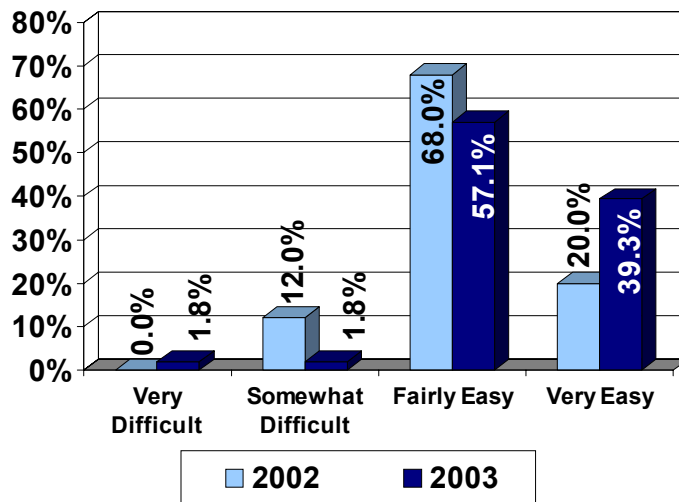


Nearly two-fifths (39.3%) of customers rated ease of doing business as "very easy," up nearly 20% from last year. "Very difficult" and "somewhat difficult" each rated 1.8%, which is down



Company Overall

Chart 5

Ease of Doing Business

"somewhat difficult" rating of 12.0%. The 2003 composite score for this question was 3.34, where 1.0 equals very difficult and 4.0 equals very easy. There were no unsure respondents. The following categories had significantly higher averages for this question: customers 2-3 years (3.45), and system users (3.56). The following categories had significantly lower averages for this question: purchasing (3.22), and machine users (3.24). Reasons for these ratings were given as:

"Very Difficult"

Service and warranty problems

"Somewhat Difficult"

I have better experience with other suppliers

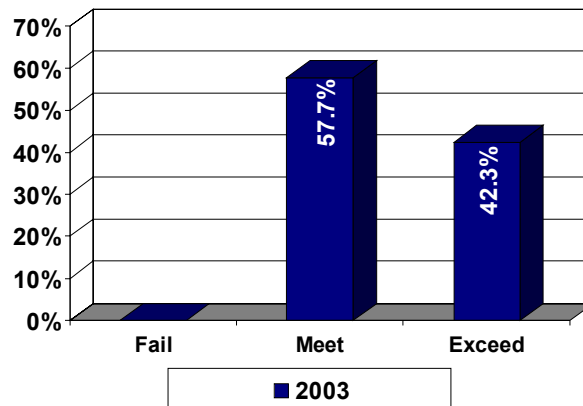


“Did the performance of your sales representative fail, meet, or exceed your expectations?”

Over half (57.7%) of respondents indicated the performance of their sales representative met their expectations. About two-fifths (42.3%) of the respondents' expectations had been exceeded. No one felt that their sales representative failed expectations. The 2003

composite score for this area is 2.42. There was one respondent (1.9%) who was unsure. The following categories had significantly higher averages for this question: customers 2-3 years (2.50), customers 10+ years (2.50), and customers using more than one product (2.50).

The following categories had significantly lower averages for this question: customers 4-9 years (2.30), and machine users (2.37).



Sales Representatives - cont.

Chart 9
Sales Representative Performance

“Did the responsiveness and timeliness of your sales representative fail, meet, or exceed your expectations?”

Three-fifths (60.4%) of respondents said the responsiveness and timeliness of their sales representative met their expectations, while 37.7% felt their expectations have been exceeded. Only one person felt that they had failed, because they felt that the area “needed improvement.” The 2003 composite score for this area was 2.36, with zero unsure respondents (0.0%). The following category had a significantly higher average for this question: customers 2-3 years (2.50).

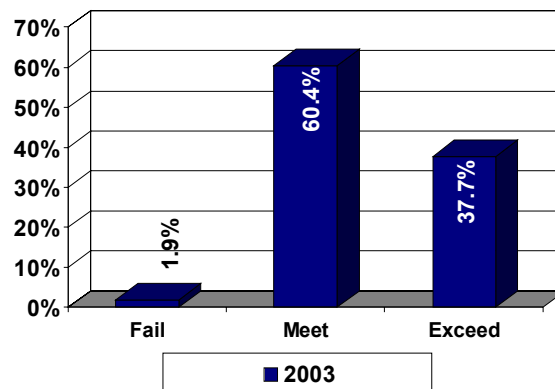


Chart 10
Sales Representative Responsiveness and Timeliness

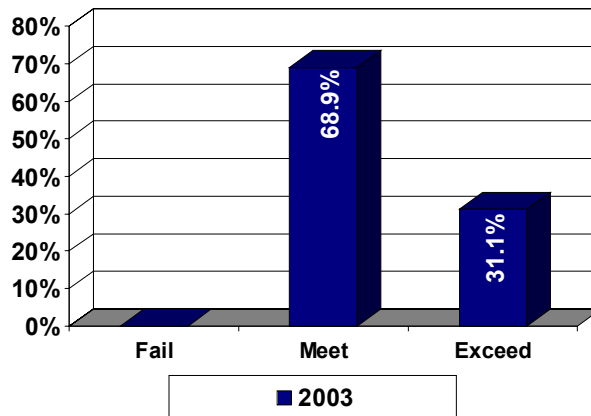
The following category had a significantly lower average for this question: customers 4-9 years (2.30).



“Did the responsiveness and timeliness of the proposal process fail, meet, or exceed your expectations?”

About seven-tenths (68.9%) of respondents said the responsiveness and timeliness of the proposal process met their expectations. While 31.1% felt their expectations have been exceeded. No one felt that they had failed. The 2003 composite score for this attribute was 2.31, with zero unsure respondents.

The following category had a significantly higher average for this question: customers using more than one product (2.50). The following categories had significantly lower averages for this question: customers 4-9 years (2.24), and machine users (2.24).



Proposal Process - cont.

Chart 15
Proposal Process Responsiveness and Timeliness

“Did communication during the proposal process fail, meet, or exceed your expectations?”

Over seventy percent (71.1%) of respondents felt that communication with the proposal process met their expectations, while nearly three-tenths (28.9%) responded their expectations had been exceeded. No one indicated failure. The 2003 composite score for this

attribute was 2.29, with no unsure respondents. The following categories had significantly lower averages for this question: purchasing (2.14), customers 4-9 years (2.25), and customers 10+ years (2.26).

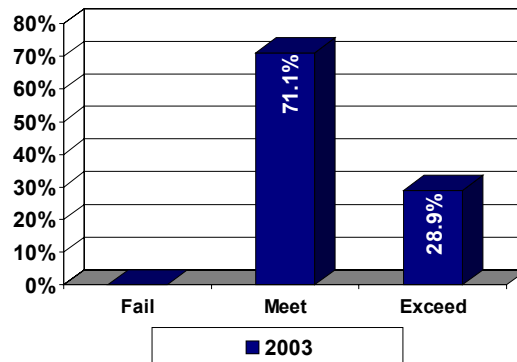


Chart 16
Proposal Process Communication



There were two questions on the survey that asked Company customers about the competition to the Company.

Competitor	2002 % Respondents	2003 % Respondents
Alpha Company	32.0%	35.7%
INC Industries	12.0%	23.2%
Super Tech	20.0%	23.2%
Superior Company	16.0%	7.1%
Excellence Inc.	4.0%	5.4%
Unsure	12.0%	5.3%
Metro Tech	4.0%	3.6%
Performance Associates	8.0%	0.0%

*some respondents named more than one competitor

The first question

asked customers who they felt was the primary competitor to the Company. The top three competitors named by respondents were Alpha Company (35.7%), INC Industries and Super Tech (23.2% each). Six respondents were unsure of who the competitor was.

The next question asked what makes the competitor stronger. Many of the respondents did not feel that the competitor was necessarily stronger than the Company but was more equal to them. Some of the respondents gave more than one reason as to why the competition is stronger, their responses are listed below.

- About equal with the Company*
- Automation*
- Can't count on the Company, they don't give 100%*
- The Company has downsized*
- Competitive prices*
- Competitive pricing on machines*
- Cost*
- Equipment capacity*
- Good engineering*
- Large worldwide presence*
- Machine performance*
- Machines are adaptive*
- Machines are better designed*
- Not stronger (5 respondents)*
- Nothing (8 respondents)*
- On-time delivery and short delivery cycle*
- Performance*
- Price competitive (4 respondents)*
- Price/value (2 respondents)*
- Range of equipment available*
- Responsiveness*
- Sell commodity*
- Stability*

Competition

Chart 43

Primary Competitors



Important Factors

Chart 44

Most Important Factor

Factors	2002 % Respondents	2003 % Respondents
Past Performance/Experience	8.0%	27.3%
Price/Value	32.0%	20.0%
Other	8.0%	18.2%
Responsiveness	N/A	10.9%
Technical Capability	36.0%	9.1%
Warranty and Service	N/A	9.1%
Delivery in a Timely Fashion	N/A	5.5%
Customer Service	12.0%	N/A
Support	4.0%	N/A

In response to "When dealing with a company like the Company, what is the one most important factor in selecting a company to work with?" Past performance/experience was the top answer. Other high answers were price/value, responsiveness, and other. These "other" answers included:

Chosen, single-dealer
Good product
Honesty
Integrity
Machine reliability
Meeting needs
Open, honest, and timely communication
Quality
Trust
Truthfulness

