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## MESCADA Technology Modules

### Marketing plan

<b>Product name</b>	MESCADA™ Beverage Production Software by Wiley Engineering		
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## Executive Summary

Wiley Engineering, a small engineering service firm for the beverage industry, has been building its company and clientele for several years. In addition to installing the equipment and setting up the processes for CSD production, Wiley has been creating and installing the technology modules to monitor these processes. While they have principally been an engineering service provider with additional technology offerings, their long-term business plan reverses that model. Wiley Engineering plans to become an engineering technology module company, with installation services provided, within 5 to 10 years. Their goal is to begin this process with a product launch of their flagship brand in Q1 2008. This would be a product brand name first, but would eventually become the name of the company itself.

Chris Wiley, the owner of the firm, was frequently consulted in developing the understanding and ideas necessary to prepare this report. He presented several potential names for the product. In order to give his staff ownership in the brand, he allowed them to propose brand names. From the available choices, we recommended MESCADA, which is a combination of several common engineering acronyms that are well-known in the beverage production industry, (MES, and SCADA). We developed a beverage-like logo concept for this name. After forming our recommendations for positioning and marketing strategy, we created a tagline to accompany the logo.

Careful study of the beverage industry and the MESCADA product revealed the best path to a successful brand launch. While the CSD industry has many engineering service providers and technology platforms, very few are specialized specifically for the CSD niche. While Wiley's competitors are much larger, financially powerful and threatening, they are also too broad to suitably compete on beverage specialization capabilities. Wiley can provide both the specialty software and service for CSD production; this expertise becomes a true differentiator and provides optimal company positioning. Consequently, all representations of the MESCADA brand must project high-quality and specialized knowledge, making our recommended prestige pricing strategy a natural fit.

Since most technology module products are sold with the actual equipment delivered by the distribution channel resellers, partnerships in promotion with these providers are possible and necessary for Wiley. There are many such resellers and few clear leaders, so we recommend a pull marketing strategy targeting end-customers in the plants themselves. With only a few major companies conducting the majority of beverage production, the industry is relatively small. Lead engineers from competing plants often talk with one another and share their enthusiasm for effective products. Thus, Wiley can gain significant industry buzz by providing a few key plants with free MESCADA installations and allowing new of their effectiveness to spread virally. Combining this strategy with direct sales calls, Lunch & Learn meetings, and trade show promotions is expected to yield excellent results.

This marketing plan provides greater detail on all of these recommendations. We wish Wiley Engineering the best of success, and expect a long life for MESCADA.

- The Marketing Team of 8240



## About Wiley Engineering

Wiley Engineering is an Atlanta-based engineering firm that specializes in engineering services for the bottlers of the carbonated soft drink (CSD) industry. While this line of business has grown the company, increasing competitive pressures in the industry are causing them to seek a long-term strategy that can provide them with growth and allow them to establish a niche within the industry. Wiley is transitioning from a service company to a product company that offers services.

To this end, Wiley is preparing to launch MESCADA, a set of software modules that is installed on the beverage production equipment Wiley installs. Wiley's focus on the challenges facing the CSD industry means that MESCADA offers superior performance in this industry relative to the less specialized control software modules the equipment manufacturers install by default.

## Carbonated Soft Drink Market Review

Wiley Engineering directly competes within the carbonated soft drink (CSD) market. The following analysis of the threats and opportunities facing this market has a profound effect on Wiley's marketing strategy.

### ***CSD Industry Profile and Analysis***<sup>1</sup>

The soda drink and bottled water industry in the US includes about 3,000 companies that manufacture and distribute beverages, with combined annual US revenue of \$70 billion. Coca-Cola and PepsiCo hold more than 50% of the market, following strong consolidation in the past decade. Only a few other companies have annual revenue above \$500 million. Most are local or regional manufacturing and bottling operations with annual revenue under \$100 million such as Jones Soda.

### ***Competitive Landscape***

Demand for non-alcoholic beverages is driven by consumer tastes and demographics. The profitability of individual companies depends on effective marketing. Large manufacturers have economies of scale in production and distribution, with average annual revenue per production worker close to \$1 million. Small companies can compete by producing new products, catering to local tastes, or selling at lower prices. The following table represents various players in the market and their relative profitability.

<b>Company</b>	<b>Revenue (\$Billions)</b>	<b>Market Cap</b>	<b>Net Income (\$Billions)</b>	<b>EPS(\$)</b>	<b>Yield (\$)</b>
Cadbury Schweppes plc	7,427	25.94B	1,034	2.07	1.65
Groupe Danone	14,073	38.10B	1,326	0.78	1.69
PepsiCo, Inc.	35,137	119.15B	5,642	3.55	2.03
Pepsi Bottling Group Inc.	12,730	8.76B	522	2.49	1.43
General Mills, Inc.	12,442	18.60B	1,144	2.99	2.71
Coca-Cola Enterprises	19,804	11.71B	-1,143	-2.55	0.99

Source: [www.finance.google.com](http://www.finance.google.com)

<sup>1</sup> [www.firstresearch.com](http://www.firstresearch.com) (SIC Code 2086; 2007)

## **Products, Operations, & Technology**

Nonalcoholic beverages include sodas (carbonated soft drinks), bottled waters, juices, and a large variety of mixtures. Sodas account for about 60% of the market. The manufacturing and distribution of most national soda brands, including Coke and Pepsi, is a two-tiered process. The primary manufacturer produces flavored syrup called concentrate that is sold to local bottlers, who manufacture and distribute the finished product. In a typical bottling operation, the flavored syrup, corn syrup (sugar), and filtered water are mixed in appropriate proportions, carbon dioxide gas is injected, and the finished soda product is poured into bottles or cans, which are capped, labeled, and packaged. The two-tiered structure is most efficient for national companies with large volume, because the manufacturing process is simple and because water, the main ingredient of sodas, is expensive to ship and is available locally.

Bottlers frequently operate sizable distribution systems, including warehouses and fleets of specialized delivery trucks. Production and distribution volume is usually measured in cases of 192 ounces, although actual cases of 12-ounce cans now contain 288 ounces. Coca-Cola produces more than 4 billion cases of soft drinks per year; PepsiCo, over 3 billion. In most cases, non-soda products are bottled by the manufacturer and distributed through the same types of channels--wholesalers, distributors, brokers--used by food manufacturers, although bottlers may also participate. Bottled waters, a rapidly growing category of beverage, are either bottled at specific springs or made locally from filtered tap water.

Manufacturers and bottlers typically operate under contracts, called Bottler Agreements, which specify the territory within which the bottler has an exclusive right to make, sell, and distribute the manufacturer's brand in bottles or cans. Fountain products are often sold separately through wholesalers, under Distributor Agreements. Bottle and fountain territories may overlap and bottlers may also be fountain distributors. Coca-Cola sells products through about 80 local bottlers and 500 fountain wholesalers. Bottler Agreements usually require that container and packaging materials be bought from suppliers that are approved by the manufacturer, and that the bottlers not handle competing products. Agreements also specify the price that the bottler must pay for concentrate. The manufacturer has no control over the prices the bottler charges customers, and usually isn't obligated to spend money for marketing or promotions in the bottler's territory.

Often, however, the manufacturer will provide marketing and promotion support. In one year, for example, Coca-Cola provided about \$600 million in marketing support to Coca-Cola Enterprises, its largest bottler. Many Coke and Pepsi bottlers hold perpetual contracts that can be terminated only for breach of contract. The industry depends on technology to develop new products in the labs and package product at the plants. Most bottling plants are highly automated with a variety of mechanical automation.

## **Sales & Marketing**

Beverage manufacturers, bottlers, and wholesalers sell products through a variety of channels, such as food and convenience stores, restaurants, vending machines, mass merchandisers, and institutions, including schools and colleges. Soda bottlers typically own local vending machines. The marketing approach to each of these channels is quite different and often includes promotional spending. Large manufacturers may also sell directly to national accounts and usually advertise on national or regional

TV and in print. Manufacturers typically produce a line of brands and often test and introduce new products into the market through their existing distribution channels.

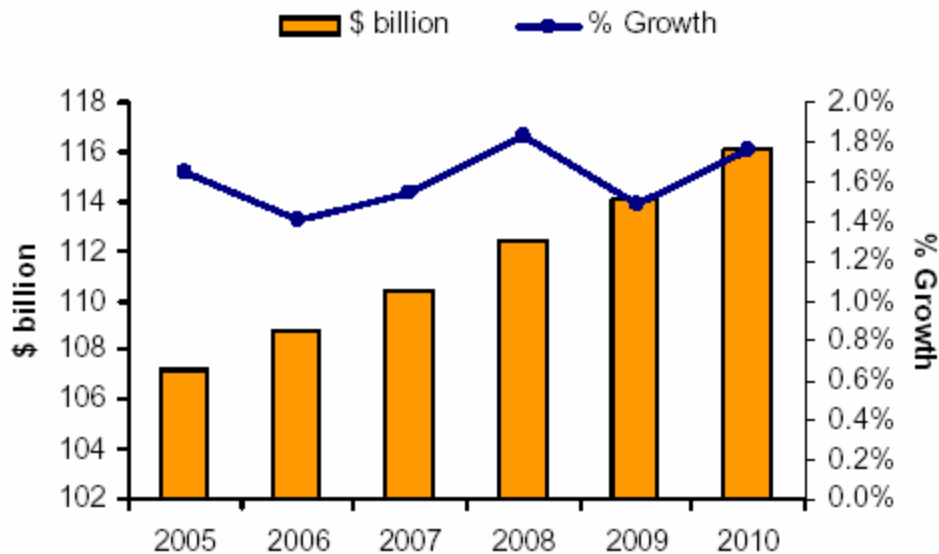
### **Finance & Regulation<sup>2</sup>**

Beverage manufacturers typically have high gross margins and high marketing expenses. Because of high product turnover with most customers, accounts are usually settled rapidly and accounts receivable are fairly low. Inventories are also low because most raw materials are easily obtained and cheap. Investment in equipment may be high, especially if the company manufactures products that require refrigeration. Supplier contracts may specify that the costs of plastic bottles, aluminum cans, and sweeteners can rise if the costs of the underlying commodities rise. The industry is subject to the usual state and federal regulations that apply to any manufacturer, and to regulations that apply to truck fleets. The manufacture of food products is subject to FDA regulations under the Food, Drug and Cosmetic Act. To reduce litter and promote recycling, a number of states, including New York and California, require consumers to pay a refundable deposit on soda containers.

### **Industry Outlook<sup>3</sup>**

In 2010, the United States soft drinks market is forecast to have a value of \$116.1 billion, an increase of 8.3% since 2005. The compound annual growth rate of the market in the period 2005-2010 is predicted to be 1.6%. Growth is fairly flat due to the maturity phase of the industry's life cycle. Companies are attempting to gain market share through advertising and other marketing techniques. Small players are competing on unique offerings and larger companies are acquiring them for their offerings such as Vitamin Water. As the larger companies continue acquiring unique beverages, producing this broad variety of beverages in large quantities is increasingly difficult.

**United States Soft Drinks Market Value Forecast: \$ billion, 2005-2010**

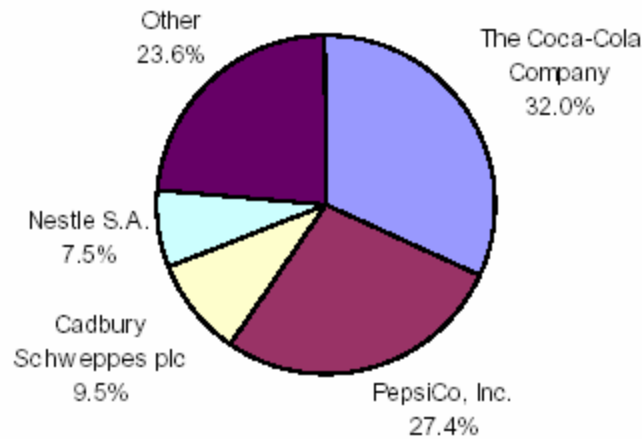


<sup>2</sup> <http://www.bevindustry.com/content.php?s=BI/2007/07&p=6>

<sup>3</sup> Datamonitor Industry Outlook for the CSD Industry (SIC Code 2086; 2007)



### Market Share of Key Players in the CSD Industry



Source: Freedonia Focus Market Research for the CSD Industry 2006

#### ***Internal Forces within the Industry***

The competitive environment of the bottling industry includes the relationship between concentrate producers and bottlers. The competitive analysis includes how these groups interact within this industry.

The economics of the concentrate business and the bottling business should be inextricably linked. The Concentrate Producers (CPs) negotiate on behalf of their suppliers, and they are ultimately dependent on the same customers. Even in the case of materials, such as aspartame, which are directly incorporated into concentrates, CPs pass along any negotiated savings directly to their bottlers. The industries are quite different in terms of profitability.

The fundamental difference between CPs and bottlers is added value. The biggest source of added value for CPs is their proprietary, branded products. Coke has protected its recipe for over a hundred years as a trade secret, and has gone to great lengths to prevent others from learning its cola formula. The company even left a billion-person market (India) to avoid revealing this information. As a result of their extensive histories of successful advertising efforts, Coke and Pepsi are respected household names, giving their products an aura of value that cannot be easily replicated. Coke and Pepsi's sophisticated strategic and operational management practices are also hard to replicate, and provide another source of added value.

Bottlers have significantly less added value. Unlike their CP counterparts, they do not have branded products or unique formulas. Their added value stems from their ability to deliver higher yield per unit



of concentrate. They have recurring negotiated contracts with their customers, with whom they work on an ongoing basis, and whose needs are familiar to them. Through long-term, in-depth relationships with their customers, they are able to serve those customers effectively.

## **Competitive Landscape for Wiley Engineering, Inc.**

Wiley's competitive landscape is highly fragmented due to limited information about competitors delivering Wiley's highly technical services. Bottlers are increasingly relying on their equipment suppliers and installers to provide the process knowledge. This broader dispersion of expertise creates a more fragmented market. This is unlike the CSD industry as a whole, which is highly consolidated. Demand is driven by the need for new processes created and promoted by the original equipment manufacturers (OEMs). Cash flows for Wiley and the industry as a whole are sustainable and non-cyclical.

Historically, there have been few financial or regulatory pressures. Recently, however, water restrictions have reduced plant output, both in the quantity and variety of beverages produced. At lower production levels, expensive process overhauls have greater impact on the per-unit production cost. Also, HACCP requirements (food safety requirements) are being enforced in production plants. This has not affected Wiley significantly thus far, but provides an opportunity for Wiley to provide better control systems for these more stringent production requirements.

The current challenge facing Wiley's customers is the need to be extremely flexible in producing a broad variety of beverages. Plants designed to produce fifty products are now producing closer to five hundred products. This creates problems for some of Wiley's competitors who are larger and comparatively immobile. As a more nimble company, Wiley is able to move quickly to meet these emerging needs in the industry, providing production control software which is more customizable and flexible, focusing on un-served niches in the market. This can be a sustaining factor for Wiley and turn into a competitive advantage in the long run.

Wal-Mart<sup>4</sup> is currently pressuring their suppliers to create a balanced scorecard requirement to reduce their carbon footprints. There will be first mover advantages for companies that become more environmentally friendly. Those who cannot meet Wal-Mart's requirements will be dropped as supply chain service providers. The industry is expected to moving rapidly in reaction to the environmental concerns of the recent worldwide green movement. Companies that can rapidly deliver solutions addressing these needs have an immediate opportunity to increase their market share.

### ***Impact on Wiley Engineering***

Given the current state of the CSD industry and Wiley Engineering's current situation, it is evident that Wiley has opportunities to achieve sustained growth. Wiley's expertise in software will prove vital to long-term growth and sustainability. Industry pressures such as Wal-Mart's environmental responsibility initiatives for suppliers will help Wiley retain business and increase market share. The CSD industry has remained fairly flat in growth and volume but there are still opportunities due to the

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<sup>4</sup> <http://www.foodnavigator-usa.com/news/ng.asp?id=78736-wal-mart-distribution-supply>



more diverse product offerings that are starting to appear. The increasingly complex industry will yield opportunities as further consolidation scenarios such as Coke's purchase of Glaceau create additional production complexity. Looking forward, Wiley must respond to its competitors' strategies and create further differentiation with customer service and specialization.

### ***Competitive Environment***

Wiley Engineering's strategy to position itself in the CSD industry as primarily a supplier of and process engineer for a software module (MESCADA) geared towards providing the control systems used to automate the CSD production process will be met with aggressive competition from many parties representing varied backgrounds with different objectives. What follows is an analysis of Wiley's key competition with special emphasis on specific threats to the successful launch of MESCADA.

### ***New Competitors***

New firms constitute Wiley's most significant competitors in the engineering services industry. Each new firm poses a unique threat to a successful product launch of MESCADA.

#### Rockwell Automation

With annual sales of US \$5billion, Rockwell towers over the competition in the industry. With more than a century of experience and a comparatively endless amount of capital, Rockwell poses a significant threat to a successful MESCADA product launch:

- Rockwell can more aggressively market its existing software modules. With such a strong position in the industrial automation market, Rockwell may be able to force its hardware customers to use software designed in-house. These modules (*RSView32* and *RSViewSE*,) were designed with many different customers in mind, and, as a result, market perception is that they do not specifically meet the needs of the CSD industry. Despite this shortfall, however, Rockwell's strong arm could close the door of opportunity, leaving Wiley without enough of a customer-base to make MESCADA a success.
- Rockwell can develop copycat software modules. Software is, in general, difficult to copyright. Rockwell can produce MESCADA-like modules and then introduce them into the marketplace without the barriers to entry that the MESCADA launch will face.
- Rockwell can use its bottomless pockets to practice extinction pricing, taking a loss upfront on the above-mentioned copycat software by undercutting MESCADA's price, and then raising the price once the competition is eliminated.

#### Hinz Automation

A much younger company than Rockwell, Hinz Automation was founded in 1971 with a focus on "the design of industrial controls and industrial power distribution." While they compete directly with Wiley in delivering engineering for process in manufacturing, it has minimal software capabilities, and therefore may not be able to produce a worthwhile product quickly enough to catch-up with Wiley's shifting focus. Regardless, they share many of the same customers as Wiley, and their relatively larger size and budget could allow them to simply purchase comparable software modules to compete with MESCADA.



### McNaughton-McKay

Established in 1910, McNaughton-McKay (MC-MC) has grown to be one of the world's leading distributors of electrical products in the industrial automation marketplace. Software design is not one of their core competencies, but they have recently responded to the lack of effective software available by developing and marketing a package called "Engineer Solutions Group" (ESG). This is essentially a combination hardware/software package, providing customers with both the machinery and the control system software modules. While ESG provides a product similar to MESCADA, and therefore poses a direct threat to a successful product launch, MC-MC designed the software to fit the needs of its expansive customer-base, resulting in a product that does not specifically meet the needs of CSD bottlers (similar to Rockwell's all-encompassing software modules). This lack of customization creates a potential niche for MESCADA to fill.

### Wonderware

With its software modules operating in over 100,000 plants worldwide, Wonderware is the undisputed leading provider of industrial automation software. Unlike Wiley's traditional competitors, this company's core competencies are software design and technological expertise. Wonderware's success in the industry, however, may not allow it the flexibility needed to meet the specialized needs of the CSD industry, leaving an opening for MESCADA.

### Siemens (WinCC)

As one of the world's largest electrical engineering companies, Siemens has all of the expected advantages and disadvantages that accompany its size and success. Their software design expertise and available capital have allowed them to produce a solid software module in *WinCC*. Similar to software from other large companies, however, Siemens' product was not specifically designed to meet the needs of CSD bottlers, and, although it has the skill set, it may not have the flexibility to specialize enough to compete with Wiley.

### **Solutions Providers**

Wiley's positioning within the CSD industry creates additional competitors — other software designers and process engineers, some of whom have existing software modules that will directly compete with MESCADA.

### Factory Automation

Similar to Wiley, this young Atlanta-based firm provides full-service systems integration. While it does not focus solely on the CSD industry, its small size gives it the flexibility to customize software solutions, and therefore poses a direct and dangerous threat to the success of MESCADA.

### Klein Process Systems

Founded in 1981, this firm provides software design and systems integration to a wide range of customers in very different industries. Similar to Factory Automation, it does not yet design software solutions specifically for the CSD industry, leaving an opening (at least temporarily) for MESCADA.

### **Original Equipment Manufacturers (OEMs)**

OEMs represent about 70% of the purchasing customers for Wiley. That being said, the relationship between the two is bumpy at best. Many OEMs are preparing to create their own software modules, eliminating the need for MESCADA. Software design, however, is generally not a core competency for these firms.

### A&B Process Systems

Founded in 1973 on a small farm in Wisconsin, A&B Process Systems has grown to become one of the leading providers of custom-designed process systems in the United States. Originally focused solely on equipment manufacturing, A&B is beginning to branch out as a provider of other services and products, and is considering software design as a possibility. Traditionally, OEMs such as A&B have to subcontract out to companies like Wiley, who provide software solutions that fit neatly with their (OEM's) hardware. A&B's soaring profits in recent years may allow them to put more time, effort, and capital into circumventing companies like Wiley in the future.

### dsi Process Systems

This company has been serving the CSD industry for almost half a century. Its size and customer-base are not as extensive as A&B, but its specialization in the industry positions it as a serious competitor in the marketplace. Like A&B, they are considering branching out into software design in order to eliminate the need to subcontract software modules.

## **The Product**

Automation, when used effectively, reduces variation and increases efficiency. Control software, as the name alludes, controls the hardware used in an automated process. The process of creating CSD beverages, especially in today's rapidly changing industry, is highly technical and requires extreme regulation and testing. As beverages become increasingly complex, particularly in light of new opportunities in mineral water and energy drinks, the technology solutions used to create these products must adapt as well. Software is an integral part of the bottling process from start to finish, including integrating the raw ingredients based on the specific formulation for each beverage. The controls system dictates every step of the process: from how much aspartame to include in a can of Coke Zero to the process for adding carbonation to a bottle of ginger ale.

OEMs and bottlers generally face two options when choosing a controls software product to automate the bottling process. One option is to purchase a generic, third party technology application and customize it for the particular application. Option two is to purchase customized software from a specialty provider such as Wiley. Generic applications tend to be cheaper on the front end, but can be more costly in the long-run, as technical "band-aids" have to be applied in order to respond to the custom needs of the application. This can lead to significant downtime due to incomplete or inaccurate documentation as individuals unfamiliar with the application attempt to troubleshoot and quickly resolve the situation.

The rapidly changing industry, as well as the degree of complexity required of the software, provide a significant opportunity for an organization with 'CSD specialized expertise' to market a customized software product. Enter MESCADA, a modular software solution conducive to all beverage applications; the product launch for MESCADA is scheduled for February 15, 2008. Based on S88 standards (used for batch control processes), MESCADA is developed and customized at the device level (note that the base devices are already specifically engineered for the beverage industry); the customized devices, or modules, are then combined to create full beverage applications. The modules comprise a library of software that contains everything the user needs for any piece of the beverage



process. The name MESCADA was the brainchild of a member of Wiley's engineering staff; it is a combination of two acronyms commonly used in the industry. MES refers to a manufacturing execution system, which is a set of modules, working together, within a given software package. SCADA, or supervisory control and data acquisition, is a type of control system which also functions to collect data. The name will be immediately recognizable within the industry and serves as a cornerstone for the brand. The key elements of the software are outlined below, as well as the compatible platforms.

MESCADA technology integration includes capabilities for:

- Receiving
- Storage
- Batching
- Dissolving
- Transfer
- Vacuum De-aeration
- Blending
- Carbonation
- Clean In Place

MESCADA is designed to function on the following platforms:

- Rockwell ControlLogix
- Siemens S7
- RSVIEW
- Ifix
- Wince
- MSSQL

Regardless of the platform utilized, the package includes extensive built-in documentation, which will function as an asset for on-site personnel, as well as be a tremendous value during integration. All MESCADA systems are easily maintained, and are built and serviced by beverage engineering and technology experts. An additional benefit is the flexibility of the system; its recipe and cleaning configuration tools have the capacity to support hundreds of products. MESCADA features full plant view, along with split screen, capabilities. The typical MESCADA package includes the following elements:

- Pre-implementation testing
- Customized software for the application
- Implementation services
- Start-up support and maintenance for the first year of implementation

The support provided by Wiley staff is a significant selling point for MESCADA; purchasers will have access to expert service personnel who will be available for hands-on support during the first year of operation.



## Product Positioning

As outlined above, the industry is fairly fragmented; this leads to pricing extremes, as pricing data is not always readily available from the various different sources. In addition, there is intentional ambiguity in the pricing structure of most products of this type, in order to prevent, or at least delay or complicate, comparisons of various products on a pricing basis. Based on the information that is available, as well as the premium product features outlined above, Wiley has chosen a prestige pricing strategy. In addition, this strategy fits the highly specialized quality perception for this brand; Wiley will position MESCADA as an improvement over any other software package currently on the market. Purchasing a premium MESCADA system ensures accurate software, expert personnel, and therefore an extremely reliable bottling operation. While the price is premium, MESCADA's quality is such that the purchase will provide significant value: customers can choose a modular approach, or simple customization, to fit their needs precisely, with none of the wasted time or effort that would be encountered in trying to customize a generic, third party technology application. The pricing structure for a typical project is outlined below:

- MESCADA modules: \$12,000/unit
- Units/plant: 20-30
- Entire MESCADA system: \$240,000-\$360,000

The pricing structure outlined above reflects a 20% increase over the current average market pricing. As is the practice in the industry, volume discounts will be provided for repeat customers, and/or based on the size of the facility. The payables schedule for MESCADA is as follows: a down-payment of 45% is due prior to the onset of the project. At the module review, another 25% is due. Prior to start-up, a 20% payment will be required. The remaining balance is payable at the conclusion of the project.

Revenue streams for MESCADA will consist of contracts for the base product as well as additional revenue from after-market and premium add-on elements, such as data collection, reporting, data drill-down (both pre-built and user configurable), web browsers, long-term consulting, and maintenance (following year one).

Wiley engineers also function in a sales capacity; if additional needs arise or become apparent during any phase of the process, the modules can be adapted to respond to that need. After-market services and maintenance will be billed at \$84-\$114/hour (an increase of 20% above the market average) and will account for 10-20% of overall MESCADA profit. More information regarding the anticipated revenue following the product launch is available in the Projected Profit and Loss section below.

Given the premium nature of the product, we developed a product tagline which would reflect the value proposition, while delineating the nature of the software package. In developing the tagline, we were cognizant of the business-to-business nature of the industry and stayed true to a fact-based approach in order to effectively communicate with our target audience. In addition, the significance of the name also plays a role in creating a brand identity for MESCADA. The product tagline is:

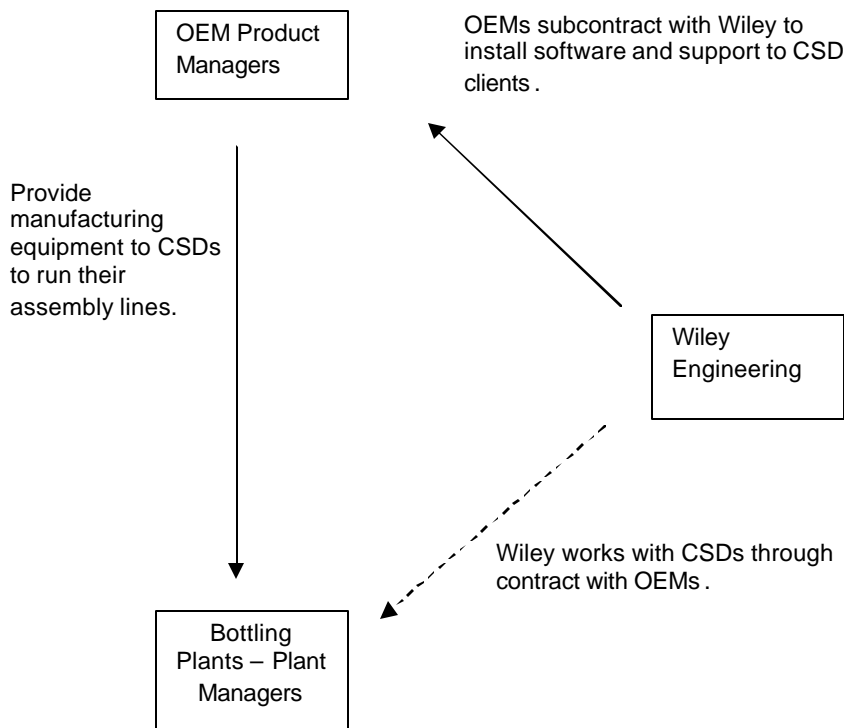




## The Customer:

In Wiley Engineering's current business, it has relationships with two distinct entities within the CSD market: Plant Managers at the OEMs and Plant Managers at the bottling plants. Depicted below is an outline of the current relationship that Wiley has with the OEM and bottling plants. Approximately 60-70% of Wiley's business comes from the OEMs. The OEMs are the key piece, as without the machines there would be no use for the software. The OEMs hire engineering firms to install the software and provide the technical support and expertise on their machines that are used at the bottling plants. This means Wiley ends up working mostly with the plant managers, but are paid by the OEMs. Wiley can also be hired by the plant managers directly; however this generally occurs as a reactionary solution to urgent problems.

### Wiley's Customer Relationships



The new MESCADA product will enable the machines to operate to their maximum efficiency, allowing for optimization of the bottling process and better overall results for the bottling plants. Wiley will have to develop different marketing channels and programs to influence the buying decisions of the Bottling Plants and OEMs.



# Buyer Characteristics

## **OEMs**

The OEM market has decreased, due to consolidation, therefore causing limited competition in the OEM marketplace. Some of the major companies that service the CSD companies are DSI Process and A&B Process Systems. These companies currently supply the equipment to the CSDs to run the assembly lines at the bottling plants. These machines are the backbone of the bottling plant providing the hardware to process and bottle the beverages. The OEMs are experts in the production side of their machines, understanding the importance of key ratios such as “cans per minute” and “optimal product yield”. However, software is not a core competency of the OEMs. They have small one or two-person teams that can provide limited technical support, but human interface and support are not a core competency. It is routine for them to subcontract with such firms as Wiley Engineering to install the software and provide the technical expertise and support that is essential to their CSD customers.

OEMs have very large budgets and spending money for new software packages would be insignificant compared to the capital expenditures of a new piece of equipment. Due to their lack of knowledge of the software, the OEMs currently look to the end-users and engineering directors for their sources for their information. They rely heavily on the end-users and value their opinion on the performance of their machines. On capital expenditures over \$50,000, OEMs typically have to get approval from their “engineering director,” or the individual who functions within that capacity for the organization. This means Wiley can influence and affect the purchase decisions of the OEMs through other channels of interaction. With consolidation and competition, the end users and OEM engineering directors are always looking for ways to improve their performance and software, such as MESCADA, can provide that solution.

## **Bottling Plants – Plant Managers**

There are four major CSD bottling companies: Coca-Cola Enterprises (CCE), Pepsi Bottling Group (PBG), Cott Beverages, and Cadbury-Schweppes. The bottling industry has seen a significant reduction in the number of plants. In 2004 there were less than 300 plants down from over 2,000 plants in 1970. Similar to the OEM companies, with the consolidation of plants the CSD industry has become extremely competitive and each plant is looking for ways to gain a competitive advantage. However, the plants have a much more limited budget than an OEM, causing them to be more cautious about new and innovative decisions. As the largest players are faced with extreme competitive pressures and shareholder scrutiny, CCE and PBG have become very risk averse. This has allowed Cott and Cadbury to utilize and test technologies in their plants.

As mentioned earlier, the plants are run by plant managers who must maximize the output of their facilities. To do this, the machines and software must operate at peak efficiency. On the hardware side, the plant managers deal with the OEMs. On the software side, the plant managers look to the OEMs with the larger budgets to provide software installation and service. The plant managers can heavily influence the OEM decision on what software providers they choose. They have the ability to subcontract directly, but that is generally avoided except in emergencies, as they know they can limit those expenditures by relying on the OEMs.

On the whole, the plant managers are a very experienced group that knows the traditional CSD business very well. However, this extensive experience can also cause some resistance to change. Currently, the



CSD industry is experiencing a transformation in their product lines. New products, such as Vitamin Water or energy drinks, are being introduced and require different bottling and testing. The engineers have limited skills to deal with these new, non-carbonated beverages, and are relying on the subcontracted software engineers to educate them on the new processes through Lunch & Learns and other targeted strategies. While MESCADA will be launched targeted to the CSD industry, these additional avenues represent the future expansion of the MESCADA brand and product offerings. The plants are also getting pressure to become more environmentally-friendly, forcing the plant managers to seek out solutions for the stricter standards. This allows Wiley to market the many benefits of MESCADA and deliver added-value services for the managers' new challenges.

### ***Reaching the Customer***

Wiley currently serves 5-10% of the OEM market and has limited exposure to the lead engineers. The lead engineers control the purchasing decisions, and Wiley needs to increase their contact with this group. They are not cold relationships, as Wiley has previously sold them their current service package; however the conversation needs to be expanded to include new products. Due to consolidation, there are a small number of players in the market which would allow Wiley to quickly make significant inroads. They would need just two or three early adopters, most likely new deployments to Cott or Cadbury plants, to make waves in the market.

Wiley has historically taken a reactive approach when dealing with the bottling plants. They react to the needs of the plant managers and work on the immediate problems. They have not had the time to collaborate and develop long-term, more strategic solutions. Wiley has meetings with the plant managers about three times per month to discuss current issues and report on progress. These meetings will need to be expanded in order to have time to educate them on the MESCADA product with the plant managers. The idea and concept of MESCADA need to be planted as early as possible, almost making the managers believe they have been a part of the development process. This would make them take a view of ownership in the product and create excitement about using it. The message would then need to be shared with the corresponding OEMs. This pull marketing strategy is crucial in the success of MESCADA.

There is also very limited information sharing and trading of best practices within plants, so there needs to be an emphasis on the Cott and Cadbury plants where the sales cycle can be shorter and have a greater chance of success due to the plants being more open to new products and innovative ideas. Wiley will need to establish more proactive relationships with plants in establish themselves with Cott and Cadbury.

### ***Sales Cycle***

The sales cycle for the MESCADA market would first start with a beta testing period which would last approximately four to six months. This would enable Wiley to get the software into a proof of concept application that the OEM and bottling plants could use during that time and make a longer-term purchasing decision. The budgeting process would occur three months after the trial period, with the official mainstream product launch about three months after the budgeting process. With a new product line such as an energy drink, the process can be compressed to six months. The twelve-month sales cycle is long; however, the beta testing period allows Wiley sufficient opportunity to make any adjustments and ensures the client has a product that will suit their needs and minimize disruption once the contract is signed. Wiley will also be able to reduce the sales cycle once they have successfully tested and sold their product into a few bottling plants. By focusing on the more innovative plants of

Cott and Cadbury and developing white papers and case studies from these deployments, Wiley can then share and leverage the results to other plants and bottlers, as well as up-sell additional services and products.

## Distribution Channels

- **Equipment Manufacturers** – Rockwell and Siemens are the primary OEMs of the equipment Wiley’s MESCADA product runs on. Although these OEMs do offer some competing products, these solutions have a general perception of being antiquated and ill-suited to the needs of CSD plants. Sales through this channel will depend largely on not alienating the OEM and leading the decision makers to specifically request MESCADA in their discussions with the OEMs. Wiley can further develop this channel by offering sizable commissions to the OEMs, so that they can view MESCADA as a source of incremental income rather than an unnecessary nuisance.
- **Direct Installation** – A significant portion of Wiley’s existing business comes through their expertise in installing skids, including the control software, directly into factories. This channel can be further developed through Wiley’s existing expertise in plant installation. Although consolidation threatens this channel, it also provides an opportunity in that Wiley uniquely understands the needs of CSD plants. In this channel, Wiley has the flexibility to set the price relative to the individual customer’s budget.
- **Middle-channel suppliers** – Plants often contract local builders to install new beverage production equipment, and rely on the builder to avail them of the installation options that are available. There are far too many of these suppliers to target them individually, especially since they are not focused on the beverage industry. The ideal strategy for this channel is to reach the decision makers in the plants so that they will request MESCADA from the builders as part of the installation. Wiley will probably need to standardize pricing in this channel to avoid time-consuming negotiations with numerous low-volume customers.
- **Mega-suppliers (Krohnes and Sidel)** – Customers are increasingly purchasing entire plants through one of these two large foreign companies who offer full management of plant construction. These plants do not always have expertise in the current trends in the beverage industry. In choosing a preferred partner, Wiley should first consider whether either company has a distinct advantage, and should then evaluate which partner has the least overlap with Wiley’s offering, such that Wiley can help them build a reputation of expertise in the CSD market through Wiley’s services. Unless they are forced to by the nature of the partnership, Wiley should seek to maximize their relationship with both companies. Both companies are likely to exert strong pricing pressure on Wiley, since they control access to a very large share of the market. Fortunately, the incremental costs of software deployments are very low, and Wiley can endure some lower pricing in this channel in exchange for growth in market share and mindshare within the industry.



# Market Research Plan & Usability Testing

The tactics for beta-testing the MESCADA product, as a strategy for long-term end-customer purchasing in the sales cycle, have been already discussed in the customer and buyer behavior sections of the marketing plan.

Wiley Engineering has just completed conducting a phone questionnaire based on a convenience sample of existing customers. The purpose of the questionnaire was to determine the suitability and demand of MESCADA technology modules among current customers, as a means to help project demand in the greater industry. Also, the questionnaire hoped to reveal customer values for related technology and services, as well as perceived chief competitors. The data from survey results will be used to determine optimal marketing strategies and tactics for the greater target segments. The final survey conducted by Wiley, following advisement, recommendations and revisions from this marketing team, can be viewed in the appendix.

The primary conclusions drawn from this questionnaire included the importance of communicating MESCADA benefits, such as a clear user interface, in marketing promotions. A strong potential reseller group was revealed in middle-channel suppliers. Additional marketing research strategies, in Wiley/customer prospect Lunch & Learns, are discussed below in the Marketing Tactics & Marketing Program Controls section.



## Opportunity Analysis

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>○ Strong technical capabilities. Staff of highly experienced engineers</li> <li>○ Currently have software modules, just need to repackage and develop marketing and branding</li> <li>○ Ability to focus on client and customize software (difficult for large, broad competitors)</li> <li>○ Understand processes, different software uses for CSD industry</li> <li>○ Lower cost</li> <li>○ Highly narrow/specialized CSD industry expertise</li> <li>○ Strong word of mouth reputation</li> <li>○ In-house technology expertise &amp; developers.</li> </ul>	<ul style="list-style-type: none"> <li>○ No dedicated sales force</li> <li>○ Limited marketing presence</li> <li>○ Weak financial position and credit history compared to competitors</li> <li>○ Limited access to other decision-makers in companies, such as Accounting and Operations. Currently dealing with mostly OEMs.</li> <li>○ Firm has extensive institutional knowledge. Knowledge transfer could prove difficult. Clients view the people as the value proposition, not the software.</li> <li>○ Wiley doesn't tangibly communicate their technology offerings to customers – they don't treat it like a core offering.</li> <li>○ No brand awareness associated with technology.</li> <li>○ Actual CSD machinery design</li> <li>○ Wiley doesn't inventory &amp; sell hardware</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>○ Software modules can be adaptable and scalable to other industries, i.e. oil &amp; gas, chemical companies</li> <li>○ Specific technology modules to be in demand as industry changes and evolves, i.e. energy drinks, Vitamin water</li> <li>○ Competition is broad – no expertise with narrow beverage focus</li> <li>○ Larger competitors have higher costs</li> <li>○ OEMs selling machinery can purchase/recommend the product.</li> </ul>	<ul style="list-style-type: none"> <li>○ Larger competitors can simply purchase software modules and packages to compete with Wiley's offerings</li> <li>○ Wiley could be purchased</li> <li>○ Rockwell forcing integrators to follow hardware purchasing requirements</li> <li>○ New drink choices enter market with unforeseen testing and packaging needs</li> <li>○ Industry Equipment Suppliers becoming competitors</li> <li>○ Very difficult to trademark/patent software packages</li> </ul>

Opportunities in the beverage industry exist for MESCADA software modules to supply needed beverage-expert technology and service, as discussed throughout this marketing plan.



## Financial Objectives

Please see Projected Profit & Loss section below

## Marketing Objectives, Timeline & Reviews

- MESCADA brand promotions will launch on February 15, 2008
- Because this is a B-to-B niche market, heavy broadcast promotion is inappropriate. Press releases, website and sales literature to accompany direct sales calls and Lunch & Learns, will constitute product launch. This will be continued and built upon throughout the first year, so only about 35% of total year's marketing budget will be spent on Q1 2008 product launch.
- After Q4 2008, marketing expenditures will be compared to sales and to awareness. Marketing research will be conducted in Q1 of 2009 to review awareness of brand and benefits for MESCADA in the CSD industry. Decisions will be made to continue with this strategy or formulate a new plan for marketing MESCADA. Strategies will also be set to expand MESCADA product offerings and awareness to complementary technology products for the CSD and greater beverage engineering community.
- Questionnaires similar to the one in this marketing plan (Appendix A), feeding into future product marketing plans, will be drawn and carried out starting Q3 2009. This will all be done with the objective of creating awareness and industry recognition of MESCADA as superior engineering technology - first in the niche CSD industry, then for all beverages, and eventually in other engineering industries.
- This process will continue to be executed and evaluated to accomplish Wiley business goals through 2013.
- We set a marketing objective to achieve 10% market share for new CSD production technology modules by Q1 2010.



## Marketing Strategy

- **Pull Marketing** - Employ a pull marketing strategy, to get the plant end-customers to demand MESCADA software from OEMs (as previously discussed in the customer section of this marketing plan).
- **Direct Sales** - A direct sales force will meet with OEMs to ensure that Wiley is available and positioned as a premium feature of their consolidated offerings.
- **Mid-size suppliers** – Target smaller OEMs with the suggestion that the use of leading edge control software can help them compete on the same level as their massive competitors.
- **Product Roll-Out and Awareness** - Create brand awareness in the industry by launching the MESCADA brand prominently targeted to industry professionals, including prominent placement of MESCADA in trade publication articles and advertisements.
- **Free Trials** - Give away to large customer prospects, a free initial MESCADA module, performing just one function, to incite purchase of additional modules. Also allow beta testing with same thinking, as previously discussed in this plan.
- **Viral Marketing** - Due to small size of beverage industry, pursue Cott or Cadbury/Schweppes as early adopters of MESCADA and allow word of mouth and inter-company staff migrations to spread the knowledge of the product's superior performance.
- **Prestige Pricing** – The cost of software modules is insignificant relative to the total cost of the overall installation process. A higher price point positions the product as an upgrade over the inferior software modules the OEMs will provide by default.
- **OEM Channel** - Form partnerships with OEMs for cross-selling products, and to share trade show and website promotional resources.

## Marketing Tactics & Marketing Program Controls

### Lunch & Learn

- Hold Lunch & Learn meetings with key decision makers in the plants, educating them about new and upcoming developments in the software modules available for their production equipment, and specifically the advantages MESCADA offers them. The meetings must have tangible career development benefits for attendees beyond a simple sales pitch; otherwise the technical staff will not be receptive to the message. These meetings will educate them about the future of beverage production technology – this information is valuable to their career whether they use MESCADA or not.

- Design a survey to distribute at the end of Lunch & Learns to gauge how convinced the targeted engineers are that MESCADA best suits their needs, and any shortcomings or further innovation opportunities they observe.

### **Trade Shows**

- Staff a display at conventions, such as BevTech, which will be well attended by decision-makers in the beverage industry; secure presentation slots when possible to present on the advances MESCADA is delivering to the industry. Use these venues to build awareness of MESCADA and gain industry contacts for follow-up with direct sales efforts.
- Share a booth with OEMs at shows where a separate MESCADA presence is not merited.
- Customize web links, email addresses, and call-in numbers for each trade show, tracking response rate and resultant sales for each trade show. Cast a wide net of attending many trade shows in the first year, trimming the least effective shows in subsequent years.

### **Product Trial Promotions:**

- Lend Beta versions of product for trial with large prospects to incite actual purchases and generate metrics.
- Give away specific MESCADA modules to large prospects to incite additional module purchases.
- Trial products will include survey and registration information, to help identify customers and prospects within the same facility.
- Provided product information will include special forwarding URL and phone extension contact information, to trace product and support inquiries back to the trial deployment they are related to.

### **Media/Public Relations:**

- Regularly send press releases containing info on MESCADA satisfied customers to industry publications and journals.
- Co-sponsor a media event at a trade show, to showcase MESCADA's benefits when used with beverage production equipment (a skid)

### **Advertising:**

- OEM-partnership website links, such as [www.dsiprocess.com](http://www.dsiprocess.com), [www.abprocess.com](http://www.abprocess.com)
- Industry trade publication ads
- Print ads will focus on communicating product benefits, such as the easy-to-use technology interface. Ads will be placed in industry-specific publications such as *Beverage Digest*

### **Published Articles & Whitepapers:**

- Document customer successes and use internal expertise to develop whitepapers and articles for industry publications, documenting proven successes with MESCADA and establishing thought-leadership regarding the future of software modules' impact on the CSD industry.



- Develop relationships with trade publications such as Beverage Industry and Beverage Digest so Wiley can be called on for quotes in articles and have their articles published, championing the future of software modules in the beverage industry.
- Publish reprints of all trade publication articles on company web site, and develop whitepapers displaying Wiley's expertise in the CSD market and the superiority of MESCADA in meeting these needs. Track traffic on web site using Google Analytics to determine which publications are achieving the most response and focus on these sources.

#### **Case Studies:**

- Case studies, in print and online versions, covering major plant MESCADA customers (such as COTT and Cadbury/Schweppes)
- Adapt to advertorials in aforementioned trade publications.

#### **Brochure/Pocket Folder:**

- Brochure with a pocket flap (for holding technical specs)
- Brochure to tie in to ad campaign

#### **Up-Selling:**

- Premium add-on elements:
  - Data collection
  - Reporting
  - Data drill-down (both pre-built and user configurable)
  - Web browsers
- Services (10-20% projected total annual income)
  - Installation/production process set-up
  - Maintenance services (following year one)
  - Long-term consulting
- Monitor this ratio each quarter, determine if stronger promotions are necessary for these services

#### **Direct Sales & Tactics:**

- See the previous discussions in the customer section of this marketing plan.

#### **Case Studies:**

- Case studies, in print and online versions, covering major plant MESCADA customers (such as COTT and Cadbury/Schweppes)
- Adapt to advertorials in fore-mentioned trade pubs

## **Projected Profit and Loss**

The revenue and income goals outlined below are divided into high and low estimates to provide an outline of the accompanying income stream resulting from both ends of the spectrum. While the low





estimates still represent a satisfactory outcome for Wiley, the high estimates represent the financial objective of this marketing strategy.

We anticipate a 15% profit margin, resulting in the income estimates outlined below. Based on these estimates, the break-even point will occur four to six months into the launch, which is reasonable based on the investment required to launch the product. We estimate that growth for the product will be sustainable—while the modules themselves could eventually be replicated, Wiley’s core competence cannot be easily duplicated; their expertise in not only control systems but the application of control systems to the CSD industry allows for an efficient, consistent, and reliable implementation process.

The important, additional installation and maintenance services offered by Wiley will be up-sold from MESCADA, and are projected to procure 10% - 20% of total income each year. In addition, the growth of the industry (approximately 1.6% annually for 2005-2010—see above) will allow Wiley to move MESCADA beyond CSDs and into other beverages.

*MESCADA Revenue/Income Estimates: Years One and Two*

	Year One		Year Two	
	Revenue	Income	Revenue	Income
Low estimate:	\$200,000	\$30,000	\$1,000,000	\$150,000
High estimate:	\$300,000	\$45,000	\$2,000,000	\$300,000



## Appendix A: Wiley Marketing Questionnaire:

### Wiley Conclusions:

Results were limited. After reviewing the effort for this one survey, I have concluded that this type of survey should be used over a long duration. Possibly a 6-month effort or part of the long-term brand report card feedback forms. We obtained surveys from 6-7 people with a lot of responses and additional information.

### Software Platform Questions

1. What control system(s) do you currently use?

- A. Rockwell Automation 100%
- B. Siemens
- C. Honeywell
- D. Foxboro
- E. Other (Please Specify) \_\_\_\_\_

Wiley Conclusions: Rockwell Automation Control Systems are hands down the owner of this market. This determines the type of platform you use for the controls application with specialized programming capabilities. The HMI layer is the over-riding computer platform with another software platform.

2. What Human Machine Interface(s) software do you use

- i. A. RSViewSE – Rockwell
- ii. B. RSView32 – Rockwell 50%
- iii. C. WinCC – Siemens
- iv. D. IFix – GE 30%
- v. E. Wonderware 20%
- vi. F. FactoryLink
- vii. G. Visual Basic Application
- viii. H. Web Based Application
- ix. I. Other (Please Specify) \_\_\_\_\_

Wiley Conclusions: Rockwell Automation HMI Systems are a major stockholder in this market, but not completely dominating. This determines the type of platform you use for the HMI application.

### Capital Budget Questions

3. Over the past two years how many mechanical changes have you made to your production system?

- i.A. None
- ii.B. 1-2
- iii.C. 3-5
- iv.D. 5 or greater 100%

4. How many mechanical changes do you expect for the next two years?
  - i.A. None
  - ii.B. 1-2
  - iii.C. 3-5
  - iv.D. 5 or greater 100%
5. How many upgrades or retrofits do you expect for the existing systems within the next two years?
  - i.A. None
  - ii.B. 1-2
  - iii.C. 3-5
  - iv.D. 5 or greater 100%

Wiley Conclusions: Each change is about \$100,000. Our share would be about 20% of the change cost. If you apply this amount of change times the number of the American Beverage market from your case study, you can estimate the market share. The intent of these questions was to identify the types of changes. These questions did not result in that response.

6. What is the biggest challenge facing your production over the next two years?

Ultra Flexibility

Healthy Drinks & Energy Drinks

Tremendous increases in the Cost of Concentrates

Cost of Materials Increase

Wiley Conclusions: This question identifies the process criteria that they will be looking for – i.e. how does the system reduce the cost of materials, how fast does the system clean and changeover to a new product, what is the production range of products that your system can operate.

#### Project Delivery Systems Questions

7. Do you usually write two contracts for your projects, one to an engineering firm and one to the subcontractor?
  - i.A. Yes 50%
  - ii.B. No 50%
8. If YES, do you use consultants to prepare your bid specifications?
  - i.A. Yes 50%
  - ii.B. No 50%
9. How many engineers do you have on staff to perform projects?
  - A. None
  - B. 1-2
  - C. 3-5

- D. 5 or greater
- 10. Do you use any automated CAD packages to maintain your documentation?
  - A. Yes 25%
  - B. No 75%

If YES, what CAD package do you use and how do you use it?

*Wiley Conclusions: Typically they are looking for anyone to prepare the specifications other than themselves and they do not have a preference for whom prepares it. All responses indicated that bid specs are prepared, and the companies do not have the capacity to increase it. Automated CAD is not a deal breaker when it comes to how you deliver the systems.*

- 11. Who approves projects less than \$10,000

- A. Plant Engineer
- B. Project Manager
- C. Engineering Manager
- D. Plant Manager
- E. Other \_\_\_\_\_

Over \$50,000 and less than \$100,000,

- A. Plant Engineer
- B. Project Manager
- C. Engineering Manager
- D. Plant Manager
- E. Other Corporate

Greater than \$100,000?

- A. Plant Engineer
- B. Project Manager
- C. Engineering Manager
- D. Plant Manager
- E. Other Corporate

*Wiley Conclusions: Two decision makers: Plant and Corporate.*

### Distribution Channel Questions

- 12. When you purchase equipment from a distributor, who supplies the fabrication and labor?

- A. Distributor and the fabrication and labor from another source
- B. Distributor and provide the fabrication and labor in-house
- C. Distributor that provides the fabrication and labor
- C. Other Local Construction Companies



Wiley Conclusions: Huge opportunity for sales incentives targeting middle channel suppliers. If we supply a good installation spec for installation along with our software.

13. When you had automation issues that required external support over the last year, did you call the;

- A. Equipment Manufacturer (30-50% of the time)
- B. Engineering Consultant (20 – 25% of the time)
- C. Other \_\_\_\_\_ In House Support (20-25%) \_\_\_\_\_

Wiley Conclusions: Not an important question.

14. How often do you change suppliers

- A. Almost Never (75%)
- B. 0-20% of suppliers each year (25%)
- C. 20-50% of suppliers each year
- D. 50-80% of suppliers each year
- E. 80-100% of suppliers each year

Wiley Conclusions: Big issue – we must find the non-performers to replace. We have some proprietary leads.

One customer said we should chase Berry Weidmuller (spelling?), Zerpak (spelling?) out of Canada, and CTR out of Colorado (CTR stands for Concept to Reality)

Questions Rank the following for importance

(1=Most important – 5 least important)

1. What are the most important aspects code developed for your PLC and HMI applications:

- 2   Extensive help tools and support documentation
- 1   Maintainability
- 4   Ease of Installation
- 5   Security
- 3   Cost
- Other \_\_\_\_\_

2. What supplier capabilities do you consider most important

- 3   Long time in the market
- 4   Large product offering (One Stop Shop)
- 1 tie   Size and capabilities of internal support group
- 1 tie   Process Expertise specific to your industry
- 5   Location
- Other \_\_\_\_\_



3. What PLC/HMI program and system capabilities do you consider to be most important
- \_2 Tie\_\_ Flexibility to change the process
  - \_4 Tie\_\_ Security to keeping the operators from making mistakes
  - \_4 Tie\_\_ Data Collection Capabilities
  - \_2 Tie\_\_ Process Instrumentation Accuracy
  - \_1\_\_ Large Range in production capabilities (turn down)
  - \_\_\_ Other \_\_\_\_\_

Wiley Conclusions: Predominantly in the responses have two important themes – large range of products, and ultra user-friendly interface even at the data collection level.

