

EXECUTIVE SUMMARY

For over the past one hundred years, Sunflower has maintained a reputation of being able to provide customers reductions in the cost-in-use of lubricants that exceeds the incremental cost of doing business with Sunflower. Therefore, Sunflower has been able to develop and maintain a large base of very loyal customers who represent Sunflower's brand. At the cornerstone of the Sunflower Industrial Program is the Lubrication Engineering Service (LES) Program.

Market and customers' characteristics change over time. However, many of the principles of LES program were developed several decades ago.

The study focused on two surveys questioning industrial customers and service providers. These surveys focused on the following areas:

1. Awareness, need, delivery, and satisfaction with the LES process and activities
2. LES process implementation and assessment
3. Perceived value and competitive assessment

The results of the surveys were compared using statistical analyses to determine what level of agreement existed between the two groups.

Providers saw their customers as moderately satisfied with the services they received. The customers agreed. There were no statistically significant differences between the two groups in the area of satisfaction. However in the

area of contribution of LES process there were significant differences. 70% of the providers saw that LES made a contribution which customers could quantify while only 39% of customers agreed.

Both providers and customers were asked to evaluate Sunflower's value for money compared to competitors. Majority of the providers believed customers perceive Sunflower as providing better value for money compared to competitors. Most of the customers agreed with the providers.