

**SAMBROOK
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Customer Survey

for

THE CLIENT

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AUTHOR'S NOTE - The information in this publication is based on real findings from several clients' customer image and performance benchmarking studies, although the actual findings (and in particular ratings and verbatim comments) have been edited and anonymised (where relevant) for reasons of confidentiality.

However, the purpose of the publication is to illustrate the depth of information that can be obtained from just 100 in-depth qualitative interviews, the different ways these findings can be presented to enable quick and easy understanding of the key trends, and how they can be used to develop reliable conclusions and meaningful, practical recommendations, that real clients have used to prioritise their marketing strategy action plans, improve their performance compared to their competitors, increase profitability of their sales and in some cases combine better margins with increased turnover.

Note: Plastic widgets are a fictional product and any reference in this report to companies, markets, products or individuals is entirely co-incidental. Sambrook Research International takes no responsibility for any associations or assumptions made by the reader.

A handwritten signature in black ink that reads "R. Spencer". The signature is written in a cursive, flowing style.

*Robin Spencer, Senior Partner
1st November 2006*

EXECUTIVE MANAGEMENT SUMMARY

Summary of main findings

- 60% of **plastic widgets** are purchased by customers are single widgets (up from 54% in 2005), 19% are double widgets and 22% are multi widgets.
- The key (prompted) buying factors of importance are similar to 2005 – technical specification, followed by product quality, margin / profitability, reliable delivery and price.
- The clients key brand strengths mentioned in 2006 are similar to those in 2005 – i. e. quality, strong brand, well known and good value.
- The client’s brand is still the one customers are most keen to support, and competitor X is still mentioned most frequently as a strongly emerging brand.
- Performance has improved over the last 12 months in 2 areas (**significantly for delivery and slightly for sales force representation**) but is considered worse in 4 areas of critical importance (to customers) – technical specification, product quality and price as well as one area of low secondary importance – product range, as summarised below.

| | |
|----------------------------|--------------------|
| Technical specification | Worse |
| Price | Slightly worse |
| Sales force representation | Slight improvement |
| Reliable delivery | Improvement |
| Product quality | Slightly worse |
| Product range | Worse |

- The client performance ratings indicate general satisfaction is high for most issues, but the client receives relatively high levels of dissatisfaction (i.e. more than 20% of customers) for three issues as summarised below.

| Decision factor | % dissatisfied – ratings <7 (ratings 1-5 in brackets) | |
|-------------------------|--|--|
| | Client | Comments |
| Technical specification | 40% (14% very) | <ul style="list-style-type: none"> • Specification gaps in new WOW product (10) • Specification poor (9) • Oil cooled widget problems (8) |
| Order administration | 28% (10% very) | <ul style="list-style-type: none"> • Slow processing/ sorting out problems (7) • Poor communication (5) |
| Product range | 38% (16% very) | <ul style="list-style-type: none"> • Weak oil cooled widget range (8) • Competitors range is better (4) |

- The performance ratings of the client, competitor A, competitor B, and competitor C are very similar in most of the important performance criteria, although all three competitors have a slight edge over the client on product range, order administration and margin.
- The key suggestion by customers of how the client can win more business is to develop a more comprehensive technical specification (19% of sample) followed by a more consistent pricing structure (13%) and more frequent visits by reps (8%).

Overall conclusions

The client's brand name remains a strong, well respected brand within the different distribution sectors. Satisfaction levels (in meeting customer needs) for the clients brand remains high, especially for the top 7 issues of importance to customers (with the exception of the number 1 issue – technical specification).

Satisfaction levels have in fact increased in some areas, in particular sales force representation and to a lesser extent reliable delivery. However, satisfaction levels have fallen for technical specification of product reflecting problems over the last 12 months.

The research therefore suggests that further actions are still required to improve the level of satisfaction in the 4 of the 5 areas highlighted in the 2005 survey. However, the priority area is technical specification (the number 1 issue of importance in the food sector), as many customers believe the client is experiencing greater problems in this area than its competitors, and technical specification problems are resulting in lost business – customers quickly find alternative suppliers, who are able to provide the specification they require.

The key recommendations to the client

The following recommendations, based on the research findings, are summarised below in approximate order of priority.

1. Review the technical specification problems raised by customers and develop urgent plans to improve the specification gaps of the new wonder oil widget launched earlier in the years as well as persistent problems of oil cooled widgets in the food sector.
2. Review the internal order admin system to identify why problems are taking so long to address and develop solutions to speed up the process. Suggestions where performance enhancement would have greatest impact are as follows:
 - a. *Communications systems with clients to keep them up-to-date on the status of outstanding admin queries*
 - b. *Allocation of account leaders to 'project manage' the resolution of any serious admin problems*
 - c. *Technical review of the invoicing software to identify whether or not additional programming could reduce or even eliminate certain admin problems*
3. Add the small sized (25mm to 30mm) to the oil cooled widget range that niche customers in the food industry cannot currently obtain from the client, provided an internal source-cost audit demonstrates this to be profitable business.
4. Develop a marketing programme to advise customers how it is addressing the quality and specification problems and also to inform them when these issues have been successfully resolved.

INTRODUCTION – OBJECTIVES, METHOD, SAMPLE

Background, objectives, research method and interview sample

The client is seeking to obtain a clear view of what customers look for when selecting a **plastic widget** supplier, how they perceive the client compared to other competitive brands, highlighting any improvements since the 2005 survey.

Background

The client is the market leader for **plastic widgets** in the UK (used by a wide range of different end users) and is owned by R Spencer Holdings, which has its head office in Sambrook, United Kingdom. It was formed through the amalgamation of 2 leading **plastic widget** brands – Spencer **plastic enriched widget** (SPEW) and Williams imperial mint plastic (WIMP) widgets (together with their subsidiary brands that include Clewes radical arm **plastic** (CRAP) **widgets** and has annual sales in the UK of around £100m.

Plastic widgets are sold to a number of different end-user segments, mainly food, chemicals, utilities and steel processing. Widgets reach these end users via distributors and the client has little direct contact with end users. The distributors are independent from the client and all other widget manufacturers.

The client reviewed its perceived market position in 2005, which highlighted certain areas of weakness. The client was therefore seeking to obtain a clear view of what customers look for when selecting a **plastic widget** supplier (in particular the chemicals sector (where it has experienced difficulties in the past) and the chemicals sector where it has recently launched a new range of widgets (the WIMP range), how they perceive the client compared to other competitive brands and highlighting any improvements since 2005.

Research objectives

The client therefore commissioned Sambrook Research to conduct a customer survey to obtain essential feedback from key independent distributors in the main markets sectors where it has high market share, which will be used to further develop its service proposition to customers, identify changing user needs and track the client's performance in meeting these needs. The key issues to be addressed are summarised below.

1. To provide a clear understanding of UK customers' requirements from a **plastic widget** supplier, highlighting the priority in order of importance, highlighting any significant changes during the last 12 months.
2. To benchmark distributors' perceptions of the client brand and position compared to competitors' performance in meeting key customer needs, together with a comparative analysis of how its perception / performance has changed since 2005.
3. To identify any significant gaps / weaknesses, as well as strengths, in the clients ability to meet key customer needs (relative to its main competitors).
4. Finally to provide strategy recommendations to the client, based on research findings regarding where it needs to focus resources / efforts to address any significant areas of weakness and hence improve its competitive position in the UK market.

Research method and sample

The research method was based on a mix of face-to-face interviews lasting 1-1½ hours and in-depth telephone interviews (fixed in advance for a mutually convenient time) typically lasting 40-45 minutes. The sample was an agreed profile of different types of customer that was considered representative of the client's customer based, based on discussions with the client at the project briefing stage. The actual sample interviewed was randomly drawn from a larger sample of prospective customers provided by the client.

Details of the sample achieved

An overview of the sample interviewed is shown below.

| Type of distributor | Total | Face-to-face | Telephone |
|----------------------------|--------------|---------------------|------------------|
| Food sector | 25 | 5 | 20 |
| Chemicals sector | 25 | 5 | 20 |
| Utilities sector | 25 | 5 | 20 |
| Steel sector | 25 | 5 | 20 |
| Total | 100 | 20 | 80 |

25% of the sample was primarily involved in the food sector, 25% primarily involved in the chemicals sector, 25% involved in utilities, and 25% mainly involved in the steel processing sector.

Normally, full details of respondents including name, position, company and location are given in the appendices, but actual respondents details are not included in this publication for reasons of respondent privacy and client confidentiality.

Definitions

The following suffixes are used throughout the report to classify verbatim comments given by type of end users interviewed.

Type of distributor

- F** – Food sector
- C** – Chemicals sector
- U** – Utilities sector
- S** – Steel processing sector

Key

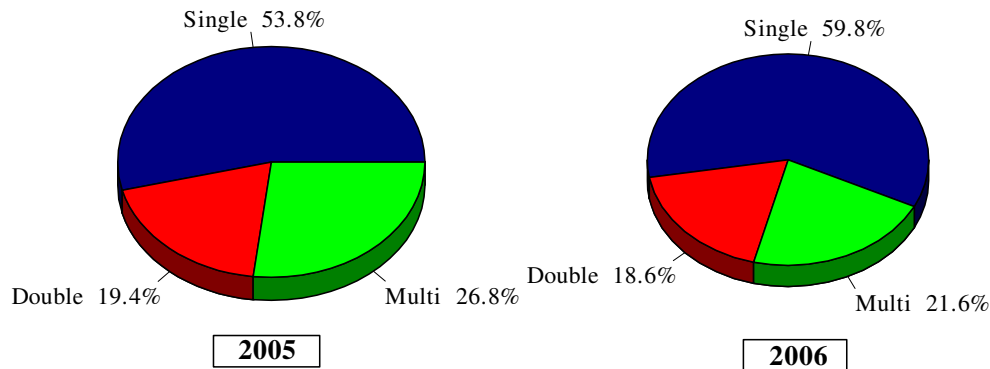
- c** – Customer
- nc** – Non customer

BUYING HABITS AND PURCHASING REQUIREMENTS

Types of **plastic widget** purchased by customers

Buying pattern in 2006 is similar to 2005. Single **plastic widgets** account for almost 60% of purchases, the biggest users being food customers (84.5%), chemicals customers (82.2%) and utilities customers (77.6%), the lowest are steel customers (39.2%).

Respondents were asked - "What proportions of the **plastic widgets** you buy are single, double or multi?"



How buying habits vary by type of end user

| End user type | Proportion of plastic widgets bought by different end users | | |
|--------------------|--|-------------------------------|------------------------------|
| | Single plastic widgets | Double plastic widgets | Multi plastic widgets |
| Steel processing | 39.2% | 24.2% | 36.7% |
| Utilities | 77.6% | 10.4% | 12.0% |
| Chemicals sector | 82.2% | 11.8% | 6.0% |
| Food sector | 84.5% | 4.8% | 10.6% |
| All sectors | 59.9% | 18.6% | 21.6% |

Source – 100 distributor interviews

Single **plastic widgets** account for almost 60% of purchases, the biggest users being food customers (84.5%), chemicals customers (82.2%) and utilities customers (77.6%), the lowest are steel processing customers (39.2%).

The buying pattern in 2006 is also very similar to 2005, and if oil cooled **plastic widget** specialists are excluded the proportion of single **plastic widgets** used in 2006 is 55.1%, only marginally higher than 2005.

Key ways to improve loyalty to one supplier

The way to increase loyalty to one **plastic widget** supplier most frequently mentioned by independent distributors interviewed in 2006 is to maintain constant technical specification, followed by good marketing support and competitive prices.

Respondents were asked - “What are the key ways to improve your loyalty (as a dealer) to one **plastic widget** supplier (other than just price)?”

| | 2006 n=100 (sample %) | 2005 n=100 (sample %) |
|---|--------------------------|--------------------------|
| Consistent technical specification | 29 (28%) | 20 (20%) |
| Good marketing support (<i>especially important are advertising support, regular special promotions, POS material, gifts</i>) | 20 (20%) | 15 (15%) |
| Offer good / competitive prices | 18 (18%) | 27 (27%) |
| Offer good customer service (<i>key aspects are proactive communication, responsive to queries and quality paperwork</i>). | 14 (14%) | 20 (20%) |
| Reliable delivery | 12 (12%) | 13 (13%) |
| Good relationship | 7 (7%) | 8 (8%) |
| Offer good incentives | 6 (6%) | 6 (6%) |
| Work together to win more business / develop markets | 5 (5%) | 7 (7%) |
| Technical support / info / back-up | 5 (5%) | 0 |
| Exclusivity offers | 4 (4%) | 6 (6%) |
| Create end-user demand | 3 (3%) | 0 |
| Product development / innovation | 3 (3%) | 0 |
| Keeping me well informed (<i>especially about new product developments and other promotional activities</i>). | 2 (2%) | 7 (7%) |
| Show commitment | 2 (2%) | 4 (4%) |
| Good sales representative | 2 (2%) | 2 (2%) |
| Stable prices | 0 | 3 (3%) |
| Management support | 0 | 2 (2%) |
| Honest approach | 0 | 2 (2%) |
| Miscellaneous other single mentions | 12 | 4 |
| Total mentions | 144 | 142 |

Source – 100 distributor interviews

As can be seen in the table above, the suggestions given in 2006 how to improve loyalty of customers to one **plastic widget** supplier are fairly similar to 2005, with some significant differences. Price is still mentioned, but no longer most frequently (as in 2005). A consistent product specification is now the most frequently mentioned issue (probably influenced by the problems encountered with the client’s new product specification).

Good marketing support has risen to the second most frequently mentioned issue (from 15% in 2005), but the number of mentions of good customer service has fallen slightly from 20% of the sample in 2005 to only 14% in 2006.

Unprompted – key factors of importance when selecting a plastic widget supplier

The unprompted factor of importance when selecting a **plastic widget** supplier mentioned most frequently in 2006 is technical specification (mentioned by 73% of all customers) reflecting the increasing importance of the technical capability of widgets.

Respondents were asked - “What are the key factors of importance when selecting a **plastic widget** supplier?”

| Reason | Food | Chemicals | Utilities | Steel | Total 2006 (% sample) n=100 | Total 2005 (% sample) n=100 |
|--------------------------|-----------|-----------|-----------|-----------|-----------------------------------|-----------------------------------|
| Sample size n = | 25 | 25 | 25 | 25 | 100 | 100 |
| Technical specification | 14 | 15 | 20 | 24 | 73 (73%) | 12 (12%) |
| Price | 17 | 14 | 13 | 17 | 61(61%) | 51 (51%) |
| Frequency of delivery | 13 | 12 | 11 | 13 | 49 (49%) | 47 (47%) |
| Service | 8 | 5 | 1 | 8 | 22 (22%) | 39 (39%) |
| Reliable delivery | 6 | 2 | 2 | 6 | 16 (16%) | 22 (22%) |
| Customer demand | 3 | 4 | 5 | 3 | 15 (15%) | 19 (19%) |
| Quality / performance | 4 | 1 | 3 | 4 | 12 (12%) | 26 (26%) |
| Brand strength | 2 | 1 | 2 | 2 | 7 (7%) | 8 (8%) |
| Good relationship / reps | 3 | 0 | 0 | 3 | 6 (6%) | 7 (7%) |
| Marketing support | 1 | 0 | 2 | 1 | 4 (4%) | 9 (9%) |
| Profitability / margin | 0 | 2 | 0 | 0 | 2 (2%) | 5 (5%) |
| Product range | 1 | 0 | 0 | 1 | 2 (2%) | 3 (3%) |
| Value for money | 0 | 1 | 1 | 0 | 2 (2%) | 2 (2%) |
| Consistency of supply | 0 | 1 | 0 | 0 | 1 (1%) | 5 (5%) |
| Technical support | 0 | 0 | 1 | 0 | 1 (1%) | 2 (2%) |
| Payment terms | 0 | 1 | 0 | 0 | 1 (1%) | 1 (1%) |
| Others | 4 | 0 | 3 | 4 | 11 | 15 |
| Total mentions | 76 | 59 | 64 | 86 | 285 | 258 |

Source – 100 distributor interviews

An overview how the factors of importance vary between the different end users can be seen in the table above.

The unprompted factor of importance when selecting a **plastic widget** supplier mentioned most frequently by respondents in 2006 is technical specification (mentioned by 73% of all customers interviewed compared to 12% in 2005) reflecting the technical problems that many customers have experienced and the serious concerns they have over poor specification criteria of the new product range launched in the spring of 2006.

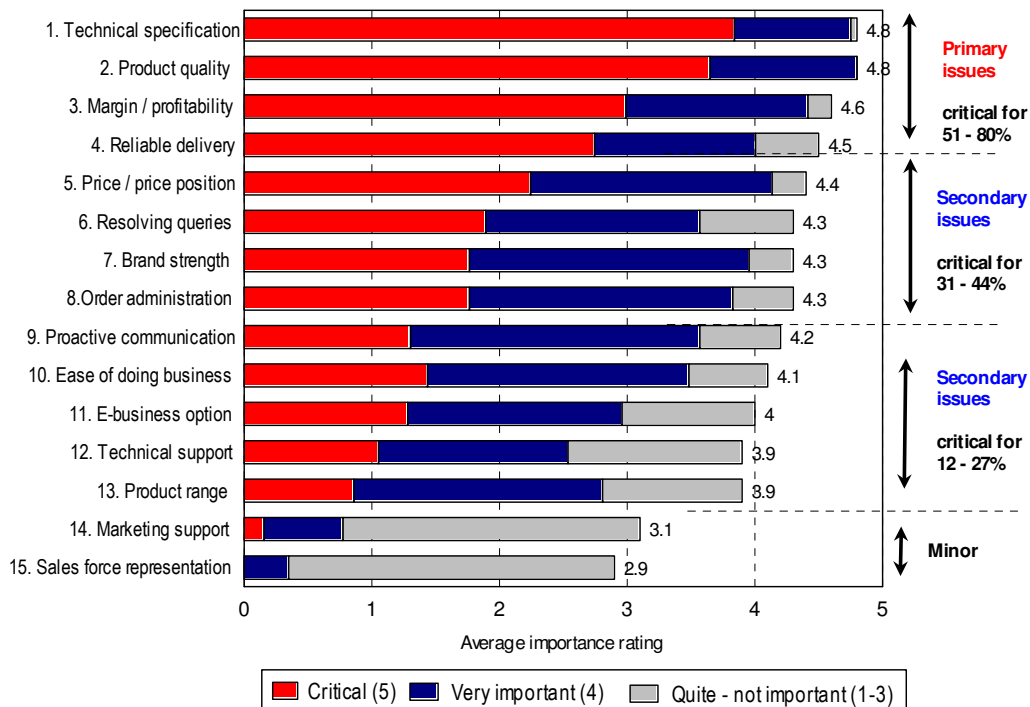
This is followed by price (mentioned by 61% of respondents which is up slightly compared to 51% in 2005) and frequency of delivery (similar to 2005)

Importance ratings of 15 prompted factors choosing a plastic widget brand / supplier

The key (prompted) factor of importance when choosing a plastic widget supplier is product technical specification, followed by reliable delivery, margin / profitability and frequency of delivery.

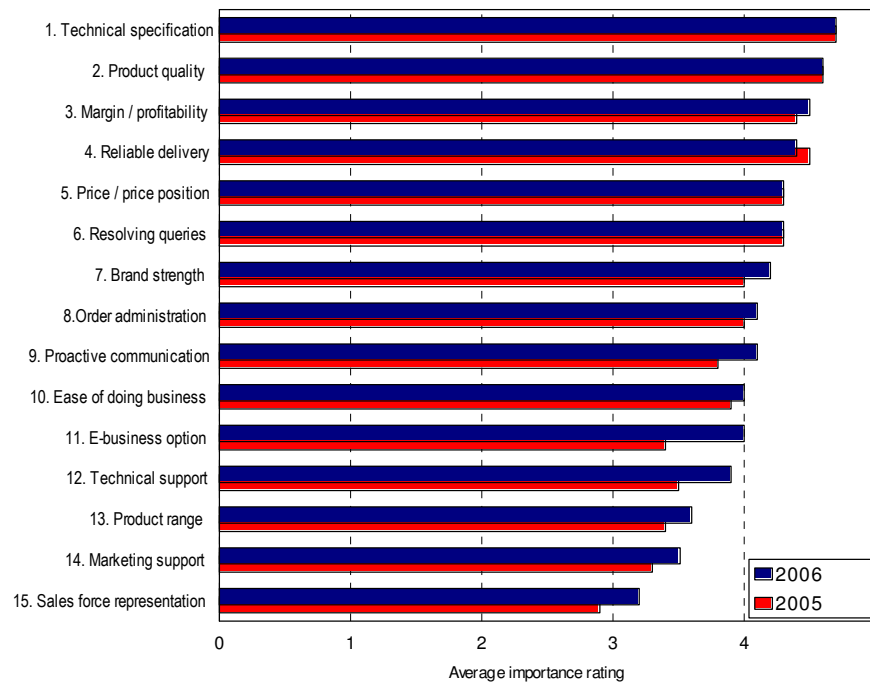
Respondents were asked – “Please rate the importance of the following potential factors when deciding which supplier / plastic widget brand to buy using a 1-5 scale (1 = not important, 2 = low, 3 = quite important, 4 = very important, 5 = critical).”

| FACTOR | Average rating | % of ratings critical (5) | % of ratings Very important (4) | % of ratings very important or critical (i.e. 4 or 5) |
|--------------------------------|----------------|---------------------------|---------------------------------|---|
| 1. Technical specification | 4.7 | 74% | 26% | 100% |
| 2. Product quality | 4.6 | 62% | 33% | 95% |
| 3. Margin / profitability | 4.5 | 56% | 39% | 95% |
| 4. Reliable delivery | 4.4 | 46% | 51% | 97% |
| 5. Price / price position | 4.3 | 43% | 46% | 89% |
| 6. Resolving queries | 4.3 | 33% | 55% | 88% |
| 7. Brand strength | 4.2 | 33% | 52% | 85% |
| 8. Order administration | 4.1 | 30% | 52% | 82% |
| 9. Proactive communication | 4.1 | 30% | 50% | 80% |
| 10. Ease of doing business | 4.0 | 30% | 47% | 77% |
| 11. E-business option | 4.0 | 28% | 47% | 75% |
| 12. Technical support | 3.9 | 18% | 51% | 69% |
| 13. Product range | 3.6 | 12% | 40% | 52% |
| 14. Marketing support | 3.1 | 5% | 20% | 25% |
| 15. Sales force representation | 2.9 | 0% | 12% | 12% |



Source – 100 distributor interviews

Comparison of how the importance of factors compares 2006 vs. 2005



Source – 100 distributor interviews

As can be seen in the above chart, five factors (technical specification, product quality, margin/profitability, reliable delivery and price) are considered most critical by end users, the next 8 factors are considered as very important secondary issues, and marketing support and sales force representation remain minor issues. There are a few movements within these bands in 2006 compared to 2005, the most significant trend in the current survey being the increasing importance of e-business.

However, respondents were also asked if they thought that the importance of any of these 15 factors had increased or decreased during the last 12 months, and if so why. Their **perceptions** of which issues had increased importance (or decreased) are shown below, together with the reasons why.

1. Technical specification **critical (74%) + v. important (26%) = 100%.**

This is very important or critical to all interviewees in all business sectors. According to many interviewees “if a **plastic widget** is not available with the correct technical specification you can’t sell it”. Many **plastic widget** distributors are likely to push an alternative product if a particular product is not up to specification because they don’t want to lose the sale.

Trends over the last 12 months become more important (14 mentions)

There were several of mentions of **plastic widgets** becoming less interchangeable, resulting in more complex stocking requirements.

2. Product quality

critical (62%) + very important (33%) = 95%.

This is very important or critical to interviewees in all sectors. Most customers want a good quality product because they want maximum efficiency and piece of mind. Customers are keen to sell good quality plastic widgets because they want satisfied customers that keep coming back. Some respondents pointed out that most manufacturers are able to supply good quality products.

Trends over the last 12 months more important (4 mentions)

No significant change since 2005 (i.e. it remains a critical issue), although there were single mentions of consumer customers getting fussier and oil cooled widgets are required to work at ever increasing speeds.

3. Margin / profitability

critical (56%) + very important (39%) = 95%.

Margin profitability is very important to most interviewees in all sectors. Many interviewees see a healthy level of profit as the basis to stay in business in this very competitive market. Some interviewees pointed out that a good profit margin is very motivating and that they are more likely to push a **plastic widget** brand where they make the most money.

Trends over the last 12 months more important (20 mentions) less important (1)

About a half of the comments related to overheads and costs going up and a fifth that margins are getting tighter. There were single mentions of increased competition, new entrants offering deals and sales flattening.

4. Reliable delivery

critical (46%) + very important (51%) = 97%.

This is critical or very important for most interviewees in all business units. According to many interviewees reliable delivery is important for planning purposes because of meeting customer requirements, planning resources and the importance of JIT delivery.

Trends over the last 12 months more important (8 mentions)

A couple of respondents linked the increase in importance to supply shortages, one distributor mentioned that they now carry less stock and are therefore more dependent on reliable deliveries.

5. Price

critical (43%) + very important (46%) = 89%.

This is critical for most interviewees on the food side. According to many interviewees the **plastic widget** market is very competitive and many end-users are very price conscious. Some interviewees pointed out that **plastic widgets** from leading suppliers are very similar in terms of quality, and price is often the ultimate decision criteria for the end-user.

Trends over the last 12 months more important (12 mentions)

About half the comments mentioned that the market is become more competitive and half related to customers becoming more price conscious.

6. Resolving queries / problems

critical (33%) + very important (55%) = 88%.

This is very important for most interviewees in all business units. Many interviewees pointed out that they want queries / problems to be sorted out quickly. Many find lingering problems frustrating. Quick problem resolving capabilities are associated with professionalism, confidence, trustworthiness and being comfortable with a company.

Trends over the last 12 months more important (3 mentions)

No significant change since 2005. There were single mentions of increased complexity of pricing structures and discounts offered on bulk purchases, the need to resolve queries quickly to avoid making the distributor's customer unhappy, the need to resolve problems quickly so they can move on.

7. Brand strength / reputation **critical (33%) + very important (52%) = 85%.**

This is very important for most interviewees in all sectors. Interviewees pointed out that many end-users prefer to have a well known **plastic widget** brand installed and some even insist on a specific brand they trust. Distributors in the chemicals sector also prefer to deal with strong brands because these **widgets** give them credibility in the market place and confidence that their customers are going to be fully satisfied.

Trends over the last 12 months more important (6 mentions) less important (2)

No significant change since 2005. There were single mentions of many new brands flooding the market (hence reputation of the brand critical to retain business), and these customers believe that quality is the key to strong brand reputation.

8. Order admin / invoicing **critical (30%) + very important (52%) = 82%.**

This is very important for most interviewees in all business units. Most interviewees want to see paperwork that is clearly structured and without any errors. Chasing incorrect invoices is seen as a major time consuming hassle factor.

Trends over the last 12 months more important (5 mentions)

Two customers mentioned that there are too many incorrect invoices which are too time consuming, and there were single mentions of customers requiring more information on the invoice so fewer mistakes make life easier, and one customer was focusing on chasing new business and had less time to resolve (admin) problems.

9. Proactive communication **critical (30%) + very important (50%) = 80%.**

This is important to most interviewees in all business units. Customers want to be informed in a timely manner about new products, obsolete products, technical issues, special promotions and advertising campaigns. Some interviewees believe that good communications is helping to build confidence.

Trends over the last 12 months more important (5 mentions)

There were three mentions of the increased technical complexity of oil cooled widgets and manufacturers trying harder to work with distributors by improving how they communicate the changes in specification of new products.

10. Ease of ordering **critical (30%) + very important (47%) = 77%.**

This is very important for most interviewees in all business units, but only considered critical by less than half the sample. According to some interviewees it is about time saving and a hassle free experience.

Trends over the last 12 months more important (0 mentions)

No significant change since 2005. No comments.

11. E-business option

critical (28%) + very important (47%) = 75%.

This is of low importance to about half of the distributors interviewed as many interviewees are not yet using an e-business option. However many distributors are currently looking into it in more detail and almost 20% already buy via proprietary e-commerce systems, and this is expected to increase rapidly over the next 2-3 years.

Trends over the last 12 months more important (18 mentions)

Respondents mentioned that this has become more important over the last 12 months, and is rated critical to 28% (compared to 9% in 2005) of the sample. There is a strong perception that e-business is now starting to move forward.

12. Technical support

critical (18%) + very important (51%) = 69%.

This is quite or very important to most interviewees in all business units. Most interviewees in the food sector pointed out that they do not require technical support very often. However, when the need arises, it is important for them to have quick and easy access. Interviewees from the chemicals sector need technical support more often and also want quick and easy access.

Trends over the last 12 months more important (3 mentions) less important (1)

No significant change since 2005. There were single mentions of oil cooled **widgets** getting faster, and the increased need for technical support for new **widget** products. .

13. Product range

critical (12%) + very important (40%) = 52%.

Product range is quite important for most interviewees and very important to just under half. It is especially important for customers that want to buy most **plastic widgets** from one supplier only in order to be able to get a better price. Ideally these companies would like to buy single, double and multi **plastic widgets** from the same supplier.

Some interviewees pointed out that the **plastic widget** market has become very complex and confusing because the manufacturers keep expanding their product ranges.

Trends over the last 12 months more important (4 mentions) less important (2)

No change since 2005.

14. Marketing support

critical (5%) + very important (10%) = 25%.

Marketing support is quite important for many interviewees in all sectors. It is especially important to smaller companies which claim that they could not afford an advertising program without the support of manufacturers. However some interviewees pointed out that they are not interested in marketing support and would prefer to get a better deal in terms of price.

Trends over the last 12 months more important (6 mentions)

There were single mentions of more people asking for oil cooled **plastic widget** information, marketing oil cooled **widgets** is increasingly important.

15. Sales force representation

critical (0%) + very important (12%) = 12%.

Sales force representation is quite important in the steel processing sector but can not be considered important/relevant in the other market sectors.

Trends over the last 12 months more important (5 mentions) less important (5)

There was a single mention that oil cooled widgets are becoming increasing technical, and therefore greater sales force presence is required.

How key decisions factors of importance vary by key end-user sector

| FACTOR | Average rating | Food sector | Chemicals sector | Utilities sector | Steel sector |
|--------------------------------|-----------------------|--------------------|-------------------------|-------------------------|---------------------|
| 1. Technical specification | 4.7 | 4.6 | 4.8 | 4.6 | 4.8 |
| 2. Product quality | 4.6 | 5.0 | 4.0 | 4.4 | 4.6 |
| 3. Margin / profitability | 4.5 | 4.6 | 4.6 | 4.6 | 4.2 |
| 4. Reliable delivery | 4.4 | 4.8 | 4.0 | 4.4 | 4.4 |
| 5. Price / price position | 4.3 | 4.2 | 4.1 | 4.4 | 4.5 |
| 6. Resolving queries | 4.3 | 4.3 | 4.3 | 4.3 | 4.4 |
| 7. Brand strength | 4.2 | 4.0 | 4.4 | 4.2 | 4.2 |
| 8. Order administration | 4.1 | 4.2 | 4.1 | 4.1 | 4.0 |
| 9. Proactive communication | 4.1 | 4.3 | 4.0 | 3.8 | 4.1 |
| 10. Ease of doing business | 4.0 | 4.0 | 4.1 | 4.0 | 3.9 |
| 11. E-business option | 4.0 | 4.0 | 4.0 | 3.8 | 4.2 |
| 12. Technical support | 3.9 | 3.7 | 4.1 | 3.9 | 4.0 |
| 13. Product range | 3.6 | 3.7 | 3.6 | 3.5 | 3.7 |
| 14. Marketing support | 3.5 | 3.5 | 3.5 | 3.6 | 3.4 |
| 15. Sales force representation | 3.2 | 3.2 | 3.3 | 3.1 | 3.2 |

Source – 100 distributor interviews

BRAND AWARENESS AND BRAND PERCEPTIONS

Awareness levels of single and double widget brands

Amongst the interview sample Competitor A had the highest awareness in the single range followed by the client. In the double widget range the highest awareness was for competitor X followed by competitor Y and competitor Z.

Respondents were asked - “Which plastic widget brands are you aware for a) single widget brands and b) double widget brands?”

Single range

| | Food | Steel | Utilities | Chemicals | 2006 n=100 (%sample) | 2005 n=100 (%sample) | % change |
|--------------|------|-------|-----------|-----------|----------------------------|----------------------------|-------------|
| Competitor A | 25 | 19 | 15 | 20 | 72 (72%) | 84 (84%) | -12% |
| The client | 25 | 21 | 25 | 0 | 71 (71%) | 73 (73%) | -2% |
| Competitor B | 21 | 17 | 13 | 13 | 54 (54%) | 54 (54%) | 0% |
| Competitor C | 2 | 1 | 24 | 4 | 31 (31%) | 30 (30%) | +1% |
| Other | 6 | 2 | 2 | 0 | 10 | 3 | |

Others mentioned once only were – Competitor D, Competitor E, Competitor X, Competitor Y and Competitor K.

Comment

Amongst the interview sample Competitor A had the highest level of awareness in the single widget range segment followed by the client. Other single widget brands that had a high level of awareness were competitor B and Competitor C. All of these brands except the client have strong awareness in the Chemicals sector, and competitor C was mentioned by 24 respondents (92%) interviewed in the utilities sector.

Respondents were also asked to rank the single widget brands they use in order of importance (by value of widgets purchased).

| | 1 st | 2 nd | 3 rd | 4 th | 5 th |
|--------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| The client | 30 | 18 | 12 | 8 | 3 |
| Competitor A | 27 | 18 | 15 | 12 | 0 |
| Competitor C | 15 | 3 | 1 | 4 | 7 |
| Competitor B | 5 | 15 | 15 | 19 | 10 |
| Competitor E | 0 | 1 | 0 | 0 | 0 |
| Competitor Y | 0 | 0 | 0 | 0 | 1 |

Source – 100 distributor interviews

The client was ranked 1st by 30% of the sample and 1st to 3rd by 60%, closely followed by its main rival (competitor A) which was ranked 1st by 27% of the sample and 1st to 3rd by 60%.

Customers' perceptions of key brands

The clients key brand perceptions are quality, brand strength, well known, good value and reliable. For Competitor A the most frequently mentioned brand perceptions are quality, performance, competitive and upmarket.

| CLIENT ORGANISATION | | Competitor A | |
|---|-----------|--|----------|
| • Quality | 32 | • Quality | 38 |
| • Strong brand | 20 | • Performance | 18 |
| • Well known | 18 | • Competitive on price | 12 |
| • Good value / price | 15 | • Upmarket | 12 |
| • Reliable | 11 | • Strong brand | 11 |
| • Good R&D / innovation | 10 | • Good technical specification | 10 |
| • No1 plastic widget company | 9 | • Customer demand | 6 |
| • World-wide brand | 8 | • Exotic | 5 |
| • Easy to deal with | 7 | • Emu widget | 4 |
| • Good reps | 4 | • Aggressive marketing | 3 |
| • Good product range | 3 | • Good range | 3 |
| • Market leader | 2 | • Strong | 2 |
| • More people use it | 2 | • Finnish (+ve) | 2 |
| • Poor technical spec (-ve) | 25 | • Euro specification | 2 |
| • Inconsistent pricing (-ve) | 5 | • Inconsistent (-ve) | 2 |
| • Expensive (-ve) | 4 | • Incoherent strategy (-ve) | 2 |
| • Lack of professionalism (-ve) | 3 | • Admin problems (-ve) | 2 |
| Other <u>positive</u> mentions – good reputation, comfort, , good pedigree, up to date, good telesales, quality company, good technical support, progressive, good marketing, big company, user friendly, trustworthy, OK widget, better coverage, growing in Europe, adaptable, approachable, recognisable logo, excellence. | | Other <u>positive</u> mentions – decent delivery, clear invoicing, strong heritage, making progress, good backing, good profile, global player, easy to deal with, keep in touch, quiet, | |
| Other <u>negative</u> mentions - expensive TV adverts, head office policies, incompetent, unreliable, inconsistent policies, weak marketing, out of touch, under achieving, was world leader, staffing problems, poor delivery, poor invoicing, lack of support, financial difficulties, disorganised, ups and downs, difficult to deal with, internal problems less in demand. | 37 | Other <u>negative</u> mentions – too large range, inflexible pricing, poor standard of reps, complex to deal with, stagnated, got weaker recently, less well known. | 17 |
| Total mentions | 215 | Total | 151 |

Source – 100 distributor interviews

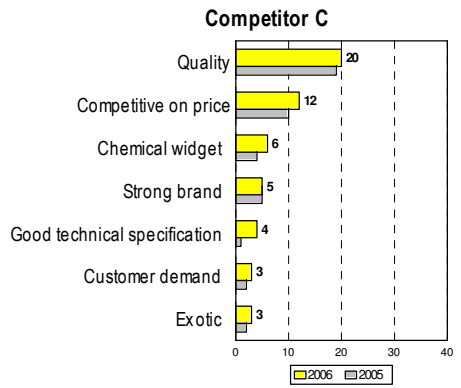
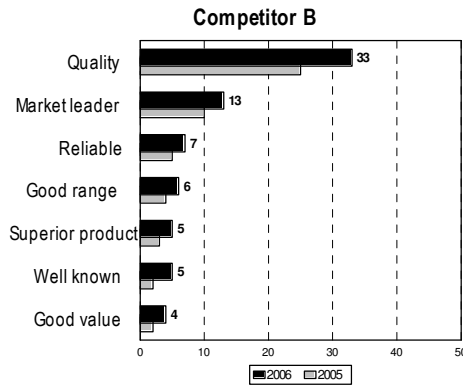
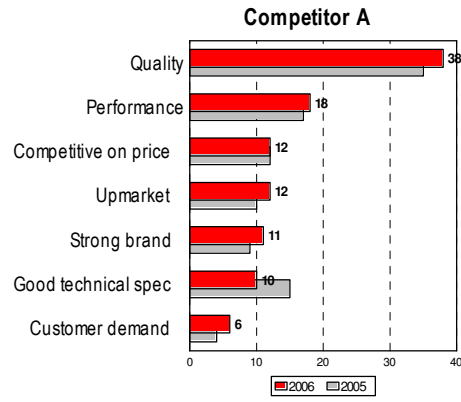
| Competitor B | | Competitor C | |
|---|------------|--|-----------|
| • Quality | 33 | • Quality | 20 |
| • Market / brand leader | 13 | • Competitive on price | 12 |
| • Reliable | 7 | • Chemical widget (leader) | 6 |
| • Good range | 6 | • Strong brand | 5 |
| • Superior product | 5 | • Good technical specification | 4 |
| • Well known | 5 | • Customer demand | 3 |
| • Good value | 4 | • Specialist widgets | 3 |
| • Good reputation | 4 | • Chinese (-ve) | 3 |
| • Good service | 2 | • Good image | 2 |
| • Willing to work with us | 2 | • Aggressive marketing | 2 |
| • Good technical specification | 2 | • Good range | 2 |
| • Strong marketing | 2 | • Inconsistent (-ve) | 2 |
| • Correct invoicing | 2 | • Import problems (-ve) | 2 |
| • Difficult to deal with (-ve) | 2 | • Admin problems (-ve) | 2 |
| • Poor service (-ve) | 2 | | |
| • Arrogant (-ve) | 2 | | |
| Other <u>positive</u> mentions – good support, performance, good technical support, good communication, sure footed, good market knowledge, appearance, continuous development, | 12 | Other <u>positive</u> mentions – decent delivery, clear invoicing, strong heritage, making progress, good backing, good profile, global player, easy to deal with, keep in touch, quiet, | 27 |
| Other <u>negative</u> mentions – delivery problems, no loyalty, weak support, struggling to stay ahead. | | Other <u>negative</u> mentions – too large range, inflexible pricing, poor standard of reps, complex to deal with, stagnated, got weaker recently, less well known. | |
| Total | 105 | Total | 95 |

| Competitor D | |
|--|-----------|
| • Quality | 15 |
| • Competitive on price | 12 |
| • Stylish packaging | 6 |
| • Strong brand | 5 |
| • Performance | 4 |
| • Customers know the brand | 3 |
| • Good technical specification | 3 |
| • Good brand image | 2 |
| • Aggressive | 2 |
| • Good chemical widget range | 2 |
| • Admin problems (-ve) | 2 |
| Other <u>positive</u> mentions – good invoicing, strong brand, good support, good profile, regional player, easy to trade with, keeps in communication | 11 |
| Other <u>negative</u> mentions – expensive pricing, poor standard of specification documents, lazy management, not known. | |
| Total | 67 |

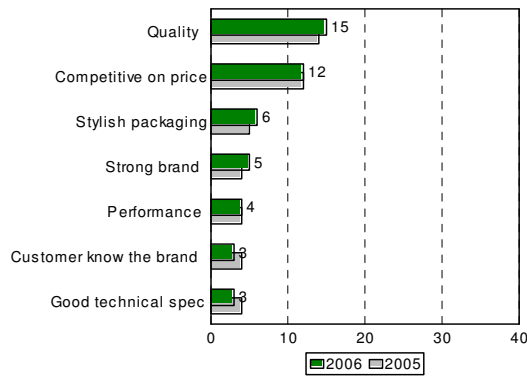
Source – 100 distributor interviews

Comparison of how brand perceptions in 2006 compare to 2005

Note – values are in percentage (of sample) format to allow for different sample sizes.



Competitor D



Specific brands that customers are keen to support

About 50% of respondents indicated that they are keen to support one or more specific brands. The key reasons are related to ownership, long term relationships, good products and good marketing support.

| Brands | 2006 n=100 (sample %) | 2005 n=100 (sample %) | % change |
|-----------------------|----------------------------------|----------------------------------|---------------------|
| The client | 25 (25%) | 24 (24%) | +1% |
| Competitor A | 6 (6%) | 11 (11%) | -5% |
| Competitor B | 5 (5%) | 9 (9%) | -4% |
| Competitor C | 5 (5%) | 1 (1%) | +4% |
| Competitor D | 4 (4%) | 3 (3%) | +1% |
| Total mentions | 45 | 48 | |

Source – 100 distributor interviews

Note: Some interviewees are keen to support more than one particular supplier.

The key reasons why customers are keen to support these brands are summarised below.

The client

- They look after us / support us (4)
- Good product (2)
- Built up trust over many years (2)
- Prices (1)
- Advertising (1)
- Local autonomy / exclusivity (1)
- Good company (1)
- Good credit (1)

Competitor A

- Long term working relationship (5)
- Marketing (3)
- Good quality products (3)
- Keener pricing (2)
- Our core product (1)
- Made in UK (1)
- Whole package – neat and tidy (1)
- Good back-up system (1)

Competitor B

- Best widget in the world (2)
- Best profitability (2)
- Good technical support (1)
- Fantastic training (1)
- Fantastic support (1)
- Good product range (1)
- Special deals / prices (1)

Competitor C

- Help us win new business (1)

The key strong brands that are seen to be emerging in the market

The most frequently mentioned brand seen to be strongly emerging in the market is Competitor X (14 mentions), followed by Competitor Y (7) and Competitor Z (6).

| Emerging Brands | 2006 n=100 (sample %) | 2005 n=100 (sample %) | % change |
|-----------------------|-----------------------------|-----------------------------|-------------|
| Brand X | 14 (14%) | 11 (11%) | +3% |
| Brand Y | 7 (7%) | 4 (4%) | +3% |
| Brand Z | 6 (6%) | 8 (8%) | -2% |
| Other single mentions | 12 | 12 | |
| Total mentions | 39 | 35 | |

Source – 100 distributor interviews

Key areas where emerging brands are seen to be performing well

The key areas where emerging brands are seen to be performing well can be seen below.

Competitor X

- Competitive price (5)
- Strong marketing / advertises in trade magazines (4)
- Brand awareness increasing (3)
- Full range (2)
- Special group deal (1)
- Aggressive sales force (1)
- Dealer promotion (1)
- Freebies (1)
- Price structure (1)

Competitor Y

- Tries harder to be competitive (3)
- Advertises in **Widget** magazines (2)
- Exclusivity areas (1)
- Good dealer support (1)
- Technical specification (1)
- Improved quality (1)
- Good margins (1)

Competitor Z

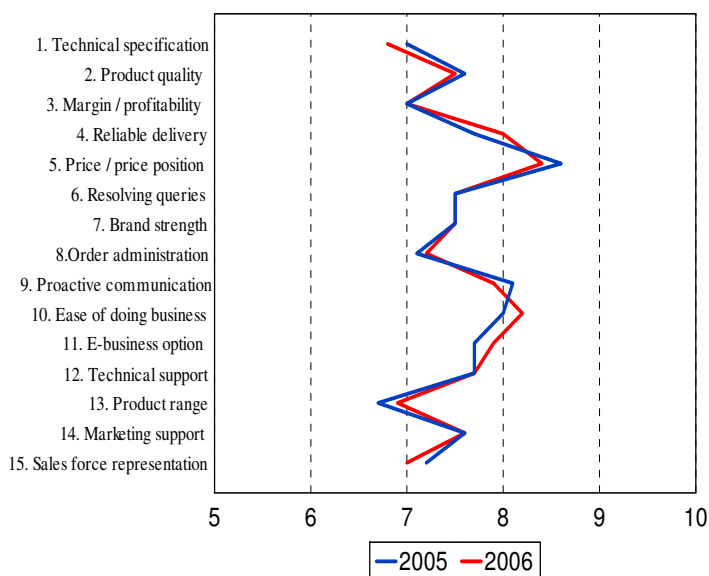
- Better pricing structure (2)
- Technically better (1)
- Exhibited at Widget Word (Paris 06)

THE CLIENTS PERFORMANCE RATINGS

Comparison of the clients performance ratings

Performance ratings for the client are generally good and it performs satisfactorily in most areas. The lowest average ratings are product technical specification (which fell below 7 this year) and product range (an issue of secondary importance).

How the client's performance ratings in 2006 compare to 2005



Source – 100 in-depth customer interviews

The Performance profile is fairly similar to 2005. However, the client's average performance ratings have shown a slight improvement in 4 areas (as summarised below).

| Performance parameter | 2006 average rating | 2005 average rating | Change 05 to 06 |
|------------------------|---------------------|---------------------|-----------------|
| Reliable delivery | 8.0 | 7.7 | +0.3 |
| Order administration | 7.2 | 7.1 | +0.1 |
| Ease of doing business | 8.2 | 8.0 | +0.2 |
| Product range | 6.9 | 6.7 | +0.2 |

However, performance ratings are slightly lower than 2005 in 5 areas (see table below).

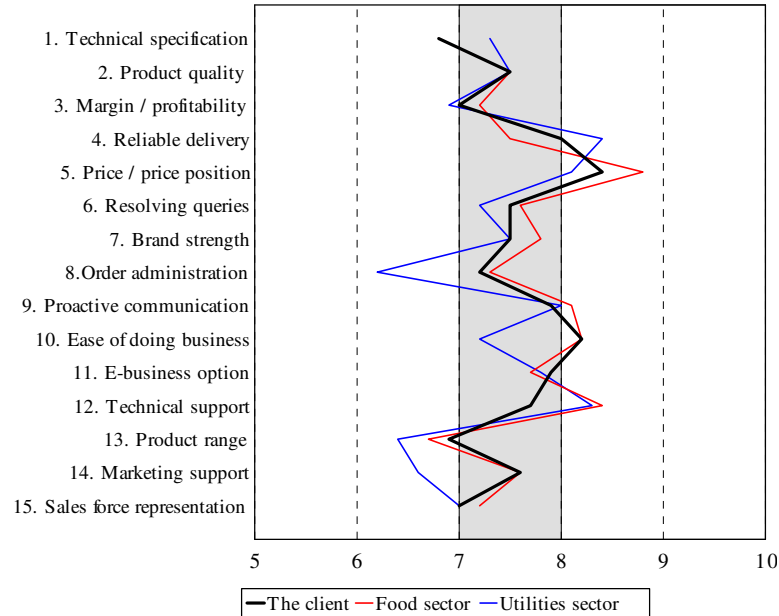
| | | | |
|-------------------------|-----|-----|------|
| Technical specification | 6.8 | 7.0 | -0.2 |
| Product quality | 7.5 | 7.6 | -0.1 |
| Price | 8.4 | 8.5 | -0.1 |

Source – 100 distributor interviews

How the clients ratings vary by key end user segment

The client performs generally highest in the utilities sector. The client performs fairly well in both the food and steel sectors against the top 12 issues of importance to customers.

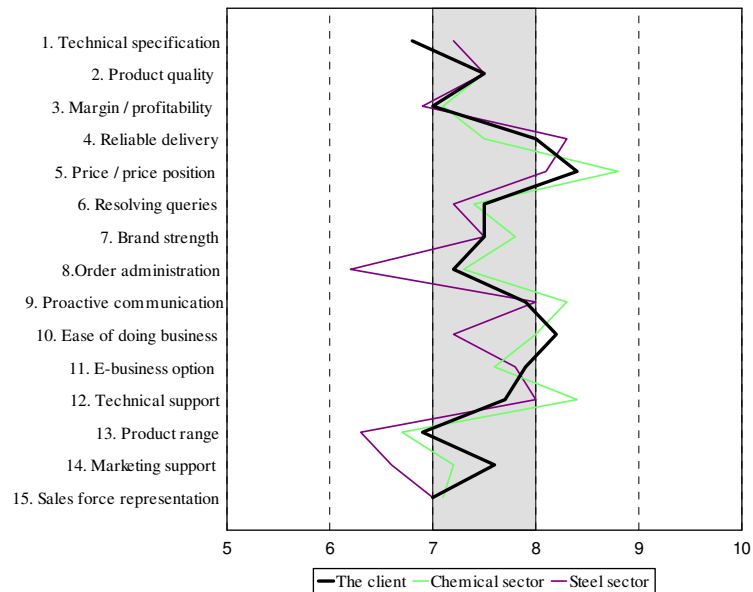
How the client performance ratings vary by type of end user segment



| Performance factor | All ratings | Food sector | Utilities sector |
|--------------------------------|-------------|-------------|------------------|
| 1. Technical specification | 6.8 | 6.8 | 7.3 |
| 2. Product quality | 7.5 | 7.5 | 7.5 |
| 3. Margin / profitability | 7.0 | 7.2 | 6.9 |
| 4. Reliable delivery | 8.0 | 7.5 | 8.4 |
| 5. Price / price position | 8.4 | 8.8 | 8.1 |
| 6. Resolving queries | 7.5 | 7.6 | 7.2 |
| 7. Brand strength | 7.5 | 7.8 | 7.5 |
| 8. Order administration | 7.2 | 7.3 | 6.2 |
| 9. Proactive communication | 7.9 | 8.1 | 8.0 |
| 10. Ease of doing business | 8.2 | 8.2 | 7.2 |
| 11. E-business option | 7.9 | 7.7 | 7.8 |
| 12. Technical support | 7.7 | 8.4 | 8.3 |
| 13. Product range | 6.9 | 6.7 | 6.4 |
| 14. Marketing support | 7.6 | 7.6 | 6.6 |
| 15. Sales force representation | 7.0 | 7.2 | 7.0 |

Source – 100 distributor interviews

How the client performance ratings vary by type of end user segment



| Performance factor | All ratings | Chemical sector | Steel sector |
|--------------------------------|-------------|-----------------|--------------|
| 1. Technical specification | 6.8 | 6.8 | 7.2 |
| 2. Product quality | 7.5 | 7.5 | 7.5 |
| 3. Margin / profitability | 7.0 | 7.1 | 6.9 |
| 4. Reliable delivery | 8.0 | 7.5 | 8.3 |
| 5. Price / price position | 8.4 | 8.8 | 8.1 |
| 6. Resolving queries | 7.5 | 7.4 | 7.2 |
| 7. Brand strength | 7.5 | 7.8 | 7.5 |
| 8. Order administration | 7.2 | 7.3 | 6.2 |
| 9. Proactive communication | 7.9 | 8.3 | 8.0 |
| 10. Ease of doing business | 8.2 | 8.0 | 7.2 |
| 11. E-business option | 7.9 | 7.6 | 7.8 |
| 12. Technical support | 7.7 | 8.4 | 8.0 |
| 13. Product range | 6.9 | 6.7 | 6.3 |
| 14. Marketing support | 7.6 | 7.2 | 6.6 |
| 15. Sales force representation | 7.0 | 7.1 | 7.0 |

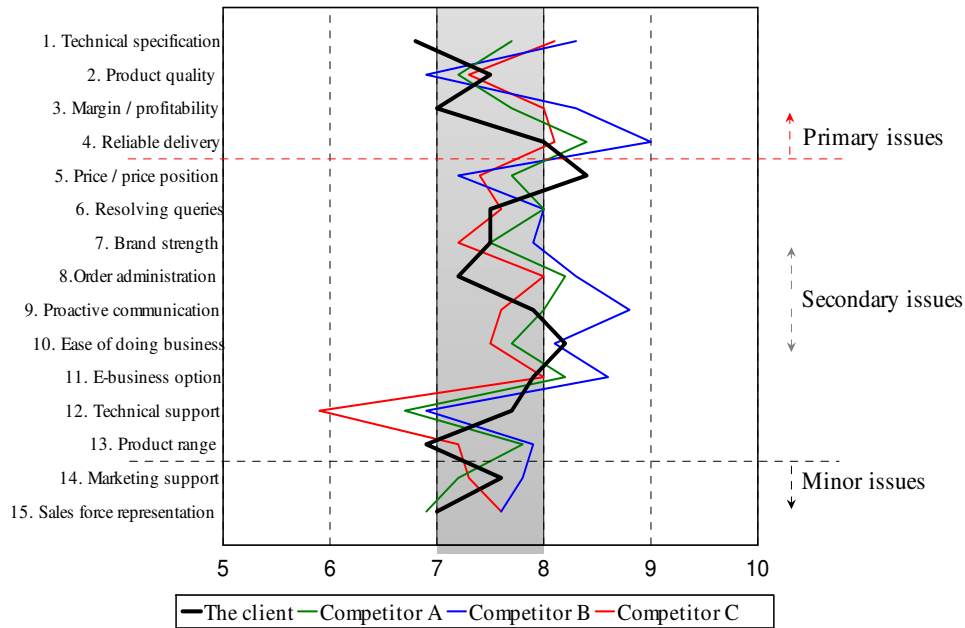
Source – 100 distributor interviews

THE CLIENTS PERFORMANCE VS COMPETITORS

How the client is rated compared to other key brands

The performance ratings of the client, Competitor A, Competitor B and Competitor C are very similar in most of the important performance criteria, although all four competitors have a slight edge on product technical specification and reliable delivery.

The clients performance ratings compared to Competitor A, B and C



Comment

| Performance factor | The client | Competitor A | Competitor B | Competitor C |
|--------------------------------|------------|--------------|--------------|--------------|
| 1. Technical specification | 6.8 | 7.7 | 8.3 | 8.1 |
| 2. Product quality | 7.5 | 7.2 | 6.9 | 7.3 |
| 3. Margin / profitability | 7.0 | 7.7 | 8.3 | 8.0 |
| 4. Reliable delivery | 8.0 | 8.4 | 9.0 | 8.1 |
| 5. Price / price position | 8.4 | 7.7 | 7.2 | 7.4 |
| 6. Resolving queries | 7.5 | 8.0 | 8.0 | 7.6 |
| 7. Brand strength | 7.5 | 7.5 | 7.9 | 7.2 |
| 8. Order administration | 7.2 | 8.2 | 8.3 | 8.0 |
| 9. Proactive communication | 7.9 | 8.0 | 8.8 | 7.6 |
| 10. Ease of doing business | 8.2 | 7.7 | 8.1 | 7.5 |
| 11. E-business option | 7.9 | 8.2 | 8.6 | 8.0 |
| 12. Technical support | 7.7 | 6.7 | 6.9 | 5.9 |
| 13. Product range | 6.9 | 7.8 | 7.9 | 7.2 |
| 14. Marketing support | 7.6 | 7.2 | 7.8 | 7.3 |
| 15. Sales force representation | 7.0 | 6.9 | 7.6 | 7.6 |

Source – 100 distributor interviews

Legend : colour codes (as follows)

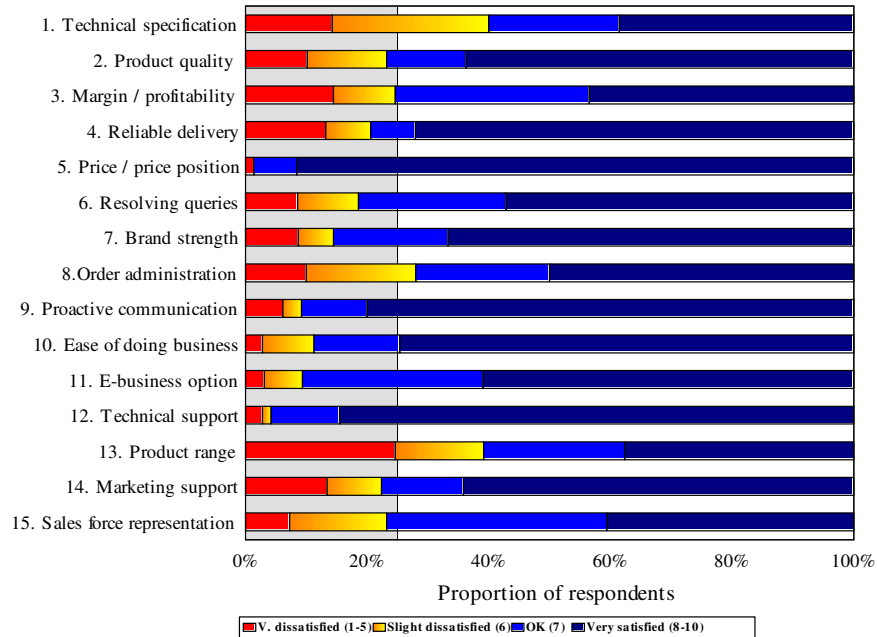
= Supplier ranked highest
 = Supplier ranked lowest

THE CLIENTS PERFORMANCE SATISFACTION LEVELS

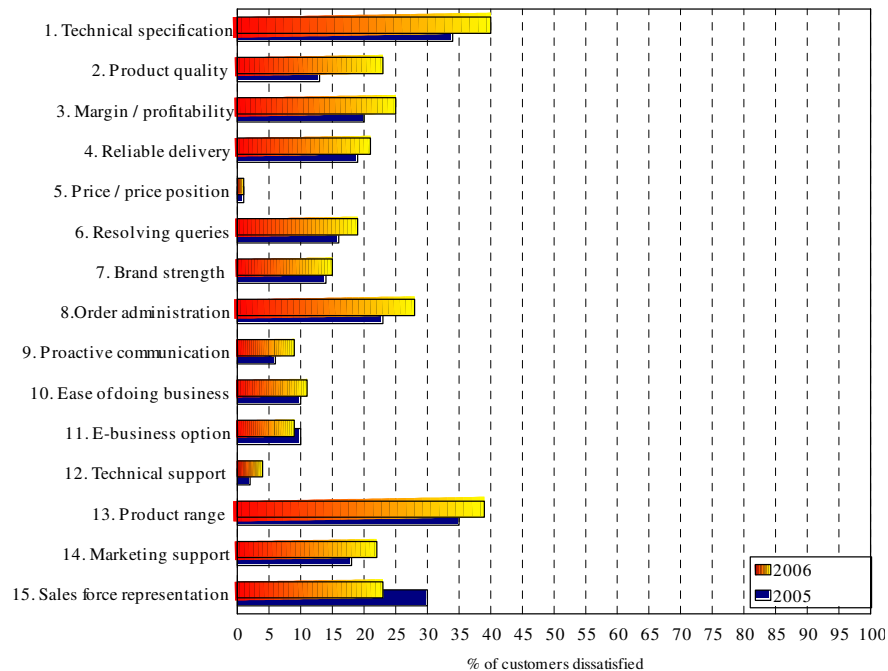
How the clients customer satisfaction level varies for different customer needs

Most respondents were generally quite satisfied with the performance of the client in key areas, the exceptions being product specification, order admin and product range.

The client - level of satisfaction / dissatisfaction in meeting customers' needs



The client – customer dissatisfaction in 2006 compared to 2005



Source – 100 distributor interviews

Table comparing the clients overall performance in 2006 with 2005

| Factor | The client av. rating change 05-06 | The client performance Satisfied (ratings 7-10) % change | The client performance Dissatisfied (ratings 1-6) % change | The client prompted comparison better / worse Last 12 months |
|--------------------------------|---|--|--|---|
| 1. Technical specification | -0.2 | -14% | +14% | better 14% : worse 33% |
| 2. Product quality | -0.1 | -11% | +11% | better 10% : worse 10% |
| 3. Margin / profitability | -0.1 | -5% | +5% | better 7% : worse 3% |
| 4. Reliable delivery | +0.3 | -2% | +2% | better 20% : worse 5% |
| 5. Price / price position | -0.1 | - | - | better 14% : worse 33% |
| 6. Resolving queries | -0.2 | -3% | +3% | better 10% : worse 10% |
| 7. Brand strength | -0.1 | -1% | +1% | better 12% : worse 10% |
| 8. Order administration | -0.2 | -5% | +5% | better 15% : worse 10% |
| 9. Proactive communication | -0.1 | -3% | +3% | better 20% : worse 10% |
| 10. Ease of doing business | -0.2 | -1% | +1% | better 10% : worse 10% |
| 11. E-business option | -0.1 | +1% | -1% | better 20% : worse 15% |
| 12. Technical support | -0.2 | -2% | +2% | better 20% : worse 15% |
| 13. Product range | +0.2 | -4% | +4% | better 10% : worse 30% |
| 14. Marketing support | - | -4% | +4% | better 20% : worse 11% |
| 15. Sales force representation | +0.1 | +7% | -7% | better 29% : worse 7% |

Table comparing the clients overall performance in 2006 with 2005

Note on comments: ↑ = Improvement (i.e. less negative or more positive comments in 2006). ↓ = Worse (more negative or less positive comments in 2006)

| Factor | The client change in net positive comments 2006 vs. 2005 | The client comments Strengths / positive comments and weaknesses / negative comments Key changes – 2006 vs. 2005 |
|--------------------------------|--|--|
| 1. Technical specification | -14 | New product specifications poor ↓ ; technical spec errors ↓ ; WOW specification gap ↓ |
| 2. Product quality | -14 | Quality issues ↓ |
| 3. Margin / profitability | -2 | No change |
| 4. Reliable delivery | +6 | Client delivery daily ↑ ; delivery next day ↑ |
| 5. Price / price position | +19 | Competitors are better (i.e. fewer mentions in 2006) ↑ |
| 6. Resolving queries | +3 | Competitive ↑ ; Client prices have improved ↑ ; Poor price structure / price policies ↓ |
| 7. Brand strength | -22 | Easy to deal with ↓ ; lack of reps ↓ |
| 8. Order administration | -4 | No change |
| 9. Proactive communication | -10 | Easy / no problems ↑ ; ordering online / electronically ↑ |
| 10. Ease of doing business | +19 | Good products ↓ ; |
| 11. E-business option | 0 | No change |
| 12. Technical support | +6 | All supplier have good range ↑ ; Other suppliers range better ↓ |
| 13. Product range | 0 | No change |
| 14. Marketing support | +7 | All suppliers provide it well ↑ ; good personal support ↓ ; |
| 15. Sales force representation | +10 | The client strong ↑ ; |

Focus for future efforts

Many customers interviewed acknowledged the efforts that the client has put in during the last 12 months to address issues of concern identified in 2005, some improvements have been achieved and overall performance ratings remain high generally.

However, one area of major concern is the deterioration in the technical specification of the new product range launched in the spring, targeting the chemical and steel sectors. Specification is the number 1 buying issue of importance, and if product does not meet the required technical specification, customers usually change immediately to another brand, hence losing sales for the client organisation.

There are two other areas where dissatisfaction is high (the same three as 2005), although there appears to have been a slight improvement in marketing support, but dissatisfaction is about the same level as last year for proactive communication and business development support.

The 3 key areas where actions should focus in the next 12 months are summarised below, in approximate order of priority, highlighting key issues of concern.

Area of primary importance

Technical specification

40% dissatisfied (14% very)

12 month trend - WORSE

- Specification gaps in new Wonder oil widget (WOW) product (10 comments)
- Specification poor (9)
- Oil cooled widget problems (8)

Areas of secondary importance

Order admin

28% dissatisfied (10% very)

12 month trend - SAME OVERALL

- Slow processing / sorting problems (7)
- Poor communication (5)

Product range

38% dissatisfied (16% very)

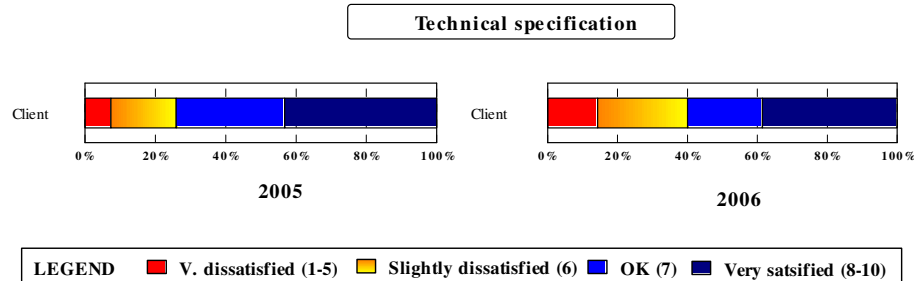
12 month trend – WORSE

- Oil cooled widget range is weak/ has gaps (8)
- Other competitors range is better (4)

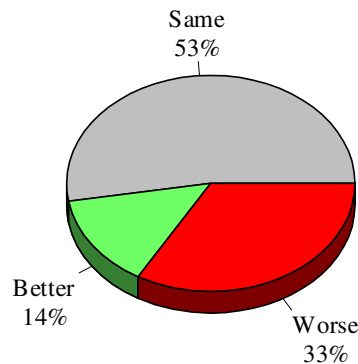
DETAILED VERBATIM COMMENTS ON CLIENT PERFORMANCE

1. Technical specification

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (30)

Good specification (15) – The client (9) majority of widgets are a good specification **S/c**; The client (8) they've got it right in the past **S/c**; The client (9) there are no specification issues in 99% of cases, the products are technically sound **S/c**; The client (9) never a specified widget I couldn't get **F/c**; The client (8) I can get what I want **C/c**; The client (9) I rarely have problems when I order bespoke specifications **F/c**; The client (8) no specification problems **S/c**; with the client (8) we have no problems **S/c**; The client (8) they are all very good but I have occasional problems **S/c**; The client (8) they have 85% of what we need **S/c**; The client (8) not aware of any problems **S/c**; The client (8) all very good **S/c**; The client (10) it's been pretty good in the past **F/c**; The client (10) there have not been obvious problems in terms of technical specification **U/c**; The client (9) no problems **S/c**; The client (9) specification is good across all key suppliers **S/c**;

Acceptable performance - (10) The client (8) occasionally problems with spec but nothing regular **F/c**; The client (8) they are OK **S/c**; The client (7) when there are problems, they let us know, and generally, we get what we need **S/c**; The client (7) specification is quite good from the client **C/c**; The client (7) generally speaking, they are all much the same in terms of this **S/c**; Generally OK **S/c**; The client (7) good specification most of the time **C/c**; The client (7) in general, we don't have too many problems, with anyone **U/c**; The client (7) fairly good **U/c**; The client (7) all have occasional specification problems **C/c**;

Miscellaneous (5) - The client (8) products are more sophisticated than Competitor A (7) **C/c**; The client (8) there's such a big range you can get a wider variation of specs **F/c**; The client (8) it's not as great an issue as proactive communication and sales representation are **C/c**; The client (8) has a widget to meet most of the specifications that our customers are looking for **C/c**; The client (7) is usually very good but there have been problems **U/c**;

NEGATIVE COMMENTS – (32)

Specification gaps in new Wonder oil widget (WOW) product (10) - The client (7) have quite a few problems with the WOW specification **F/c**; The client (5) launched the new wonder oil widget before it was fully developed, which caused us a lot of headaches **F/c**; I heard through a sister company that the client's (3) new WOW range isn't all it claims to be, so we went for a similar slightly downmarket product from competitor C (7) – a pity **F/nc**; client (6) – the new WOW product didn't meet our specification criteria **F/c**; the so called wonder WOW is a real OW – had a lot of specification detail problems **U/c**; client (7) I tried the new WOW, but had problems in meeting the spec, so we went back to using Competitor B (8) BOW WOW widget **S/c**; Client (6) – weak specification detailing (WOW range) **F/c**; Don't like the external ridging design of the Client (5) WOW range **F/c**; client (6) WOW product – rather poorly designed **F/c**; We sold the Client (4) new WOW product to several clients, but most had to be replaced after 3 months because of design flaws – this should have been sorted out before they launched the product **U/c**;

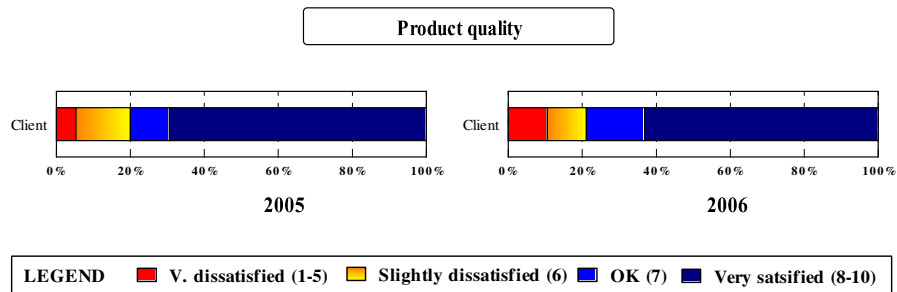
Specification poor (9) - The client (5) they don't always have the spec we require **F/c**; The client (4) they just haven't got the variety of specs **S/c**; The client (7) when you ring up and order they've not always got the product to meet your specification **S/c**; The client (4) they don't have it **S/c**; The client (7) not always available when we want **C/c**; The client (2) they never have the spec **S/c**; The client (4) we would order many more widgets from the client if specification could be improved **S/c**; The client (5) for some reason, specification has been shockingly poor **U/c**; The client (5) there have been some serious issues in the last few months, just don't seem to have the technical knowledge **C/c**;

Oil cooled widget problems (8) - The client (5) the specification for oil cooled widgets is very poor from all suppliers **U/c**; **The** client (5) I realise there are problems with oil cooled widgets from all our 3 main suppliers at present **U/c**; The client (2) product specification is poor across all three oil cooled widget products **U/c**; specification of client (5) oil cooled widget not up to scratch **U/c**; O-C widget specification problems – again! **U/c**; Client (7) didn't react very well when we had problems with the oil cooled 25mm Z-range (oil cooled) widget – a bit disappointing really **F/c**; client (6) – oil cooled widget specification failures on the 25mm and the 30mm range **F/c**; The client (3) – totally let us down when the Z-25 widgets failed the specification criteria – right in the middle of a major contract – cause us no end of problems and we still haven't resolved the issue after 6 months! **U/c**;

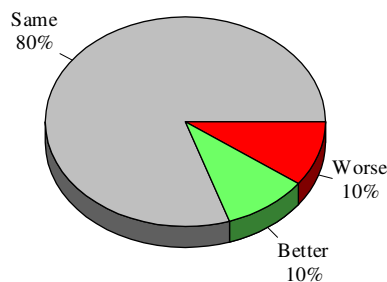
Miscellaneous (5) – The client (4) a weaker range of widgets and products than Competitor D (5), **S/c**; The client (2) I just don't think they are market reactive **U/c**; The client (2) did really well for a while, then we started to have a lot of problems **C/c**; The client (7) the problem is the people in R+D I think **F/c**; The client (7) a slight improvement but there have been specification problems **F/c**;

2. Product quality

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (35)

All single widget brands similar high quality (18) – The client (8) there is very little difference between the single widget brands **S/c**; The client (10) top quality products, there is never any complaints about them **S/c**; The client (8) no difference **F/c**; The client (9) all single widget brands similar **S/c**; The client (10) all these brands you get very, very little problems, the occasional one or two **F/c**; The client (9) they are all pretty high, can't really fault anyone **S/c**; The client (8) not too much to choose between them **F/c**; The client (8) I think they are all the same, you can't fault any of them **S/c**; The client (10) there's nothing wrong with the quality of any of them **C/c**; The client (8) I class them all as an even quality product, it's the way it's marketed and how the end user perceives the product, none are considerably better than others **F/c**; The client (10) all single widget brands offer top quality **S/c**; The client (9) all single widget brands have similar quality **S/c**; The client (9) there is no difference in quality **S/c**; The client (10) all supply top quality single widget **U/c**; The client (10) all the single widget brands offer top quality **S/c**; The client (10) all single widget brands, no quality issues **S/c**; The client (9) they are all good quality products **F/c**; The client (8) they are all virtually as good as each other, they are all well designed **C/c**;

Good reliable quality (11) - The client (8) they are quality, the way they are made and their performance **S/c**; The client (10) they are reliable **S/c**; The client (10) spends a lot on technical innovation, I believe them to be the best quality of manufacture **S/c**; The client (8) we have not had any quality issues for several years **U/c**; The client (7.5) quality is good for them **F/c**; The client (10) there's nothing wrong, the plastic widget is made perfect, no hassle **F/c**; The client (10) all are top quality **S/c**; The client (8) in terms of quality, value for money and the complaints I don't get, customer satisfaction is high and trouble free **S/c**; The client (10) good, reliable widgets **F/c**; The client (10) it never lets you down as a product and it says what it's going to do on the widget **S/c**; The client (8) I can't find fault with the quality, only competitor X (6) is not as consistent **S/c**;

No / very few complaints (5) - most widgets these days you don't get many complaints, they are all pretty good **S/c**; The client (8) have very few problems **S/c**; The client (9) my knowledge of them, my experience, minimal complaints **S/c**; The client (9) we have a lot of customer satisfaction with the client, get very few complaints, they are a good widget **S/c**; The client (10) we've sold them for so many years we don't get complaints about them but we do get a lot of problems with Competitor B (5) widgets **S/c**;

Miscellaneous (1) - The client (9) they spend a lot of money on R & D, the market leaders **S/c**;

NEGATIVE COMMENTS – (25)

Client widget quality problems (10) - The client (4) we have massive quality problems with the client **S/c**; The client (7) their finish is a bit poor, a few come back under the complaints procedure, it doesn't look as good (the product) **F/c**; The client (3) often have problems **S/c**; The client (8) room for improvement in everyone, the client has been very late in bringing in an oil cooled widget **S/c**; The client (2) poor quality **S/c**; The client (7) could be better **U/c**; The client (4) poor quality **C/c**; Inconsistent quality of client (6) widgets **F/c**; Quality of Client (6) widgets has been poor recently **U/c**; Widget finish problems from the Client (5) that should have been sorted out by now **F/c**;

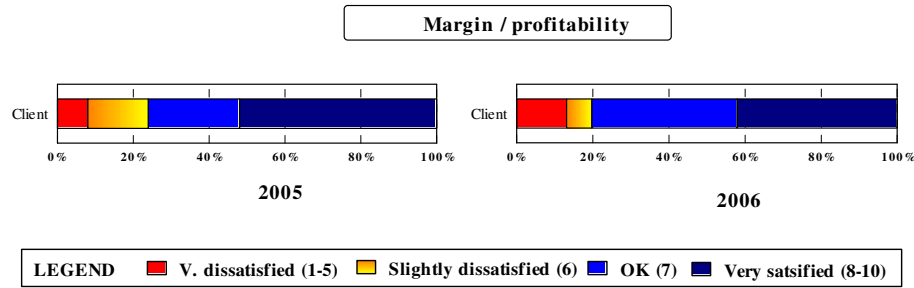
Competitor has better quality (6) - The client (8) all single widget brands have a good quality but Competitor A (9) has still slightly the edge **S/c**; The client (7) a reasonable quality plastic widget but competitor C (8) is better **F/C**; The client (7) never been any dips in Competitor B's (10) quality as there have been, occasionally, with the others **S/c**; Competitor C (10) I've never had a problem (steel processing) with them **S/c**; The client (8) from experience they're not as good as a Competitor A (9) **C/c**; The client (7) OK but Competitor X (10) has superior quality **S/c**; The client (8) may be only a perception thing, but I feel Competitor C (9) is the stronger product **U/c**;

Product recall on air cooled widgets (5) – Client (5) has a problem in the summer and had to recall 200,000 A-C widgets – we had loads of problems sorting that out! **F/c**; client (4) – all due to the A-C widget recall – need I say more? **F/c**; Client (6) – had to recall the ZA-C widget range – fortunately we hadn't sold many so we weren't affected as much as others **U/c**; I heard that the client (6) had to recall all their Z-class A-C widgets – what a mess **F/nc**; we had to return half our client (5) A-C stock and replace those we'd already sold – a nightmare really **S/c**;

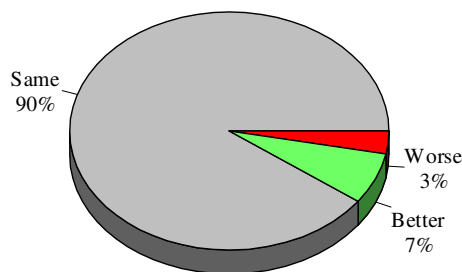
Miscellaneous (4) – some product issues I heard from colleagues in the food industry **F/c**; quality problems again! **U/c**; I think they had a rogue batch of thermoset plastic that caused quality problems in the food industry **F/nc**; I don't handle the quality side (you need to talk to our QC department, but I understand there have been some quality issues this year **S/c**;

3. Margin / profitability

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (26)

Buy at the right price / good margin (7) – The client (8) we buy them quite well so there is a better margin on them when we sell them **S/c**; The client (8) because the margins are quite good, the prices are right, we do good deals with them **F/c**; The client (10) we get the best price so the margin is better for us **S/c**; The client (9) what we sell at we do make a good healthy margin **S/c**; The client (8) we can achieve a good price from them, we are happy **C/c**; The client (9) profitability really **F/c**; The client (8) widget prices are stable but not our overheads, which go up all the time **S/c**;

All suppliers similar (7) - The client (8) they all have the same mark up **C/c**; The client (8) I personally have no problem in this regard with any of the manufacturers, they do the best they can I think **S/c**; The client (8) we get a good deal from all manufacturers **S/c**; The client (8) generally, overall, they are much the same **U/c**; The client (8) similar margins, as far as I can tell **S/c**; The client (7) all much the same, what I would call fairly good, could always be better though **U/c**; The client (8) our margins are similar for all brands when we ignore special deals which are offered by all manufacturers **S/c**;

High volume at good price from the client (3) - The client (8) they have got deals they are able to negotiate on pricing, on quantities **F/c**; The client (9) I buy the product better in the first place, we buy a lot of widgets from them **C/c**; I get good price from the client (9) because of the volumes we buy **C/C**;

Good term & conditions (2) - The client (10) gives us very good conditions which help with our profitability **F/c**; The client (10) I get preferential terms **S/c**;

Miscellaneous (7) - The client (7) I think the client has been doing some work on their pricing, margins etc during the past few months **U/c**; The client (7) the product creates it's own profit, in it's market place **S/c**; The client (7) my margin is fixed to a certain extent, built into the buying cost **S/c**; The client (8) we buy on a net price and put our own profit on **S/c**; The client (7) historical

negotiated deals allow this **C/c**; The client (7) we make up our own prices based on what we buy at **C/c**; The client (8) they have tried I think, to accommodate us so that we can improve our margins **U/c**;

NEGATIVE COMMENTS – (23)

Other brands are more profitable (8) - The client (7) very little margin to play with **U/c**; The client (5) we have better margins with Competitor A (8) **C/c**; The client (6) margins with the client are not as good as with other brands, prices from the client are very inconsistent **S/c**; The client (2) are dearest **S/c**; The client (7) again, they are probably just not as good as others, although they are, perhaps, improving **U/c**; The client (7) would have to look at the books to be sure but I feel that the margin on the client is not quite as good as the others, not sure why that is **U/c**; unfortunately the client (5) is on the expensive side, probably as a result of being the brand leader for oil cooled widgets **S/c**; The client (7) we had some special deals from the client at the beginning of the year but they were not renewed and other are now better positioned **S/nc**;

We don't buy at the right price (4) - The client (5) it's to do with their pricing structure **F/c**; The client (3) they've pushed up prices **C/nc**; The client (5) their pricing, we are a bit too high, in my opinion **S/c**; The client (5) at the moment, for various reasons, I think the client is trying to keep brand perception high by keeping price range high, a mistake **U/nc**;

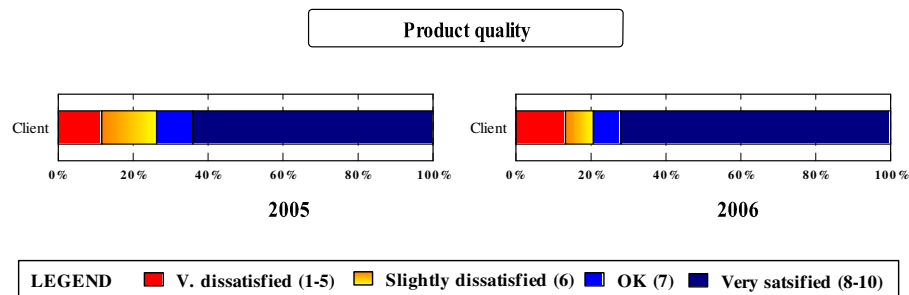
Inconsistent pricing (4) - The client (5) our profitability is negatively affected by the fact that the client has very inconsistent pricing **S/c**; The client (7) they need to control the Chinese import market **S/c**; The client (6) the profitability of the clients margin is negatively affected by inconsistent pricing **S/c**; The client (5) you never know where you are with them on price, and customers perception is such that the client performance is not the same as Competitor X (8) **C/c**;

The client margins poor (3) – The client (6) the differential in the price of them **C/c**; The client (5) margins are very poor **U/nc**; The client (6) we don't stock them anymore because of price and margin issues **C/nc**;

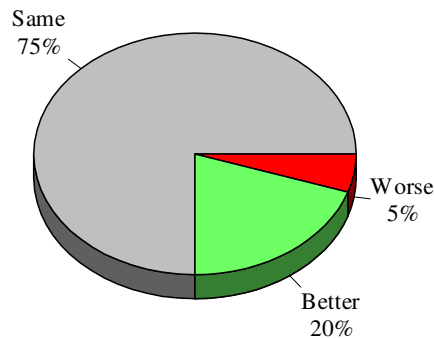
Miscellaneous (4) - The client (7) because if I buy the client normally I'm selling it against a price **F/c**; The client (7) the end result is poor **F/c**; The client we do not receive particularly good deals from them (6) **S/c**; The client (7) all similar (low margin) **S/c**;

4. Reliable delivery

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (30)

Client very reliable / no problems (10) – Client (10) you can guarantee you'll get the plastic widgets at that time, gives us confidence with our customers **F/c**; Client (9) use a 3rd party delivery service **S/nc**; Client (10) I know they'll arrive that day, or they can trace the vehicle for an ETA if we ask them **S/c**; Client (8) very reliable **S/c**; The client (8) rare mistakes and they normally arrive on time, it's the same driver and he looks after you **F/c**; The client (10) I've never had any that haven't come **F/c**; The client (7) if they say it's coming it's coming **F/c**; Client they've never let me down **S/c**;

Quite reliable (8) – Competitor C (9) is just that bit more reliable, if we ask for a particular time of delivery they can always accommodate us, The client (8) are not bad, but they could do with more flexibility **F/c**; The client (8) generally there when they say **C/c**; within the usual constraints, there are sometimes problems, so no-one is 100 percent **U/c**; The client (7) they do come when expected but the problem is supply **U/c**; Client (9) it is quite good, we are pleased with it **C/c**; Client (9) no problems **S/c**; Client (9) they do turn up, usually a complete order too **C/c**; The client (8) they are, on average, reliable, when there is a problem it is usually not their fault, sometimes held up by an unforeseen problem **S/c**;

All suppliers very good (6) - Client (9) all excellent **U/c**; The client (7) all reliable **S/c**; The client (10) recently Competitor B (6) has been short on some deliveries, but there are no problems with the others **F/c**; The client (8) Competitor Z (8), they are always reliable (The client) and Competitor A (8) **S/c**; The client (8) all reliable **S/c**; The client (7) generally deliver when promised **U/c**;

Miscellaneous (6) – The client (10) they do turn up at the same time, but it's not regular enough **F/c**; The client (7) they all come with the same courier **S/c**; The client (10) a better picking system

F/c; The client (9) usually delivers when it says once out of 20 they don't come on the expected day, **C/c;** The client (9) give a good service **F/c;** The client (8) only order once every few months or so from the client **F/c;**

NEGATIVE COMMENTS – (17)

Unreliable deliveries (7) - The client (5) the reliability have gone down in the last few months **F/c;** The client (6) not satisfied with the client at the moment, over the past few weeks we had several delivery problems **U/c;** the client (6) delivery service is currently completely unreliable **C/c;** the client (6) sometimes it doesn't turn up, they don't always let us know **S/c;** The client (6) not as reliable as we would like, don't always turn up when they say they will, come sometimes a day later, again, I think there are carrier problems **S/c;** The client (3) it happens quite frequently that promised products are not delivered on time **C/c;** the client (6) has failed to deliver products and did not inform us **U/c;**

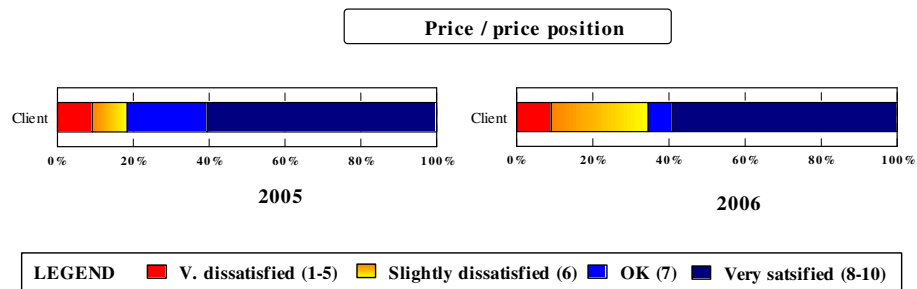
Product delivery mistakes (4) - the client (4) we get wrong deliveries. Delivery is by unqualified 3rd party personnel, happens 2 or 3 times a quarter, reflects badly on me **S/c;** The client (7) incorrect deliveries sometimes, not always the right quantities, but that happens **U/c;** the client (5) is extremely unreliable especially over the past few months, we get the wrong products **F/c;** the client (5) a container sometimes has other customers orders in it. **S/c;**

Order shortages (2) – The client (7) you get the odd shortage, can't let me know in advance it will be short, human error **C/c;** the client (6) we get short orders, we just get what we get, they don't let us know the order will be short **F/c;**

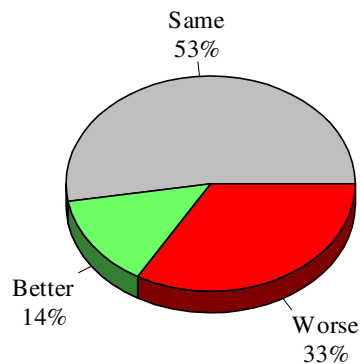
Miscellaneous (4) - the client (2) we really don't know where we stand with them, they don't communicate with us **S/c;** The client (6) was reliable till recently, more to do with the delivery company, Quick Quick Delivery (QQD), not good, deliver late **U/c;** The client (6) technical problems in the warehouse, means lost sales or buying elsewhere **C/c;** The client (5) rotten at the moment **U/c;**

5. Price / price positioning

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (37)

Good competitive prices (16) – The client (9) very competitive **S/c**; The client (9) we are getting a good deal from The client **S/c**; The client (9) is very well positioned **C/c**; The client (10) they are a leading brand at a sensible price **F/c**; The client (9) look after us well, we get good prices **C/c**; The client (8) we've dealt with each other for so long that we know where price needs to be for our mutual benefit **S/c**; The client (9) for what you pay you are getting good product spec **S/c**; The client (8) are probably on a par with Competitor A (8) **U/c**; The client (9) the best of the lot, their prices are keener **F/c**; The client (9) is pricing it's products just right **S/c**; The client (9) for the quality of the product they are priced very well, especially in the chemicals sector **C/c**; The client (10) we are guaranteed best price from the client **S/c**; The client (10) we rate them higher because we are able to get more competitive prices **S/c**; The client (10) is really good value **F/c**; The client (9) is probably better than most **S/c**; The client (7) may be cheaper than the others, but more cut throat pricing because there is less margin to play with **U/c**; The client (8) are there or thereabouts **C/c**

The client pricing has improved (7) - The client (7) has improved quite a lot, they seem to be trying very hard to be quite competitive **S/c**; The client (9) they have tried hard to improve the pricing, it's pretty good now **U/c**; The client (10) is priced more aggressively to push it into the market **U/c**; The client (9) definitely spent some time considering prices, and this has helped push them forward this year **U/c**; The client (8) has come down a bit in price I think **U/c**; The client (8) they've reduced prices so they can be competitive **F/c**; The client (9) has just started picking up this year as a result of a new pricing structure **F/c** I think both the client (8) and Competitor A (8) have adapted their prices during the past year or so **U/c**;

Compares favourably with competition (4) - The client (8) reflects accurately where they are in the market **S/c**; The client (8) is very competitive **F/c**; The client (7) all on a par **S/c**; The client (7) actually they are all about the same, they are all competitive **S/c**;

Flexible pricing policy (2) - The client (7) I can negotiate prices with the sales teams, other suppliers are more inflexible **C/c**; The client (8) is more willing to negotiate special deals **S/c**;

Miscellaneous (8) - The client (10) I'm a franchisee, I get a good service **S/c**; The client (9) we are very satisfied with the conditions we have **S/c**; The client (8) variable pricing, up and down, **F/c**; The client (7) I buy where I get the best deal **F/c**; The client (9) at the moment they have got two different price structures **F/c**; The client (7) the only one I would rate outstanding here is Competitor Z (9) because they are new to the widget market they are priced very well **S/c**; The client (9) we buy a lot off the client at the moment because we can get them at a very good price **S/c**; The client (10) because we sell so many of them and that's the acid test, its what you sell that counts **F/c**;

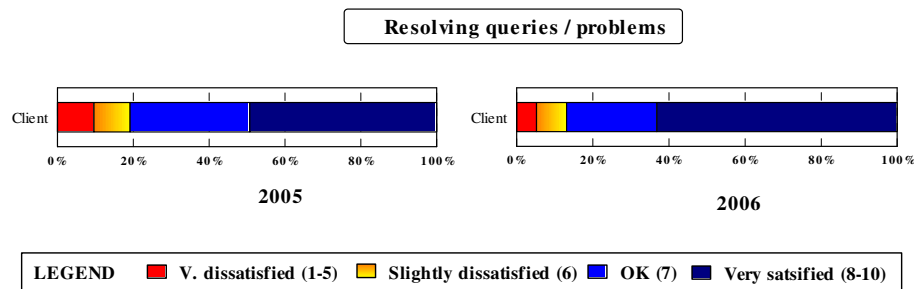
NEGATIVE COMMENTS – (12)

Expensive (7) - The client (5) is high on price **S/c**; The client (7) more expensive than Competitor A (10) **F/c**; The client (7) they are always pushing price, getting greedy **C/c**; The client (6) they are all getting expensive, due to their increased costs **C/c**; The client (6) widgets are too expensive **C/c**; The client (6) they are higher priced, not really worth the higher price **S/c**; The client (5) at the moment, for various reasons, I think the client is trying to keep brand perception high by keeping price range high, a mistake **U/c**;

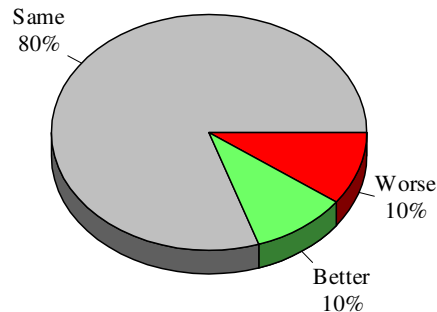
Miscellaneous (5) The client (7) we are always looking for perfection in pricing **S/c**; The client (7) is more affected by the end users **S/c**; The client (7) the price positioning is OK but not good **C/c**; The client (6) are less competitive than one year ago and as a result lose business to other manufacturers **S/c**; The client (5) they make it up as they go along, they'd like to price themselves the same as Competitor A (9) and they'll do that for a month until they don't sell the widgets and then they drop the price **C/c**;

6. Resolving queries / problems

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (34)

Very responsive / quick (12) – The client (10) they are very good, dealt with very quickly and acted upon **U/c**; The client (10) any queries and they'll get to the bottom of it **S/c**; The client (7) dealt with quickly, I can't complain when we do have queries **S/c**; The client very responsive **F/c**; The client (8) is more responsive and we have much less problems **S/c**; The client (9) most queries can be resolved with one phone call **S/c**; The client (8) also high, good response **U/c**; The client (9) because we deal directly with them thing gets done faster **S/c**; The client (8) respond quickly to resolve things **U/c**; The client (10) Freddie Fixer makes all the difference he makes sure that problems are addressed quickly **S/c**; The client (9) we are very satisfied with Eddie Eager, most problems get solved very quickly **C/c**; The client (7) make less so it's a knock on affect and sorting out problems is less difficult and they resolve problems relatively quickly compared to other companies **F/c**;

Few problems / queries to resolve (11) - The client (9) I have very few problems **S/c**; The client (9) we don't have any problems, there's nothing to resolve **F/c**; The client (8) very rare, we have anything **S/c**; The client (7) can't really comment, don't have many queries, but it is available and it works **U/c**; The client (8) is more responsive and we also seem to have less queries with them **S/c**; The client (8) have had very few problems and don't recall any issues regarding this **U/c**; Rare to have problems, but they are usually sorted out immediately **S/c**; The client (7) we have occasional issue with all of them but nothing major **S/c**; The client (8) we can just communicate, there's a willingness to resolve, compromise even, but it's very rare **F/c**; The client (8) no problems, they are really good, my contact (David Givemore) is clued up on the phone **F/c**; The client (8) when we have problems, help is usually available, we don't have that many problems outside of the odd technical query **U/c**;

Satisfied (3) – The client (8) they seem efficient at sorting things out **S/c**; The client (9) we get satisfaction from our man (Eddie Eager) not once but every time **F/c**; The client (9) no problems **U/c**;

Helpful / show interest in sorting it out (3) - The client (10) the accounts department are really good, if there's a problem they are interested in sorting it out **F/c**; The client (8) we have a better relationship with the client and they are more interested in our company **S/c**; The client (7) not had many opportunities to contact them, but they do try to help, where there is a problem to be dealt with **S/c**;

Miscellaneous (5) - The client (10) no waiting **S/c**; The client (8) the staff, our rep (Eddie Eager) and Freddie Fixer in the order office is fairly good and a personal rapport has built up over time **F/c**; The client (8) very good but I think they need to have a few more staff members available in this respect, it's usually technical problems that we have, **F/c**; The client (9) they've always been good, certain people were not as sympathetic and didn't get a grasp of your enquiry, that is changing **F/c**; The client (8) we have constant contact with their senior sales people in Newport, they visit us regularly, we feel appreciated **C/c**;

NEGATIVE COMMENTS – (16)

Slow to respond / sort things out (5) The client (5) very slow in responding to queries, unless the sales rep takes care of it nothing happens **U/c**; The client (7) we can't always get people, they are on voice mail and don't respond to messages, **S/c**; The client (6) you get a lot of voice mails and often they don't ring back, and we are very busy here, it's as though they have a right **NOT** to call back, a longer process than it needs to be **S/c**; The client (4) they don't do anything, we have keep chasing them and their standard answer is 'can you fax it?' and after 3 faxed attempts I leave it, don't have the time **C/c**; The client (4) when you phone someone it is no reply, and voice mails, easier to contact **HO S/c**;

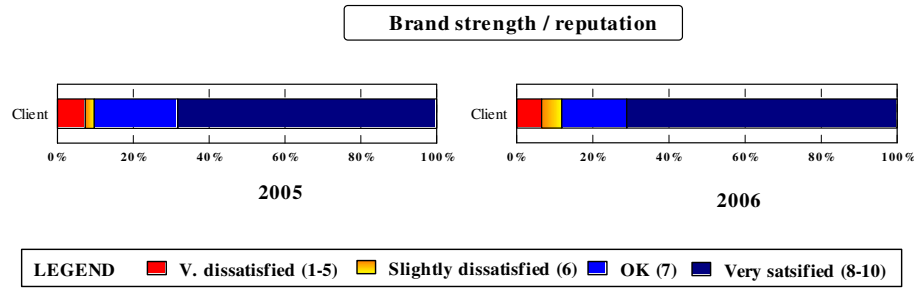
Difficult to get hold of right person (4) - The client (7) trying to get hold of someone can be a problem, they are always on voice mail **S/c**; The client (5) the time it takes, get passed around a lot, never ring you back, an account, you do need someone you can contact, would be nice to have an a/c manager, reps can play this role **C/c**; The client (6) there's too many people to contact, can get passed around, too many separate departments, not sure which one to contact, can be time consuming, would prefer one point of contact **C/c**; The client (6) everyone is fair but not diamond sharp, you get fobbed off, only persistence gets you there in the end **S/c**;

Disorganised (3) - The client (5) still some things they could do, they do listen and they do try but you get the feeling there are still a few things that need sorting out back in the office, like who is in charge of sorting out A and who is in charge of sorting out B, proper delegation **S/c**; The client (6) don't seem to be organised, not very good at this, nothing happens **U/c**; The client (6) rep gives me a price but it's a different one on the invoice, with the client poor communication in-house lead to a lot of unnecessary phone calls trying to resolve a problem, we have very few if any problems with Competitor A (9) **C/c**;

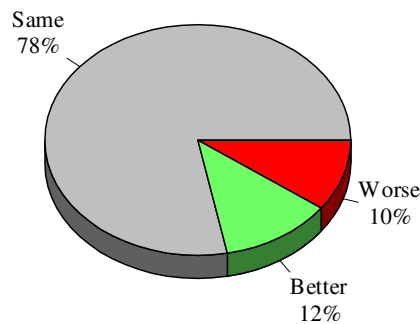
Miscellaneous (4) - The client (7) need chasing a bit more **C/c**; The client (7) the lack of personal rep contact, you have to go into it, they don't know you, it's more long winded **F/c**; The client (6) always seem to have problems with invoices, but I think they are getting a bit better at dealing with them **U/c**; The client (7) all suppliers need to improve, the key is to solve problems quickly, problems with billing should be solved within 24hours **C/c**;

7. Brand strength / reputation

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (43)

Strong established brand (12) – The client (10) brand awareness with customers **S/c**; The client (8) a well established brand **S/c**; The client (8) it's a perceived thing, something you see a lot about, their advertising is strong enough to bring it to mind **F/c**; The client (10) it's just a long established company **F/c**; The client (10) are a well established brand **U/c**; The client (10), they are the leading brand in the UK but Competitor B has also a very strong position **U/c**; The client (10), 1st brand that comes to mind **S/c**; The client (9) is the leading brand in the UK **S/c**; The client (7) been around for a long time so brand knowledge is good **U/c**; The client (7) is well known **S/c**; The client (8) since they pushed the single widget brand **C/c**; The brand is known by everyone, they have been around for so long - strong recognition of brand **S/c**;

All brands similar (9) - The client (8) all single widget brands are similar **F/c**; The client (8) all single widget very similar **U/c**; The client (8) there is no difference between key players **C/c**; The client (8) all similar now, the brand strength of the client used to be superior in the UK but the others have caught up **C/c**; The client (8) really there's nothing between them but the customer perception is that Competitor A (9) is rated slightly higher than any other **S/c**; The client (7) all much the same **S/c**; The client (10) all brands have strong reputation with customers **S/c**; The client (7) all brands have a relatively strong reputation **U/c**; The client (9) all double widget brands similar **S/c**;

Good products (5) - The client (8) I know the product well and have confidence in selling it, there are no problems selling it **S/c**; The client (9) quality superb, **F/c**; The client (8) been around a long time, you know the product will perform **C/c**; The client (9) their acceptance in the market place **S/c**; The client (8) the quality is good **S/c**;

Good reputation (4) – The client (7) the reputation quite strong, compared to other brands, they have endured **S/c**; The client (8) and Competitor C (7) both have a stronger reputation than

Competitor X (5) **S/c**; The client (8) think their reputation has started to climb again, they had a bad patch, but they definitely seem to be over it now **U/c**; The client (8) can't argue with their reputation, quite solid whatever problems the company has been having **S/c**;

Loyal customers (2) - The client (9) probably just in terms of general support for the brand, it has a fairly loyal following **U/c**; the client (8) because of our loyalty for them, over 30-35years **S/c**;

Miscellaneous (11) - The client (8) but they could promote themselves better **S/c**; The client (9) always doing research, updating the product **S/c**; The client (9) they are manufacturing in 4 different parts of the world **F/c**; The client (9) does a lot more advertising and they've been in the UK longer and on quality people talk more about them **C/c**; The client (8) brand and product are good but they are not an easy outfit to work with **C/c**; The client (8) their range is better than Competitor A (7) but they are not as competitively priced as Competitor C (9) **F/c**; The client (8) is good but not a high performance product in the steel sector **S/c**; The client (9) because their whole package is good **F/c**; The client (8) we have a lot more demand for them, so we have a lot more to do with them **S/c**; The client (9) I deal with them everyday, I know them well **S/c**; The client (8) historically it did not have exceptionally good name, but they are now emerging as one of the top due to the fact that they are concentrated on getting market share, will do whatever they need to do to get their market share **U/c**;

NEGATIVE COMMENTS – (10)

Staff turnover (2) - The client (2) their reps are constantly changing and they never know anything **S/nc**; The client (6) we used to do a lot of business with them, in fact I suppose we still do but with all the management changes that have taken place, it's really fallen to pieces, you don't really know who you are dealing with anymore, things change on a daily basis **U/c**;

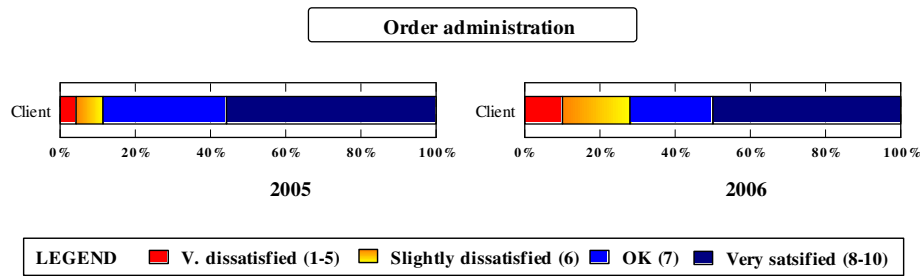
Lack of market demand (2) - The client (6) - not a brand people ask for **U/nc**; The clients (5) because there's not generally demand **F/nc**;

Poor reputation (2) - The client (6) has not got a good reputation in the chemicals market **C/nc**; The client (7) but Competitor A (9) has a better reputation, supply seen as been better **U/c**;

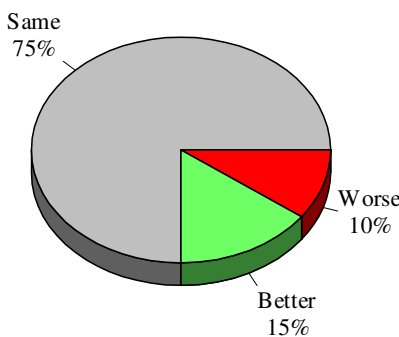
Miscellaneous (4) The client (6) at the moment they have not stepped their pace up, a lot of old product, there's duplication of product **F/c**; The client (7) I think they are struggling at the moment, my own perception, the market is flooded with competition, good competition **S/c**; The client (8) has had a few hiccups in the past **U/nc**; The client (7), I don't think the brand is as strong as it used to be **C/nc**;

8. Order administration

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (21)

No problems (14) – The client (8) no problems **S/c**; The client (7) no real hassles **S/c**; The client (9) they get it right more often **F/c**; The client (10) I can still do a fax on a Saturday, it's processed Monday and it comes in Tuesday, it's reliable **F/c**; The client (8) they all have occasional errors in the paper work but generally this is not a problem area **S/c**; The client (8) no issues **S/c**; The client (9) no problems at all **S/c**; The client (7) in general, things work quite smoothly **U/c**; The client (9) I have not been told of any problems **S/c**; The client (10) always accurate and on time, everything comes with the deliveries **S/c**; The client (9) no problems **S/c**; The client (9) efficient, we don't have any errors **S/c**; As far as I know there are no problems with this **S/c**; The client (7) all in order, on those few occasions **S/c**;

Clear / straightforward paperwork (5) - The client (10) all on the advanced delivery notes, so we hit the button and it's there **S/c**; The client (9) it's all documented and priced up the day after I get the product **F/c**; The client (10) very clear and straight forward invoicing procedure I'm happy **F/c**; The client (8) all straight forward **S/c**; The client (9) we have interlinked systems, goods received notes are automatic **S/c**;

Not had any complaints from staff (3) - The client (8) I don't really know, I don't deal with this, as far as I know they all good, we rarely have problems, at least not that I hear of **S/c**; The client (9) don't deal with it personally, but no complaints from the staff **U/c**; The client (7) I am not involved in looking at paperwork but I have not heard any complaints **S/c**;

Miscellaneous (5) - The client (8) and Competitor A (9) are always bang on and correct, never have to raise a credit note, but it can happen with the client although they are very good **S/c**; The client (8) the delivery notes are OK, I can't comment about invoices because I don't see them **C/c**; The client (7) that we deal with here, no real problems **U/c**; The client (9) price quoted is the one on the invoice **C/c**; The client (8) I don't handle much paperwork, we just get an advice note, a delivery note, which gives the basic information i.e. what, how many etc **U/c**;

NEGATIVE COMMENTS – (18)

Slow processing / sorting problems (7) - The client (8) takes too long for problems to be sorted out **C/c**; The client (4) worst in the industry resolve problems **S/c**; The client (6) have to chase them to sort out problems **S/c**; The client (6) very slow to process orders **U/c**; The client (5) very slow to sort our problems with orders **C/c**; The client (6) can take months to sort out problems, this is not good enough **C/c**; The client (6) slow compared with Competitor A (8) who are much more helpful **F/c**;

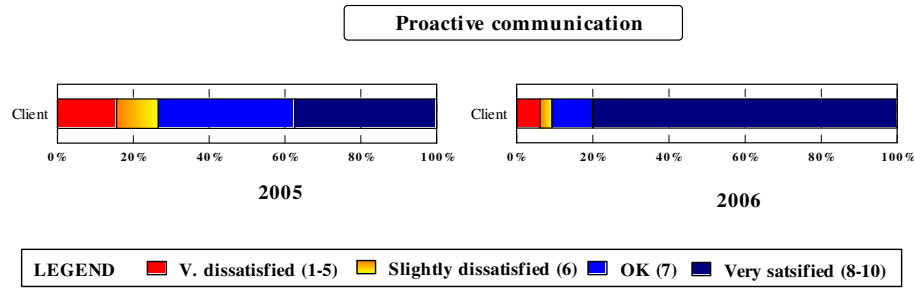
Poor communication (5) - The client (6) they should improve their communication systems to help us, too many different methods of communication exist **C/c**; The client (4) there are a lot of problems because we are not informed about price increases in a timely manner **C/c**; The client (7) we have picking errors which need to be addressed **F/c**; Communication from the client (6) is very poor **F/c**; The client (5) is very slow to communicate **F/c**;

Deliveries notes don't have prices on (2) - The client (7) we would like to see the prices included in the delivery note, all other widget suppliers do it **F/c**; The client (6) we would like to see cost price included in delivery notes, the invoice should be delivered together with delivery note **S/c**;

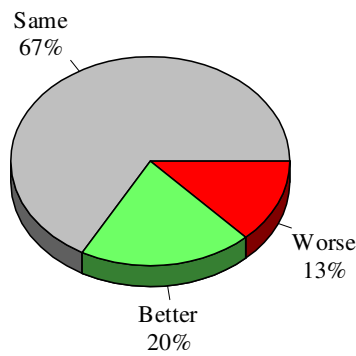
Miscellaneous (5) - The client (6) because they are not as switched on as other people **F/c**; The client (7) I wish they'd accept the fact that I moved here 18 months ago, paperwork can go astray but the deliveries have got it right, must have different departments **C/c**; The client (6) they are reasonable, I don't really see much of the paperwork **U/c**; The client (7) they all have room for improvement **C/c**; The client (6) generally not as efficient as Competitor X (9) **U/c**;

9. Proactive communication

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (34)

We are kept up date (16) – The client (8) we can really rely on the sales rep, he keeps us well informed **C/c**; The client (8) I know most of them in the call centre, let me know of problems and specials, keep me informed **C/c**; The client (8) tells me the latest things **S/c**; The client (9) we receive good marketing information, we have up to date pricing information, no problems **S/c**; The client (9) we get all information we need from them without asking **S/c**; The client (9) things like widget load ratings, they keep us informed on a very regular basis **F/c**; The client (8) I suppose that they do what they need to do, they do keep us informed about the things we need to know about, they are all quite good with that **S/c**; The client (10) they keep you informed, in the picture, rep and emails **C/c**; The client (8) because they tell us about things **F/c**; The client (7) new product launches, we are informed about them **S/c**; The client (8) we get a lot of letters and notifications, so any more and we would be swamped out **C/c**; The client (8) no problems with them, but the level of business we do with them is very small **U/c**; The client (7) they are OK regarding some aspects of communication, marketing and special offers **F/c**; The client (7) because they make an effort to come and talk to me and keep me up to date (yearly confab) **F/c**; The client (6) think we get enough, bulletins, letters etc **U/c**; The client (10) on the ball, on top of everything, if there is a query or problem, they just handle it, they keep us informed re developments which may affect us **C/c**;

All suppliers equally good (6) - The client (9) we get regular bulletins from all suppliers **S/c**; The client (8) we get regular information from all of them **S/c**; The client (7) generally speaking, they all keep us quite well informed as regards product launches, price increases and so forth **U/c**; The client (9) we speak to all our key suppliers on a daily basis **F/c**; The client (8) we do get bulletins, as well as letters keeping us informed of promotions and the like, don't exactly remember who send what but they are all quite good **U/c**; These days the suppliers are generally very good here **S/c**;

The client better than competitors (4) - The client (8) we get e-mails about new products and special offers from the client more frequently **S/c**; The client (10) we get all the information we need from them, whereas with Competitor C (2) we always have to ask for information **S/c**; The client (8) we have less frequent face to face contact with Competitor C (4) **S/c**; The client (9) they are better than the others, we get regular information bulletins and updates, good with marketing information **U/c**;

Good sales representative (3) - The client (9) sales rep keeps me up to date **U/c**; The client (9) is rated high because we have regular contact with the sales rep **S/c**; The client (9) the sales rep keeps us up to date with all new developments, we also get information by email **C/c**;

Miscellaneous (5) - The client (9) replying to e-mails, addressing our needs promptly rather than not addressing them at all **F/c**; The client (10) mainly communication on products, leaflets, write ups **F/c**; The client (8) most communication is coming via Competitor A **S/c**; The client (7) usually filtered down from our German HO, and seems to be useful, timely info, we get the occasional letter or whatever from the manufacturers, but mostly via our HO **U/c**; The client (7) most communication is coming from HO in Berlin **C/c**;

NEGATIVE COMMENTS – (16)

Lack of proactive personal contact (6) - The client (5) we only talk to the reps, there's no-one else we can talk to, **S/c**; The client (5) lack of contact, we can be the last to know some things **S/c**; The client (5) I never see or hear anything from anyone ever, I contact them and we've dealt with them over 3 years, it would be nice to catch up, what deals are going on, what's the market doing etc **F/c**; The client (6) we never see anyone **S/c**; The client (5) don't feel there is much communication, the others Competitor A (7), Competitor C (8) are certainly better, we have more contact with the others' reps company and what is going on in the market **S/c**; The client (2) if they stayed long enough to learn anything it would be better, but they chop and change all the time. I don't get any calls, **S/c**;

Poor communication (5) - The client (7) the communication from the logistic department is not very good **C/c**; The client (6) the communication with the client is very poor, they have significant delivery problems and we have sent many emails but we don't get any satisfactorily responses **F/c**; The client (7) has started to have delivery problems and communication was very poor **C/c**; The client (3) I don't get any communication **C/c**; The client (6) is not proactive when it comes to informing us about problems **F/c**;

Not informed in a timely manner (3) - The client (6) needs more information on new products **F/c**; The client (7) we receive all info we need but not early enough **U/c**; The client (5) we don't get much info from The client and when we do get it is often out of date **U/c**;

Miscellaneous (2) - The client (5) none really do anything, if you want to find out something you have to go to them, difficult **S/c**; The client (7) they do communicate but there's no follow up ever, nothing ever happens **C/c**;

Good relationship (7) - The client (9) straightforward routine relationship with The client **S/c**; The client (9) good relationship, been with them a long time **C/c**; The client (8) I have a good rapport with the new rep (Jimmy Jango), which is good, who does help resolve any problems, the other guy was a young lad, had no commitment, couldn't get serious about things **C/c**; The client (10) we have a very good and strong relationship with them, we have less problems with them compared to Competitor A (7) **S/c**; The client (9) overall we have a closer relationship **S/c**; The client (9) just for contact, I have the local guy's phone number and he'll come and see me if there's a problem **F/c**; The client (8) the sales rep is the lynch pin in our dealings **C/c**;

Straight forward phone contact (4) - The client (10) I can get hold of someone on the phone OK, it's easy to order plastic widgets on the phone, you don't get put on hold **F/c**; The client (8) rapid phone response **S/c**; The client (9) quite a pleasure to deal with now compared to what it was like, it's a breath of fresh air. There are real people on the phone and a person comes to see you, the new team is instructed to be more sympathetic to us **F/c**; The client (10) a phone call and the product is there **S/c**;

The client has improved (4) - The client (9) generally they have improved a lot in the past two years **U/c**; The client (7) overall, they have improved slightly over the past year or so, but there are still some areas to work on **U/c**; The client (7) has improved, or at least it is trying to improve but still think they need to have a stronger company strategy, they seem not to be 'together' in some ways, not all pulling in the same direction **F/c**; The client (6) they are getting better, but there is still a whole lot they could do, to be up where they would like to be **U/c**;

Miscellaneous (4) The client (9) they are very efficient, sort out most problems but 3rd party phone line lets them down **S/c**; The client (8) we have integrated systems and communication can be good some of the time **S/c**; The client (7) all as good or bad as each other, we need to stay with them, because of the demand for their widgets, it's not loyalty, it's dependence **C/c**; The client (9) the staff in place are very amenable, there's a new lady at the helm (Harriet Helpful), who is a lot sharper **F/c**;

NEGATIVE COMMENTS – (14)

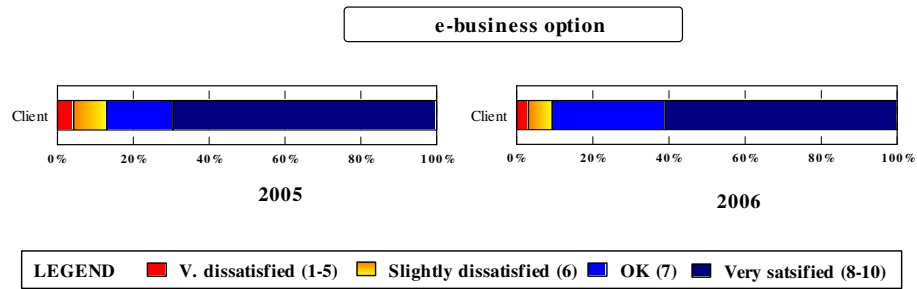
It is hard work to deal with the client (5) The client (4) they make it hard work, to do business with them, they don't support you, **C/nc**; The client (5) they need a BIG change before it will ever be easy to do business with them **S/nc**; The client (6) overall, it's not easy doing business with them, I would welcome the opportunity to work regularly with them but they are not interested. **S/nc**; The client (3) our relationship with the client is not very good which makes it difficult to work together **C/nc**;

Slow to respond to queries (4) - The client (5) is more difficult to deal with because they don't respond to problems quick enough **C/c**; The client (6) slow to return phone calls, always out of stock and never know when they are coming **S/c**; The client (5) delivery problems, pricing problems, not responding to queries etc **U/c**; Competitor A are more responsive, but the client (5) does not value us as a customer so they don't really care **C/c**;

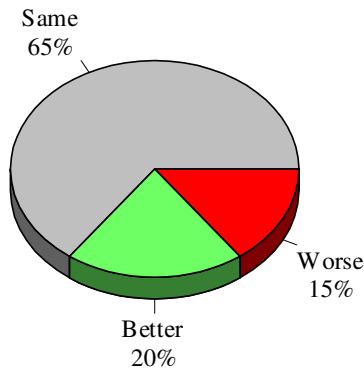
Miscellaneous (5) - The client (5) there's been a change at middle management level which has made life very difficult for a lot of people, they have retracted deals made **F/nc**; The client (7) probably could have better product knowledge within the sales office **U/c**; The client (6) struggling a bit with the specification issue, as it creates a bit of a problem **S/c**; The client (5) they still lack somewhat with regard to good communication and proactive communication **U/c**; The client (7) a lot that they could do to just be more organised, get better staff training happening, in terms of the technical stuff, go a bit more out of their way for us **F/c**;

11. E-business option

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (14)

Easy to use / works well (10) The client (10) easy to use and access, on screen information when communicating to a customer helps us to get the widgets quicker **S/c**; The client (10) we've grown up with it, taken on board new things, we are happy with it, and we don't have to wait on the phone **S/c**; The client (8) very user friendly **U/c**; The client (9) the e-business option from the client is great and it's easy to use **Mc**; The client (9) we have moved most of our ordering online, it's easy and efficient **S/c**; The client (9) I like it, the information is on line you can order on line, order from home, it frees you up **C/c**; The client (9) they do have one, which is the best of all of them and it is easy to order **C/c**; The client (10) ease of use and good information is available, the client system is the only one we have **S/c**; The client (9) we all use the same system, we can communicate very easily **S/c**; The client (8) I know this usually runs well **S/c**;

Miscellaneous (4) - The client (7) I prefer to send a fax because we're not on-line permanently **F/c**; The client (7) you can tap into different levels of sales personnel by email, for problems or queries **C/c**; The client (9) we are able to get good online support from all three of our widget suppliers, especially in relation to product info **S/c**; The client (7) not yet widely used, still relying on sales rep and proactive communication **C/c**;

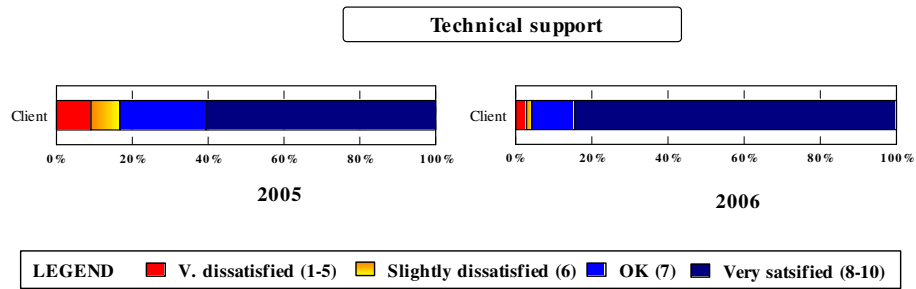
NEGATIVE COMMENTS – (5)

System is long winded / more difficult (3) - The client (5) system is too long winded **S/c**; The client (7) do use but clumsy **U/c**; The client system is long winded but then they all are **C/c**;

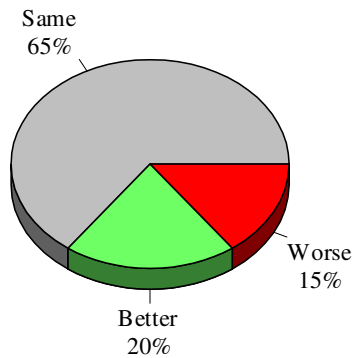
Miscellaneous (2) – Client (6) e-business systems is not as user friendly as Competitor A's system (8) **S/mc**; Client (7) systems is rather basic, not compatible with our purchasing systems **U/c**;

12. Technical support

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (45)

All suppliers provide it well (13) – The client (7) not something we use a lot, we are very experienced ourselves in-house **S/c**; The client (8) if you have a technical query you can usually get someone to help, maybe not immediately, but they do call back if necessary, I think all of the manufacturers are about the same **U/c**; The client (8) they are all good, I do not have problems getting answers to technical questions or issues **S/c**; The client (9) they all provide professional support **F/c**; The client (9) all provide high quality technical support **S/c**; The client (9) any problems we can phone and get answers **C/c**; The client (7) if you have a specific technical query then they are all fairly good, the technical departments have knowledge but not the sales departments **U/c**; The client (10) all provide excellent support **S/c**; The client (9) all of them are equal **U/c**; The client (8) can't fault any of the manufacturers **U/c**; The client (7) on the rare occasions that we do need technical support, they are all pretty good **F/c**; The client (7) they are all fine in terms of general paperwork related queries but would definitely fall down on more complicated ones **S/c**; The client (9) they all have dedicated resources for technical support **F/c**;

Good support if / when (rarely) needed (12) - The client (9) if you need to ring them they are at the end of a phone always, and they are knowledgeable **S/c**; The client (10) they have a technical helpline, they are always there and if not they will ring you back **S/c**; The client (10) always give you an answer, always there, and do return calls **S/c**; The client (10) whenever needed we can get it **S/c**; The client (8) any problems there is the helpline, it's OK, either there or they ring back same day **F/c**; The client (8) no complaints, help is there at the end of the phone **S/c**; The client (9) we don't need the technical support very often but when needed it's there **S/c**; The client (8) we get good technical support, we only need it when customers want plastic widgets that the client no longer produces **S/c**; The client (9) never any difficulty overcoming any small problems **F/c**; The client (7) it is there when needed **U/c**; The client (8) we get very good technical support from

them **S/c**; The client (8) I have to rate them high here, we have had a good response, and good information, when faced with technical problems, and these are very rare **U/c**;

OK but rarely needed (6) - The client (7) not required very often **U/c**; The client (8) not required very often **S/c**; GY (7) don't have many technical issues, one or two a year maybe, if that **U/c**; The client (7) but not something we use a lot **S/c**; The client (7) not used very often, the quality of the plastic widgets is very good **F/c**; The client (7) satisfactory, I don't rely on a lot of technical knowledge unless a customer wants something out of the ordinary **F/c**;

Good professional technical staff (4) - The client (9) key staff know exactly what they are doing **F/c**; The client (7) technical people are quite good, they can usually answer our technical questions **S/c**; The client (10) the rep usually sorts out my technical queries - he is great **F/c**; The client (10) we can give them a ring, the rep is very knowledgeable (but the sales force is lacking) **F/c**;

Technical literature / information (4) - The client (8) we do get updated, new posters, we have a helpline to ring **S/c**; The client (7) we have technical brochures and bulletins, and a helpline, we leave a message and they get back to us normally same day **S/c**; The client (10) we get all the information we need **C/c**; The client (8) we do get a lot of technical bulletins and training programs **U/c**;

No problems (2) - The client (7) no problems at all **F/c**; The client (8) no problems **U/c**;

Miscellaneous (4) - The client (8) technical support is weaker from Competitor A (7) and Competitor C (7) **S/c**; The client (8) manufacturers are usually our first point of call, not too bad **F/c**; The client (9) there's a lot on the website but we hardly use it, we use the telephone **C/c**; The client (8) they are very slow in getting information out, they should do it on CD, **S/c**; The client (7) they give me updates and a helpline number to ring someone if I need help **F/c**;

NEGATIVE COMMENTS – (12)

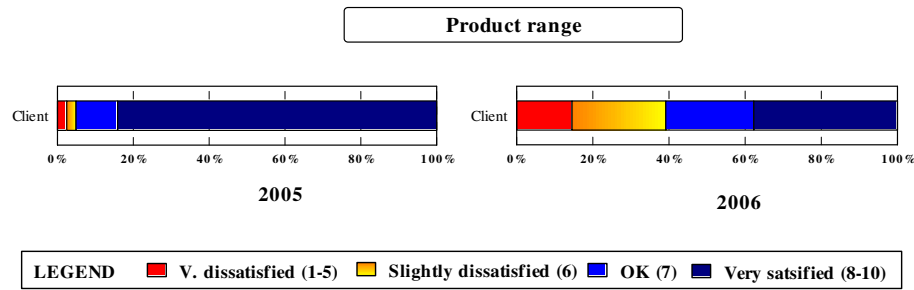
Poor / lack of technical information (5) - The client (5) it's patchy, it does exist, but you have to go to the technical support section **S/c**; The client (7) technical data books, we have much more from the others, I don't think they produce them like the others do, I'm told they are in the process of being compiled **C/c**; The client (3) they don't do anything, **F/nc**; The client (2) we may as well have tried to talk to the wall, they used to have good technical staff but I don't know what has happened now **S/c**; The client (6) does not send regular technical bulletins, The client is not doing any proactive work **U/c**;

Lack of contact (2) - The client (7) it's back to the lack of seeing sales rep situation, because reps give good technical support, we have to chase the client and it's difficult because there's not the continuity of people **F/c**; The client (6) doesn't send us any info on what is happening, bulletins, problems, new development etc and the helpline returns our calls too late **C/c**;

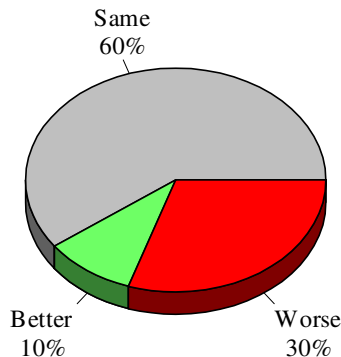
Miscellaneous (4) - The client (4) at a glance indexed information that answers a lot of queries, we don't have a technical data magazine any longer **S/c**; The client (4) better product knowledge needed by sales people **C/c**; The client (6), Competitor A are more responsive and tend to give a more favourable outcome for customers **S/c**; The client just seem to send anyone out when there are problems, guys arrive to sort out a technical problem and they don't have a clue, embarrassing **S/c**; The client (5) they don't have any technical staff and if we have a problem with a product or fitment spec we don't get that support, they used to have a telephone helpline, but no longer and no back up service from personnel **S/c**;

13. Product range

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (17)

All suppliers have a good range (10) - The client (9) there is no longer a difference between the leading widget brands **U/c**; The client (8) no difference **F/nc**; The client (9) all brands similar **S/c**; The client (9) can't fault anyone here **S/c**; The client (10) they all have an extensive range **C/c**; The client (9) they have a full range across the brands **S/c**; The client (8) there's a lot of different sizes out there today and these manufactures they do them all **S/c**; The client (8) they are all more than adequate **U/c**; The client (9) there is no difference in product range **C/c**; The client (10) all very similar **S/c**; The client (9) they all have the range these days

Very broad range, but too big / complex (3) - The client (9) all offer a very wide range, but there are too many widgets on offer **C/c**; The client (7) the plastic widget market is getting too complex, there are too many this is very confusing for the end user **S/c**; The client (8) they cover everything but it's far too complicated **F/c**;

Miscellaneous (4) - The client (9) I sell a lot of them, know them a lot better **S/c**; The client (8) have got a lot of specialist plastic widgets **F/c**; The client (8) a good range **F/c**; The client have always been very good at bringing a product to market, they are much more focused than Competitor A **F/c**;

NEGATIVE COMMENTS – (15)

Oil cooled widget range is weak / has gaps (8) – Client (6) has a poor range of oil cooled widgets **F/c**; The client (5) range of air cooled is weak compared to other suppliers **F/c**; Client (4) – lacks any small (i.e. less than 20mm) oil cooled widgets **U/nc**; Client (4) does have the breadth of niche A-C widgets that competitor A (9) and competitor C (8) can provide **F/nc**; Client (6) – weak oil cooled range **U/c**; Client (7) only offers standard air cooled widgets **U/c**; Client (4) can't provide 20mm, 30mm or the 35 anti-lock oil cooled widgets, which are the main products we sell into the

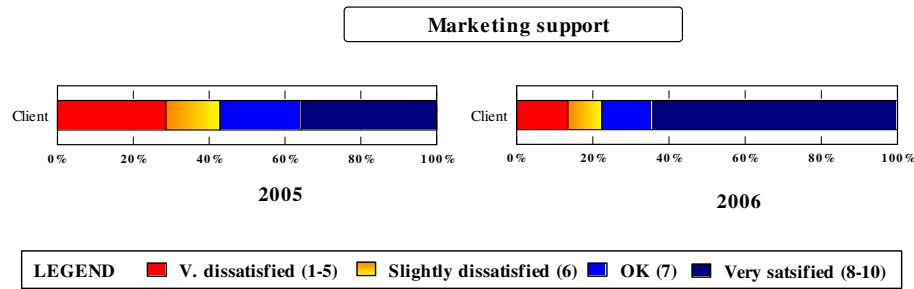
steel re-processing sector **S/c**; Competitor C (9) has a broader range of air cooled widgets than the Client (7) **U/c**;

Other competitors range is better (4) - The client (8) Competitor X (9) offers more products for niche applications **S/c**; The client (2.5) pretty small and in decline, it's being reduced **F/C**; Competitor A (9) have a greater product **S/c**; The client (7) Competitor A (9) probably better in terms of larger range **F/c**;

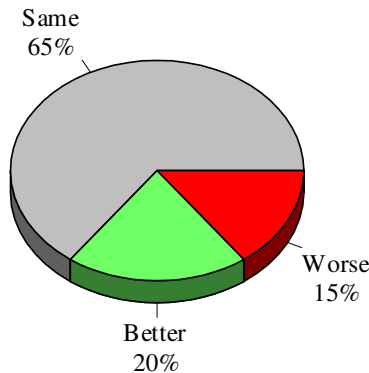
Miscellaneous (3) - The client (7) the product range from the client is very confusing **C/c**; The client (7) I'm not really aware of the full range they do, because we don't have that much contact with them, the rep is over stretched **F/c**; The client (2) terrible range, they never have what you want **S/c**; The client (7) they have narrowed it down a bit and it's a bit on the sly side, I'm not sure what will come on the next time around – I feel a bit wary but they probably have other things in the pipe line **F/c**;

14. Marketing support

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (28)

We get good marketing / promotional material support (12) - The client (10) the rep keeps us informed and gives us literature as it comes available **S/c**; The support we get from the client (8) is very good, we receive timely info about promotions and new products **U/c**; Good support from the client (8) and Competitor A (8) free gifts, special offers etc **C/c**; The client (7) we get advertising support from them **S/c**; The client (9) supply a great deal of promotional stuff **U/c**; The client (8) we get good support from them **F/c**; we get very good promotional support from Competitor C (9) and the client (9) **F/c**; The client (9) we get excellent support from them **S/c**; The client (8) they understand our market, they understand what we're trying to achieve **F/c**; The client (8) because they send lots of promotional equipment and stickers customers like free gifts **F/c**; The client (8) we get lots of stuff from all of the companies, brochures, flyers, information etc. I think this is probably all we need **S/c**; The client (10) we do get some help, materials **U/c**;

We get more marketing support from the client (6) - The client (8) is there to help me, there's no loyalty from the others, although there is advertising which I also get from others **S/c**; The client (9) we get good pricing information and information about special deals from them **S/c**; The client (8) no-one from the others deal with me direct, I get a lot of support **S/c**; The client (8) we get point of sales material such as brochures **F/c**; The client (7) they do a reasonable amount of advertising, some of the others don't **S/c**; The client (6) it's not great but it's still much better than Competitor (4) **U/c**;

Improved in last year (4) - The client (9) it's improved over the last year, I'm not sure over the way it's been done, I'm getting more and more information **F/c**; The client (10) this year there's a new person on board and they are making steps, **F/c**; The client (8) in the past we did not get any support at all, but over the past few months we received a number of gifts to pass on to customers

S/c; The client (7) getting better, they have put a new person in place and are keeping us updated with anything new **F/c;**

Good support from sales rep (2) - The client (7) good support from the rep, he tries to help us out where he can but from the company itself not much **S/c;** The client (8) local sales team are good on the ground **C/c;**

Miscellaneous (4) - The client (8) it is adequate **U/c;** The client (7) because they do make an effort to do something for me **F/c;** The client (8) they've been doing good advertising in widget magazines recently **F/c;** The client (8) good support of events **S/c;**

NEGATIVE COMMENTS – (17)

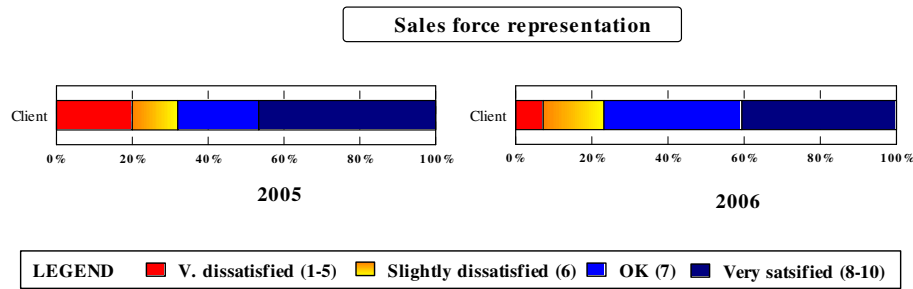
The client doesn't provide much / any (10) - The client (6) we don't get any marketing support from them **S/nc;** The client (1) we get absolutely no support from them, **U/nc;** The client (7) we don't get any, and I don't mind, I run things my own way here **C/nc;** The client (5) not giving anything that I know of, they should create offers that will popularise their brand **U/c;** The client (5) nothing from them **F/nc;** The client (6) don't get any marketing support from them **U/nc;** The client (3) we don't get any support from them **C/nc;** The client (3) they don't do much for our company **C/nc;** The client (2) they don't give us any at all, just a one line in their brochure and there's a spot on their web site **F/c;** The client (6) we get absolutely nothing from them **S/c;** The client (2) please, they just embarrass us, and anyway, there is no marketing support to speak of **S/nc;**

Not doing enough advertising (2) - The client (8) lack of advertising and sales contacts from the company, feel they could be seen much more **S/c;** The client (6) because they do very little promotion or advertising, **F/c;**

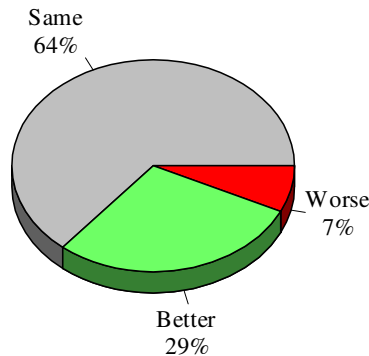
Miscellaneous (5) - The client (5) we've not had much communication over the last 12 months because of my situation **S/c;** The client (7) it's back to supply, ease of supply **F/c;** The client (6) lack of information, lack of knowledge, lack of technical ability **C/c;** The client (5) give something, sort of, but nothing like we used to get years ago **U/c;** The client (7) should focus it's marketing support on providing life style gifts **S/c;**

15. Sales force representation

SATISFACTION LEVEL



How the client's performance compares to 12 months ago



POSITIVE COMMENTS - (28)

The client sales rep very good / helpful (21) – The client (9) we have a very good relationship with the client sales representative **S/c**; The client (8) we get regular visits from the rep and he is very knowledgeable and helpful **S/c**; The client (10) it's the same person, very involved in our business, helps us, **F/c**; The client (10) known him a long time, wonderful guy, can't do enough for us **C/c**; The client (9) receiving good support from the rep, he keeps me well informed about all new developments **U/c**; The client (8) it is a pleasure to work with them, they are very helpful and responsive **S/c**; The client (10) the sales rep is excellent, he visits us every 2 weeks, he is very responsive and reliable **S/c**; The client (8) because the guy I deal with now is very good, I speak to him on the phone, make a query, it gets done, he's very proactive and has a genuine interest in widgets **F/c**; The client (8) our rep (George Harrison) is charming, and regular, does do his best to help me, generally co-operative, **S/c**; The client (9) we have a very good relationship with the sales rep, he is very responsive and looks after us very well **F/c**; The client (10) Evans does an excellent job, we can fully rely on him **S/c**; The client (7) I have a lot to do with the rep, we get whatever we ask for **S/c**; The client (8) their new guy, because he's coming round and is communicating as well **F/c**; The client (8) we get regular visits from all of them **S/c**; The client (8) we now get regular visits while before we have not seen anyone for years **S/c**; The client (8) keeps us well informed with regular e-mails **S/c**; Excellent rep, know him well **C/c**; The client (7) rep is good, we have a good relationship **U/c**; The client (7) we don't see the reps that often, couldn't tell you when we last saw them, usually so busy that we don't pay much attention, but the reps are good, have a fairly good relationship with them **U/c**; The client (9) excellent rep who tries hard for us, H/O doesn't always allow him to do what he wants for us **S/c**; The client (9) both the people we deal with are very good, they understand the market and what we are trying to achieve **F/c**;

Miscellaneous (7) - The client (10) they've gone from zero to hero in a very short space of time and are falling over themselves to work with us which is great **F/c**; The client (7.5) it's one person slightly better than 12 months ago **F/c**; The client (8) they have got new people in place, now there's a dedicated rep working with us, there's enough personal contact **F/c**; The client (7) not something particularly relevant to us, too busy to spend time with reps in any case, when we do see them they seem to be just average sales reps **U/c**; The client (7) the sales reps from the client are not empowered to make any decisions **U/c**; The client (9) reps always seem to turn up at the worst possible times and we wish they would just go away, unfair though as they do know their stuff **U/c**;

NEGATIVE COMMENTS – (20)

We don't see the sales representation frequently enough (13) - The client (5) we only see him for 10 minutes about every 6 weeks, he's not proactive, he is reactive **S/c**; The client (5) we don't see anyone that often, see someone once every 3 or 4 months **S/c**; The client (7) the sales rep comes less frequently and is less keen to find out about our business **C/c**; The client (3) he has such a large area to cover, we rarely see him, an ok chap but we don't see enough of him **C/c**; The client (5) we very rarely see anyone, don't know why but, would like to see someone once a month **S/c**; The client (4) have to get out there, get in front of people, **U/c**; The client (4) I have seen someone although it wasn't often **S/nc**; The client (1) we have not seen a sales rep from the client for several years **C/nc**; we only see the client rep (6) once every six months, he is not that good, the previous one was great, but only seen this new one once, once in about 9 months actually **S/c**; The client (5) we don't see anyone, I feel we should, would like to see someone every 3 months **S/c**; The client (6) they don't do any selling for us at all, I used to see them frequently, but less so now **S/c**; The client (6) we never really see the reps, I think we have seen them maybe once or twice in the last few years, but they are not really interested **S/c**; I have not seen a client (3) sales rep for more than 2 years, I see the Competitor A (9) and Competitor C (9) sales rep once a months **C/c**;

Reps not very qualified / lack knowledge - (3) The client (7) lose points on lack of knowledge of competitors' products, they need to know what is going on in the market place **C/c**; The client (6) rep does not have the plastic widget industry knowledge, he needs to learn about the job **C/c**; The client (3) because of what they have done, like the banks, placed inexperienced people who know nothing about widgets and when asked questions about technical specs he cannot answer **S/c**;

Miscellaneous (4) - The client (6) because I don't know if they have got a sales force specifically for food widgets **F/c**; The client (6) not very good, they are not out here supporting us **F/c**; The client (7) the guy does try really hard but lack of head office support, too big an area to cover, spread too thinly **C/c**; The client (2) none **S/c**;

OTHER RESEARCH ISSUES ADDRESSED

Suggestions how the client can win more business in the future

The most frequently mentioned suggestions how the client can win more business in the future was to improve the technical specification of the client, followed by more consistent pricing structure, increased frequency of deliveries and more frequent visits by reps.

22 respondents did not have any suggestion how the client can win more business in the future. 78 respondents made a total of 101 suggestions, as shown below.

| SUGGESTIONS | 2006 n=100 (%sample) | 2005 n=100 (%sample) | % change |
|--|----------------------------|----------------------------|-------------|
| Better product technical specification | 19 (19%) | 10 (10%) | +10% |
| Better pricing / more consistent pricing structure | 13 (13%) | 14 (14%) | -1% |
| More frequent visits by company representatives | 8 (8%) | 9 (9%) | -1% |
| Improve communication | 5 (5%) | 5 (5%) | - |
| Better marketing (<i>especially more advertising, raise profile at exhibitions and events, etc.</i>) | 4 (4%) | 9 (9%) | -5% |
| Acknowledge problems and resolve them faster | 4 (4%) | 3 (3%) | +1% |
| Put people on sales teams with good technical / product knowledge | 4 (4%) | 0 | +4% |
| Take a more personal approach / establish better relationships | 3 (3%) | 7 (7%) | -4% |
| More reliable delivery | 3 (3%) | 0 | +3% |
| Improve order admin | 3 (3%) | 0 | +3% |
| Other miscellaneous suggestions (mentioned once or twice) | 26 | 28 | |
| Total mentions | 101 | 88 | |

Other suggestions mentioned twice were - sort out quality problems (2), sort out incoherent pricing policy / more straightforward pricing (2), streamline product range (2), provide better training, especially product (2), keep executives in place longer (2), more technical support / staff (2), provide information quicker (2), closer sales support (2),

Suggestions mentioned once were - , more people to take calls / fewer voice mails, return calls quicker, work on product development, develop / expand the range, generate more consumer demand, more sales staff to see customers, offer more special deals, better margins, improve the brand awareness, strengthen relations at Head Office.

APPENDIX

Details of respondents interviewed during the project

Details of the respondents interviewed are shown below for the different type customer interviewed during the fieldwork interview programme.

Respondents interviewed face to face are marked with an asterisk (*).

Steel processing

| | |
|-----------------------------|--|
| Company Alpha, Somerset | Mr Andy Alpha, Operations Director * |
| Company Bravo, Newquay | Mrs Emma Day, Managing Director |
| Company Charlie, Glasgow | Mr Harrish Patel, Marketing Director |
| Company Delta, Birmingham | Mr Evans Halshaw, Purchasing Manager |
| Company Echo, Manchester | Ms Donna Karen, Procurement Director |
| Company Foxtrot, Warrington | Mr Ted Baker, Senior Vice President |
| Company Golf, Southampton | Mrs T. Woods, Marketing Director |
| Company Hotel, Plymouth | Mr Vish Singh, Managing Director * |
| Company India, Kings Lynn | Mr Eric Morecombe, Purchasing Manager |
| Company Juliet, Blackpool | Mrs Jo Evans, Managing Director |
| Company Kilo, Hereford | Mr Lee Smith, Procurement Director |
| Company Lima, Cardiff | Mr Joe Lemon, Marketing Director |
| Company Mike, Dublin | Mr Jon Doe, Procurement Director |
| Company November, Liverpool | Mrs Karen Millen, Procurement Director * |
| Company Oscar, Newcastle | Mrs Celina Ramsey, Purchasing Manager |
| Company Papa, Brighton | Mr Teddy Smith, Director of Buying |
| Company Quebec, Chester | Mr Ernie Wise, Managing Director * |
| Company Romeo, Bristol | Mr S. A. Casanova, Purchasing Manager |
| Company Sierra, Oxford | Mrs Fiona Moana, Marketing Director |
| Company Tango, Telford | Mr E. Evans, Finance Manager |
| Company Uniform, Leicester | Mrs E. Roundhead, Procurement Director |
| Company Victor, Sheffield | Mr B Blackhead, Purchasing Manager * |
| Company Whisky, Derby | Mr Jack Daniels, Marketing Director |
| Company X-ray, Cambridge | Mr Steve Sidwell, Purchasing Manager |
| Company Yankee, London | Mr G. Bush, Sales Director |

Similar charts would be presented for all sectors interviewed, i.e. utilities, food and chemicals.