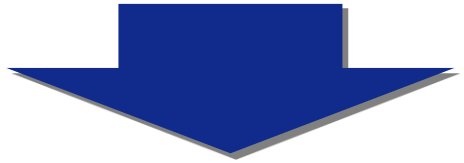
The Client's existing model is the Model A, however it still offers a legacy product (the Model Z) and needed an update on customer preferences and purchase process

The problem (1 of 3)

- As a component of the product fitness program, the Client needed a customer assessment of Model A preferences prior to any NPD phase
- In particular, it needed to know the optimal Element A of Model A within the market, and by region (North America versus Europe)
- In accordance with most VOC engagements, nxtMOVE also identified features that should be removed or added to the equipment (a) for cost-cutting purposes, and/or (b) to more accurately meet customer needs and demands
- The analysis also included an assessment of end-uses for the Model B series (in comparison to Competitor 1's model Q)



nxtMOVE applied its VOC methodology to this engagement with particular emphasis on the optimum dimensions of the equipment

nxtMOVE applied VOC research methodologies to the interviews, but also added conversation related to equipment dimensions, applications and unmet needs

The approach (2 of 3)

Customer profile

- What is the size of the customer's fleet?
- What is the interviewee's title?
- In what region does the customer conduct its business?
- What type of dealer is the customer? National? Rental? Independent?

Understand the customer purchase process

- Evaluate purchase decision factors (PDFs) from three points of view: volume, rank and weight
- Score supplier performance on customer PDFs
- Identify factors that have the greatest influence on customer decisions and supplier performance

Analyze key elements of product features

- Identify elements as 'must-have', 'nice-to-have' or 'don't care about'
- Determine why customers categorize elements in each of these buckets
- Illustrate features where 'cost-cutting' measures can be implemented to increase margin without an impact on share
- Identify features where Client has a leading position relative to the competition (particularly Competitor 1) and vice versa

Determine optimal dimensions of Model A

- Dimension 1
- Dimension 2
- Strengths and Weaknesses of Client and competing equipment (primarily Competitor 1)
- Unmet needs for customer applications (particularly Model B series)

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The research and analysis illustrated – by region – the most important decision factors, the elements that underlie the purchase decision and the optimal equipment dimensions

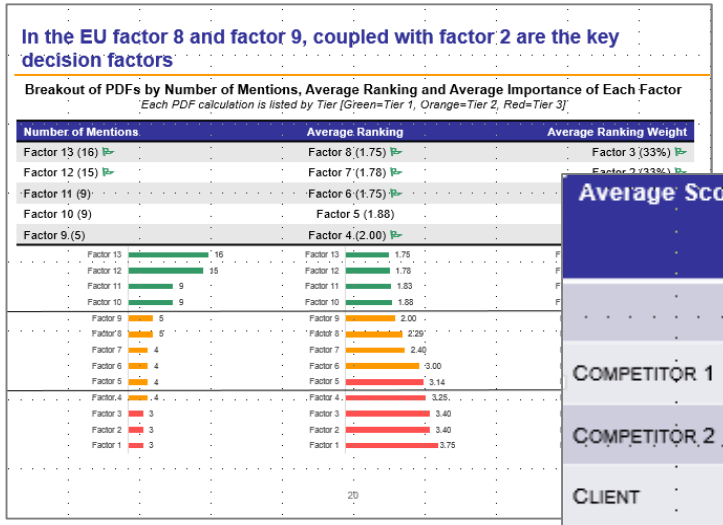
The results

(3 of 3)

❶ **By region, nxtMOVE's analysis identified the most important decision factors for Model A equipment. The analysis included the total times a factor was mentioned, the average ranking of that factor as well as the amount of weight that customers place on that factor**

❷ **The follow on discussion that nxtMOVE had with customers involved a 1 to 5 scale that helps to illustrate where Client stands relative to the rest of the market for the Model A series equipment**

❸ **Finally, optimal dimensions were determined through discussion of the ideal Model A – this analysis also included a breakdown of the elements that are 'must-have', 'nice-to-have' and 'don't care about'. This discussion naturally led to discussions on unmet needs and manufacturer strengths and weaknesses**



Average Score – by Competitor – against ranked and weighted PDFs
(Total Mentions)

	TOTAL	EU	NA
COMPETITOR 1	4.24 (122)	4.00 (63)	4.49 (59)
COMPETITOR 2	4.07 (14)	4.07 (14)	N/A
CLIENT	4.06 (173)	3.80 (95)	4.37 (78)
ALL COMPETITORS	4.13 (309)	3.90 (172)	4.42 (137)