7%
	3	11%	11%	13%	6%	14%
Legal issues	1	2%	5%	1%	1%	1%
	2	3%	3%	1%	3%	4%
	3	7%	5%	9%	9%	5%
Other	1	10%	0%	7%	8%	15%
	2	5%	0%	2%	7%	6%
	3	20%	42%	21%	20%	13%



Negative external factors impeding entrepreneurs' overall operations and workflow, by business size

Factor	Ranking	Total (n=439)	Fewer than 5 employees (n=113)	5 to 19 employees (n=197)	20 to 49 employees (n=83)	50 or more employees (n=46)
Difficulty accessing additional funding	1	33%	31%	39%	33%	30%
	2	17%	22%	10%	10%	20%
	3	12%	13%	10%	10%	10%
Government regulations and requirements	1	21%	17%	24%	25%	37%
	2	24%	24%	24%	28%	16%
	3	19%	18%	19%	23%	16%
Taxation	1	15%	19%	11%	13%	5%
	2	26%	24%	29%	23%	25%
	3	12%	10%	13%	20%	20%
Value of the Canadian dollar	1	11%	12%	9%	15%	20%
	2	9%	6%	12%	17%	15%
	3	9%	8%	9%	7%	15%

Base: All respondents. **Green** and **red** indicate a statistically significant difference between categories.



Negative external factors impeding entrepreneurs' overall operations and workflow, by business size (cont'd)

Factor	Ranking	Total (n=439)	Fewer than 5 employees (n=113)	5 to 19 employees (n=197)	20 to 49 employees (n=83)	50 or more employees (n=46)
Insurance	1	5%	4%	6%	0%	0%
	2	9%	9%	8%	13%	5%
	3	12%	10%	16%	10%	10%
Interest rates	1	3%	3%	3%	2%	0%
	2	7%	7%	9%	5%	5%
	3	11%	13%	8%	7%	10%
Legal issues	1	2%	2%	1%	2%	0%
	2	3%	3%	1%	5%	0%
	3	7%	7%	6%	12%	5%
Other	1	10%	12%	8%	8%	10%
	2	5%	4%	6%	3%	15%
	3	20%	23%	19%	10%	10%



Management team: Evaluation of “responsiveness,” by region and business size

Level of responsiveness	Total (n=429)	Atlantic Canada (n=42)	Quebec (n=105)	Ontario (n=144)	Western Canada (n=138)
High (7 to 10)	77%	78%	76%	77%	77%
Medium (5 to 6)	13%	14%	12%	14%	12%
Low (0 to 4)	10%	8%	12%	9%	11%
Average	7.4	7.2	7.2	7.5	7.4

Level of responsiveness	Total (n=429)	Fewer than 5 employees (n=108)	5 to 19 employees (n=193)	20 to 49 employees (n=82)	50 or more employees (n=46)
High (7 to 10)	77%	82%	72%	68%	79%
Medium (5 to 6)	13%	8%	18%	25%	16%
Low (0 to 4)	10%	11%	11%	8%	5%
Average	7.4	7.6	7.1	7.1	7.4



Management team: Evaluation of “adaptation,” by region and business size

Level of adaptation	Total (n=435)	Atlantic Canada (n=42)	Quebec (n=106)	Ontario (n=146)	Western Canada (n=141)
High (7 to 10)	70%	63%	64%	76%	70%
Medium (5 to 6)	22%	29%	28%	18%	22%
Low (0 to 4)	8%	8%	9%	7%	8%
Average	7.2	7.1	7.0	7.2	7.3

Level of adaptation	Total (n=435)	Fewer than 5 employees (n=112)	5 to 19 employees (n=194)	20 to 49 employees (n=83)	50 or more employees (n=46)
High (7 to 10)	70%	75%	64%	63%	70%
Medium (5 to 6)	22%	19%	27%	24%	25%
Low (0 to 4)	8%	6%	9%	12%	5%
Average	7.2	7.4	7.0	6.8	7.1



Operations team: Evaluation of “flexibility,” by region and business size

Level of flexibility	Total (n=427)	Atlantic Canada (n=41)	Quebec (n=104)	Ontario (n=142)	Western Canada (n=140)
High (7 to 10)	75%	74%	74%	76%	74%
Medium (5 to 6)	21%	24%	23%	20%	21%
Low (0 to 4)	4%	3%	2%	5%	5%
Average	7.4	7.4	7.5	7.5	7.3

Level of flexibility	Total (n=427)	Fewer than 5 employees (n=110)	5 to 19 employees (n=189)	20 to 49 employees (n=83)	50 or more employees (n=45)
High (7 to 10)	75%	74%	77%	71%	75%
Medium (5 to 6)	21%	23%	17%	27%	20%
Low (0 to 4)	4%	3%	6%	2%	5%
Average	7.4	7.5	7.3	7.1	7.3



Operations team: Evaluation of “innovativeness,” by region and business size

Level of innovativeness	Total (n=435)	Atlantic Canada (n=42)	Quebec (n=109)	Ontario (n=143)	Western Canada (n=141)
High (7 to 10)	64%	57%	58%	69%	64%
Medium (5 to 6)	28%	38%	34%	24%	27%
Low (0 to 4)	8%	5%	7%	8%	10%
Average	7.1	6.7	7.0	7.1	7.1

Level of innovativeness	Total (n=435)	Fewer than 5 employees (n=111)	5 to 19 employees (n=195)	20 to 49 employees (n=83)	50 or more employees (n=46)
High (7 to 10)	64%	66%	62%	54%	74%
Medium (5 to 6)	28%	29%	27%	34%	21%
Low (0 to 4)	8%	6%	11%	12%	5%
Average	7.1	7.2	7.0	6.6	7.1



Use of project management software, by region

Do you use project management software to manage your projects and teams?	Total (n=433)	Atlantic Canada (n=40)	Quebec (n=109)	Ontario (n=145)	Western Canada (n=139)
We do not use a project management software package	47%	49%	44%	38%	56%
We use one generic project management software package	13%	11%	11%	21%	6%
We use one custom project management software package	8%	8%	9%	8%	6%
We use a combination of generic and custom software packages	7%	8%	8%	5%	6%
We use several generic project management software packages	4%	3%	5%	5%	3%
We use several custom project management software packages	2%	0%	4%	2%	0%
Not applicable	21%	22%	18%	21%	23%

Do you use project management software to manage your projects and teams?	Total (n=433)	Atlantic Canada (n=40)	Quebec (n=109)	Ontario (n=145)	Western Canada (n=139)
We use a project management software package	32%	28%	38%	41%	21%
We do not use a project management software package	47%	50%	44%	38%	56%
Not applicable	21%	22%	18%	21%	23%



Use of project management software, by business size

Do you use project management software to manage your projects and teams?	Total (n=433)	Fewer than 5 employees (n=112)	5 to 19 employees (n=193)	20 to 49 employees (n=83)	50 or more employees (n=45)
We do not use a project management software package	47%	45%	50%	46%	37%
We use one generic project management software package	13%	15%	9%	15%	11%
We use one custom project management software package	8%	6%	9%	12%	5%
We use a combination of generic and custom software packages	7%	5%	9%	5%	16%
We use several generic project management software packages	4%	3%	4%	5%	5%
We use several custom project management software packages	2%	1%	2%	2%	5%
Not applicable	21%	24%	18%	15%	21%

Do you use project management software to manage your projects and teams?	Total (n=433)	Fewer than 5 employees (n=112)	5 to 19 employees (n=193)	20 to 49 employees (n=83)	50 or more employees (n=45)
We use a project management software package	32%	31%	32%	39%	42%
We do not use a project management software package	47%	45%	50%	46%	37%
Not applicable	21%	24%	18%	15%	21%



Use of an operations workflow or diagram, by region

Do you have a detailed operations workflow or diagram? In your opinion, which employees refer to it, and how regularly do they do so?	Total (n=432)	Atlantic Canada (n=41)	Quebec (n=107)	Ontario (n=144)	Western Canada (n=140)
We do not have an operations workflow	40%	35%	47%	39%	39%
We have an operations workflow used mostly by the management team	15%	19%	15%	16%	13%
We have an operations workflow; employees refer to it when they start their job but most of them don't refer to it once they get familiar with their job	14%	19%	7%	16%	15%
We have an operations workflow that all employees refer to regularly	7%	8%	4%	9%	7%
Other	2%	0%	1%	3%	3%
Not applicable	21%	19%	26%	18%	22%



Use of an operations workflow or diagram, by business size

Do you have a detailed operations workflow or diagram? In your opinion, which employees refer to it, and how regularly do they do so?	Total (n=432)	Fewer than 5 employees (n=112)	5 to 19 employees (n=193)	20 to 49 employees (n=82)	50 or more employees (n=45)
We do not have an operations workflow	40%	42%	42%	33%	25%
We have an operations workflow used mostly by the management team	15%	14%	14%	21%	20%
We have an operations workflow; employees refer to it when they start their job but most of them don't refer to it once they get familiar with their job	14%	10%	17%	23%	25%
We have an operations workflow that all employees refer to regularly	7%	3%	10%	15%	10%
Other	2%	2%	5%	0%	0%
Not applicable	21%	29%	13%	8%	20%



Survey evaluation, by region and business size

Survey evaluation	Total (n=437)	Atlantic Canada (n=42)	Quebec (n=108)	Ontario (n=146)	Western Canada (n=141)
Good (7+ out of 10)	61%	66%	57%	57%	66%
Neutral (5 or 6 out of 10)	29%	21%	27%	35%	27%
Poor (0 to 4 out of 10)	10%	13%	16%	8%	7%
Average	6.6	6.6	6.5	6.4	6.9

Survey evaluation	Total (n=437)	Fewer than 5 employees (n=113)	5 to 19 employees (n=196)	20 to 49 employees (n=83)	50 or more employees (n=45)
Good (7+ out of 10)	61%	60%	64%	59%	60%
Neutral (5 or 6 out of 10)	29%	30%	26%	29%	30%
Poor (0 to 4 out of 10)	10%	10%	10%	12%	10%
Average	6.6	6.6	6.7	6.4	6.6

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