

# **Get Customers Inspired: How Modern ERP Can Support Greater Customer Experience**

WHITE PAPER

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## **EXECUTIVE SUMMARY**

IDC Manufacturing Insights recently conducted a worldwide study of over 460 enterprises across multiple sectors including industrial machinery and equipment, high-tech and metal fabrication, and covering 13 countries worldwide. The survey showed that:

- The business focus of worldwide manufacturing companies currently continues around costs and profitability, which our results show is more of a concern for companies in developed countries. Looking forward, however, business initiatives are customer-orientated. The shift toward value-added services has been evident for a few years, but what is new is the *importance* of improving customer experience. Companies in all countries and industries covered in this survey will be concentrating on serving their customers better, but they still need to understand better how this can overcome cost challenges and ultimately grow their businesses.
- The research reveals an immaturity about the definition of customer experience which ultimately impacts how a customer-oriented strategy manifests itself inside the organisation. Companies continue to describe good customer experience in terms of products or service features and functions and their alignment to the customer's needs. Only 9% of leading companies have fully realised the importance of creating a customer-oriented culture and process workflows to generate superior customer experience.
- The role of ERP appears crucial to improving customer experience. Companies on higher levels in the customer experience maturity model have a higher consideration of their ERP as a key tool in delivering a good customer experience. This is more evident in larger organisations that combine a single instance ERP with a customer-centric culture, but smaller and mid-sized companies could also see the same benefits by replicating this model. The research indicates that an improved customer experience can be gained through investments in modern, fully integrated, flexible and easy to use ERP systems that streamline all operational

processes and connect back office with front office by offering integrated CRM, warranty and aftermarket functionalities.

Over the next three years, manufacturers will have to consider prioritising initiatives aimed at improving the customer experience. They will have to build customer-centric values into purchasing decisions to reduce the current emphasis on costs. Partnering with suppliers will also be beneficial to deliver customer experience. Last but not least, manufacturers will have to rely on the critical support of modern IT. An open and modern ERP will be an essential tool to improve customer experience, but to become truly customer-centric they will have to combine technology and processes with an embedded customer-oriented culture at all levels of the organisation.

## **SITUATION OVERVIEW**

The global manufacturing industry is passing through what is probably one of the most complex market contexts ever. In recent years, the business landscape has been dominated by a sequence of financial crises and by a continued threat of instability in global markets. The impact of this tough economic situation has been very relevant to the manufacturing industry, which has seen profitability challenged by a number of factors, including the need to retain clients and the struggle to expand into new markets.

This dramatic change in the marketplace clearly emerges from our research as the most compelling concern for manufacturers worldwide. This is translated into a challenging worldwide competition and the need to keep operational cost and profitability under control. Other than these obvious and understandable concerns, what is very notable in our survey results is the challenge for manufacturers to retain existing clients. Customer retention is among the most challenging concerns for manufacturers, particularly in developed economies where it is viewed as one of the most critical challenges together with profitability.

Companies in developed markets feel the pressure of aggressive competition that is eroding their market. Their existing customer base — pressured themselves by the need to keep costs under control — is eagerly looking at emerging competitors as a viable alternative. Manufacturers located in emerging geographies have instead different immediate challenges, notably the need for business growth. Thus their aggressive competitive approach to expand in worldwide markets by leveraging their lower production costs.

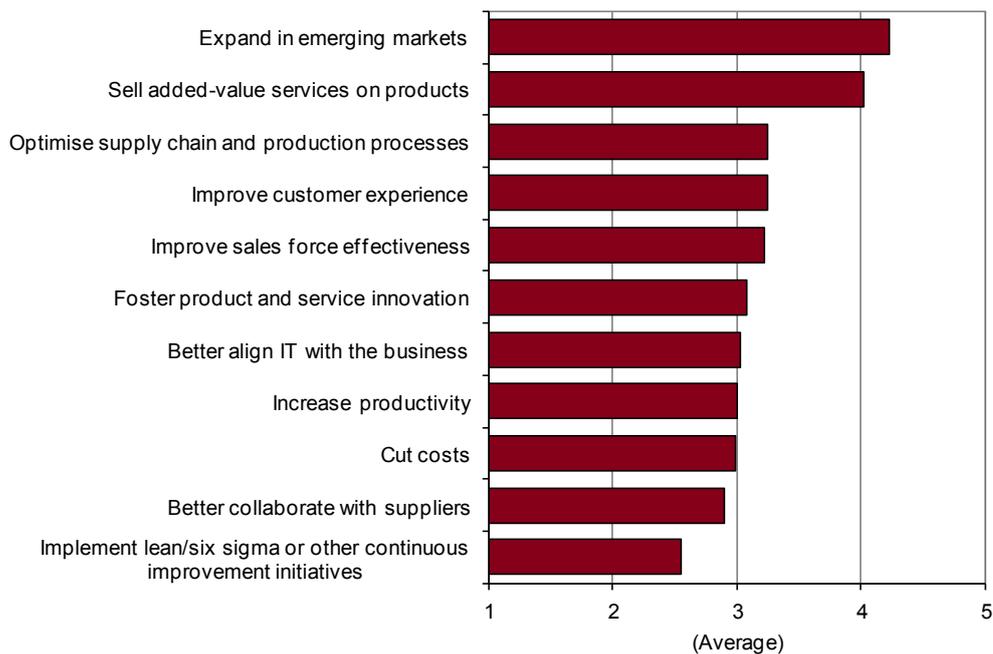
Although operational costs continue to be one of the manufacturing industry's biggest concerns, it is not directly translated into cost cutting initiatives as was evident in the past few years. After years of crisis, manufacturers understand that a business strategy purely based on cost cutting isn't sustainable. The top business initiatives emerging from our survey (Figure 1) show that the future focus is about growth and differentiation through value-added services and improved customer experience.

The shift toward value-added services has been evident for a while, but the importance of improving the customer experience is now appearing as significant. Traditionally, manufacturers have been more focused on their engineered products or the efficiency of their assets rather than on the satisfaction of their clients. This traditional inward looking approach is now giving way to a more modern outward looking, customer-driven approach.

**FIGURE 1**

**Key Business Initiatives**

Q. *What business initiatives do you expect your company will undertake over the next three years?*



Number of valid respondents: 465

Base: All Sample

Source: IDC Manufacturing Insights, 2013

**THE APPROACH**

There are several possible definitions of customer experience. One that is common and well accepted says customer experience is defined as *"the sum of all experiences a customer has with a supplier of goods and services, over the duration of the relationship with that supplier"*.

Customer experience is therefore built on all the interactions a manufacturer has with a supplier. If those interactions have been effective, if it has been easy to do business with that supplier and, most importantly, if the level of satisfaction is superior to other similar suppliers, then the purchaser will certainly buy again. However, in a competitive marketplace, if the experience is not fully positive, the purchaser will search for an alternative provider. The time of loyal

customers has passed unless they are supported by appropriate initiatives aimed at creating a superior customer experience.

This holds particularly true in today's marketplace often characterised by fast product commoditisation and where new customers are gained with price discounts. There is no winner in a competitive battle based on mere price cutting and discounts. To stand out from competition it is essential to find a way to leave the endless loop of price erosion. Delivering a superior customer experience plays a vital role in creating value. Value can counterbalance shrinking prices.

There are several factors that contribute to building a good customer experience. The foundational elements are of course related to the basics of customer-supplier relations: meeting customer expectations in terms of features, quality and price.

However, in a modern business environment, customer experience is much more than that. It is related to the service level the supplier is able to provide to its customer, beyond the manufactured product itself. It includes, for example, the ability to deliver the perfect order – right quality, quantity, location, and due date — and the range of aftermarket services supporting the initial product. An enhanced customer experience paves the way for customer loyalty and longer lasting relationships between supplier and purchasers.

Beyond aftermarket services, customer experience encompasses a number of essential capabilities including how easy an organisation is to do business with, reliability, speed of interaction, and willingness to help or serve. These capabilities create an essential engagement to the product, service, company or brand, and create business benefits including differentiation from competitors, profit increase, and business growth. And this is the ultimate goal for any manufacturer.

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### ***Lack of Customer Experience Maturity***

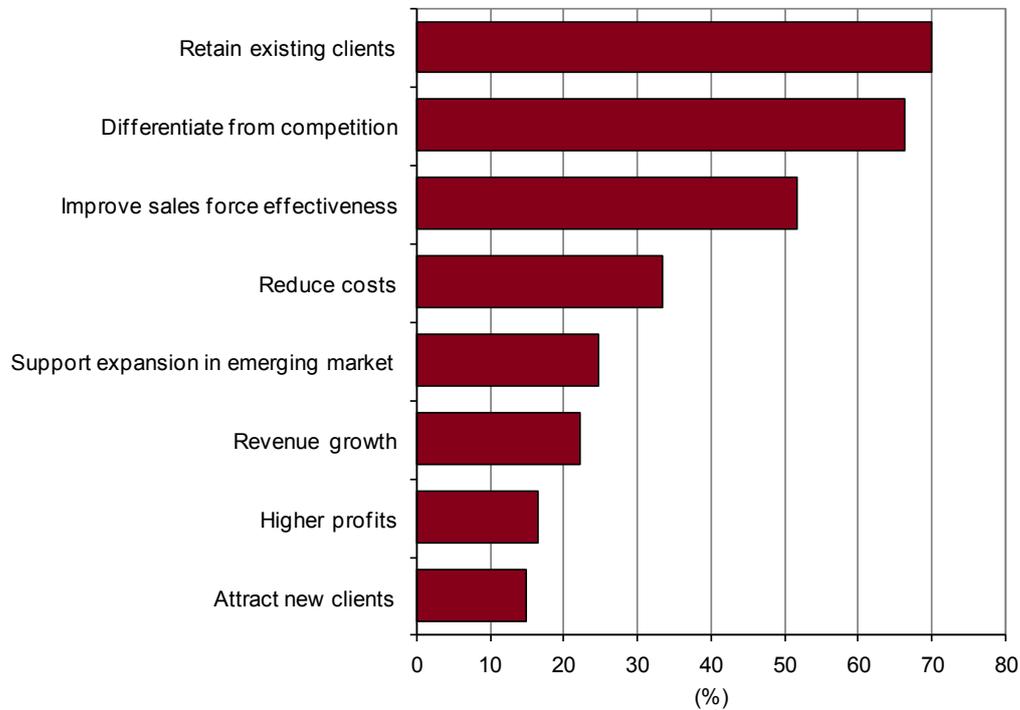
Though improving customer experience is among the top business initiatives for many manufacturers worldwide, its definition, its level of maturity, and approaches toward improving it greatly differ across manufacturers.

Data shown in Figure 2 highlights that customer retention, differentiation from competitors and sales force effectiveness are the top three perceived benefits of delivering a good customer experience. Those capabilities are essential elements of a greater customer experience and can go a long way toward stabilising revenues. Our respondents, however, have not wholly grasped that delivering a good customer experience can positively impact profitability, revenue growth and the attraction of new clients.

**FIGURE 2**

**Customer Experience Benefits**

Q. *What are the main benefits of creating a greater customer experience?*



Number of valid respondents: 465

Base: All Sample

Source: IDC Manufacturing Insights, 2013

This lack of customer experience maturity is further demonstrated in Figure 3. This tells us that when interacting with suppliers, the key factor negatively impacting the experience is price. Although price is an essential element of a happy supplier-customer transaction, it doesn't represent what customer experience really is.

In today's manufacturers' mindset, price still supersedes in importance even elements such as concerns on supply reliability, quality and lead time. This shows how purchasing is very much being squeezed by the continuing need to reduce costs and increase profitability.

It is our impression that the majority of respondents to our survey are still prone to a crisis-minded approach to the marketplace, where lower prices and discounts are seen as the only way to go to market. This is a very short-term strategy that can't last very long. It negatively affects profits, it doesn't sustain differentiation and it doesn't create any long-lasting business growth.

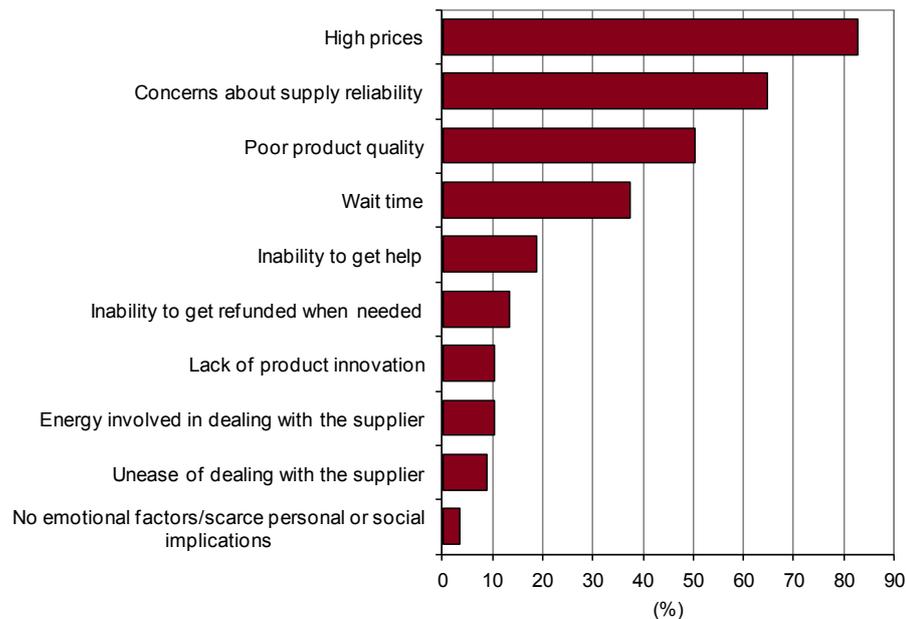
Given quality and price are increasingly commoditised features in today's marketplace, competitive differentiation needs to be found somewhere else. Research results presented so far suggest that to build long lasting competitive advantage, manufacturers have to realise that there is much more they have to do other than just meeting price

expectation. And as customer experience is cited here as a top business initiative, over the next three years manufacturers will have to build service quality and customer-centric values into their purchasing decisions.

**FIGURE 3**

**Factors Negatively Impacting the Customer Experience**

Q. *When interacting with your suppliers, what are the key factors that you feel negatively impact your experience?*



Source: IDC Manufacturing Insights, 2013

***Purchasers are From Mars and Sellers are From Venus***

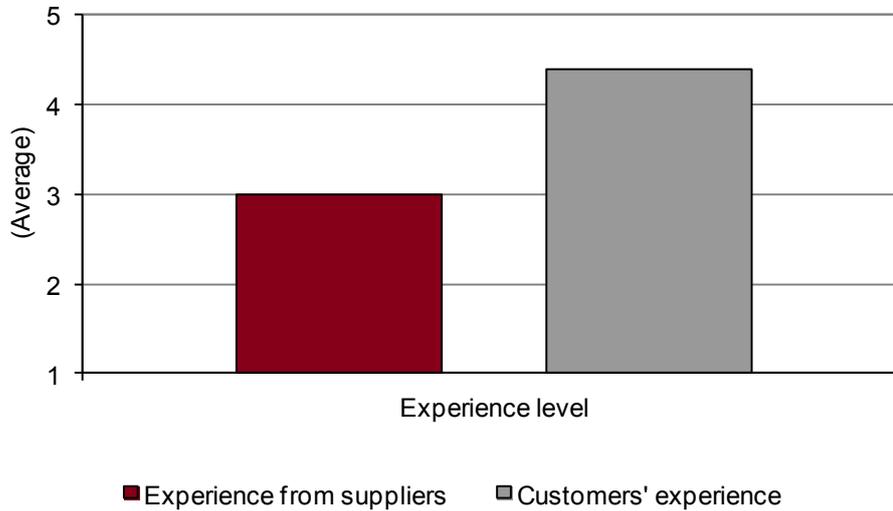
The roots of this immature view of customer experience can be found by measuring the current level of customer experience along the value chain. One of the most striking survey results is the significant difference between the experience manufacturers believe they provide to their customers and the experience the customers get when working with their suppliers.

Figure 4 shows that as purchasers they are not fully happy with the overall experience with their suppliers and that continued relationships seem to be based largely on their ability to meet price expectations (Figure 5). Only 30% of respondents indicated continued relationships were influenced by meeting product expectations and only 6.5% based continued business with a supplier on their ability to support and deliver a product.

**FIGURE 4**

**Customer Experience Levels**

- Q. *How would you rate your experience when interacting with or purchasing from your suppliers?*
- Q. *How do you think your customers would rate the experience they have when interacting with or purchasing from your company?*



Number of valid respondents: 465

Base: All Sample

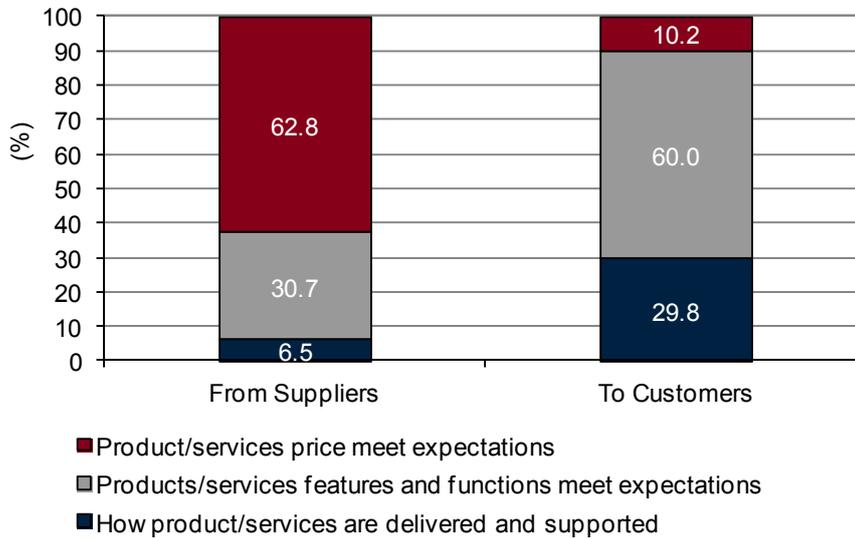
Source: IDC Manufacturing Insights, 2013

Conversely, as sellers their focus is less about cost but more about delivering a good product and service to their customers (Figure 5). They are working hard to meet product/service features and function expectations (60%) and believe their customer will continue buying if they greatly deliver and support their product and service (29.8%). However, they clearly believe there is still room for improvement and feel they are unable to completely fulfil customers' expectations to create the perfect experience.

**FIGURE 5**

**Main Purchase Drivers**

- Q. *With reference to your suppliers, what is the single most critical reason you continue to purchase from them?*
- Q. *With reference to your customers, what is the single most critical factor why you think they buy/purchase from you?*



Number of valid respondents: 465

Base: All Sample

Source: IDC Manufacturing Insights, 2013

Research findings therefore show a value chain in which purchasers continue to squeeze their suppliers for cost advantages, but as you move up the chain service takes a more prominent role in the sales cycle. It is not, however, the picture of a mature value chain in which participants are partnering to achieve the common goal of satisfying the customer of the customer.

This immature approach to the value chain finds its roots in an evident disconnection between purchasing and the boardroom. Purchasing is not linked to the top business initiatives focused on customer experience. Purchasing is still driven by the continuing need to reduce costs and increase profitability and is therefore prone to a merely price-driven rather than value-driven approach.

Business strategists, however, understand the importance of delivering a superior customer experience as a long lasting driver for generating new business. They know they have to go beyond just meeting price expectations in order to generate higher profits. To unlock this situation, quality and customer-centric values need to be built into the purchasing decisions and those values need to flow through to the customer in order to optimise the selling price and process.

## ***The Maturity Model for Customer Experience in Manufacturing***

To better understand how manufacturers are conceiving the customer experience today, we submitted a set of possible definitions for customer experience to our panel of manufacturing enterprises (see Table 1), each describing a different level of customer experience maturity.

**TABLE 1**

### Customer Experience Definitions

Definition	
1	Customer experience is defined entirely by the customer, not the solution provider
2	Endeavour to serve the client better when requested by them, in addition to meeting their product and service needs
3	Customer experience is essentially defined by physical product or service features and functions associated with the customer's need
4	Customer experience is related to analysing past customer interaction and gaining better insights into the marketplace
5	Create a customer-oriented culture and process workflows to make sure clients find it easier to deal with us than with our competitors at all times

Source: IDC Manufacturing Insights, 2013

The basic definition we submitted is "customer experience is defined entirely by the customer, not the solution provider" and is de facto a "negation" of customer experience. The most advanced definition is a forward-looking one that elevates customer experience to a corporate business culture, rather than a mere sequence of activities carried out by a specific team.

By combining the five above definitions with a number of other survey questions (including those presented in figures 1, 2, 4, 5, and 7), we have been able to create a maturity model for customer experience defined by five progressive phases:

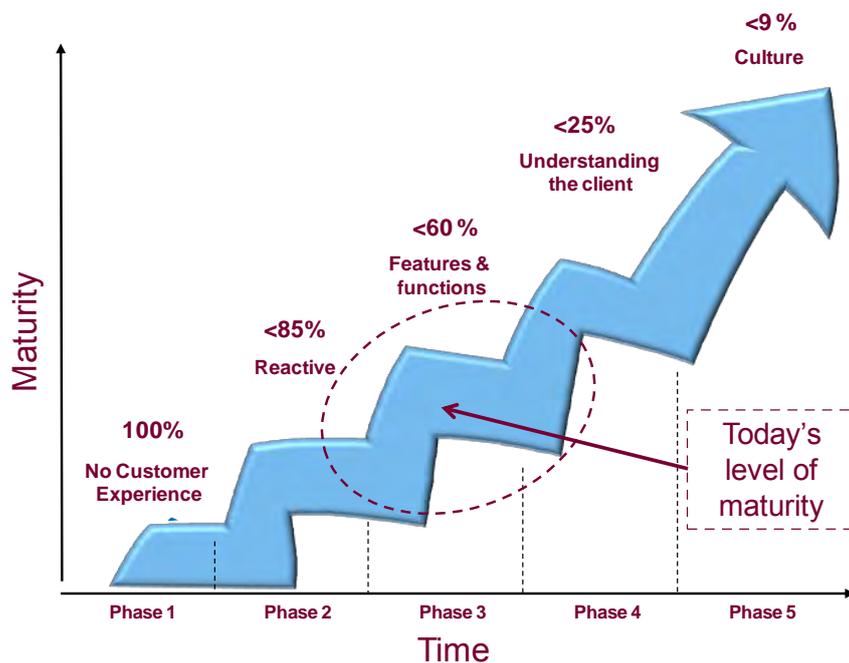
- **Phase 1 — No customer experience.** Companies in this group do not focus on customer experience because they believe they have no control over it. This highlights a completely inward-looking attitude and the lack of awareness that everything a company does in fulfilling customer requests (from order intake to product delivery) somehow has an impact on their experience.
- **Phase 2 — Reactive.** These companies acknowledge the importance of customer experience but consider it a mere reaction to client requests rather than a proactive activity. They tend to primarily focus customer experience on their ability to meeting customer price expectations. They also believe a key enabler to customer experience is improving their responsiveness and adaptability.

- **Phase 3 — Feature and functions.** Manufacturers realise customer experience has to be actively executed and is delivered by providing clients with products matching their feature/function expectations. These companies acknowledge they sell mostly on product, and therefore they rely on product innovation and customisation to fulfil the customer's expectations.
- **Phase 4 — Understanding the client.** These manufacturers analyse and use historical data for improved customer insight. They are focused on providing superior delivery and support for their products and services. Although customer experience practices may still be siloed within sales and aftermarket departments, these companies believe the key to unlocking customer experience opportunities lies in analysing historical customer interaction data.
- **Phase 5 — Culture.** Customer experience leaders realise that in order to deliver real value to their customers, and therefore generate new business opportunities, they have to develop a company culture for customer centricity. Nurturing a customer-centric culture among employees is a key enabler to building long-term profitable relationships with their clients, securing revenue growth and increasing profits.

The results of our data analysis are shown in Figure 6, which shows the maturity model for customer experience.

**FIGURE 6**

The Customer Experience Maturity Model



Source: IDC Manufacturing Insights, 2013

Our research reveals that manufacturing companies are still relatively immature in their customer experience approach.

Just a handful of surveyed companies (9%) are in Phase 5 of our maturity model — as we expected. The majority have a "reactive" approach to customer experience or a focus on matching product price, feature and quality, as a best case.

At the same time, this highlights that those more dynamic companies can reap significant benefits by enabling the business to deliver products and services to customers where the quality of experience is paramount.

## **FUTURE OUTLOOK**

Manufacturers want to improve customer experience as it is among the most critical business initiative over the next three years. Nevertheless they still need to mature their understanding in terms of what customer experience is and what critical business benefits it can deliver.

On their way towards improved customer experience, worldwide manufacturers understand the need to leverage modern technologies to sustain this transformation. When asked "what could be done to improve the customer experience you deliver to your customers?",

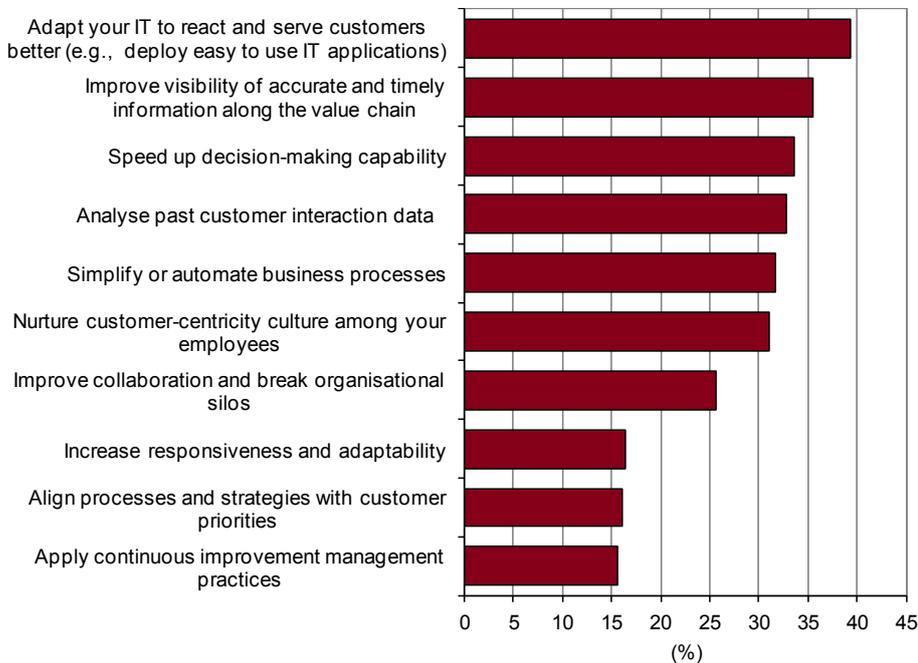
manufacturers clearly answer they have to adapt IT to react and serve customers better, and deploy easy to use IT applications (Figure 7).

More adaptable, usable and flexible IT is the top enabler to improving customer experience. The other top items in the figure — analyse past customer interaction data, speed up decision-making and improve visibility of accurate and timely information along the value chain — can all be underpinned by more flexible IT applications.

**FIGURE 7**

**Customer Experience Enablers**

Q. *In your opinion, what could be done to improve the customer experience of your customers?*



Number of valid respondents: 465

Base: All Sample

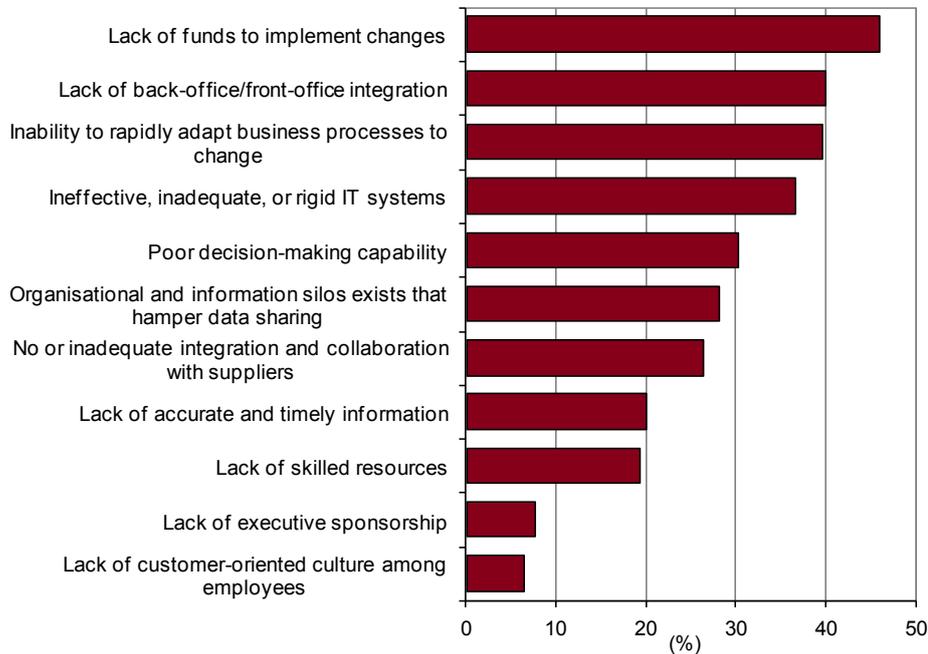
Source: IDC Manufacturing Insights, 2013

Therefore the main improvements to the customer experience are seen as being dependant on tools and technology. Certainly IT is an essential enabler, supporting and improving the speed and operational efficiency of the organisation. However, its efficiency and application in improving customer experience must be supported by a customer-centric culture in order for progress along our maturity model. It is interesting therefore, that "nurture a customer-centric culture among employees" does not even feature in the top five enablers.

**FIGURE 8**

**Main Barriers to Customer Experience**

Q. *What are the main barriers to creating a greater customer experience?*



Source: IDC Manufacturing Insights, 2013

This finding is further highlighted in Figure 8. The most critical barrier to creating a greater customer experience is essentially related to lack of funds to implement the required changes. Organisational issues, such as lack of back-office/front-office integration and inability to rapidly adapt business processes to change and poor decision making capabilities, point to an inability to access and utilise data — and ineffective, inadequate or rigid IT systems are also blamed as critical barriers to creating a greater customer experience. The survey is therefore telling us that current IT is a big part of the problem, but if fixed, predominantly by financial investment, it becomes an essential enabler to providing a better service to customers.

However, once again the connection between a customer centric culture and a good customer experience is not made. Culture is considered the least important barrier to creating a greater customer experience, again highlighting an immature approach to implementing a customer-centric strategy.

***The Role of ERP in Supporting a Higher Customer Experience***

For most if not all manufacturers, ERP is the essential system of record to run their business and our respondents indicate an inability to operate without an ERP system in place. However, when it comes to how ERP contributes to delivering a superior customer experience,

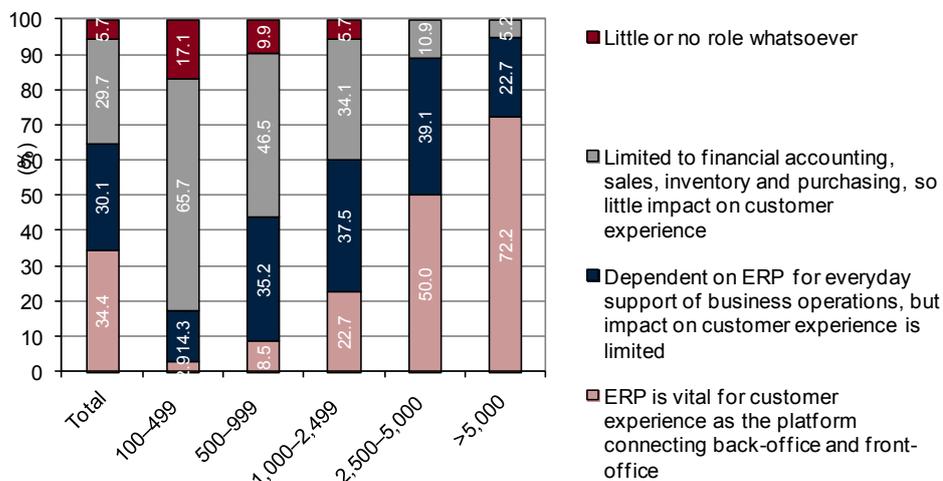
manufacturers do not share the same opinion and this is related closely to the size of company they operate in.

Considering the entire sample of respondents to the survey, less than 35% believe ERP is vital for customer experience. However this is influenced strongly by responses from small to mid-sized manufacturing enterprises (Figure 9).

**FIGURE 9**

**ERP and Customer Experience**

Q. In your organisation, what role does your ERP play in contributing to or delivering a good customer experience?



Number of valid respondents: 465

Base: All Sample

Source: IDC Manufacturing Insights, 2013

In companies with 100–1,000 employees, over 90% of respondents indicated that their ERP has limited, little or no contribution towards the delivery of a good customer experience. The opposite holds true for larger companies with more than 5,000 employees.

The survey data provides further explanation for this. Where ERP systems are not considered helpful with customer experience, this is linked to their perceived ease of use. Manufacturers strongly believe there is still a lack of mobility for ERP functionality, an inaccessibility to or visibility of accurate and timely information, and they think new employees cannot use ERP systems without being properly trained.

More than this, the complexity of integration with other existing applications and upgrading to current versions, and a lack of fully integrated CRM features are pointed to as being the major limitations or weaknesses of current ERP systems, in terms of how it affects the ability to improve customer experience. Poor integration and disparate

systems manifesting themselves as a key contributor to a reduced customer experience, particularly in smaller companies.

Conversely, better integration seems to be an enabler of an improved customer experience in larger companies where there is a higher instance of single ERP systems. In particular, nearly 75% of large manufacturers with 5,000 employees or more indicated that their ERP is a vital platform for delivering a good customer experience as it connects the back and front office operations.

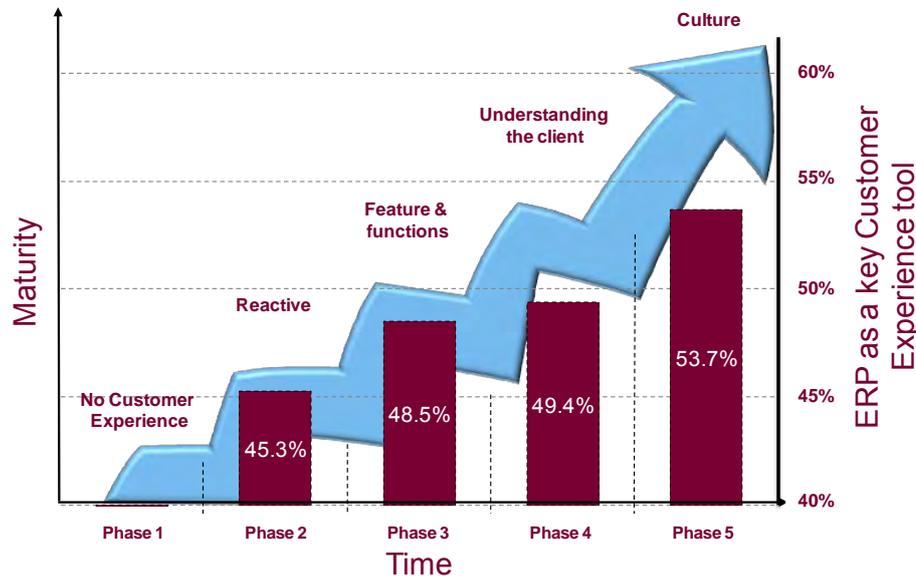
All in all, the message emerging from the survey is that improved customer experience can be gained through fully integrated ERP systems. The reality across the majority of small and mid-sized enterprises is instead lots of home-grown systems (nearly 40% for manufacturers with 100–1,000 employees) or no ERP, creating a lack of timely information as data is stored in too many different IT systems that are loosely connected. It is therefore easy to understand why there is such an immature approach to customer experience in small to mid-sized manufacturing organisations.

### ***The ERP and the Maturity Model***

Our research shows that companies at higher levels of customer experience maturity have a greater consideration of ERP as a key tool to deliver customer experience. Figure 10 shows how the importance of ERP for customer experience consistently improves as the maturity level rises. To confirm this further, our data shows that companies matching the highest maturity model consider ERP as critical more frequently and report higher levels of customer satisfaction overall.

**FIGURE 10**

ERP Applications Supporting Customer Experience, by Maturity Model Level



Number of valid respondents: 465

Base: All Sample

Source: IDC Manufacturing Insights, 2013

### **Beyond ERP**

A better integrated ERP system is therefore seen as being central to creating a greater customer experience. This is confirmed in Figure 11, where ERP is ranked among the top three most critical IT applications that can affect the customer experience.

But ERP alone cannot support customer experience. Other respondents revealed a range of additional customer-facing IT applications as essential in delivering superior customer excellence — warranty management applications, aftermarket and field service applications and customer relationship management (CRM).

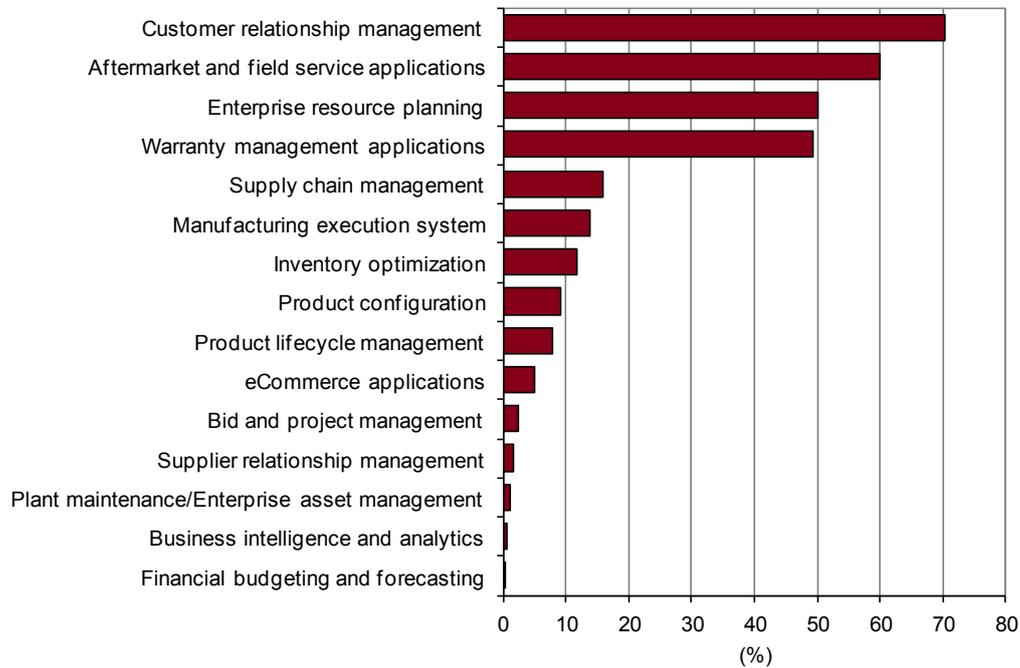
Manufacturers acknowledge that a flexible ERP system offering or easily integrating these customer-facing applications will add the most value.

At the same time, the massive preference for the top four applications unveils again another level of immaturity. Customer experience cannot be merely delivered through front-office applications but would also require the integration of back-office applications such as supply chain management (SCM) and manufacturing execution systems (MES).

**FIGURE 11**

**IT Applications Supporting Customer Experience**

Q. *What are the top three IT applications you believe greatly affect your customer experience?*



Number of valid respondents: 465

Base: All Sample

Source: IDC Manufacturing Insights, 2013

**ESSENTIAL GUIDANCE**

Manufacturers today have come to realise that providing superior customer experience has to be one of their top initiatives. They acknowledge that engaging on deeper levels with their customer base is the only way to get out of the dead-end of poor economic growth and low customer loyalty.

Though the target of securing growth by delivering superior customer experience may be clearly defined at boardrooms, we still witness a low level of maturity around how this strategy is actually implemented. The majority of companies still believe that having happy customers is reliant on meeting price expectations and product features and functions, rather than an overall effort of the whole organisation to improve customer experience. This attitude finds its roots in today's widespread mindset of purchasers, who are pressured by tight business environments and always looking for the cheapest deals.

A handful of leading organisations is moving beyond this narrow perspective. They recognise that only by nurturing a customer-centric culture along the whole chain will they be able to deliver responsiveness and a superior customer experience. They see this in

turn as being clearly linked to their ability to retain customers, grow the business and increase profits.

This research shows that the role of modern IT is crucial. A lack of interoperability across disparate IT systems, particularly in smaller companies, is manifesting itself as a key contributor to a reduced customer experience and service delivery. Conversely, where there is a higher instance of single ERP systems, better integration and a more flexible IT environment, this provides the infrastructure that facilitates an improved experience for the customer. And this is apparent particularly in larger companies.

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### ***Advice for Manufacturers***

- **Consider improving customer experience among your key initiatives.** Our research shows that leading companies have well understood the importance of customer experience to build business opportunities. By increasing the quality of your engagement with your customers, your company will be rewarded with higher profits, avoiding the race to the bottom of cheaper prices.
- **From strategy to execution.** It is not enough to have a strategy in place that dictates your company's need to improve customer experience. You need also to make sure the whole company is committed to implementing it. Research results highlight a disconnection between strategy and execution in many manufacturing organisations. In order to best implement your customer experience strategy, you should start by identifying and prioritising areas where achieving customer experience is critical in creating differentiation and success. Consistently monitor and measure performance indicators and benchmark yourself against competition in order to sustain progress. However, as your customer experience strategy adapts to new business conditions, the areas where it matters may also change.
- **Nurture a customer-centric culture.** Research results highlight an immature approach to customer experience that does not prioritise cultural change among employees. Evidence shows that leading manufacturers have created a successful customer experience enforced by a customer-driven culture within their enterprise. You need therefore to make sure the whole company is committed to creating superior customer experience. It may be beneficial to have a dedicated organisational unit — centres of excellence — that can prioritise activities, provide guidance and training across the organisation, and motivate widespread employee participation.
- **Involve your suppliers.** You will need to build customer-centric values into the purchasing decisions first, and reduce emphasis on cost. Companies are linked in a value chain in which they are both suppliers and customers at the same time. As suppliers they want to sell on value, while as customers they still purchase on mere

cost. By treating your suppliers with a price-focused approach only, you might gain quick savings, but you are missing fundamental opportunities to benefit from higher product or service levels. By treating suppliers as partners and actively engaging with them, you will find benefits that you can ultimately pass on to your customers, improving their overall experience of doing business with you.

- **IT is essential, but not enough.** Manufacturers on their way to improving customer experience appear prone to a simplistic approach that sees IT as the fundamental tool to achieve that goal. We believe that IT is essential in this journey, but not enough. Remember that new technology in old organisations simply generates expensive old organisations. Customer experience is a journey requiring sustained dedication to a customer-oriented shift of culture in your organisation. IT is an enabling tool for that, but it is just one element of the overall strategy for improving the customer experience.
- **Consider an open and modern ERP system as your customer experience backbone.** Our research demonstrates that companies at higher levels of customer experience maturity have a higher consideration of ERP as a key tool to deliver customer experience. However, according to our survey, not all ERP systems are able to deliver or support higher levels of customer experience, if not properly integrated with other customer-facing IT applications. This includes warranty management applications, aftermarket, field service applications, and CRM. Flexible ERP systems that include or easily integrate those applications will add the most value to manufacturers in relation to creating a superior customer experience.
- **Size should not dictate the ability to deliver a superior customer experience.** All our respondents were clear about the customer orientation of business initiatives for the next three years. However, our research indicates that larger companies seem to be in a better place to deliver against these initiatives due to more internal maturity around what defines the customer experience — their IT infrastructure and reliance on the ERP system, which is invariably a single instance ERP. However, large companies do not have exclusivity to these elements. Smaller and mid-sized companies should take direction from their larger counterparts. Culture is driven from the top and should provide a framework for business execution and tools to facilitate change. Aligning and streamlining the ERP strategy against these initiatives is critical. Investing in a single ERP package, would provide more flexibility and integration across the organisation. Key features to look for would include SOA/middleware openness, ease of use, mobile features to streamline service operations, open choice of deployment, and functional agility. As cost management will still overshadow business expenditure, look for a solution that will help you achieve a rapid return on your IT investment.

## APPENDIX

This appendix explains our methodology for the research that supports this White Paper.

### Methodology

The information presented in this document comes from primary research by IDC Manufacturing Insights, sponsored by Epicor.

The primary research for this paper is based on a global survey conducted in winter 2012/2013 across multiple discrete manufacturing industries such as industrial machinery and equipment, high-tech and metal fabrication. 465 interviews were carried out with professionals at different size businesses in the main countries across Europe, Asia/Pacific, and the Americas. Tables M1, M2 and M3 provide further details.

**TABLE M1**

#### Vertical Market Quotas

	%	Count
Industrial Machinery & Equipment	33.3%	155
High-tech	33.3%	155
Metal Fabrication	33.3%	155
Total	100%	465

Source: IDC Manufacturing Insights, 2013

**TABLE M2**

#### Company Size Quotas

	%	Count
200–499	19.8%	92
500–999	19.8%	92
1,000–2,499	19.8%	92
2,500–5,000	19.8%	92
5,000	20.9%	97
Total	100%	465

Source: IDC Manufacturing Insights, 2013

**TABLE M3**

## Number of Completes by Country

Region	%	Country	%	Count
Developed	60.2%	US	12.9%	60
		Canada	4.3%	20
		Germany	8.6%	40
		France	8.6%	40
		UK	8.6%	40
		Nordics	8.6%	40
		Australia	8.6%	40
Emerging	39.8%	Mexico	4.3%	20
		Latin America	5.4%	25
		Russia	8.6%	40
		Middle-East	8.6%	40
		China	8.6%	40
		Malaysia	4.3%	20
		Total	100%	Total

Source: IDC Manufacturing Insights, 2013

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