



# ORIGINAL EQUIPMENT SUPPLIERS ASSOCIATION **BULLETIN**

To: OESA Members  
From: Neil De Koker, President and CEO, OESA

BULLETIN: 08-05  
Date: March 3, 2008

## OESA 2008 Member Feedback Survey Results

The results from the annual member feedback survey are now available. OESA surveys member companies on an annual basis to keep the association relevant and advance the business interests of automotive original equipment suppliers. The survey measures member satisfaction and enables OESA to prioritize and allocate resources based on member input.

OESA would like to thank the 336 individuals from the 165 regular member and 28 affiliate member companies who took the time to share opinions on OESA's performance and future direction.

The current state of the association is very good:

- The overall rating for member satisfaction is 4.32 on a scale of 1 to 5, with 5 being outstanding
- Ninety-four percent of respondents rated their overall satisfaction a 4 or 5
- Ninety-three percent say OESA makes their companies more effective
- Sixty-five percent can explicitly say OESA involvement has a positive ROI; although, actual quantification of the savings is difficult

Our members have told us they value OESA for:

- Providing a forum to address issues of common concern
- Serving as a resource for industry information and analysis
- Promoting the interests of the OE supplier community
- Serving as a credible voice and positive change agent for the industry
- Offering networking opportunities for industry executives

The results of the feedback survey clearly indicate that the more a supplier executive participates in OESA activities, the more value the individual executive – and his or her company – receives from OESA membership. There are many tools that suppliers can leverage through OESA to improve operational effectiveness in a cost effective manner. We encourage all OESA members to take advantage of these opportunities and actively participate in OESA councils, events, committees, town halls, conferences and briefings.

Visit <http://www.oesa.org> to view the survey results. For more information, contact Neil De Koker at 248.952.6401 ext. 224 or [ndekoker@oesa.org](mailto:ndekoker@oesa.org).



# **2008 OESA Annual Member Feedback Survey Results**



# The Annual Member Survey Provides Feedback on OESA Efforts to Meet our Mission

## OESA Mission

OESA advances the business interests of automotive original equipment suppliers by *providing a forum* to address issues of common interest, *serving as a resource* for industry information and analysis, *promoting the interests* of the OE supplier community and *serving as a voice* and *positive change agent* for the industry.

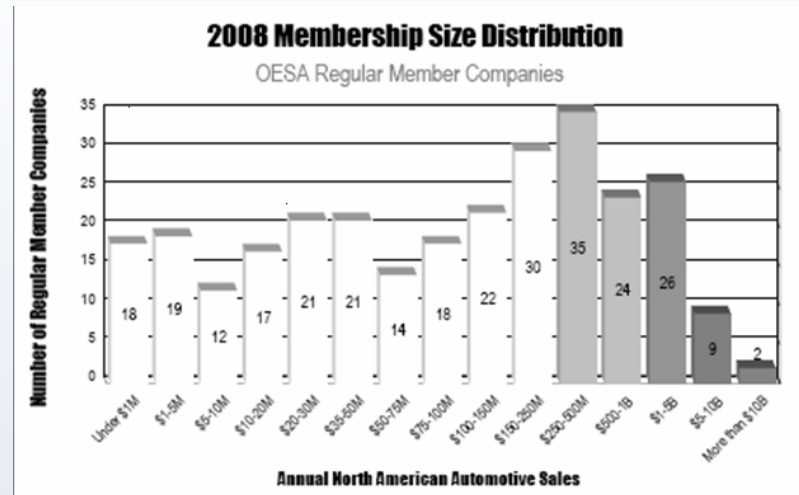




# Survey Respondents Reflect OESA Membership

## Survey Demographics

- 2008 Survey conducted January 11 to January 31, 2008
- 336 individuals from 165 regular member and 28 affiliate member companies responded (51% member response rate)
- 2007 Survey included 395 individuals from 191 regular member and 33 affiliate member companies

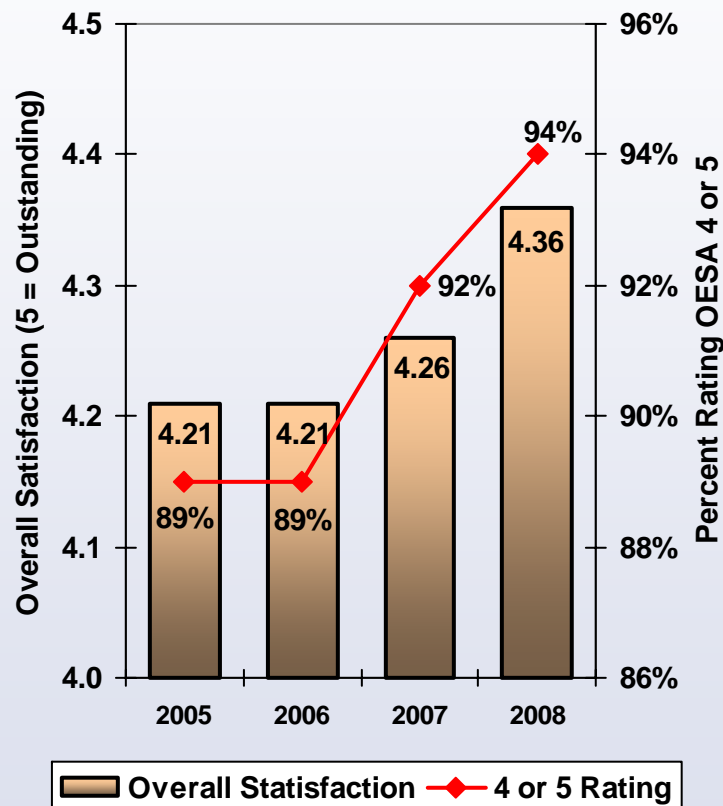


- 385 members
- 288 regular members
- \$300 billion global sales



## Overall Satisfaction with OESA

Overall, how satisfied are you with OESA?



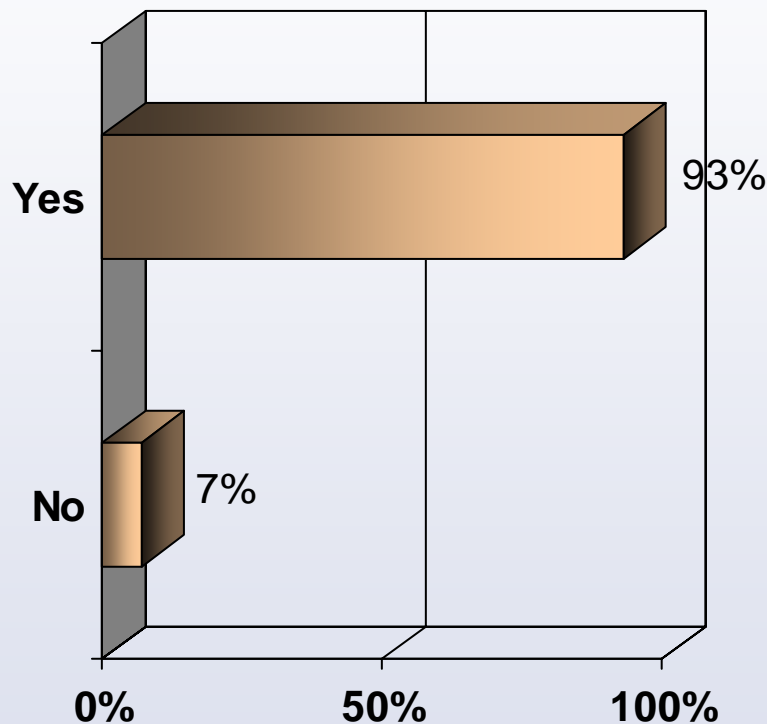
### What OESA members are saying . . .

- "OESA has given insight into areas of the OEM community that would have been impossible to evaluate in years past."
- "We receive a tremendous amount of benefit from OESA, mainly because we actively use their services."
- "OESA is the only legal forum to bring suppliers together addressing industry issues objectively."
- "I like the events like town hall meetings with Bo or Tony as well as events with special subjects as well as the council work."
- "Fantastic venue for networking, complaining, laughing, learning, sharing, planning."
- "OESA focuses on relevant issues that are important to all suppliers, regardless of size."



## OESA Improves Supply Chain Effectiveness

Does OESA information help make your company more effective?



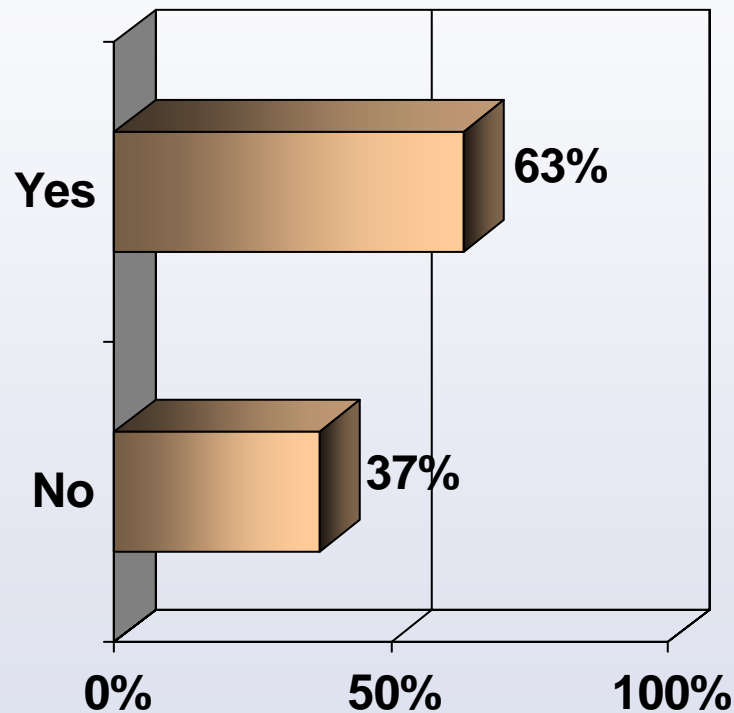
### What OESA members are saying . . .

- "It is the best opportunity for an open exchange of position on sensitive issues of common interest in a selective "low risk" environment."
- "OESA is also effective in allowing various committees to interact in a positive business environment and discuss current business issues in the automotive industry."
- "Lessons learned from others prevent our organization from making the same mistakes."
- "Discussion of business tactics regarding IP, T&C and raw material price fluctuations are beneficial as our company makes strategic decisions."
- "As a relatively small tier supplier remotely located from Detroit we receive insight from OESA activities that we would otherwise not enjoy."
- "Enables industry issues of concern to be expressed holistically and broadly discussed among stakeholders."



## OESA Helps Save Hard and Intangible Dollars

Has knowledge gained saved your company money you can quantify?



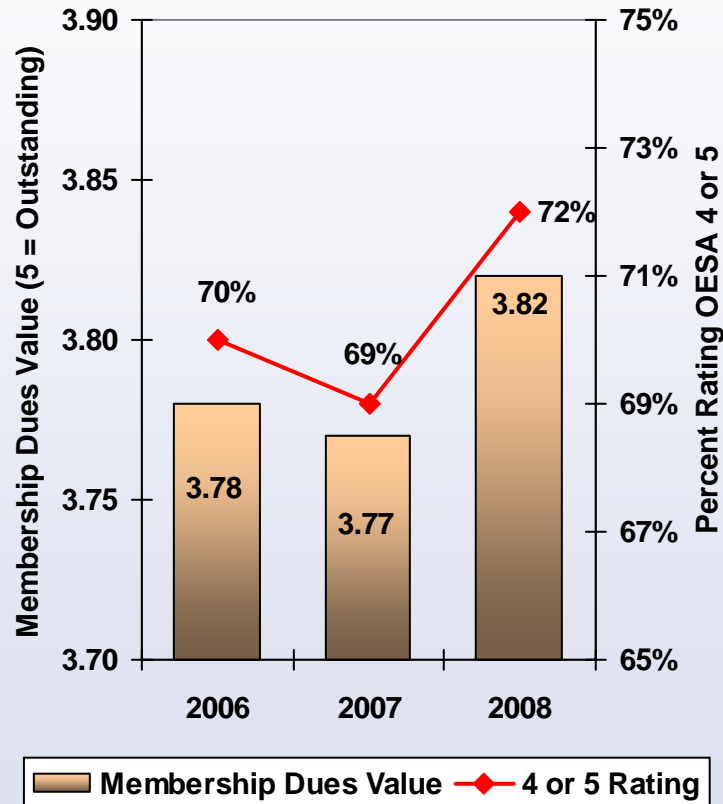
### What OESA members are saying . . .

- “The knowledge gained from OESA materials pricing meetings has been **invaluable.**”
- “Have contracted with service providers who presented at OESA. **Cost avoidance of \$2 million.**”
- “The dollar amount is hard to determine, but it has been helpful to better understand how the OEMs are negotiating with the supply base. This information is **helpful in our negotiations.**”
- “The **IP training materials** developed by OESA would have cost significantly more to prepare through outside or even in-house counsel, to site just one example.”
- “Ford T&Cs is a great example. Difficult to quantify the dollar amount but received **valuable perspectives** used in negotiations and final resolution.”
- “Knowledge regarding non-competing suppliers **strategy and tactics** for responding to items such as warranty changes at Chrysler, ABF alignment at Ford, material cost increases at Nissan have likely resulted in tens, or even **hundreds of thousands of \$ in cost avoidance.**”
- “MEMA-JAMA meetings have been a big benefit for us in **growing with Japanese customers.**”



## OESA Membership Dues are Reasonable

Are membership dues reasonable for the value received?



What OESA members are saying . . .

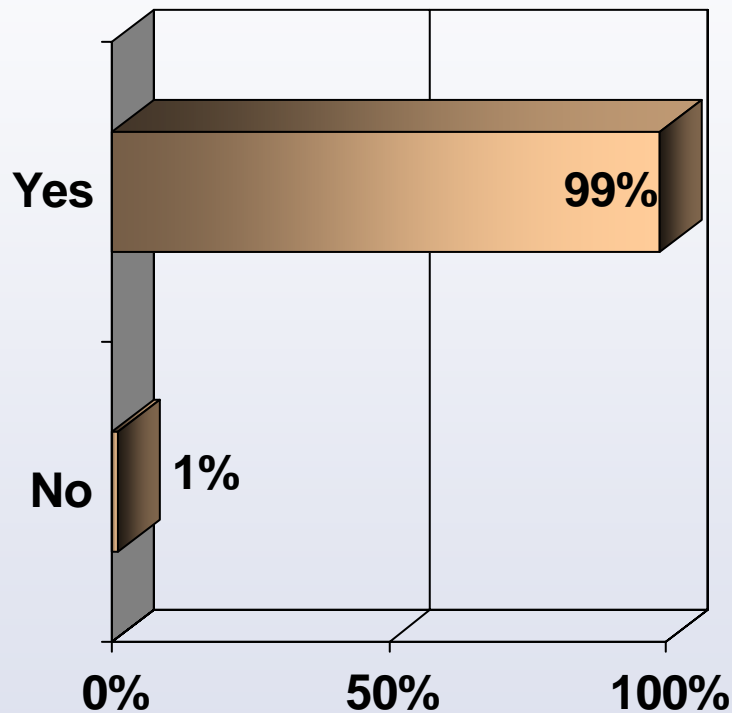
- "We cherish the great value in the OESA membership."
- "I feel value is being added to our company by being part of OESA."
- "I believe it provides a good cost/benefit ."
- "You get back proportional to what you put in."
- "The fees are reasonable and fair for the value potential."

Only 3% of members feel dues are not reasonable



## OESA Members: a Ready Source of Referrals

Would you recommend OESA to another OE supplier?



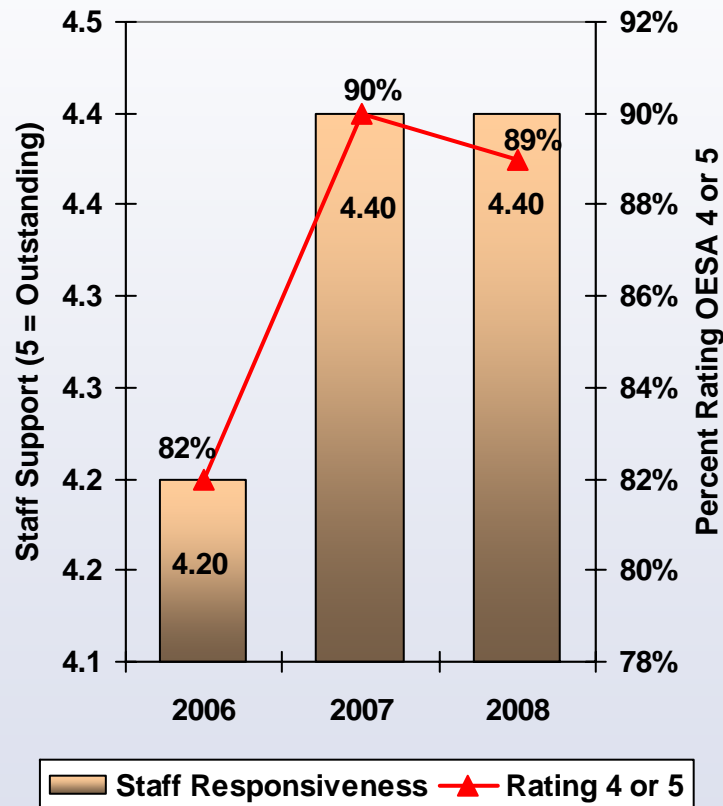
### What OESA members are saying . . .

- "The only organization that provides an effective and unified voice for automotive suppliers."
- "Great insights and comparative information into industry issues."
- "OESA is THE supplier organization to belong to and participate in ... credible, respected by all industry stakeholders, attuned to trends and challenges of the industry."
- "Excellent value for common issues of the OE supplier. Provides a voice for supplier issues that otherwise might not be heard by the OEMs."
- "I am a strong advocate for OESA membership and have recommended membership to numerous companies who are now members."
- "Valuable source of information through councils, networking, studies and events. Support for developing solutions to common industry problems; takes lead in bringing common supplier concerns to stakeholders."



# OESA Staff is Responsive to Members

Is OESA staff responsive to your needs?



What OESA members are saying . . .

- "Great group of people focused on serving their members."
- "OESA is a very hands on professional organization."
- "I always reach someone when I call, and answers to questions are promptly returned."
- "Extremely pleasant, responsive and helpful when called upon."
- "Always responsive. Always looking to foster two way discussion."
- "Always quick to respond ... and professional as well."
- "Short response time, great support."



## OESA Sponsors a Wide Range of Activities

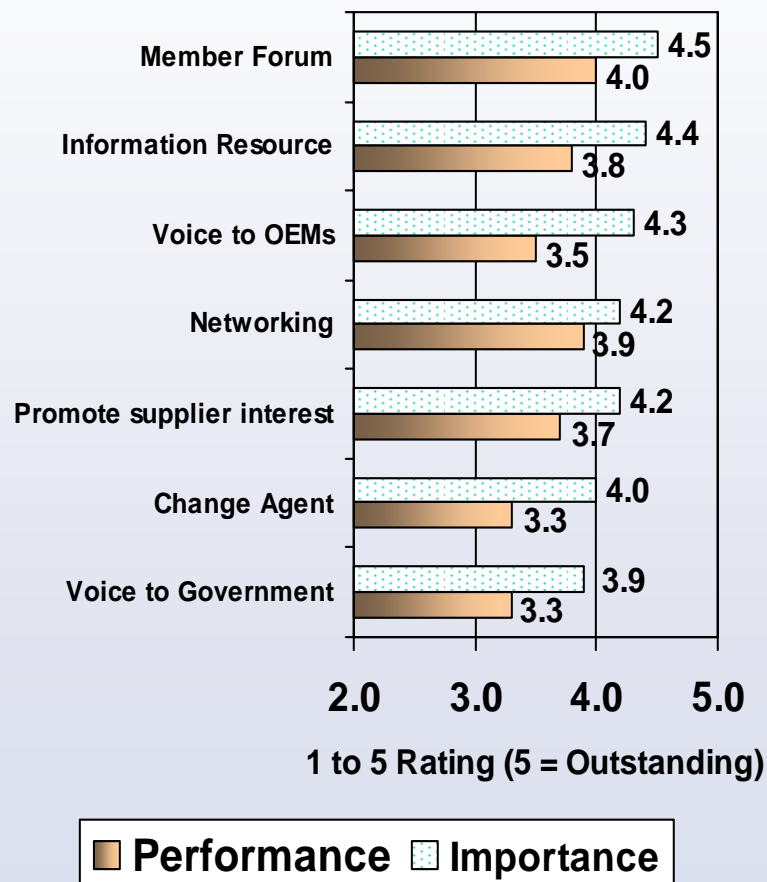
<u>Activity</u>	<u>Member Value/ Importance</u>	<u>Percent Rating a 4 or 5</u>
➤ OEM Town Hall Meetings	4.3	77%
➤ Peer Group Councils	4.2	74%
➤ Studies (Manufacturing, Product Dev., Purchasing Trends)	4.2	80%
➤ Events on Materials and Cost Strategy	4.2	76%
➤ Events on Industry Restructuring	4.1	75%
➤ Events on Supplier Financial Performance/Strategy	4.0	74%
➤ Develop/Promote Model Terms & Conditions	3.9	65%
➤ Supplier Barometer Survey	3.9	69%
➤ Global Activities (China Strategy Council, JAMA, Trilateral)	3.9	70%
➤ Events on Diversifying Customer Base	3.8	60%
➤ Small and Medium Suppliers Events Series	3.7	47%
➤ Lobbying Efforts in Washington DC	3.7	55%

On a 1 to 5 scale where 5 equals significant



## OESA Provides a Wide Range of Services

How important are these activities and well is OESA performing?



### What OESA members are saying . . .

- "In general, **we've benefited** from attendance at Town Hall meetings, council memberships and events. We may not be able to point directly to action taken or money saved, but overall it gives us a better idea of what's going on in the automotive supplier industry."
- "Contract negotiations. Knowing where we leverage and when we don't has allowed us to **negotiate with more confidence and knowledge**. We were **able to stand firm** on a number of contract extensions, knowing the value we had as the incumbent."
- "China strategy council has been a **significant benefit** due to information that is shared among the companies as well as the information provided to council members from outside consultants that would otherwise cost additional investment."
- "Training, IP protection, Terms and Conditions and business practice benchmarks. **Cannot put a mark on dollars saved.... but it is vast.**"



## Other Items of Interest

- **How many council meetings and events did you attend last year?**
  - 2008: 80% 2+ events, 37% 4+ events, 7% attended none
  - 2007: 73% 2+ events, 34% 4+ events, 11% attended none
  
- **Do you post OESA information on your company internet or forward to others?**
  - 2008: Yes, 44%
  - 2007: Yes, 37%
  - 2006: Yes, 40%
  
- **I visit [www.oesa.org](http://www.oesa.org) for information**
  - 2008: 60% ranked 4 or 5
  - 2007: 62% ranked 4 or 5
  - 2006: 55% ranked 4 or 5



## Survey Summary

- OESA membership is strong and values what OESA provides the industry
- OESA provides members valuable forums, credible information and networking opportunities
- OESA voice for suppliers and Town Hall meetings provide a very important interface and access to OEM customers
- OESA staff is professional and responsive to member needs
- OESA success is ongoing responsiveness to industry issues in a timely manner
- OESA dues are very reasonable for the value received; those that do not take advantage of the services may feel the cost is high
- OESA must continue efforts to increase the value proposition for members outside Southeastern Michigan that may have difficulty justifying the time and travel to meetings