

Results of cpi Customer Survey

PLEASE NOTE: All views and comments within this document are the views of the respondents to a marketing survey sent out by Cement Performance International. The majority of respondents were cement manufacturers from different parts of the global cement industry, and therefore the views do not represent the opinion of Cement Performance International.

Section 1: Use of Consultants

Question 1: Does your company, or has your company in the past, used consultants?

Answered Yes – 21 respondents
Answered No – 1 respondent

Question 2: In which business area does/has your company used consultants?

Management Performance	16
Technical Improvement	18
Project Management	18
Personnel/Recruitment	17
Finance	6
Cost Reduction	7
Training	13
Systems/IT	16
Others	7

Question 3: Who within your company initiates the use of consultants?

Varies from Directors to department head	4
Management team	10
Directors	6
Department heads	2

Question 4: Who within your company:

(a) Decides which consultant will be used?

Varied	2
Management team	5
Dependent upon project	1
Director/Plant Manager	11
Department head	1
No reply	2

(b) What are the criteria that are used?

Expertise in field/similar projects/referrals	6
Business benefits	7
Various	3
Dependent upon project	2
Directors Initiatives	1
No reply	3

Question 5: Is there a size/complexity level below which line management are allowed to employ consultants without authorisation?

All use required authorisation	8
Authorisation level depends on project	7
Below \$5000 allowed	2
Informal procedure	2
Allowed once in the budget	2
Don't know	1

Question 6a: In what areas are consultants seen to add value within your business?

General Engineering	6
Specialist knowledge/no expertise	8
Technical Improvement/cost reduction	3
All areas	2
Restrains on internal resource	1
International experience	1
Management development	1

Question 6b: How would you describe your experiences of working with consultants?

Very good	2
Good	9
Generally good with some disappointment	6
Varied	4
Poor	1

Question 7: When using consultants do you seek recommendations or accreditations from others?

Yes – 19
No – 3
Sometimes – 1

If so who?

Industry contacts	10
Recent customers	3
Personal contacts	4
Sister companies	1
No reply	4

Question 8: What are the drivers that would lead you to using a consultant?

Lack of own resources	19
Change management programme	8
Training requirement	14
Lack of in-house experience	20
Outsourcing programme	1
Short term project workload	17
Performance improvement	19
Other	3

Section 2: cpi Services

Question 1: Which of the following services do you associate with cpi?

Cpi Services	Number of responses
Process Optimisation	22
Plant Design	12
Operator Training	16
Environmental Compliance	9
Due Diligence	11
Reliability Strategy	11
Shutdown Planning	5
Engineer Training	10
Process Chemistry	18
Cost Reduction	13
Management Consulting	16
Benchmarking	14
Product Optimisation	11

Question 2: Would you be interested in a service which provides you with on-line remote access to all of cpi's engineering resources?

Answered Yes – 17 respondents

Answered No – 3 respondents

No reply – 2 respondents

Question 3: What services would you like cpi to provide that it does not currently supply?

CO2 optimisation	1
Change management	1
Raw material investigation	1
Benchmarking figures	1
Maintenance support	1
Cement Technology Course	1
Mining engineering	1
None	4
Not sure	4
No reply	7

Question 4: Which services that cpi supply can add most value to your business?

Process Optimisation	8
Reliability Management	4
Process Engineering	3
Training	3
Cement process/cost reduction	2
Process Chemistry	2
Benchmarking	1
Due diligence	1
Management consulting	1
Not sure	2
No reply	3

Question 5: cpi sees itself as a business consultant in the cement industry - not simply a technical consultant. Do you use business/management consultants?

Not used	10
Rarely	1
Use local Pakistan consultants	1
Yes	4
Not sure	1
No reply	5

If so which companies do you use?

McKinsey, Curzon, PWC Consulting, BCG, Lafarge and various SAP consultants

Section 3: Awareness of cpi

Question 1: Have you used the services of Cement Performance International?

Answered Yes – 12 respondents

Answered No – 7 respondents

No reply – 3 respondents

Question 2: How did you hear about Cement Performance International?

Formal colleagues of cpi personal	9
Advertising/Articles in Industry Journals	6
Attendance at Industry Conferences (IEEE/Cemtech etc)	4
Internet Search	1
cpi Newsletter	1
Referred by colleague	4
Others	0

Question 3: How important is a word of mouth recommendation?

Very Important	11
Important	9
Good starting point before using	1
Not important	1

What information do you seek when looking for a recommendation?

Results achieved and value added	8
Job properly defined and delivered	2
Competence of staff	2
Reliability and credibility	2
Total professionalism of company	2
Opinion of colleagues in the industry	1

Question 4: If you were looking for a Consultant to provide any of the services provided by cpi, where would you look?

Internet Search	7
Industry Journals	2
Equipment Suppliers	1
Industry Organisations	4
Engineering Institutes	8
Ask Colleagues/Industry Contacts	3
Visit Industry Conferences	1
Other	1

Question 5: Please specify search engine most used?

Google	10
Yahoo	1
Internet	1

Question 6: What key words would you use in your search?

Cement consultant	6
Cement Engineering	1
Cement Industry consultant	1
Consulting and Cement	1
Process/Support/Maintenance	1
Performance Improvement	1
Clinker Optimisation	1
Would not search like this	1
Depends on issue	3
No reply	10

Section 4: Commercial Issues

Question 1: Please rank the following attributes of cpi in order of importance to you and your business?

1 most important, 7 least important (NB – for ease of interpretation the score for each category was averaged and then multiplied by 10).

Independent of suppliers	41
Long Term Relationships	49
Range of services offered	46
Technical competence	12
Multinational Experience	53
Our people	36
Value for money	39

Question 2: In terms of your own business, what are your key imperatives? For example, profit, cost per tonne, safety etc

Safety/environment/quality/cost per tonne/throughput	15
Cost per tonne	2
Profit	2
Operations and management improvement	1
Dependent on Business cycle	1
No reply	1

Question 3: Within your business, how is strategy decided and how and by whom are the key decisions made?

Directors with local input	16
President/Directors	3
Mainly local	2
Corporate engineering	1

Section 5: Website

Question 1: Have you visited the cpi website?

Answered Yes – 16 respondents

Answered No – 6 respondents

Question 2: How did you find the cpi website for your first visit? (only 16 replies as 16 had only been on the website)

Internet Search Engine	3
Link From Advert	0
Link from newsletter	2
World Cement Website link	2
Other	9

Question 3: What was your reason for visiting the website?

Research on cpi	4
Curiosity	6
Previously colleagues of cpi team	3
Training course details	2
Variability calculator	1
No reply	6

Question 4: Could you find the information that you were looking for on the site?

Yes – 11

Not visited site – 5

No reply - 6

Question 5: Which areas of the site were most useful?

Services and professionals – 6

Not looking for specifics – 4

Didn't really look – 2

No reply - 10

Question 6: Which areas of the site were least useful?

No answer – 17
Didn't really look – 2
No "successes achieved" section – try adding – 1
Not looking for specifics – 1
All areas useful – 1

Question 7: Did you try the variability calculator and did you find it easy to use?

No reply – 12
Not yet - 5
No - 4
Yes - 1

Question 8: Were the results useful? If not, why not?

No reply – 17
No – already assessed our own variability
Yes – 1
No answer - 1

Question 9: What further information about cpi would you like to see on the cpi website?

No answer – 17
No really – prefer personal contact - 1
More actual results achieved from work completed - 1
Nothing – 1
Not sure yet - 2

Section 6: Advertising

Question 1: Which of the following Cement Magazines do you read?

World Cement	17
International Cement Review	19
Global Cement	17
VDZ	10
Cementos Hormigon	0
None of the above	0
Other	3

Question 2: Which areas of these magazines do you find most useful?

Editorial	11
Corporate News	9
Technical Articles	7
Regional Reviews	9
Advertising	10
Industry News	11
Other	0

Question 3: Have you seen cpi adverts in any of the above magazines?

Yes – 13
No – 8
No reply

Question 4: Please indicate whether you recognize or any of the advertisements?

Advertisement Title	Yes	No	No answer
Trouble Shooters	8	10	5
Keeping it Clean	1	12	10
Optimising	5	11	7
Ground Breaking	4	12	7
Knowledge is Power	8	13	2
Solutions	7	10	6

Question 5:

a. Have you read any articles written by cpi in any of the above publications?

Answered Yes – 12 respondents

Answered No – 5 respondents

No reply – 5 respondents

b. Can you remember the subject of the articles?

No reply – 10

No – 4

Variability reduction – 2

Optimisation/benchmarking – 1

Profit improvement – 1

Diverse kiln aspects – 1

Due diligence – 1

Can remember - 2

Question 6: If you were looking for a consultant to supply technical expertise:

a. Would you use a cement journal to find one?

Answered Yes – 6 respondents

Answered No – 15 respondents

No reply – 1 respondent

b. Where in the journal would you look for one?

Advertisement – 1

Advertising section – 1

Process Section – 1

Advertiser's index – 1

No particular place - 1

No reply – 17

Question 7: In the publications listed above - whose adverts do you remember and why?

10 respondents with the following comments

FLS and Polysius due to the graphics

Holcim as they appear regularly

FLS/A TEC/KHD as they have large adverts with their latest news

Generally equipment suppliers as they demonstrate their new technology

cpi due to their colour scheme and KHD/Polysius as they have the same format and latest news

Major equipment suppliers

I tend to ignore the adverts

I remember adverts that were specific to my needs at the time (same comment twice)

None

No reply – 14 respondents

Question 8: Any other comments on the cpi advertising strategy and content.

7 respondents with the following comments

Personal contact preferred

Action shots in adverts a little corny but probably effective

CRM is key in my opinion – my key contacts is where I go first

Keep up the good work

No, not interested in marketing

No (twice)

No reply – 14 comments

Section 7: Industry Leadership

Question 1: Who are the other suppliers of the services that cpi offers that you use?

Penta Engineering	4
FLS	2
Jeneke and Johansen	1
Whitehopelman	3
Major equipment suppliers	3
Roberts and Schaffer	1
Unifield	3
Consultec	1
Holcim	1
PEG	1
Rolf Vatterodt	2
Dr. F. Gregory Millar	1
Lafarge	3
Heidelberg Cement	1
Trinity Engineering	1
None	2
Don't know	1
No reply	1

Question 2: Are there other suppliers that you would consider using but have not yet tried?

Yes	6
No	8
Not looked	2
Perhaps	1
No reply	5

Question 3: Are there other suppliers of the services that cpi provide that you would consider to be competitors to cpi?

Yes but not specified	3
FLS	3
Penta	1
Various competitors but with varying competence	4
No competitors offering the full range like cpi	6
Not sure	2
No reply	3

Question 4: For the suppliers that you use or have used, in what areas do they exceed expectations?

Plant and process design	5
Raw materials handling	1
Equipment supply	1
Network capabilities	2
Knowledge and experience	2
Not sure	4
No areas	1
Project management	1
No reply	6

Question 5: For the suppliers that you use or have used, in what areas did they not meet your expectations?

Main equipment suppliers do not have problem solving skills	2
Not able to optimise or support basic skills	2
Turnaround time	3
Only have a short term view	1
Weak in process engineering	1
Lack of follow-up	1
Too general/not tailored	1
No reply	9

Question 6: For those repeat suppliers, what is that motivates you to use their services again?

Ease of access/turnaround	2
Historically used	1
Results achieved/quality of work	6
Commitment to customers	1
Technical competence	3
Cost	1
Not sure	2
Professionalism	1
Working relationship/trust	2
Reputation with government agencies	1
No reply	4

Question 7: Who do you see as the Industry Leader in the provision of Consultancy to the Cement Industry?

cpi	6
FLS	6
Holcim	1
Unifield	1
AMEC	1
Penta	1
Not sure	4
No reply	2