

Service & Parts Customer Satisfaction Analysis

September 15, 2021

Metrics Refreshers

- NPS – most important metric
 - % of detractors - % of promoters
- CSAT (Customer Satisfaction) – how service met or surpassed customer expectation
- CES (Customer Effort Score) – measures ease of customer interaction
- CSAT and CES questions were given possible answers of -2 to +2
 - -2 – bottom 10% of all vendors
 - -1 – below average vendor
 - 0 – average vendor
 - +1 – above average vendor
 - +2 – top 10% of all vendors
- Thresholds for each metric (derived from Bain & Company, creators of NPS)
 - 0-20% – Good
 - 20-50% – Favorable
 - 50-80% – Excellent
 - 80% + – World class
- All analyses done on rolling 12 months average

July Highlights

Despite slight decline since June, positive trend still maintained

NPS – 40.16 (Favorable)
CSAT – 1.15 (Excellent)
CES – 1.17 (Excellent)

60% of responders
named Ellison as best
Parts & Service
Organization
(Favorable)

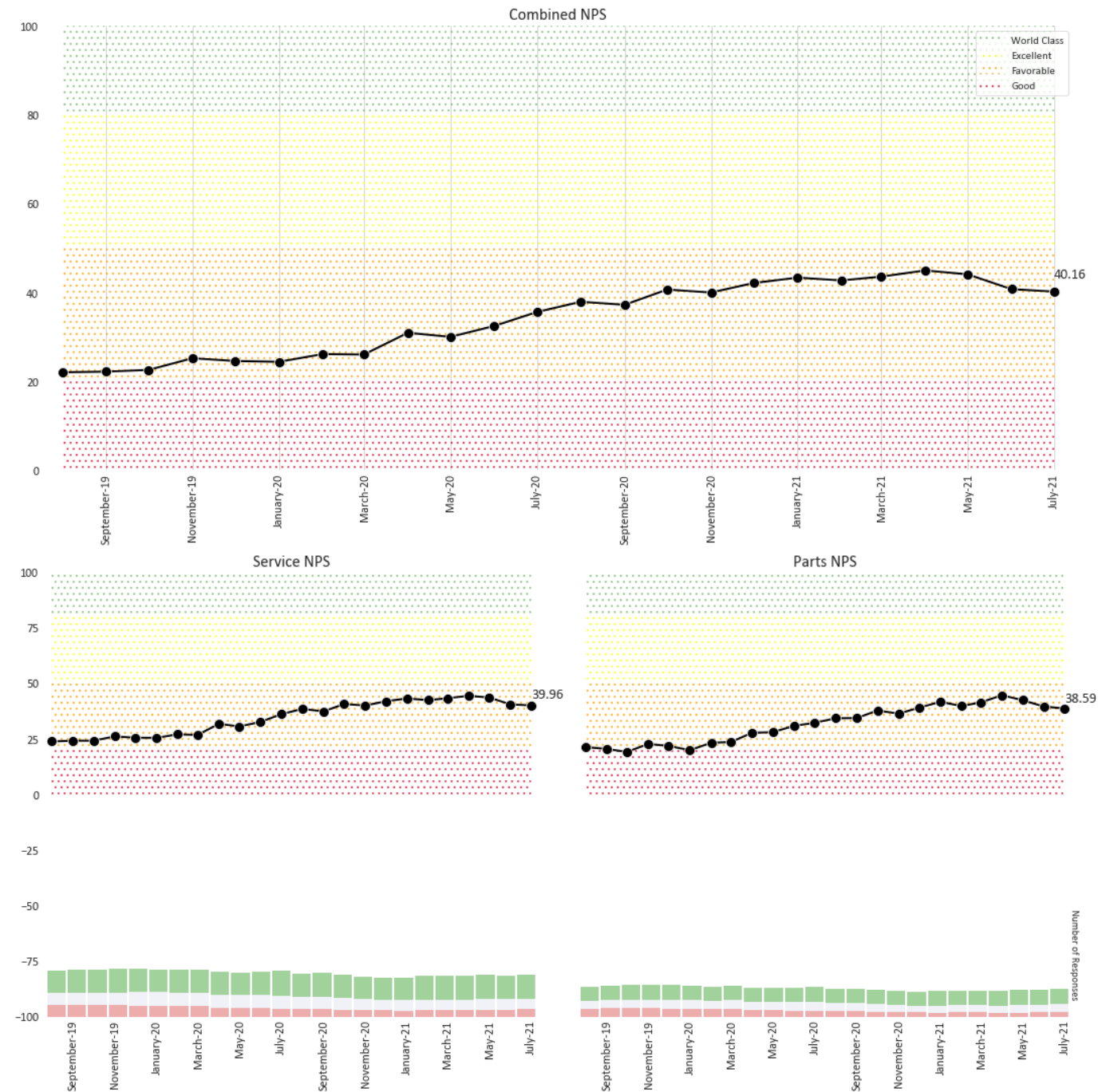
Top 3 branches for NPS:
Northwest, Ohio,
Southern California (all
Excellent)

Branches of concern:
Charlotte (Good),
Northern California
(Less than Good)

Recommendation: RCA
for Northern California

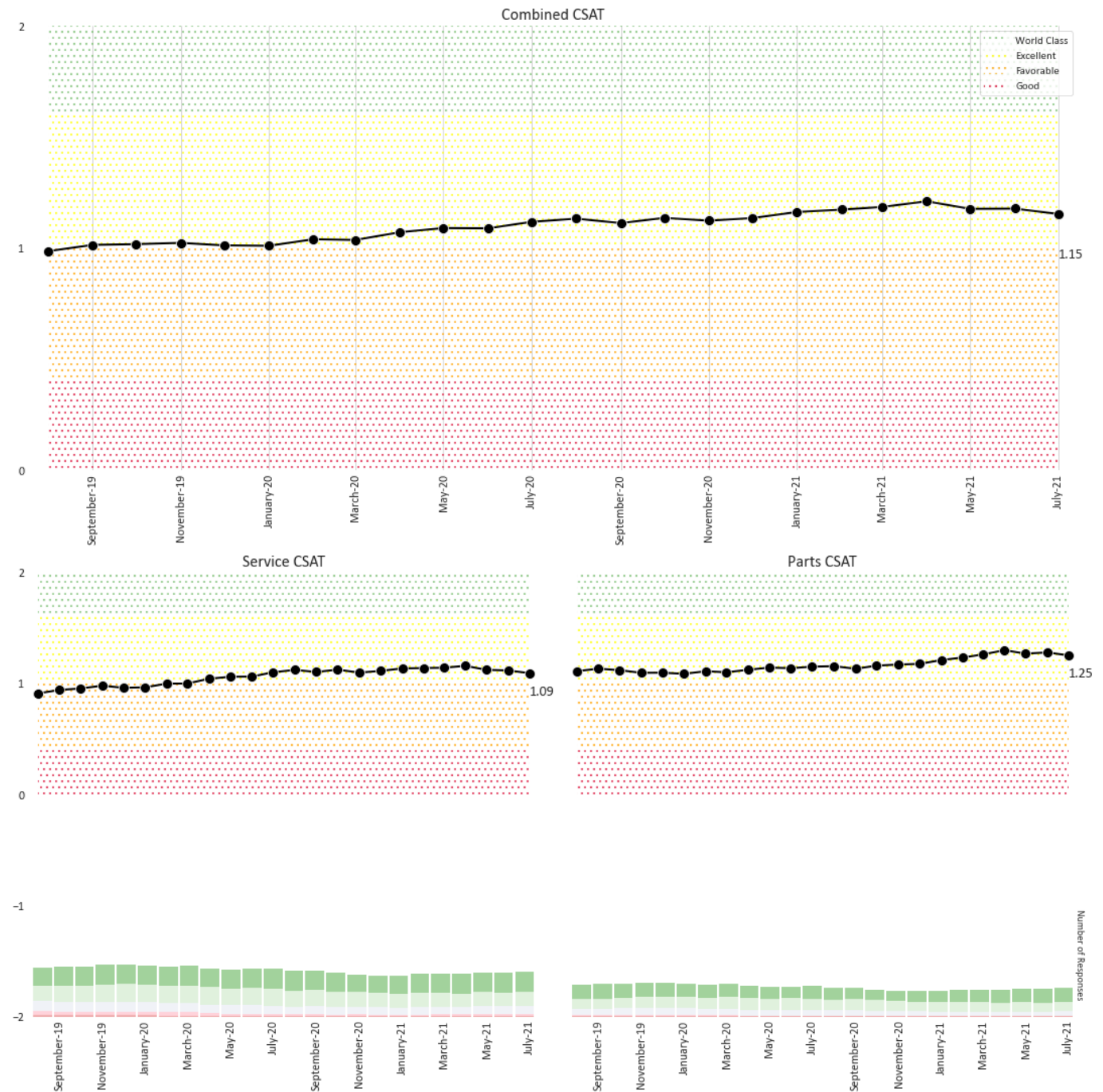
Overall NPS

- Gradual rise in the last 2 years
- Started off at the bottom of Favorable and approached Excellent a couple months ago, but has seen a small decline since then
- Overall Service NPS is a little higher than Parts NPS, but not by much



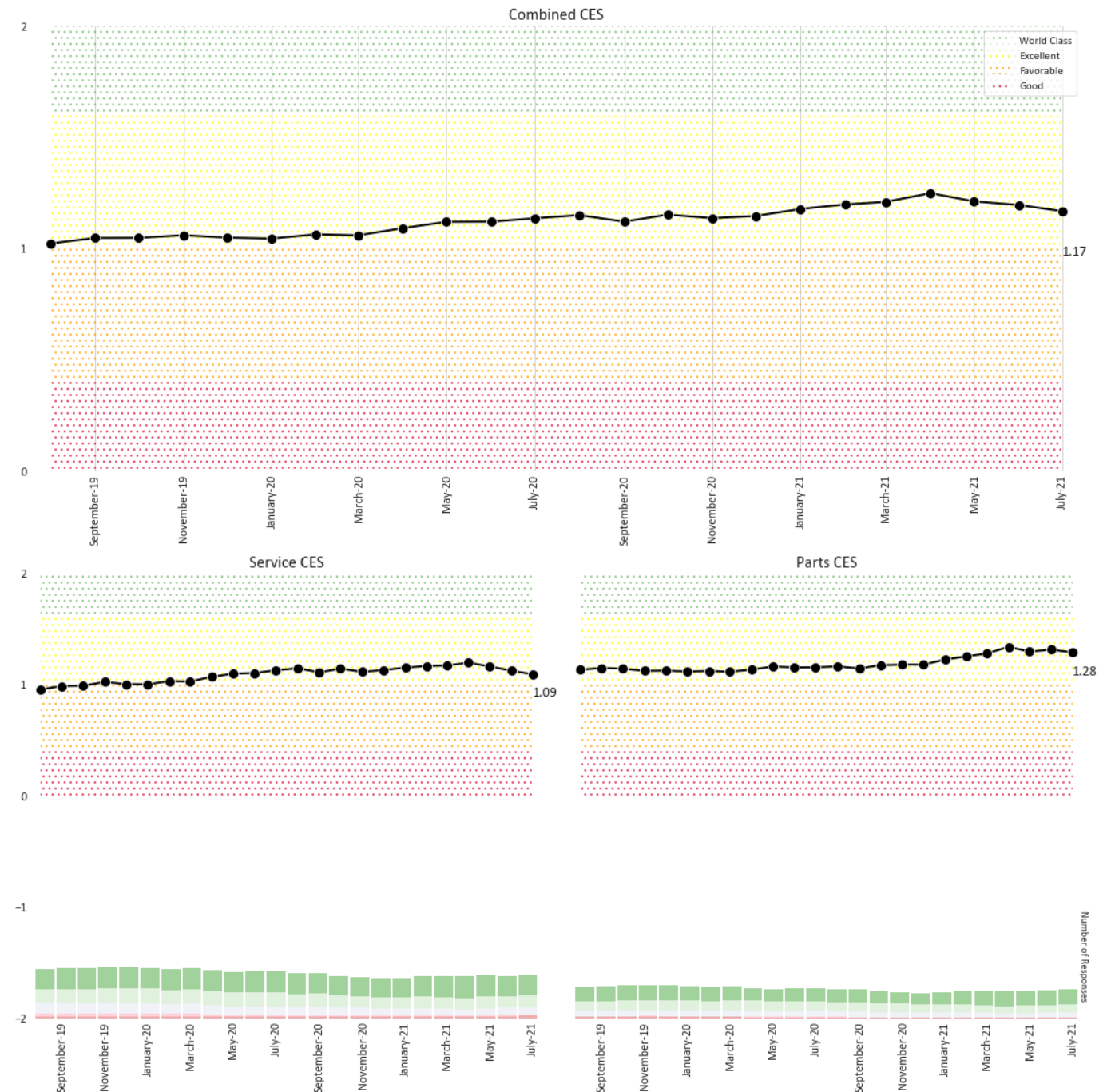
Overall CSAT

- Gradual rise in the last 2 years
- Started off at the top of Favorable and has been Excellent for more than a year
- Similar to NPS, peak was a couple months ago with a short decline since then
- Parts CSAT is higher than Service CSAT



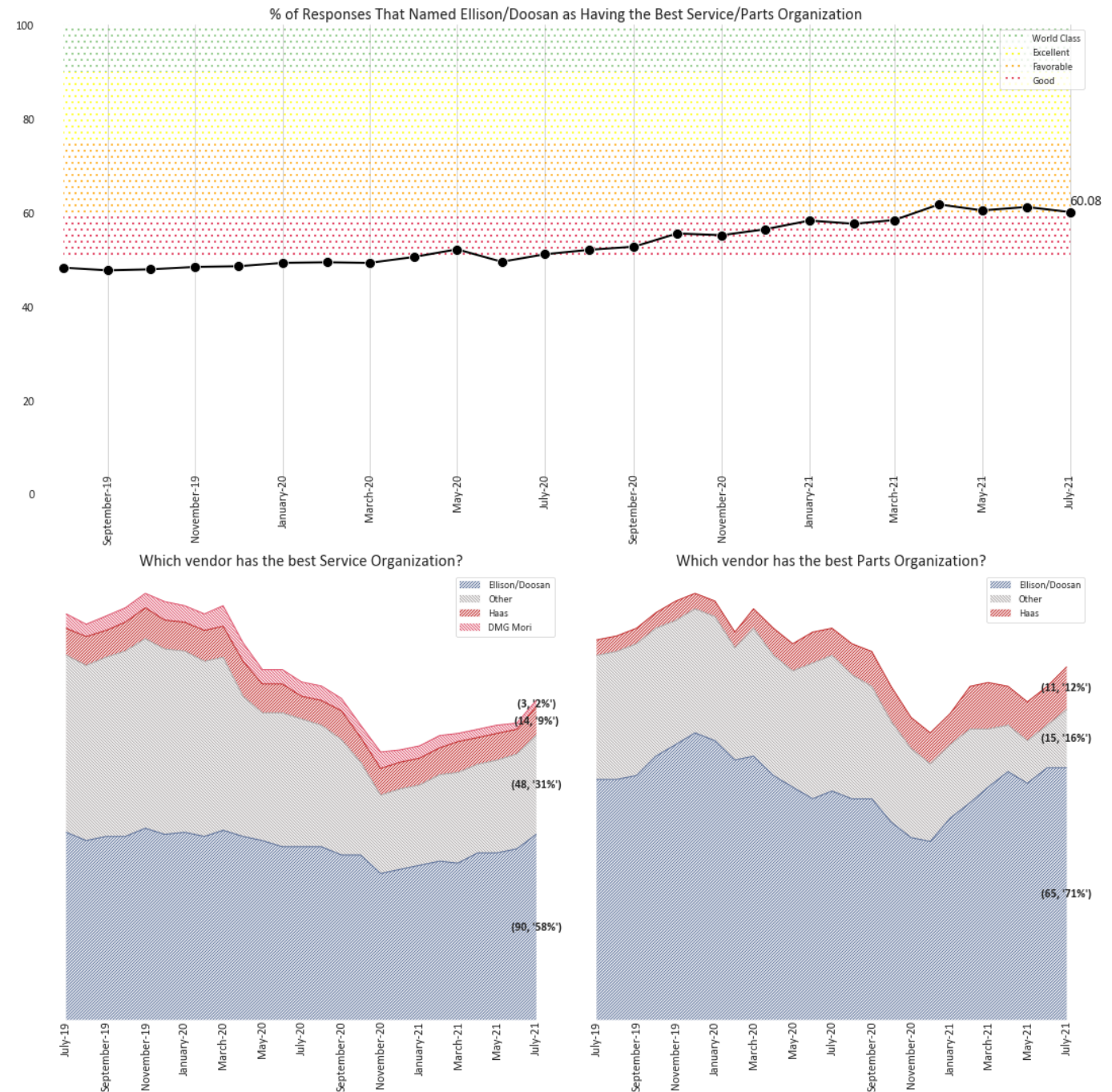
Overall CES

- Gradual rise in the last 2 years
- Started off at the bottom of Excellent and has maintained Excellent CES since then
- Similar to NPS, peak was a couple months ago with a short decline since then
- Parts CES is higher than Service CES



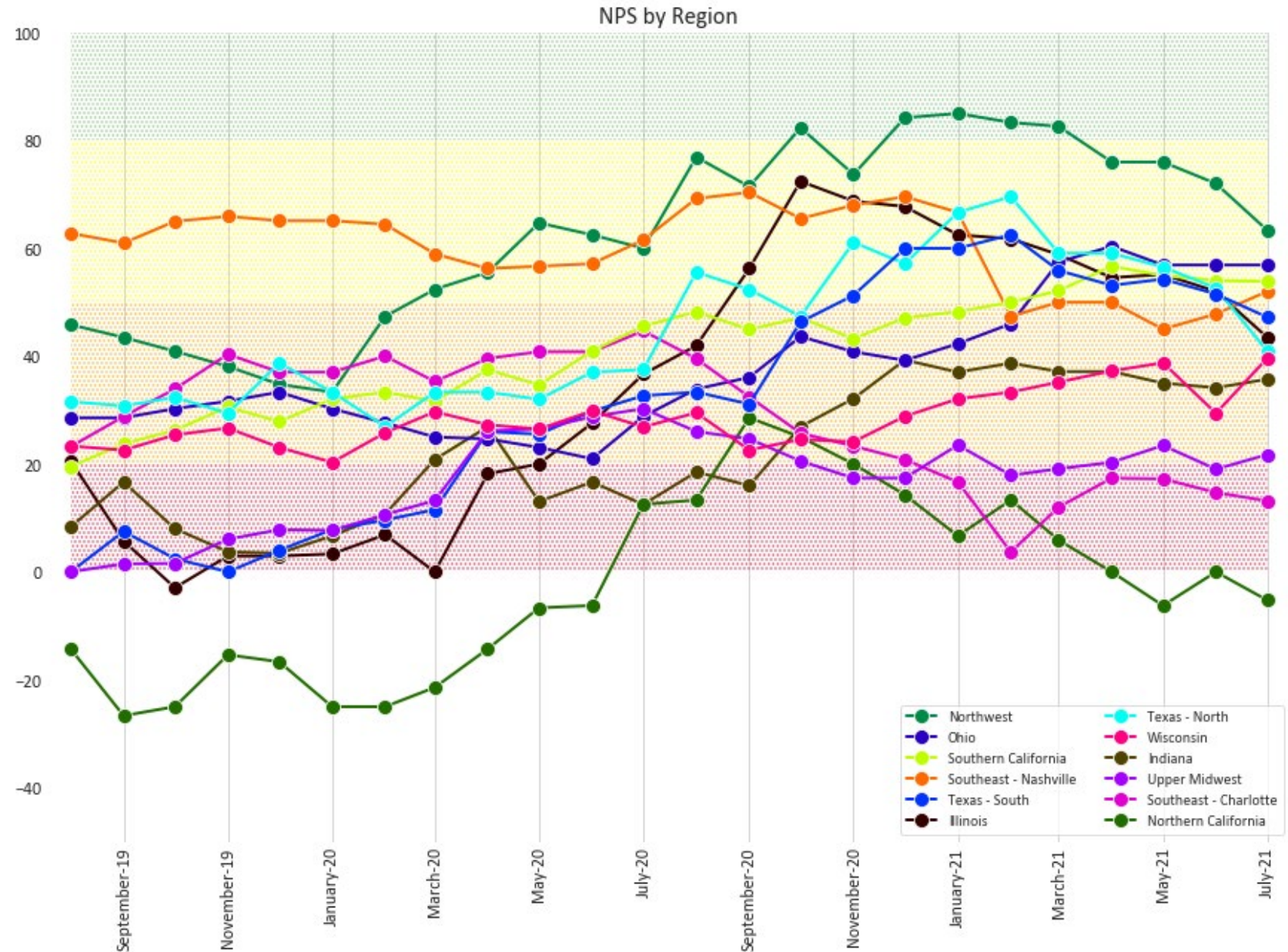
Best Vendor in America

- Significant rise in the last 2 years
- Started off less than Good and is now Favorable
- Similar to NPS, peak was a couple months ago with a small decline since then
- Overall, Parts seem to more popular amongst competitors when compared to Service
- Biggest competitors: Haas, DMG Mori



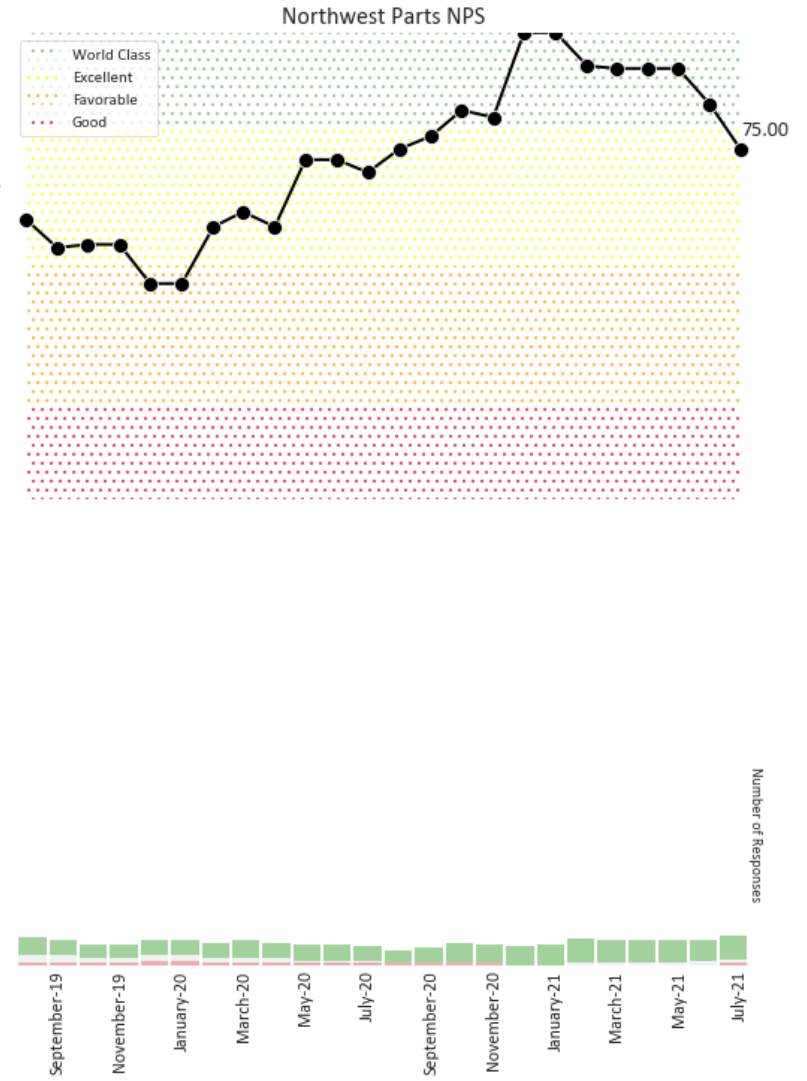
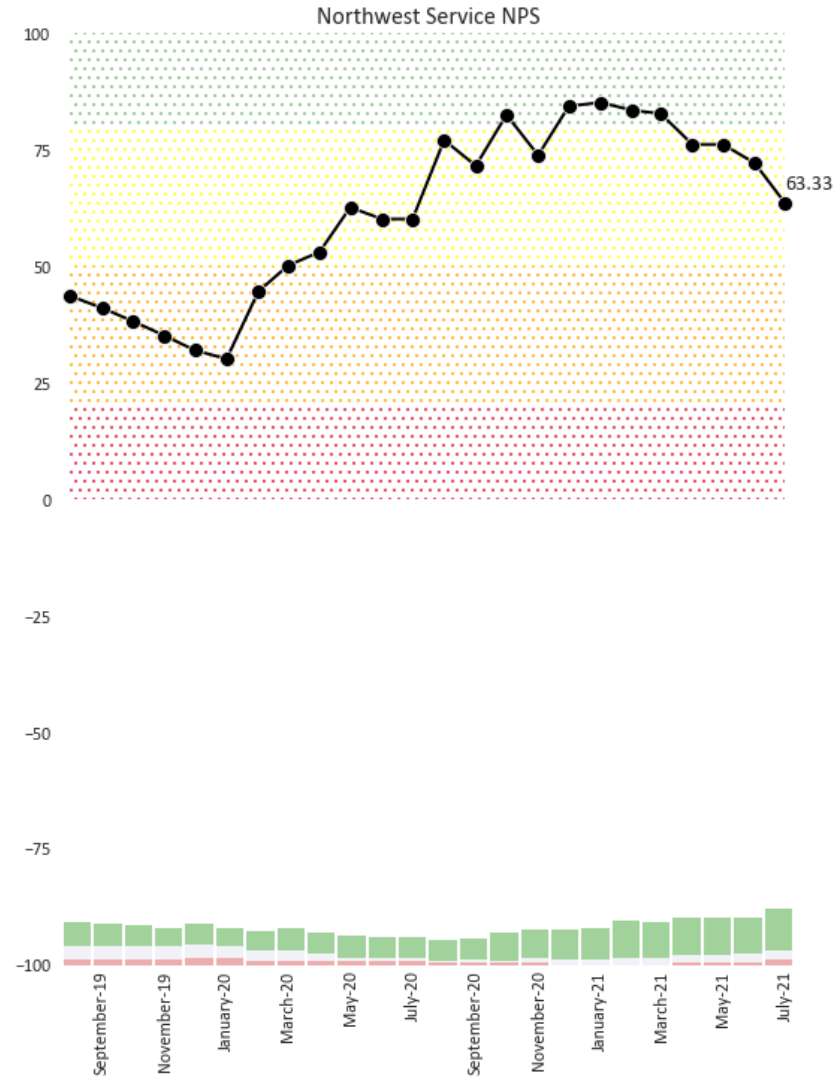
NPS By Region

- Top 3 regions by NPS – **Northwest, Ohio, Southern California**
 - **Northwest** is the only region to have entered World Class
- Bottom 3 regions by NPS – **Northern California, Charlotte, Upper Midwest**
 - **Northern California** is the only region with an NPS that is less than Good



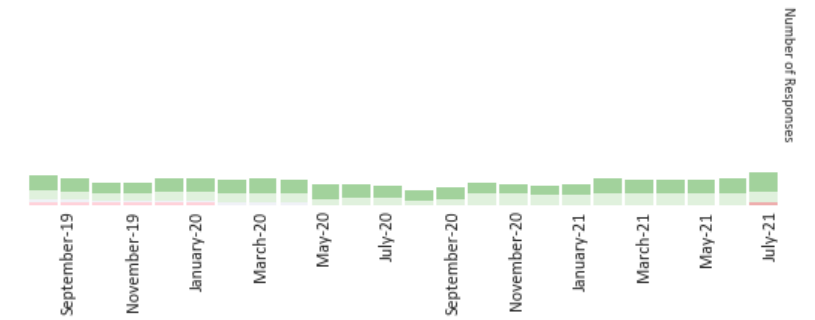
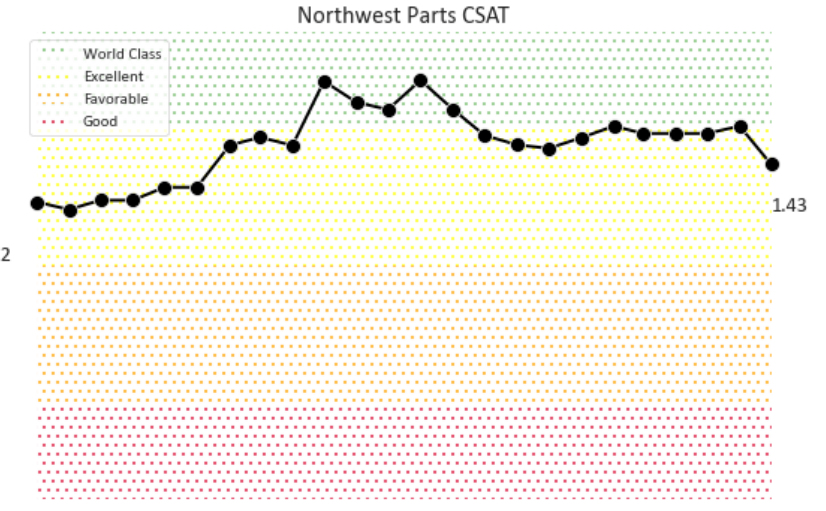
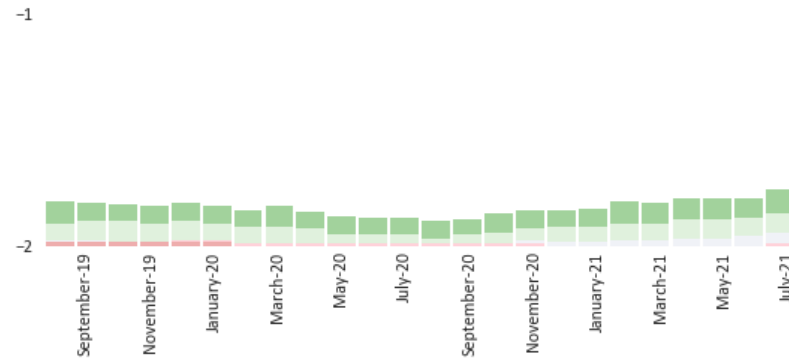
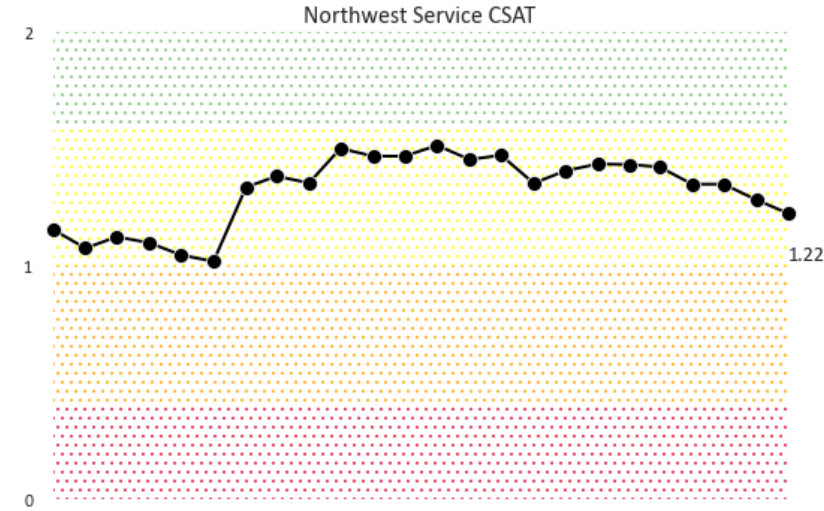
Northwest NPS

- Highest NPS in Service Organization
- Both Service & Parts have Excellent NPS, occasionally breaking into World Class
- Parts reached **100% NPS** for a couple months, currently at 75%
- Parts NPS significantly higher than Service NPS



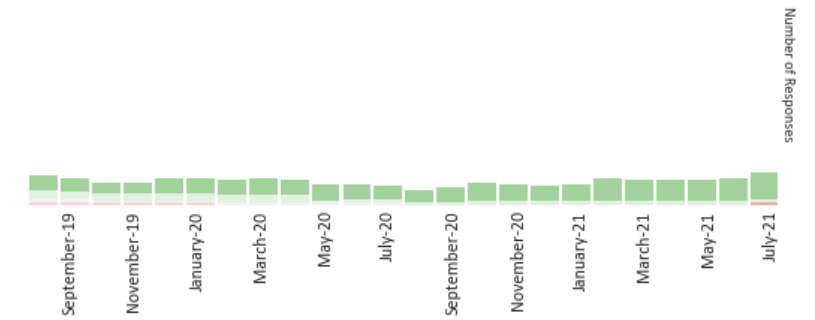
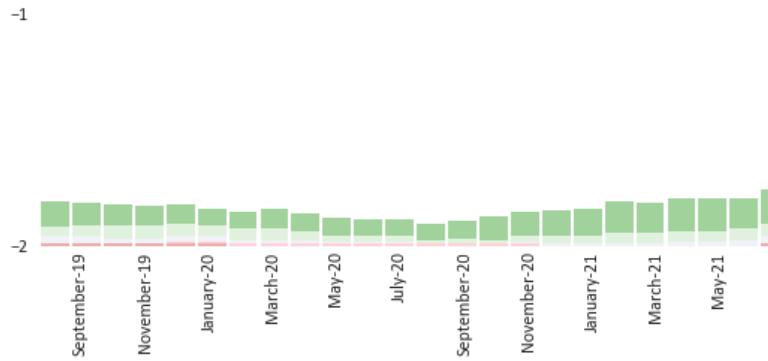
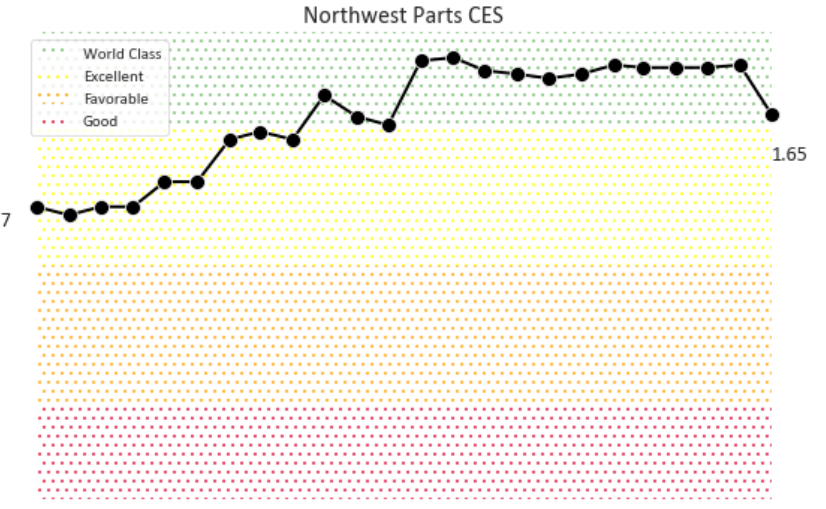
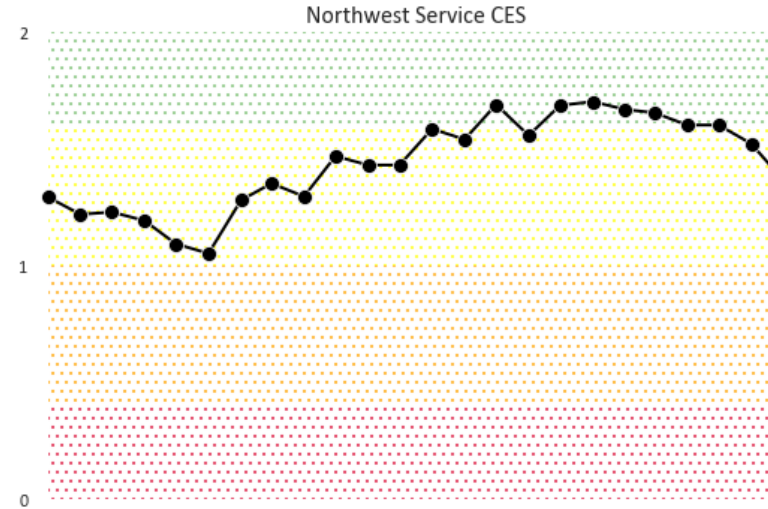
Northwest CSAT

- Both Service & Parts have consistently Excellent CSAT
- Parts broke World Class CSAT a year ago, still in Excellent
- Parts CSAT relatively higher than Service CSAT



Northwest CES

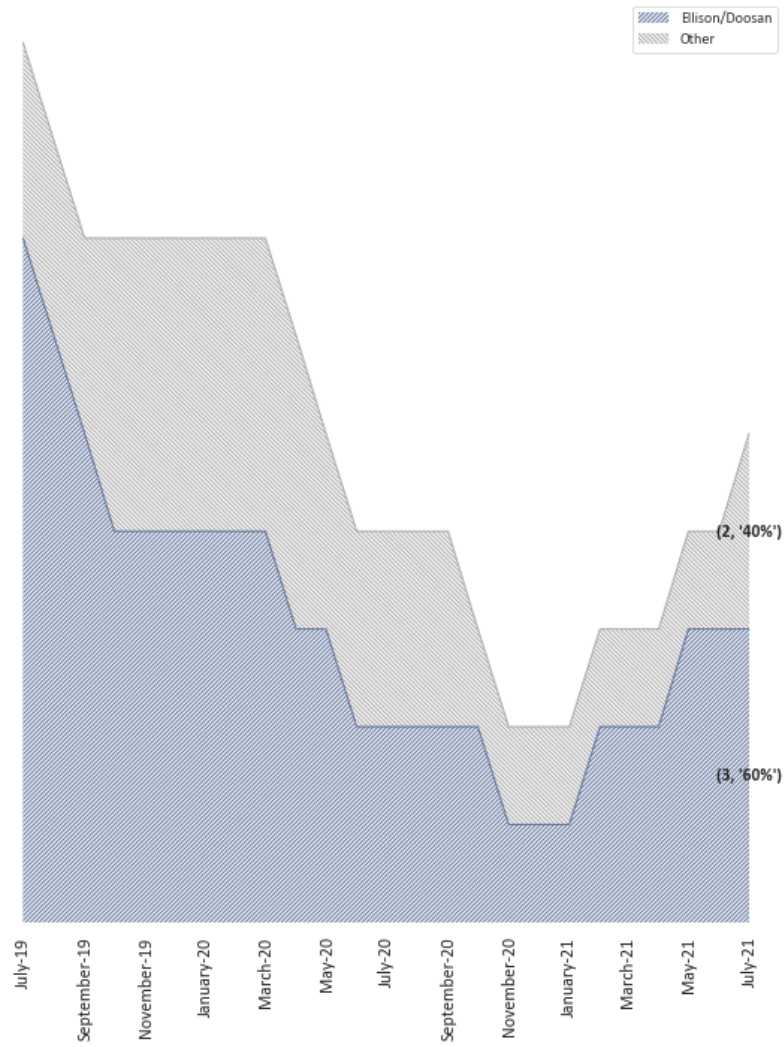
- Service CES consistently Excellent, occasionally World Class
- Parts CES currently World Class, has been World Class for at least a year now
- Parts CES significantly higher than Service CES



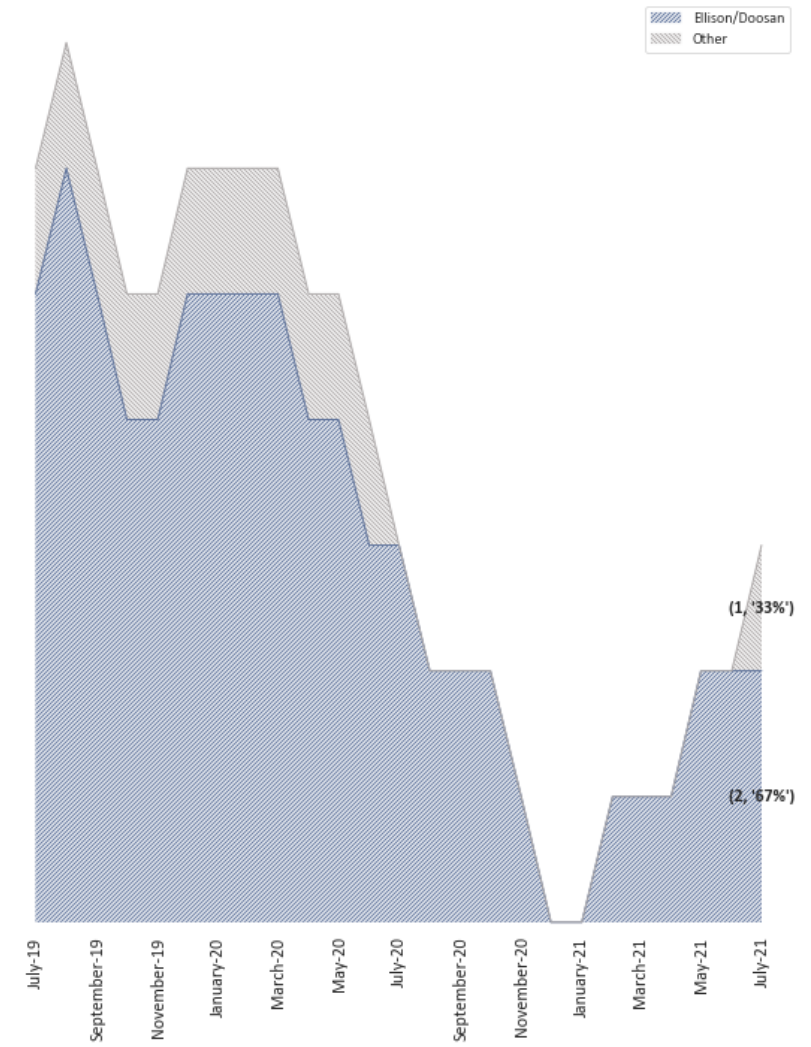
Best Vendors in the Northwest

- Service & Parts rated best in >60% of responses (Favorable)
- Other service organizations mentioned: Yamazen, Ellis, CNC Machine Services

Which vendor has the best Service Organization? (Northwest)



Which vendor has the best Parts Organization? (Northwest)

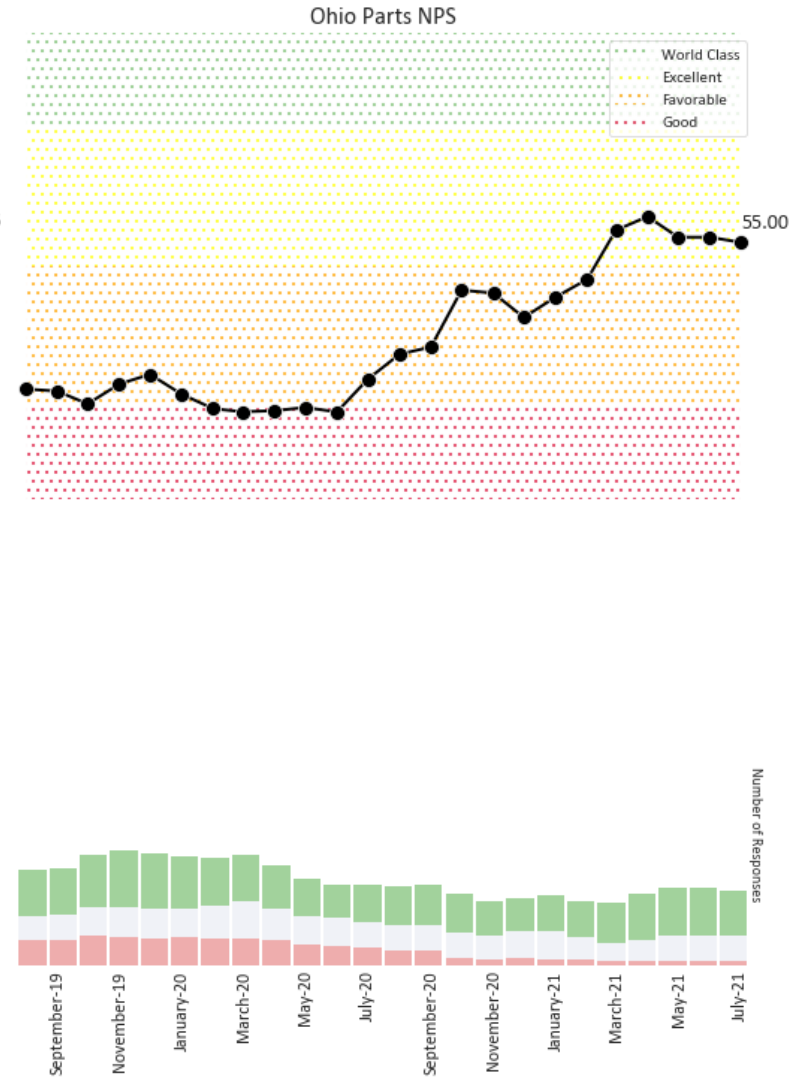
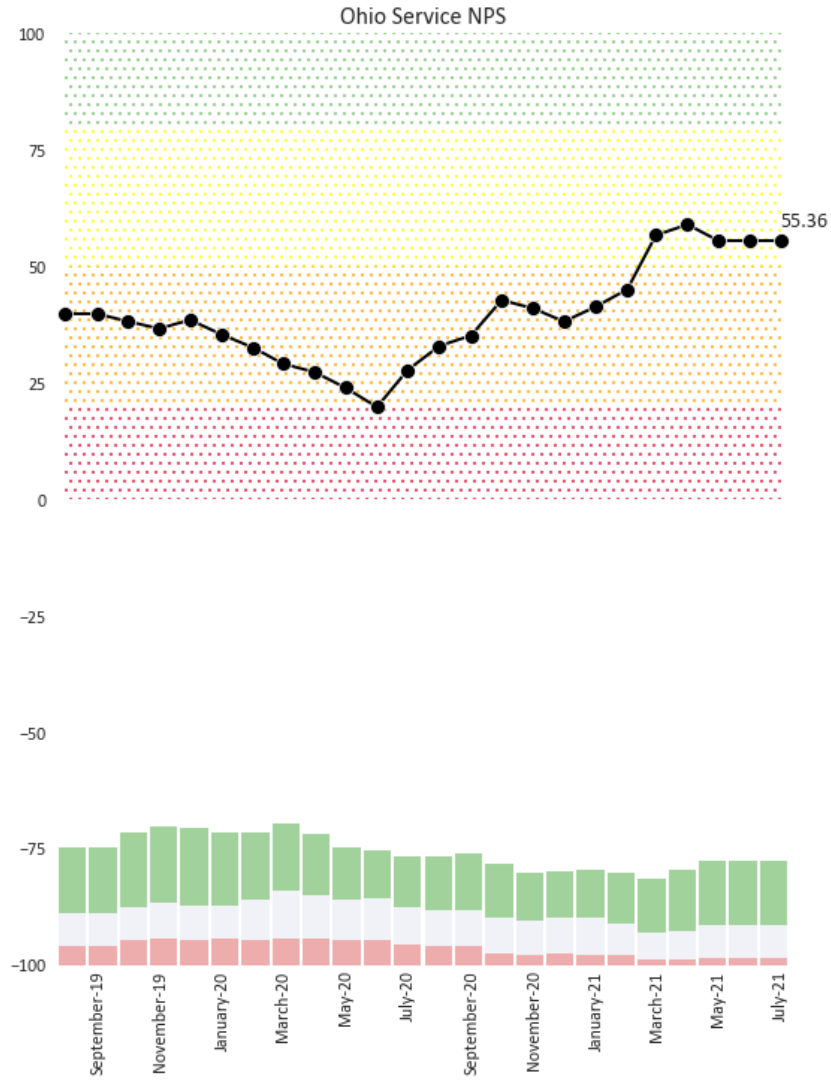


Northwest Open-Ended Comments (July)

- You know the product you sell and are competent with repair/troubleshooting (Promoter)
- Your communication is poor and your knowledge is poor. It took more than 3 months to provide basic information about a PM. Part of that delay was insisting that parts/oil could be purchased after the PM and performed on a follow up visit. (Detractor)

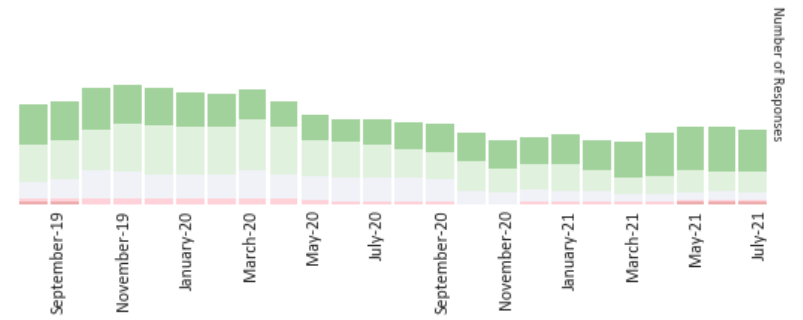
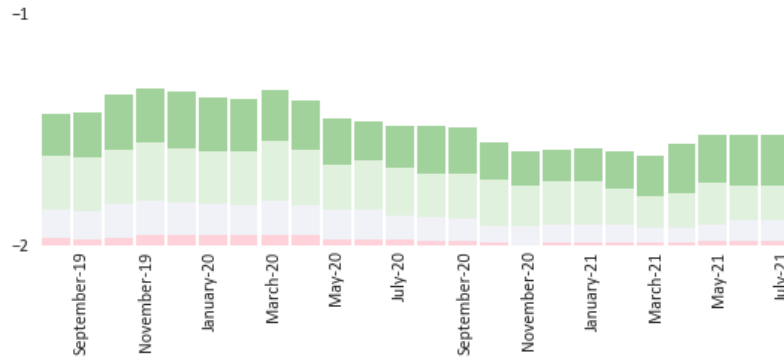
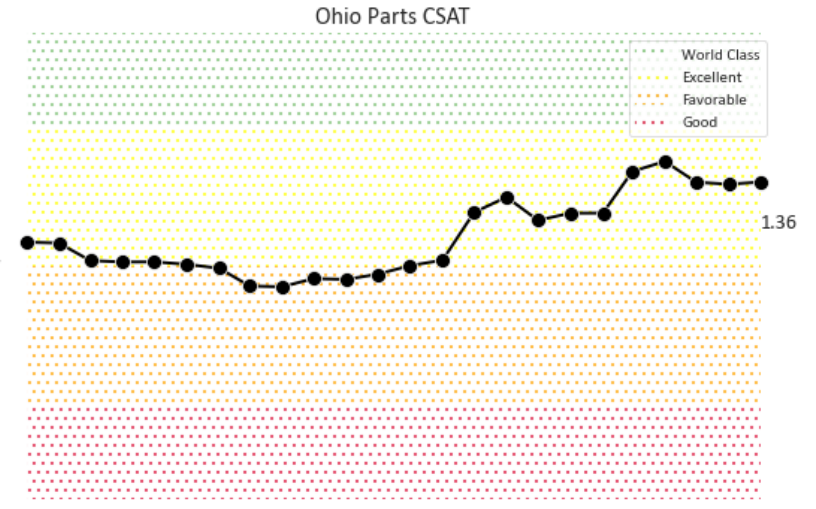
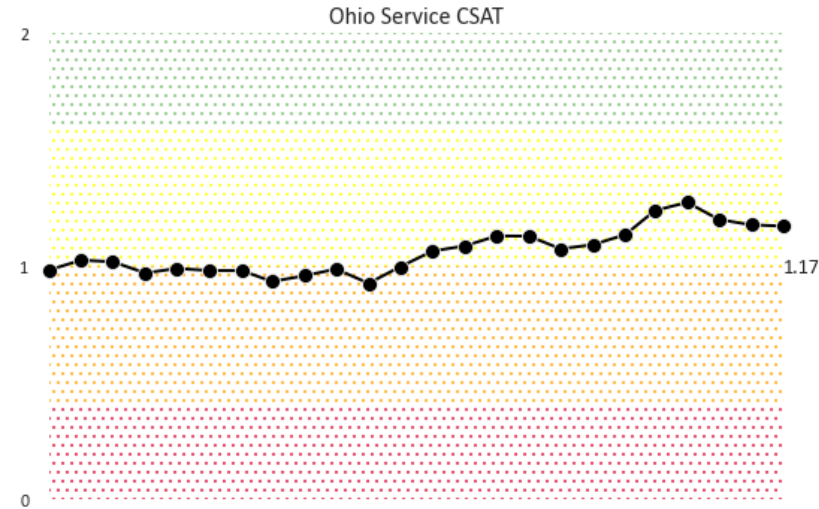
Ohio NPS

- 2nd-highest NPS in Service Organization
- Both Service & Parts started out with Favorable NPS, now Excellent
- NPS is about the same between Service and Parts



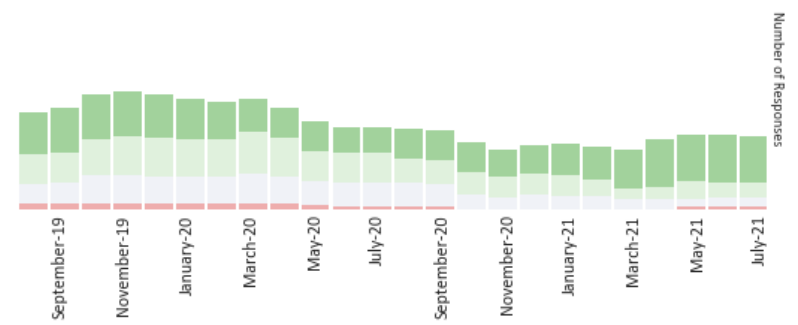
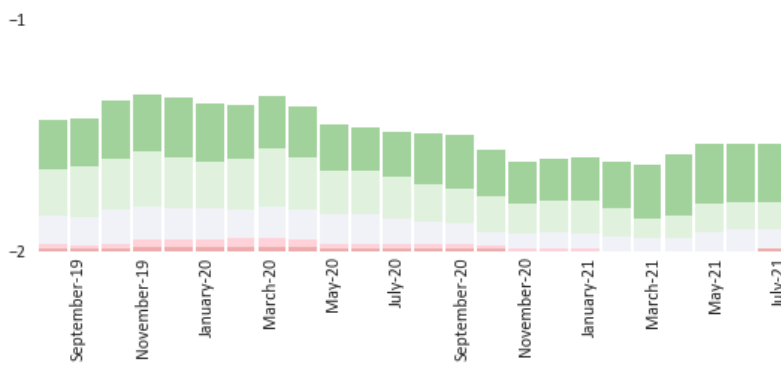
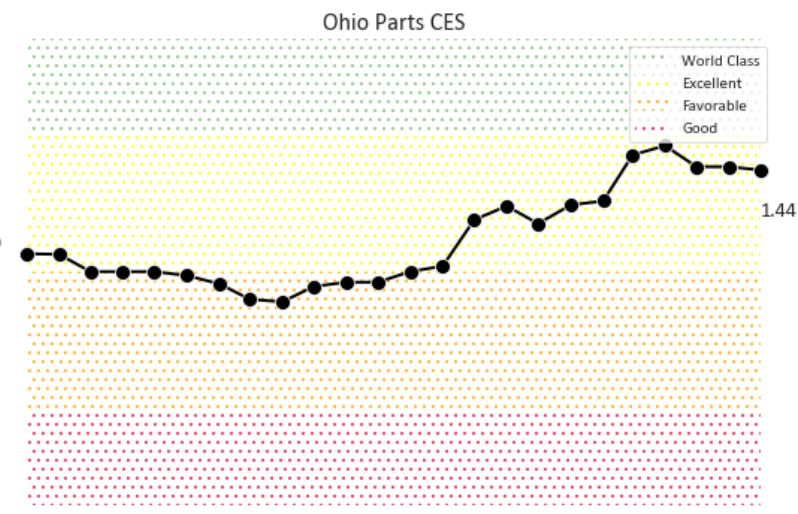
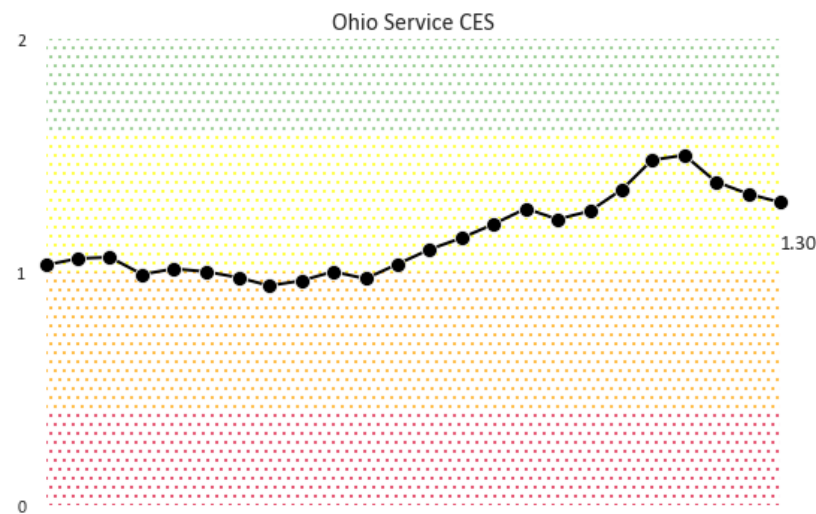
Ohio CSAT

- Both Service and Parts bordered on Excellent and Favorable CSAT, now both comfortably in Excellent
- Parts CSAT relatively higher than Service CSAT



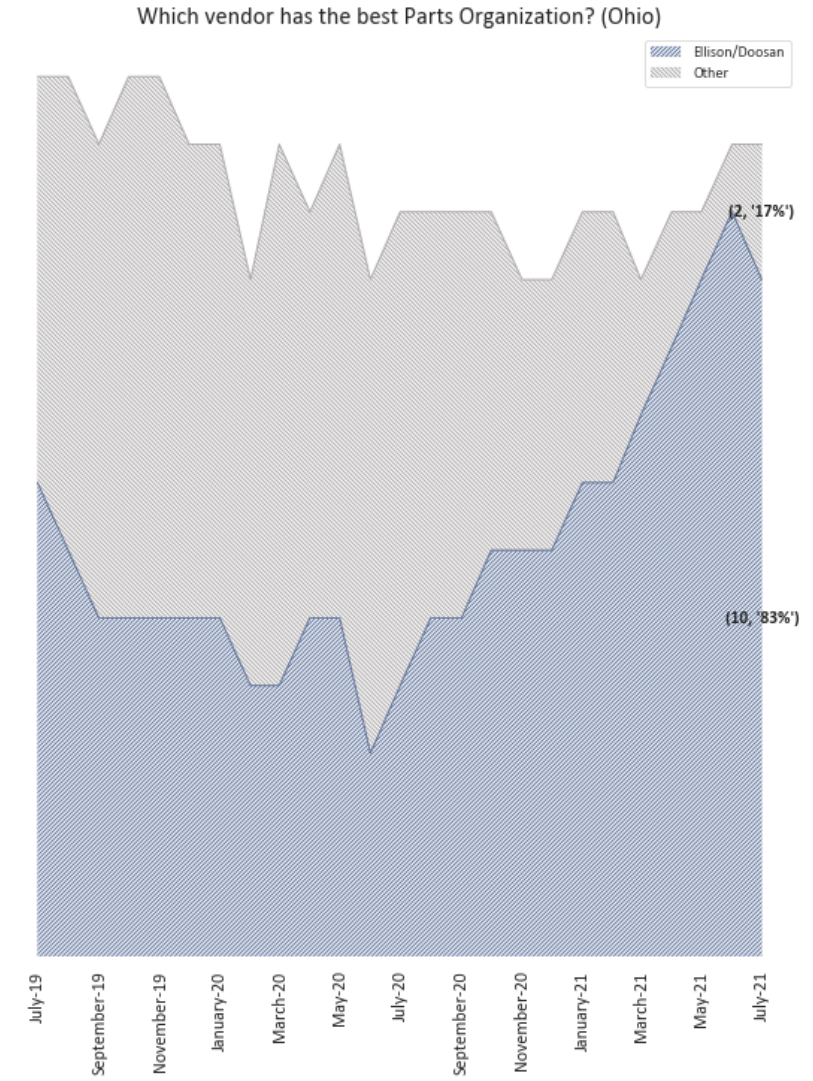
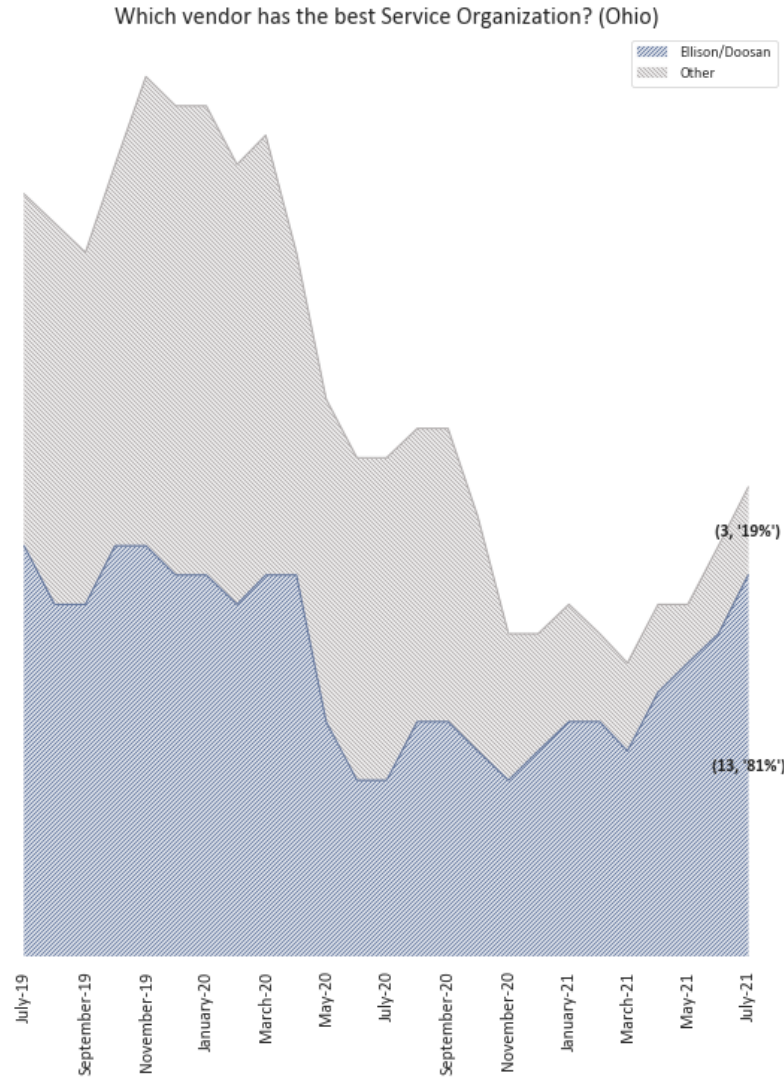
Ohio CES

- Both Service and Parts bordered on Excellent and Favorable CES, now comfortably Excellent
- Parts CES slightly higher than Service CES



Best Vendors in Ohio

- Service & Parts rated best in >80% of responses (Excellent)
- Other service organizations mentioned: Makino, Diamond, Technical Services

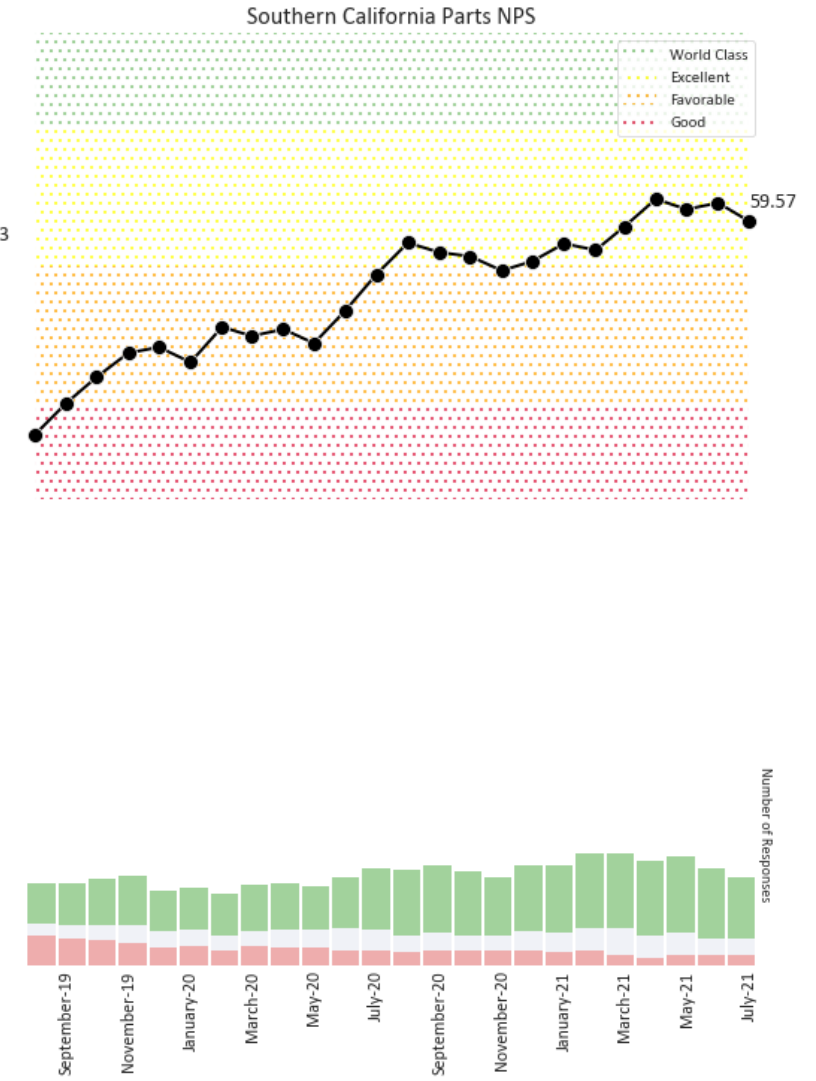
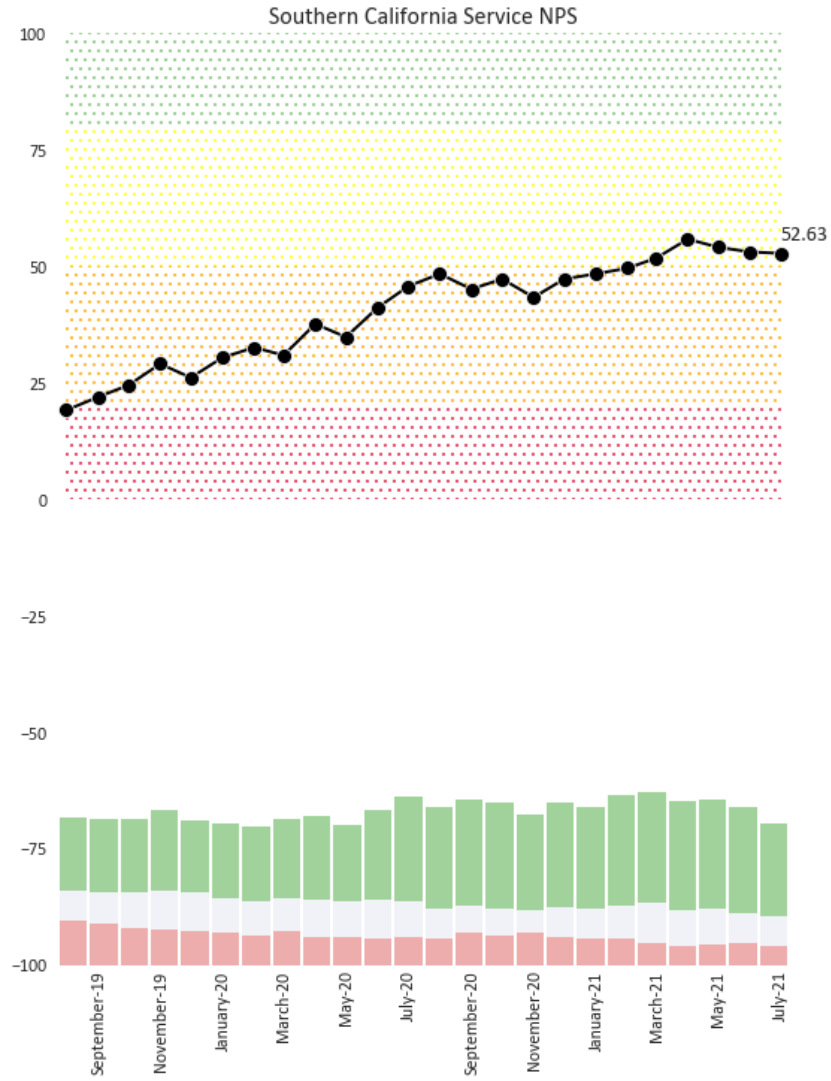


Ohio Open-Ended Comments (July)

- Do everything possible to retain Joe Szymczyk, Eric Kellem, Brian Smith, and Megan Colonia. I would have to say they are the best of the best! (Promoter)

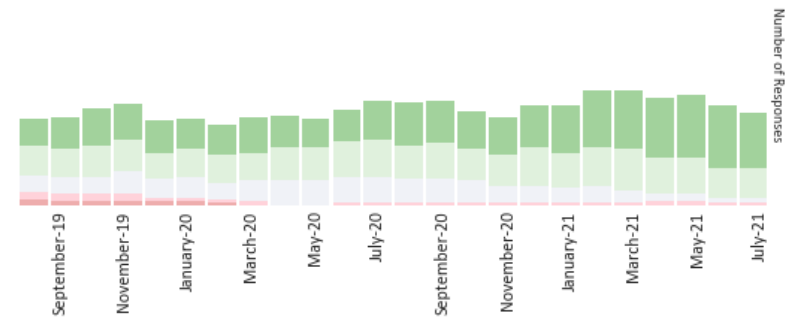
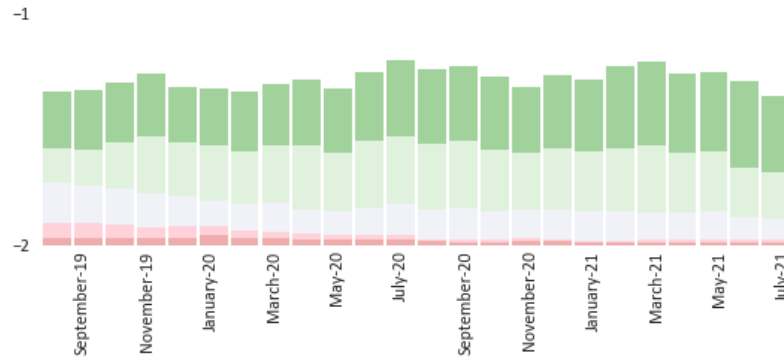
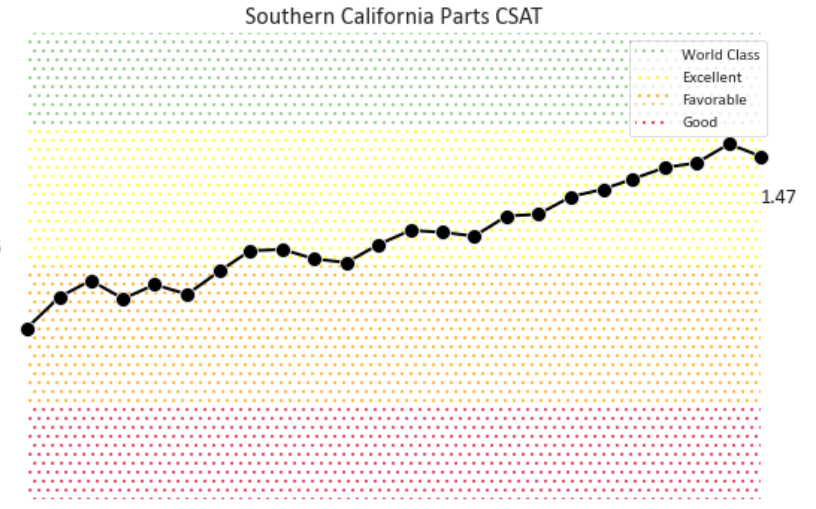
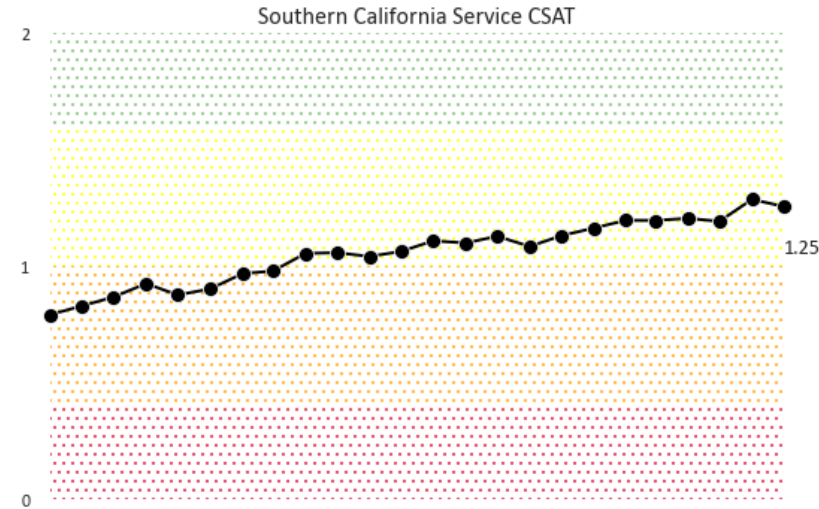
Southern California NPS

- 3rd-highest NPS branch in Service Organization
- Both Service & Parts started out Good, now Excellent
- NPS is slightly higher for Parts than Service



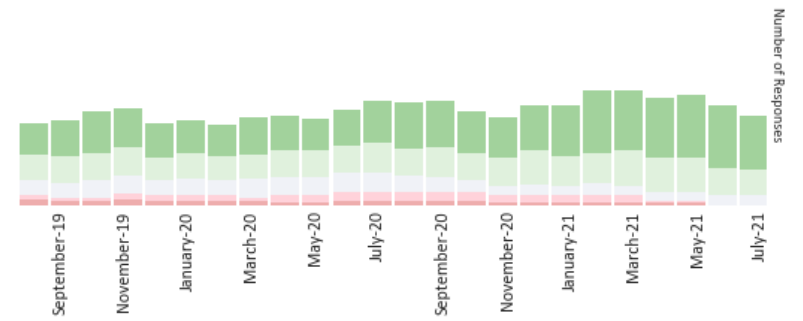
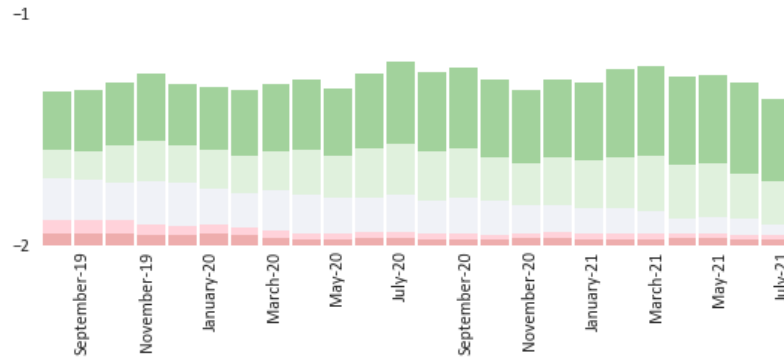
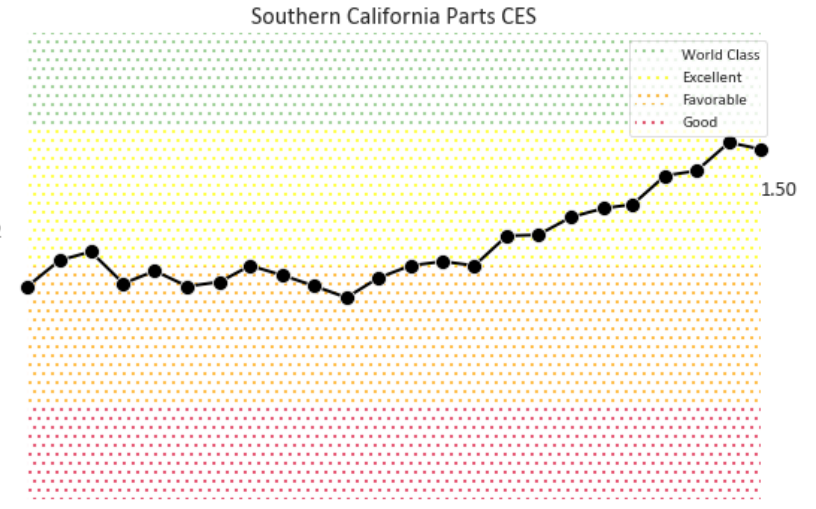
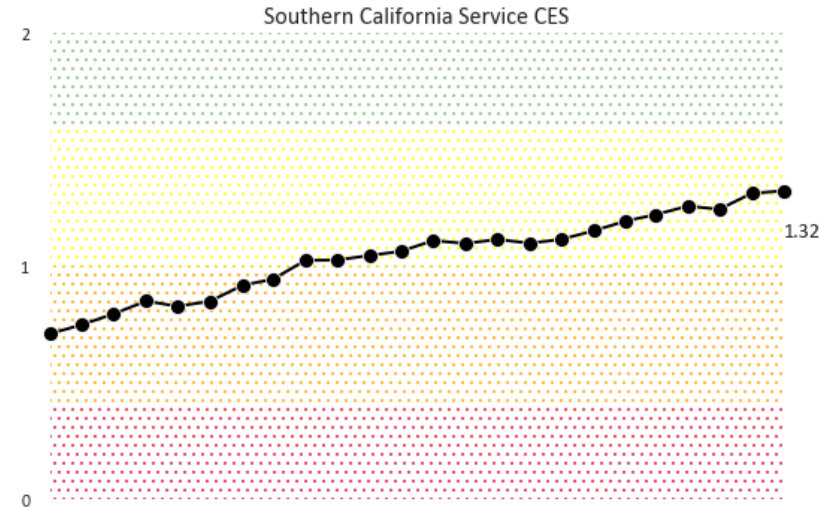
Southern California CSAT

- Both Service and Parts started out Favorable, now comfortably Excellent
- Parts CSAT relatively higher than Service CSAT



Southern California CES

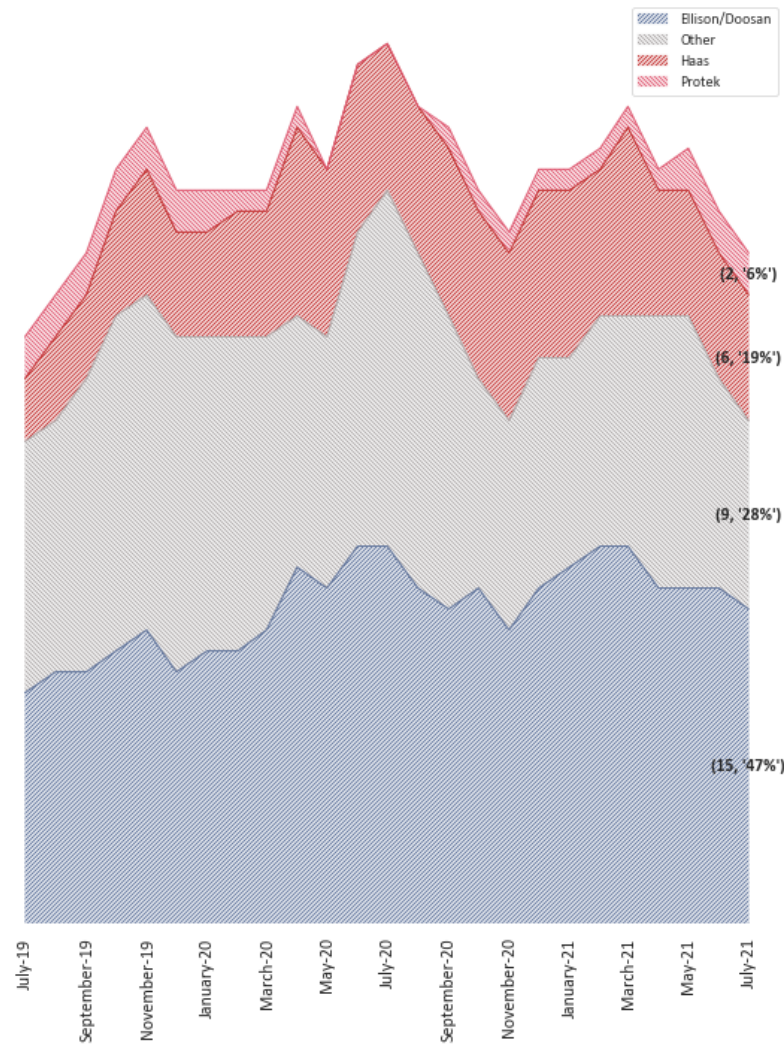
- Both Service and Parts CES started out Favorable, now comfortably Excellent
- Parts CES relatively higher than Service CES, approaching World Class



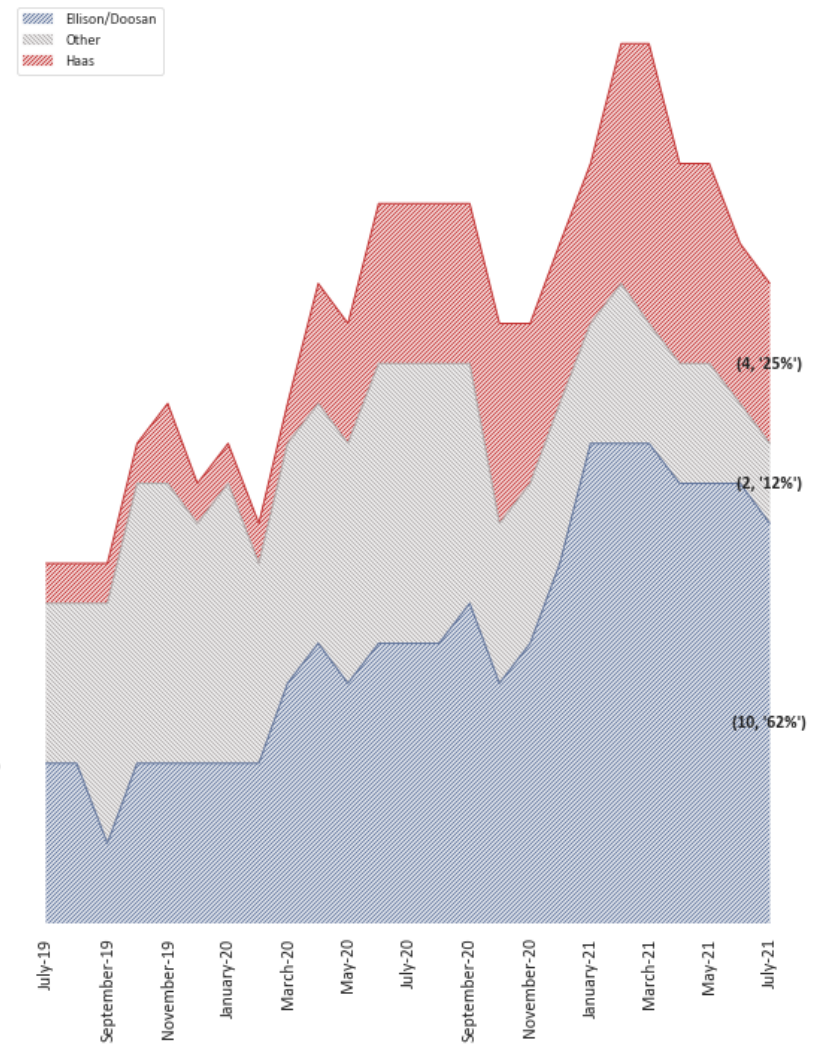
Best Vendors in Southern California

- Service Organization rated best in 47% of responses (below Good)
- Parts Organization rated best in 62% of responses (Favorable)
- Biggest competitors: Haas, Protek

Which vendor has the best Service Organization? (Southern California)



Which vendor has the best Parts Organization? (Southern California)

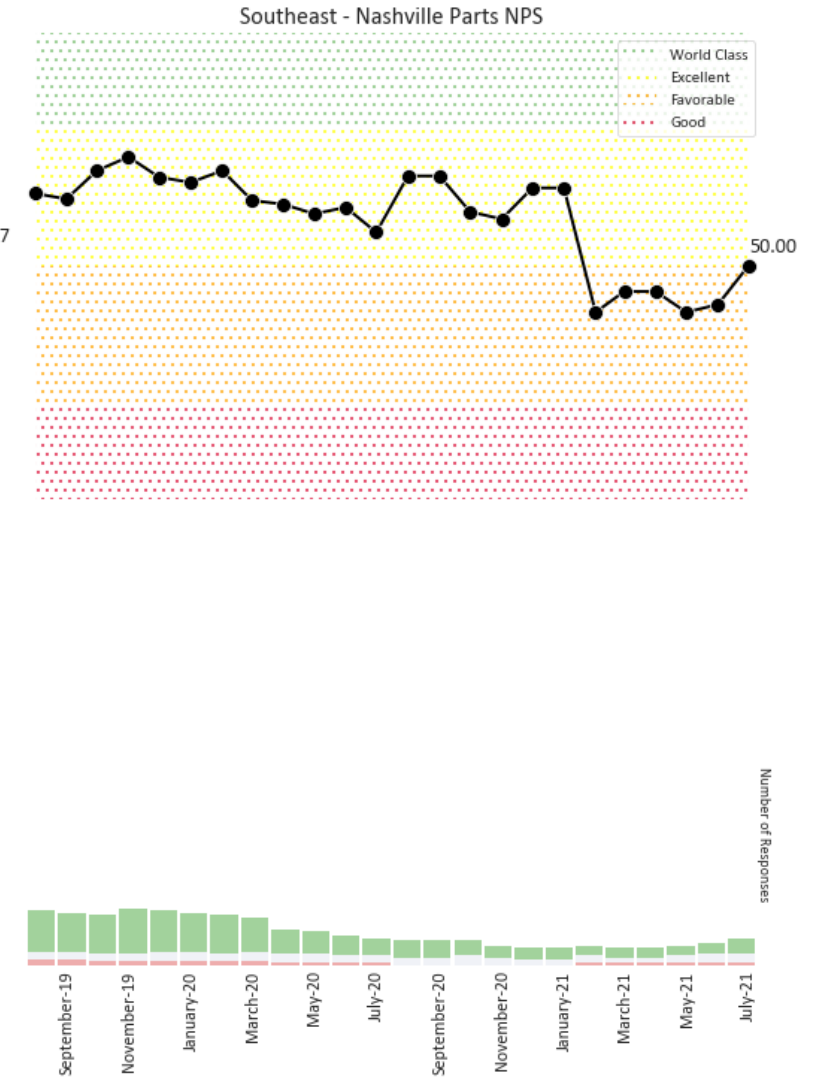
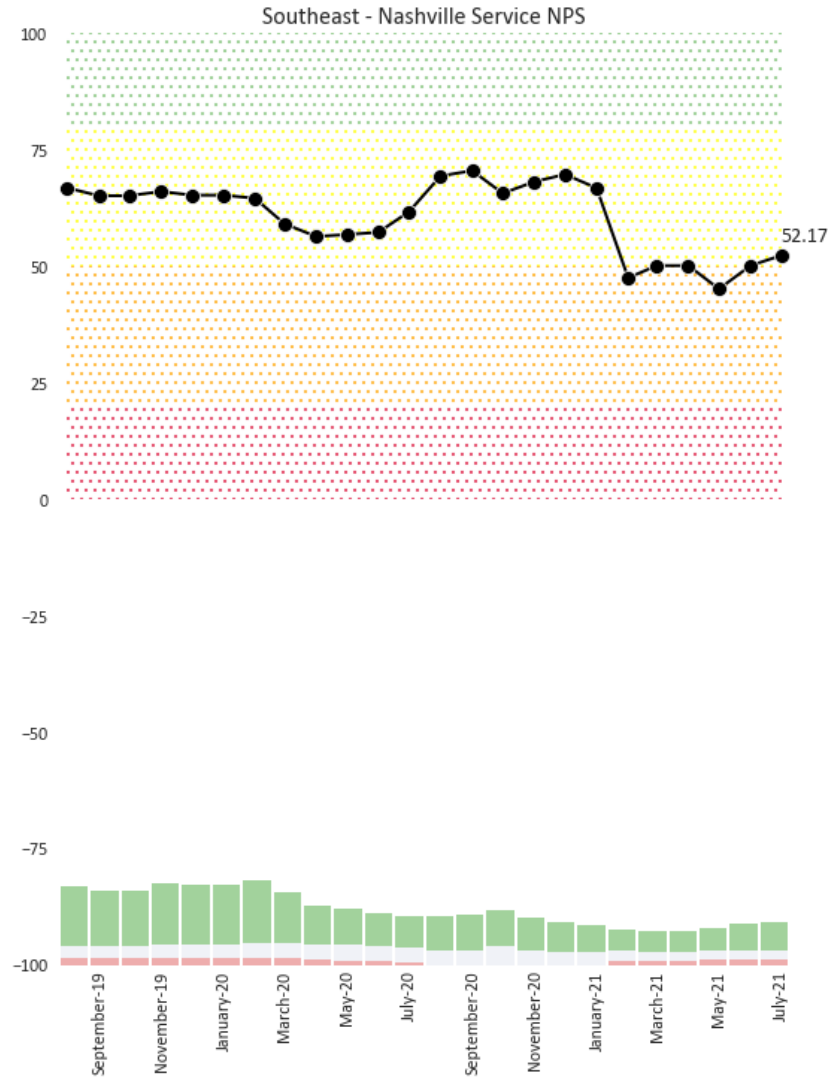


Southern California Open-Ended Comments (July)

- James is awesome !! (Promoter)
- Techs are great, getting them in in a timely fashion i hard. Luckily I am not running a job shop, so we are less effected by it. (Promoter)
- Daniel Knipp is doing a great job for Ellison. He is professional, courteous and follows through. (Promoter)

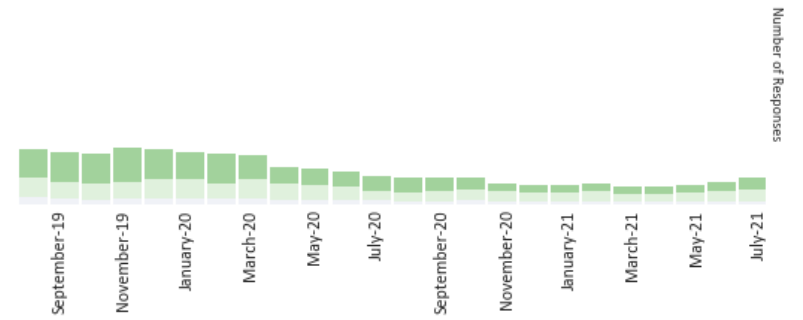
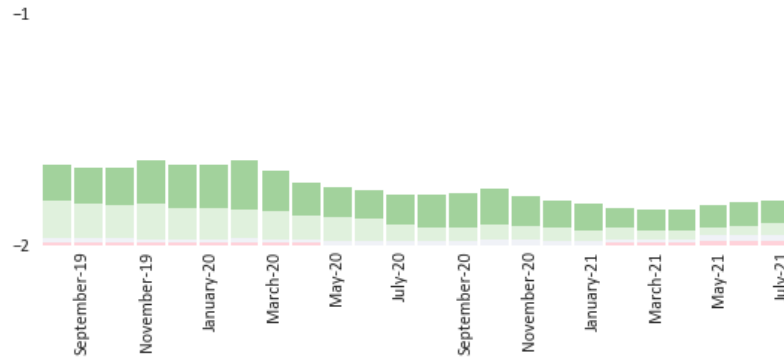
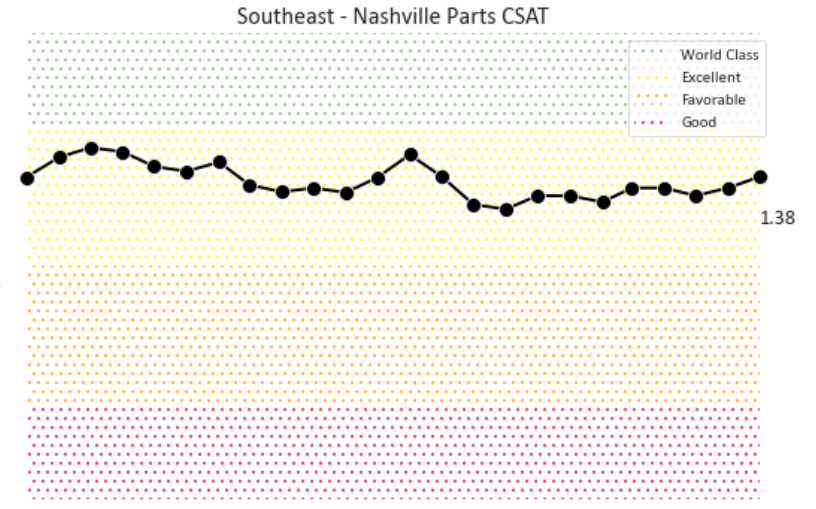
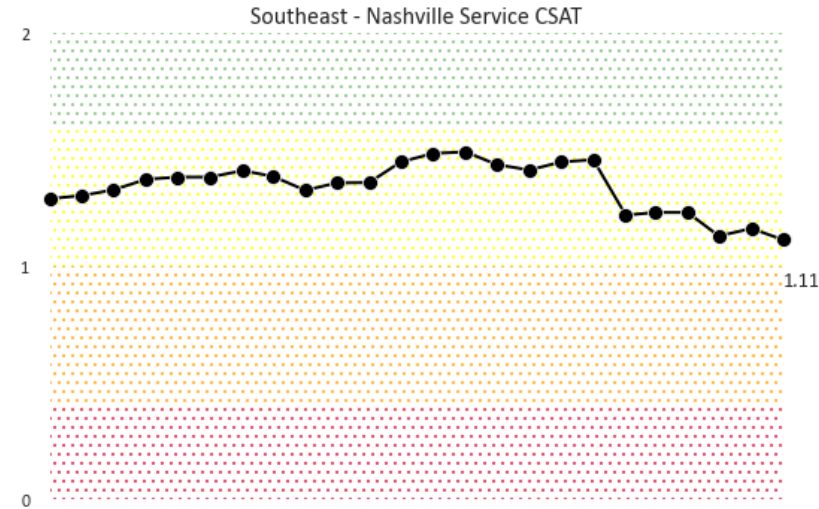
Nashville NPS

- Had the highest starting NPS, now 4th-highest
- Both Service & Parts NPS started out Excellent, dropped to Favorable, and are back to Excellent
- NPS is about the same for both



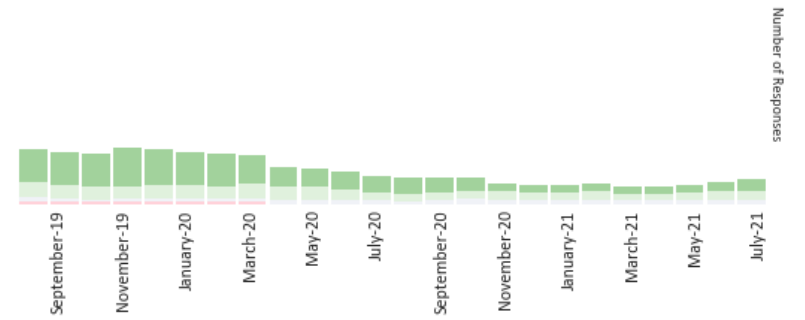
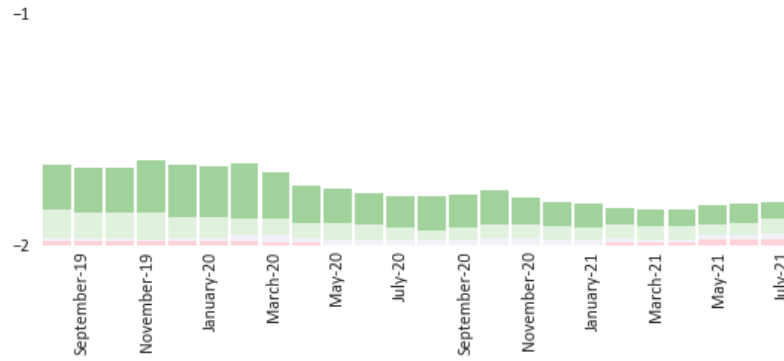
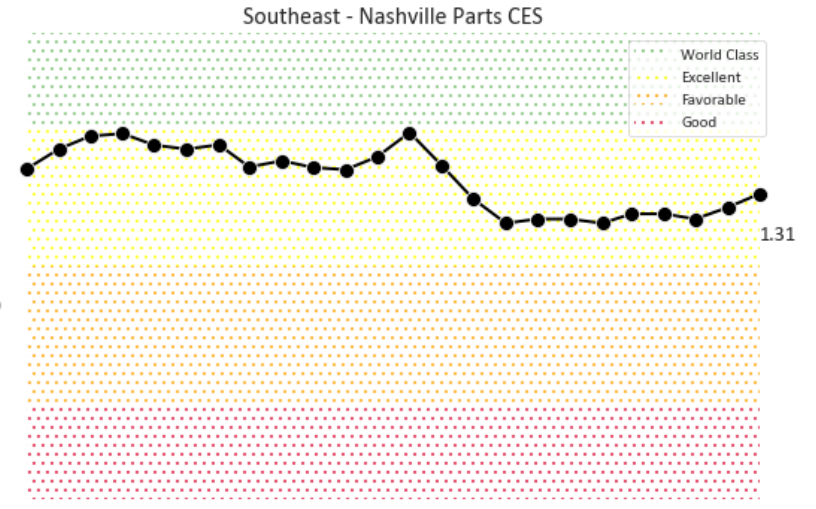
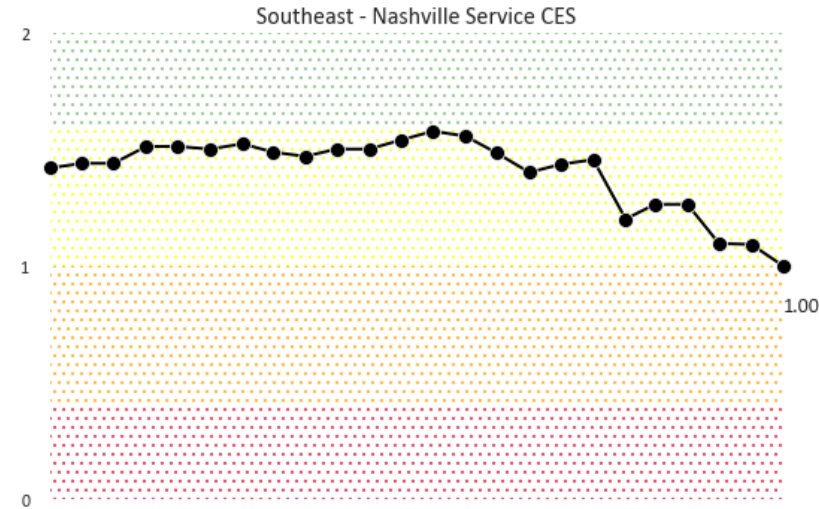
Nashville CSAT

- Both Service and Parts have maintained Excellent CSAT in the last 2 years
- Parts CSAT relatively higher than Service CSAT



Nashville CES

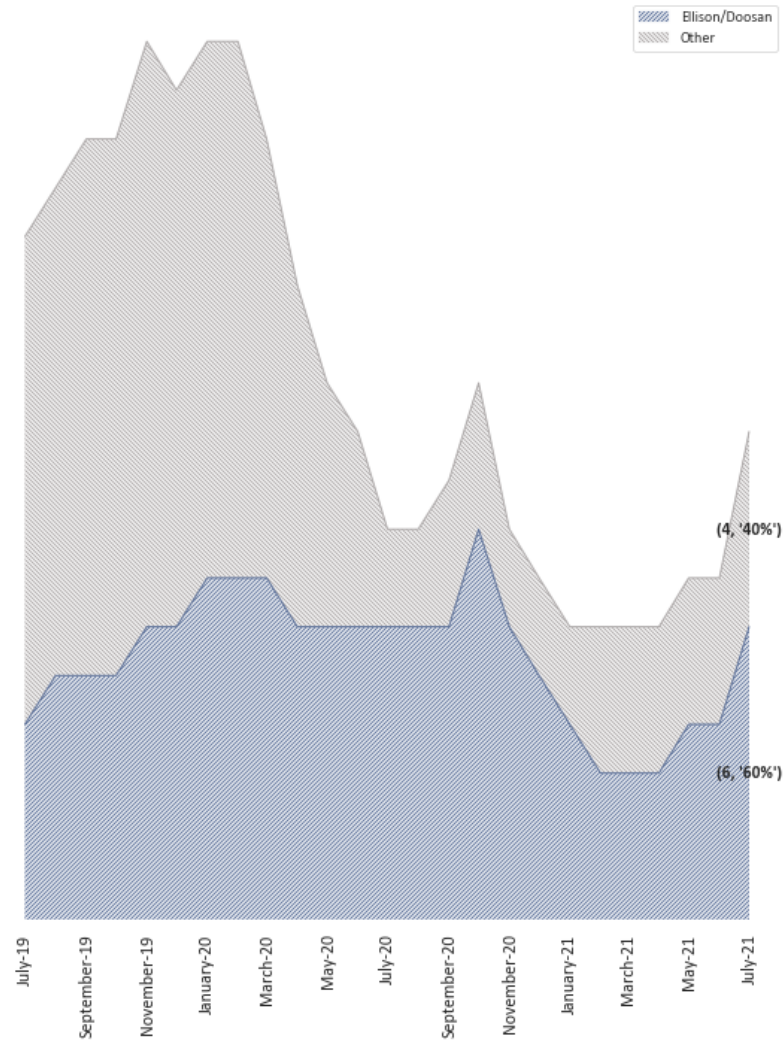
- Both Service and Parts have maintained Excellent CES in the last 2 years
- Service CES dropped to 2-year low in July, approaching Favorable territory
- Parts CES significantly higher than Service CES



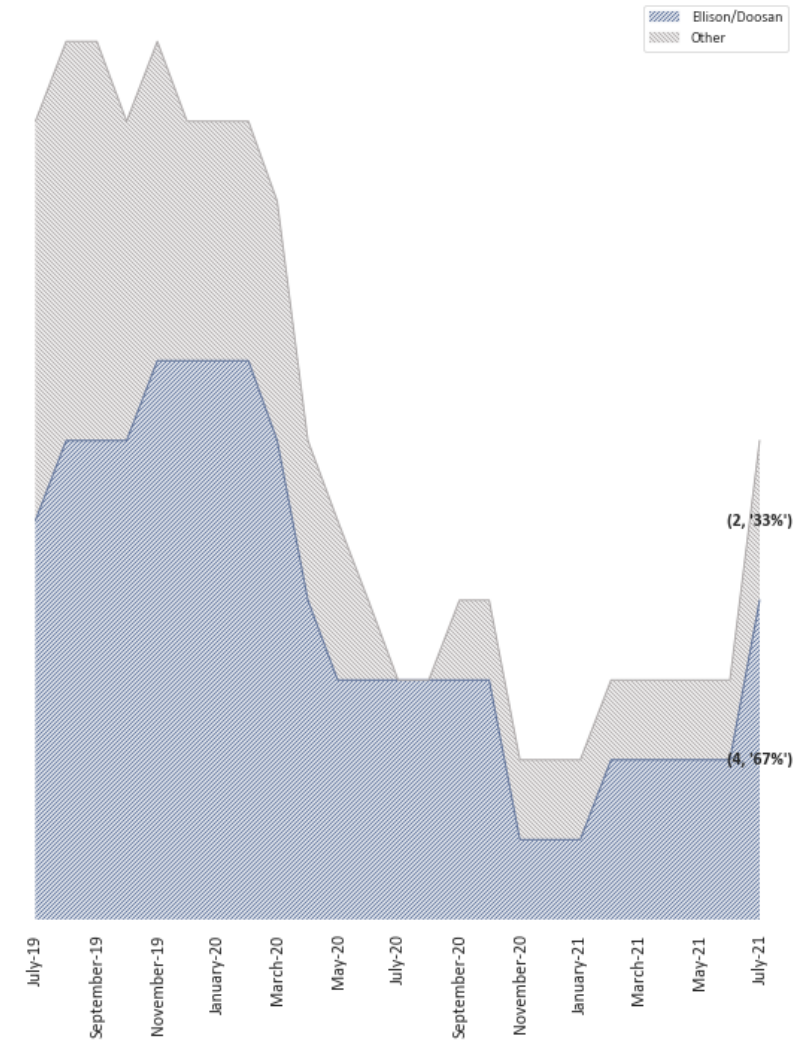
Best Vendors in Nashville

- Service & Parts rated best in >60% of response (Favorable)
- Other service organizations mentioned: Nigatta, Haas

Which vendor has the best Service Organization? (Nashville)



Which vendor has the best Parts Organization? (Nashville)

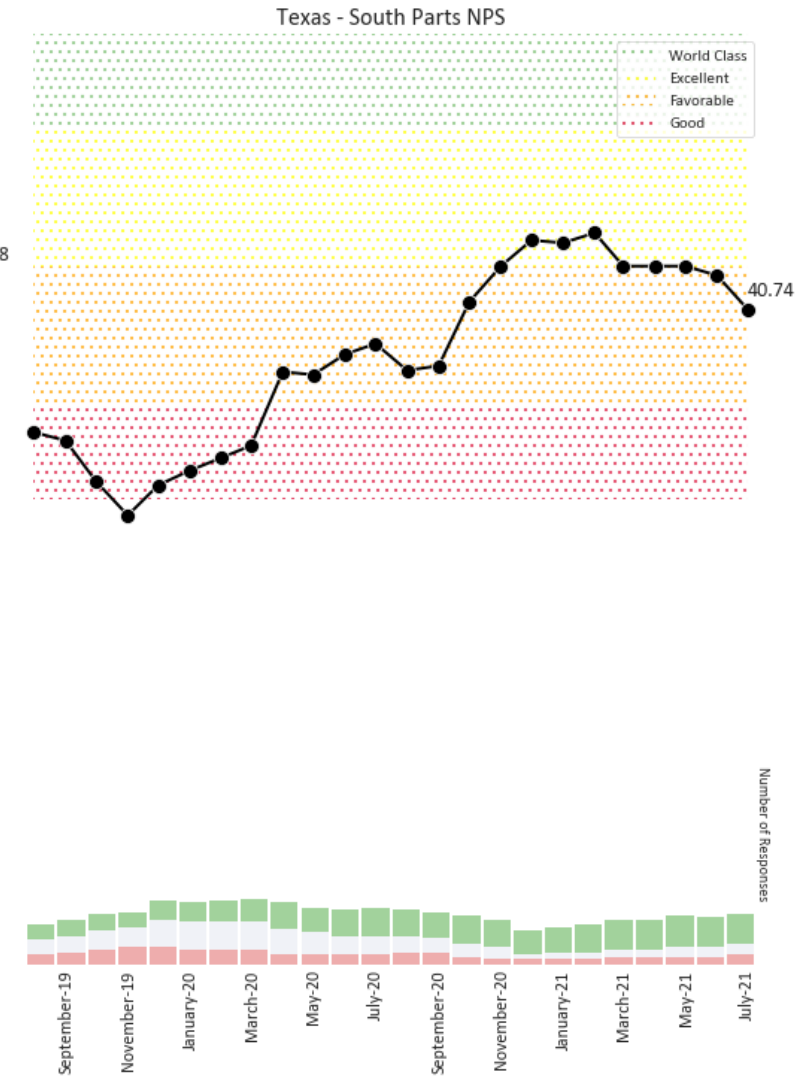
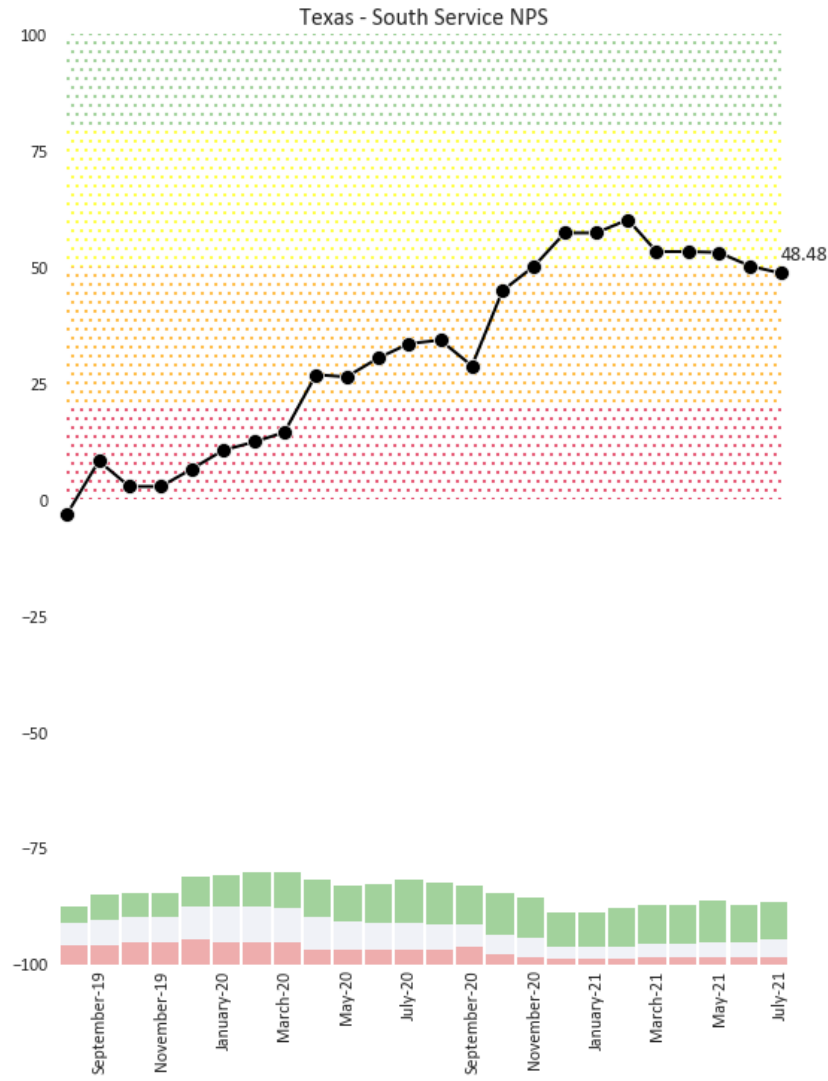


Nashville Open-Ended Comments (July)

- I have been doing this type work for many years Ellison would be my first call (Promoter)
- Brandon, David, Emily & all of the folks affiliated with Ellison at the Nashville, TN branch which I realize some work from NC are GREAT !!! (Promoter)
- Good working with you (Promoter)

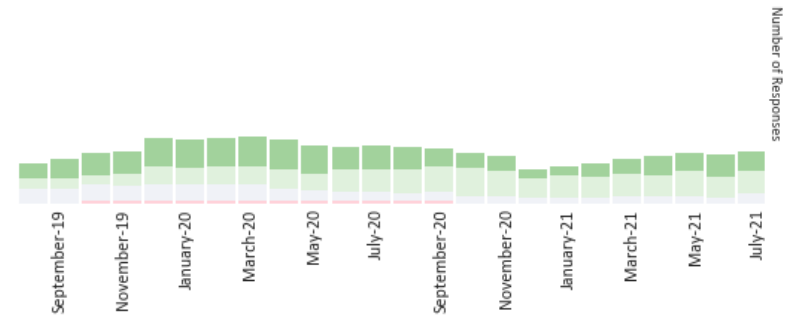
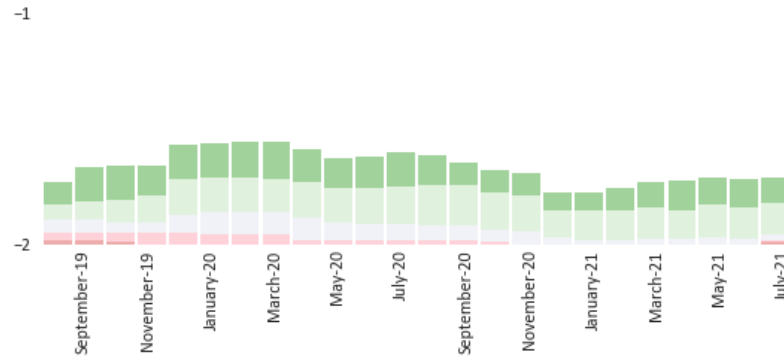
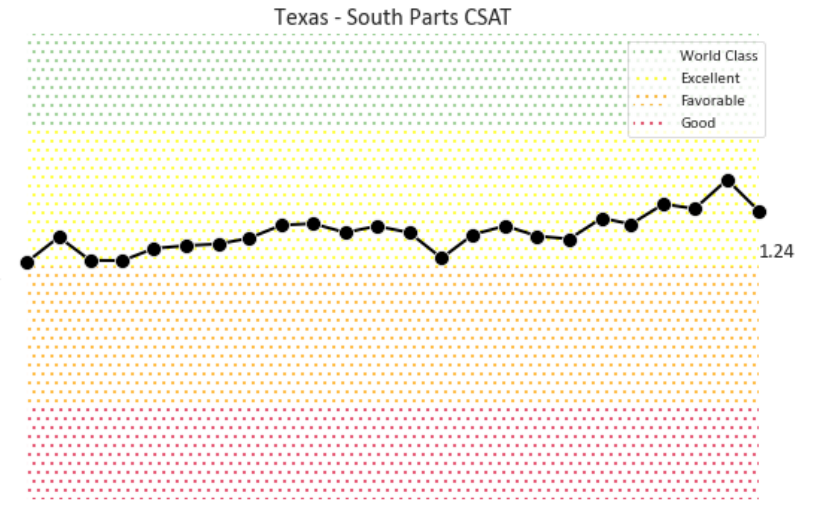
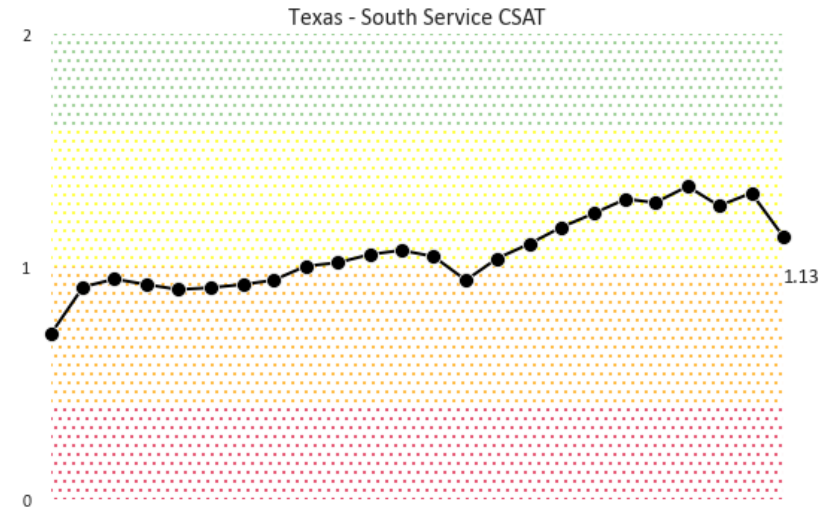
Texas-South NPS

- Very significant improvement from 2 years ago
- Service NPS started out below Good, reached Excellent, now Favorable
- Parts NPS started off Good, reached Excellent, now Favorable
- NPS is about the same for both



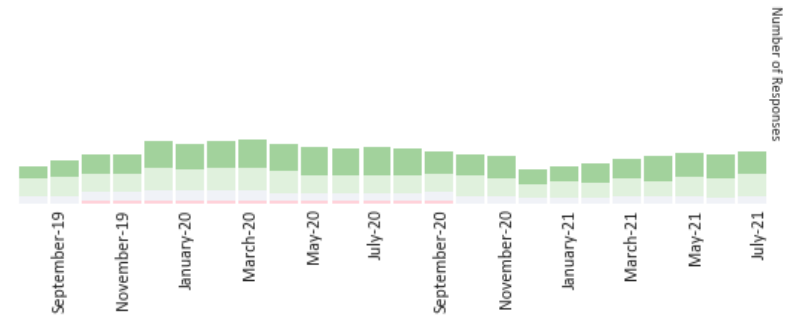
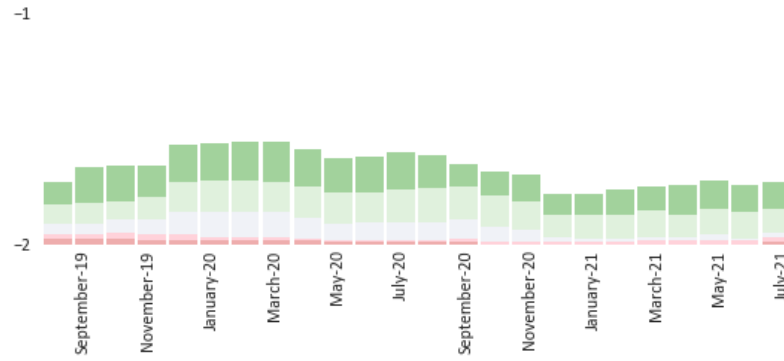
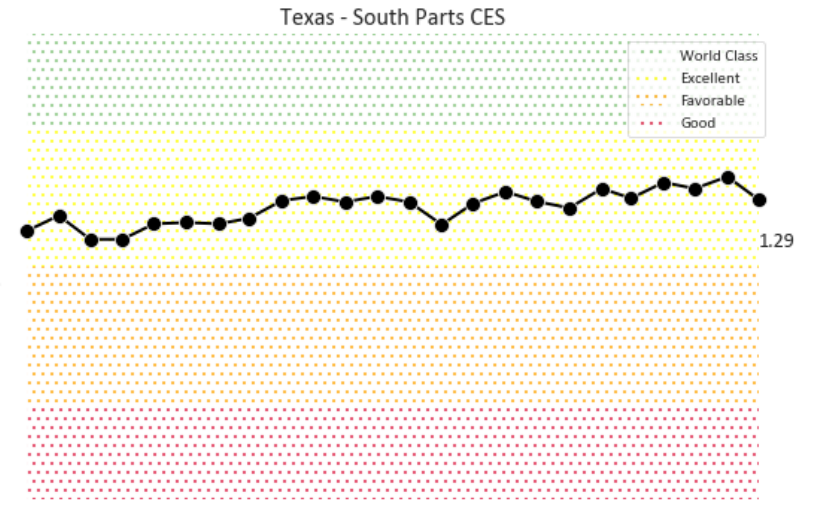
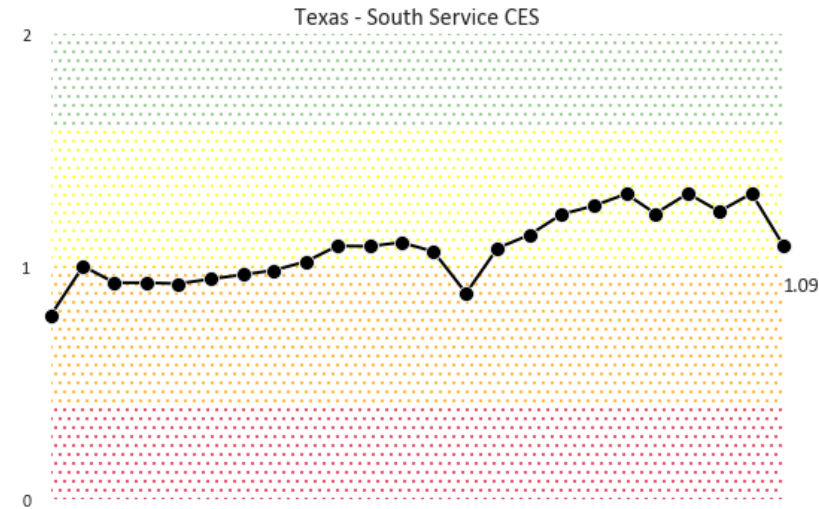
Texas-South CSAT

- Service CSAT started out Favorable, now Excellent
- Parts has maintained Excellent CSAT for 2 years
- Parts CSAT slightly higher than Service CSAT



Texas-South CES

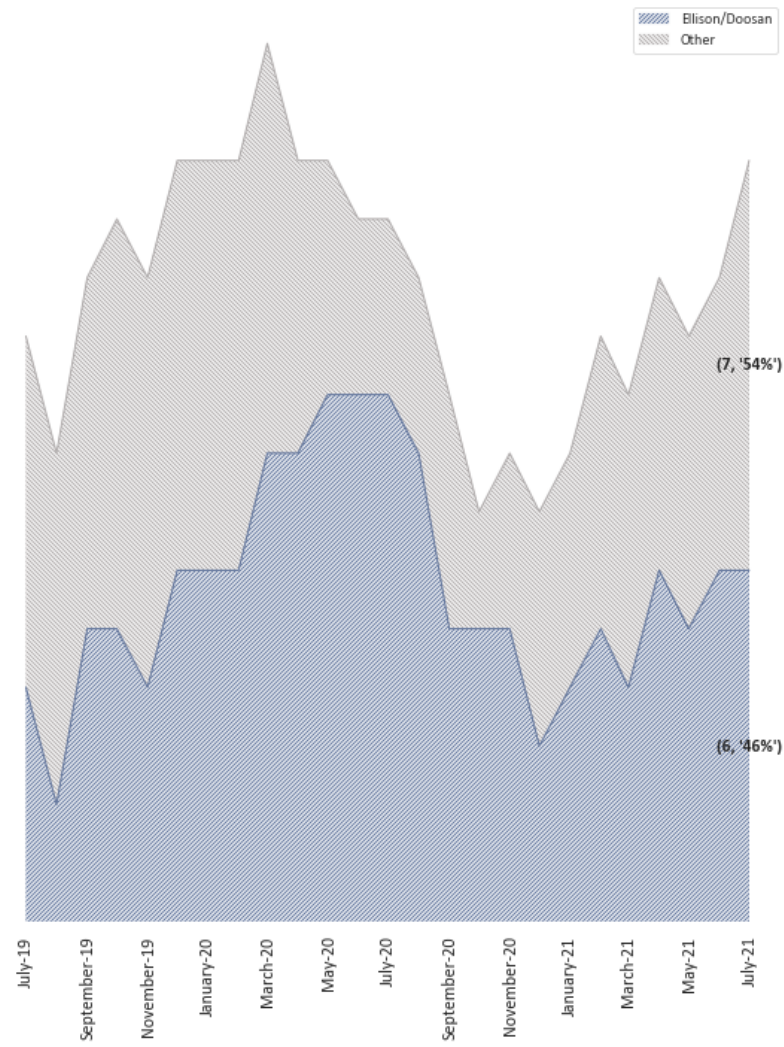
- Service CES started out Favorable, now Excellent
- Parts has maintained Excellent CES for 2 years
- Parts CES slightly higher than Service CES



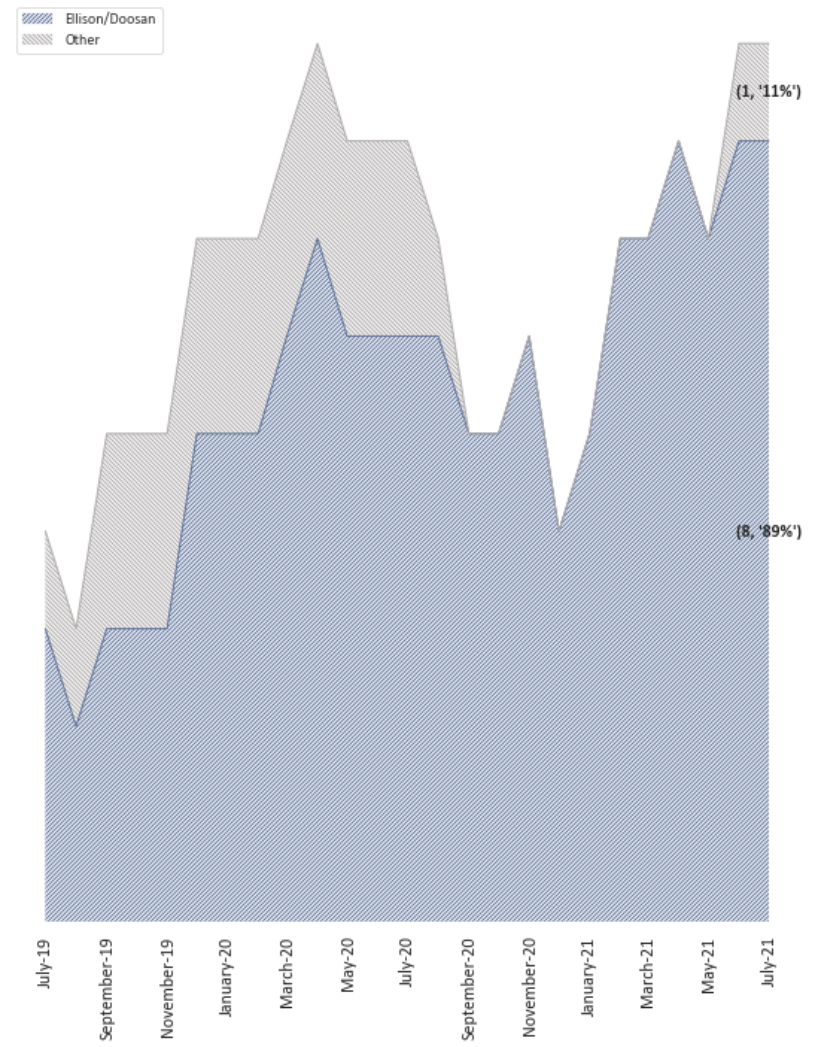
Best Vendors in Texas-South

- Service rated best in 46% of responses (less than Good)
- Parts rated best in 89% of responses (Excellent)
- Other service organizations mentioned: Haas, DMG Mori, AmTTech, Hartwig

Which vendor has the best Service Organization? (Texas - South)



Which vendor has the best Parts Organization? (Texas - South)

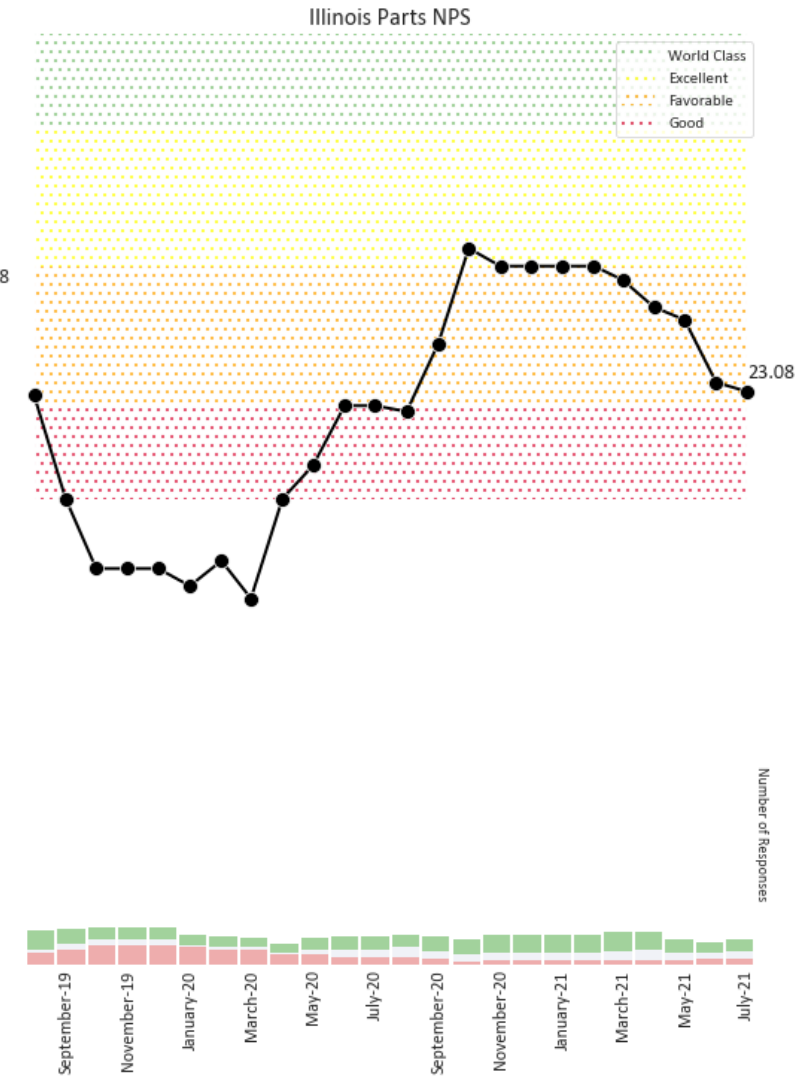
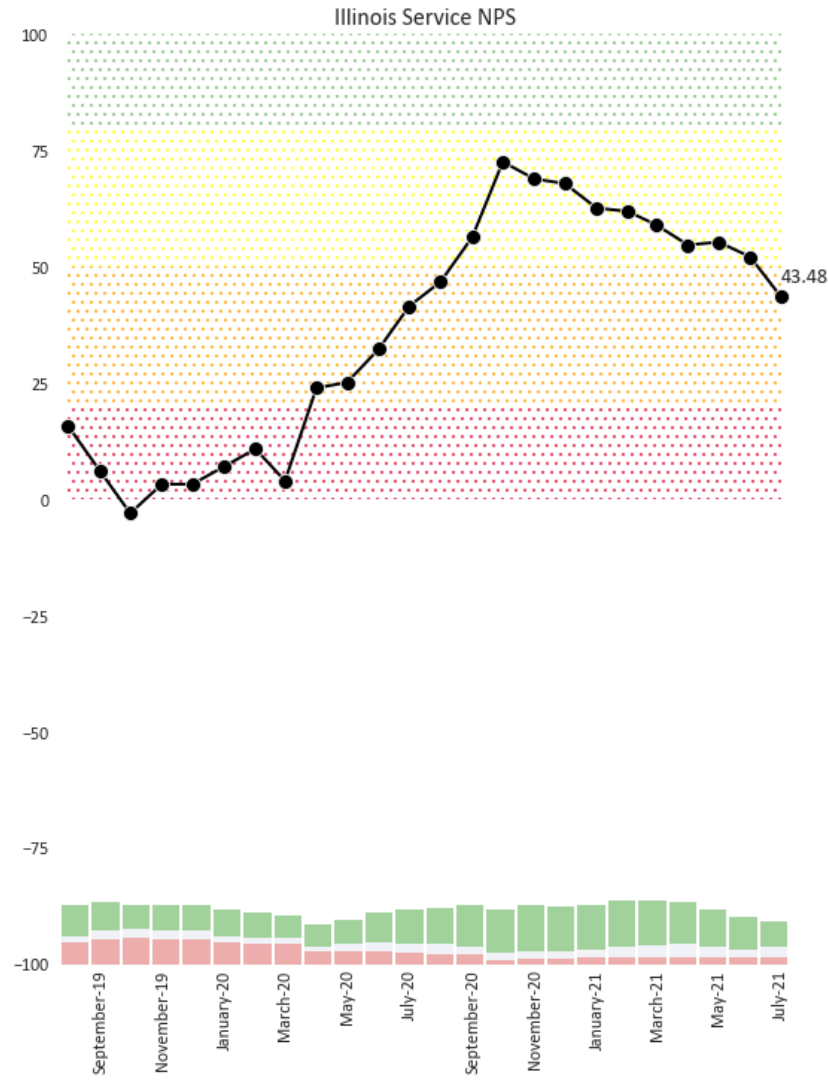


Texas-South Open-Ended Comments (July)

- OUR SALESMAN JEFF COX IS AMAZING I JUST THINK ELLISON AS A WHOLE NEEDS A BETTER SERVICE DEPARTMENT TO BACK HIM. SERVICE IS EVERYTHING (Promoter)
- We bought 4 Doosan cnc machiens from the previous dealer and we dealt with them often , and due to building a very close relationship with them it has been very hard to let that go because we trusted them with our business, not to say we could never trust anyone else and that has been sometime back now but we are just happy to continue buying our parts from you guys . We have now taken the task of repairing our machines in-house . (Detractor)

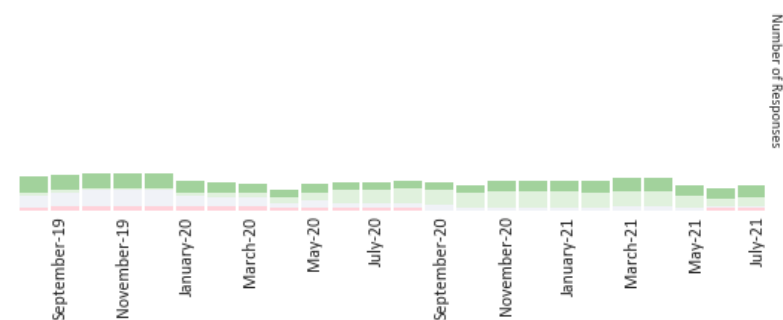
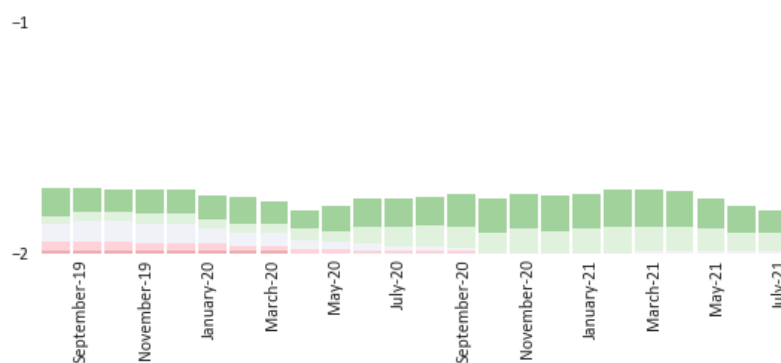
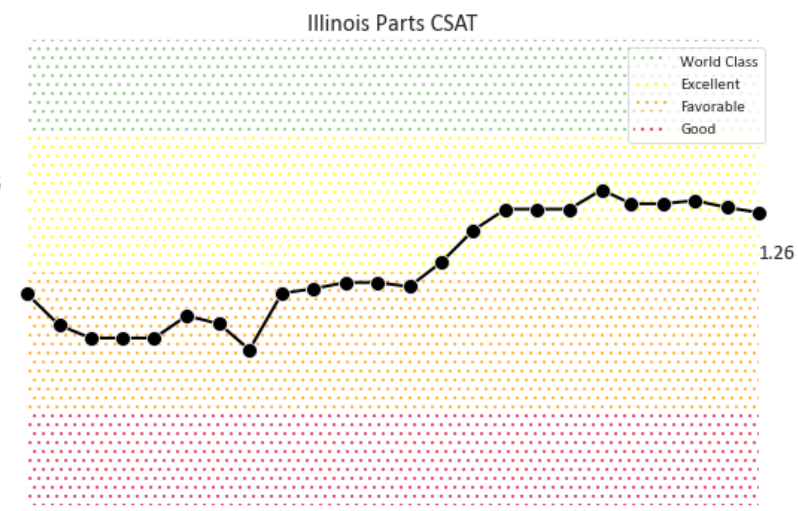
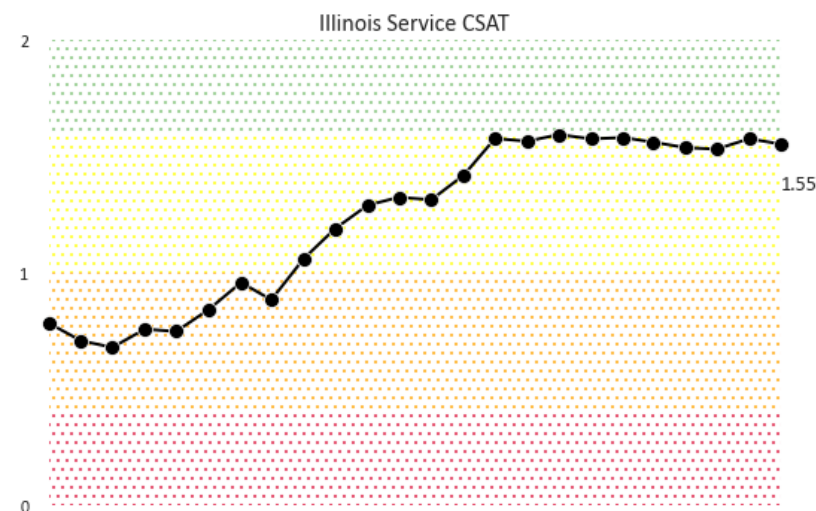
Illinois NPS

- Service NPS started out Good, climbed to Excellent, now Favorable
- Parts NPS started out Favorable, declined and rose sharply, and is back to Favorable
- Service NPS greatly higher than Parts NPS



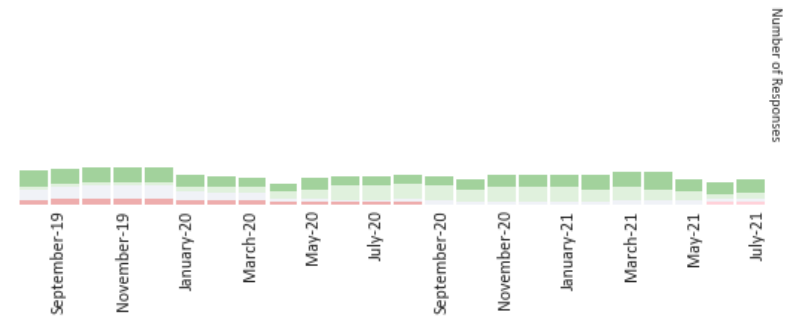
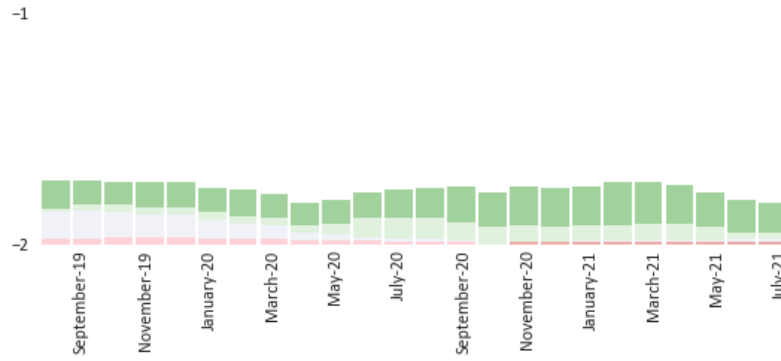
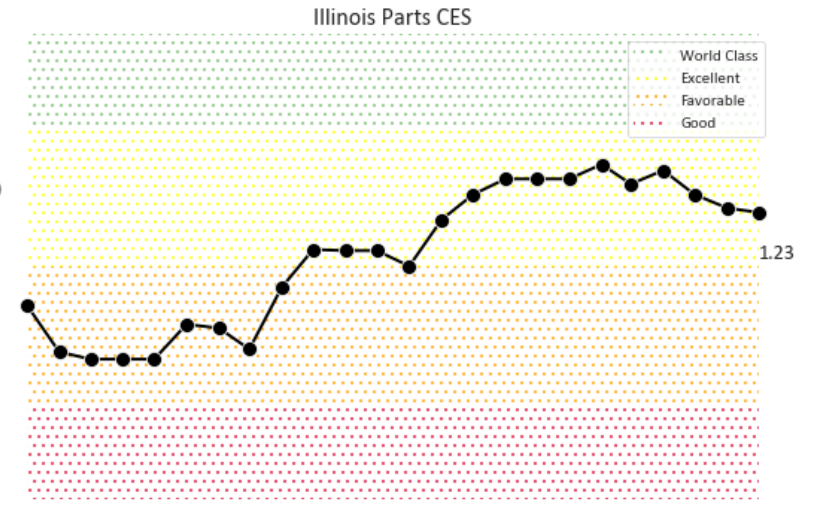
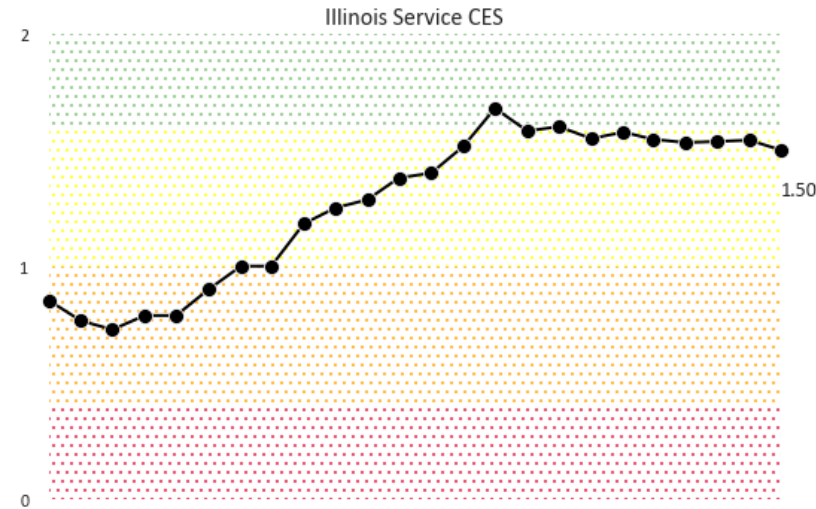
Illinois CSAT

- Service CSAT started out Favorable, now Excellent, near World Class
- Parts CSAT started out Favorable, now comfortably Excellent
- Service CSAT relatively higher than Parts CSAT



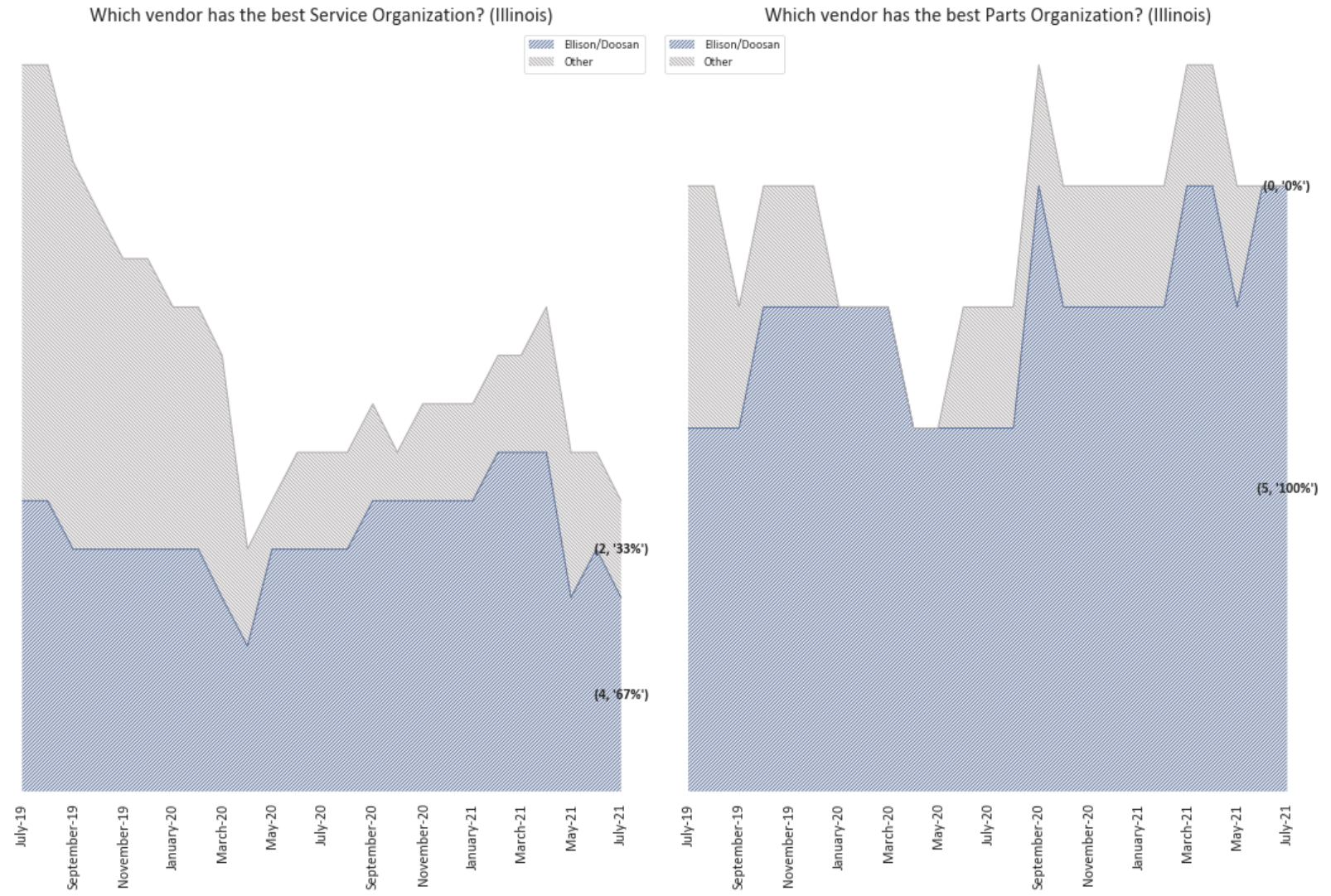
Illinois CES

- Service CES started out Favorable, now Excellent, near World Class
- Parts CES started out Favorable, now comfortably in Excellent
- Service CES relatively higher than Parts CES



Best Vendors in Illinois

- Service rated best in 67% of responses (Favorable)
- Parts rated best in 100% of responses (World Class)
- Other service organizations mentioned: Haas, Trumpf

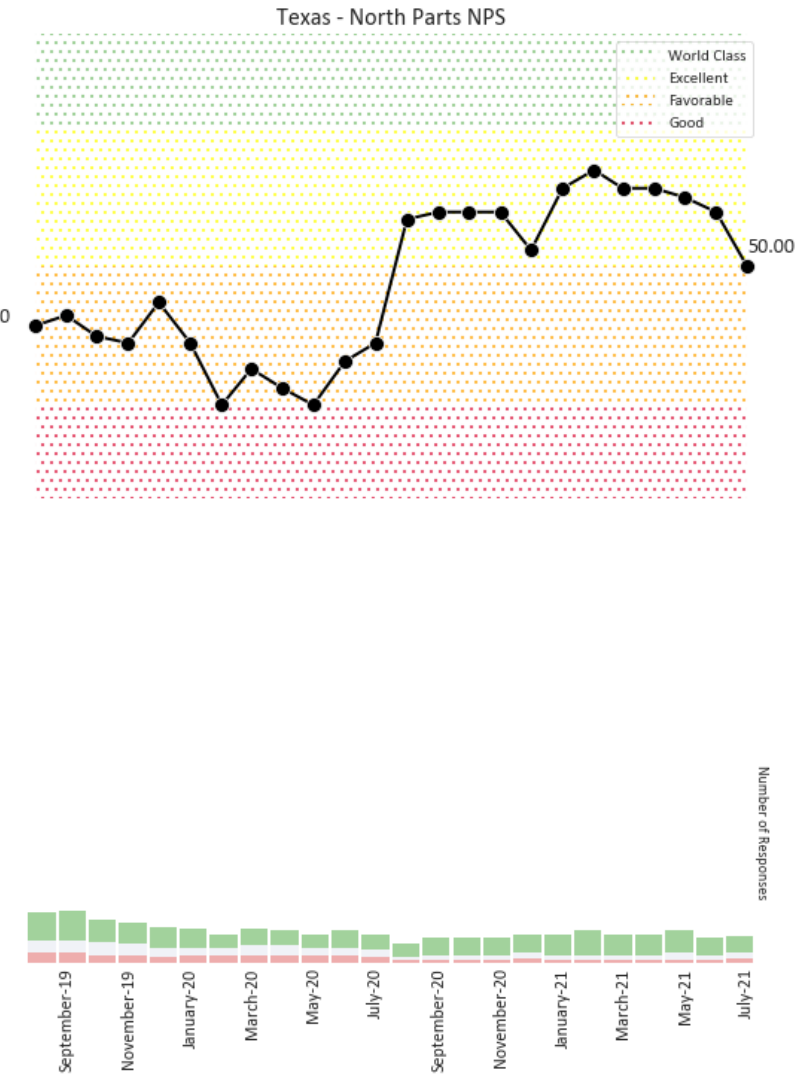
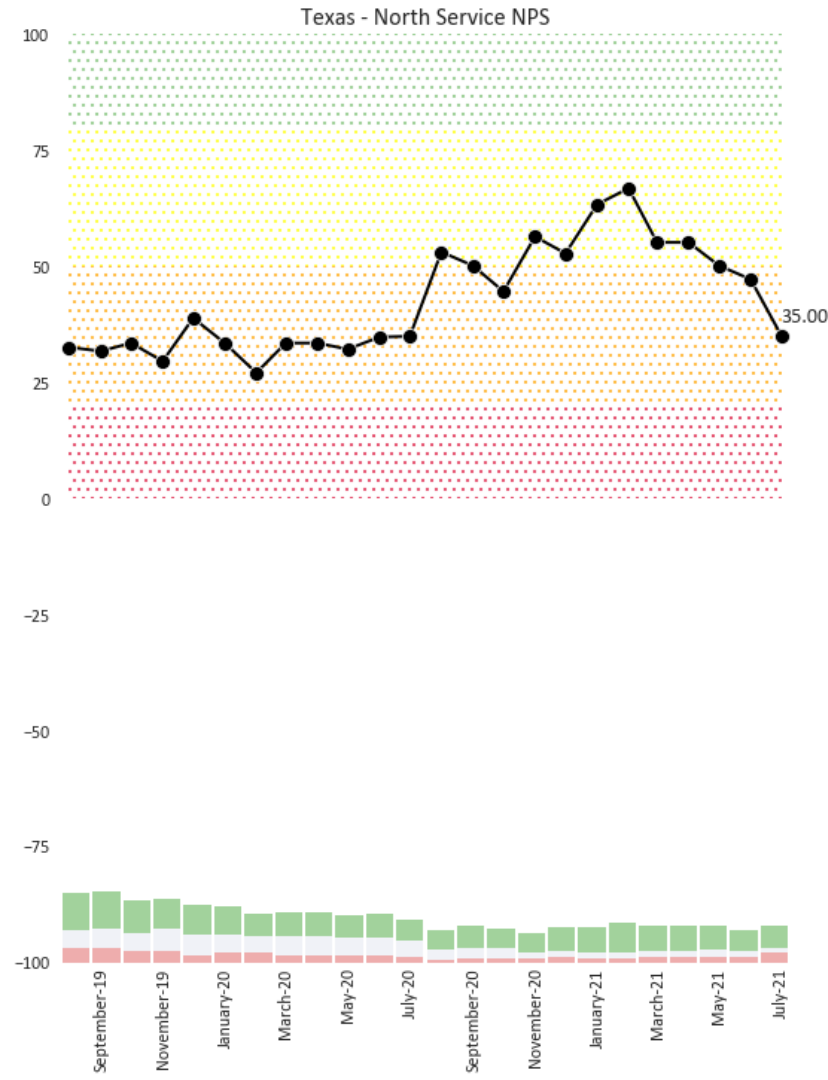


Illinois Open-Ended Comments (July)

- I'm assuming that Ellison Tech and Makino are the same? (Passive)

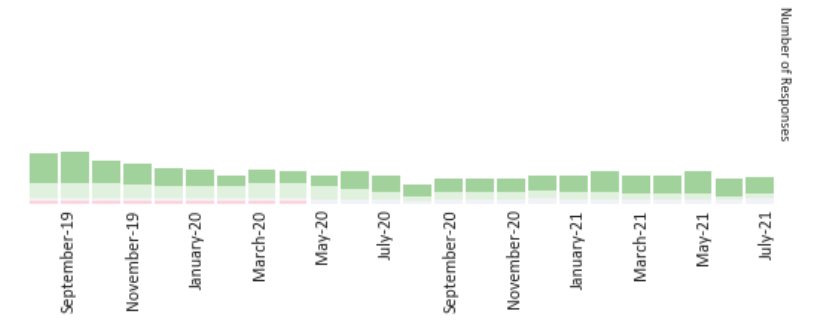
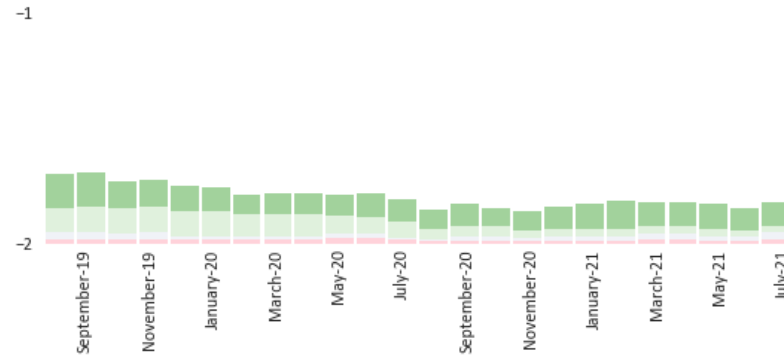
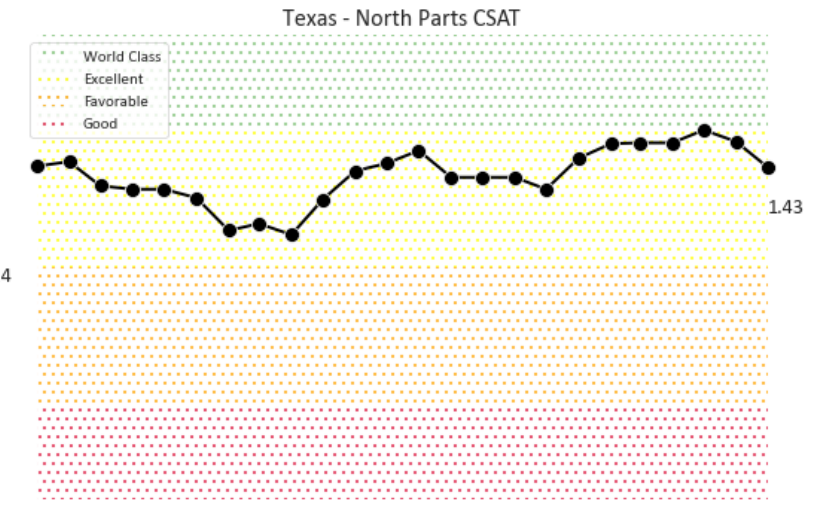
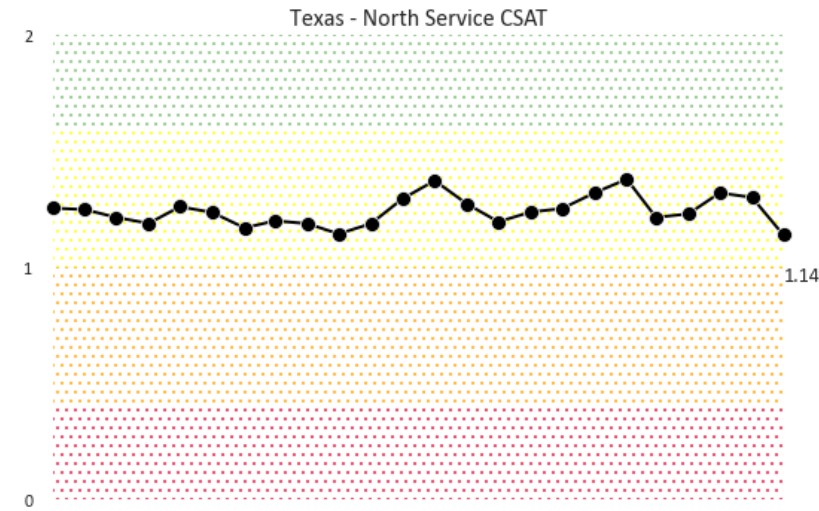
Texas- North NPS

- Service NPS started out Favorable, climbed to Excellent, now Favorable
- Parts NPS started out Favorable, now Excellent, approaching Favorable again
- Parts NPS significantly higher than Service NPS



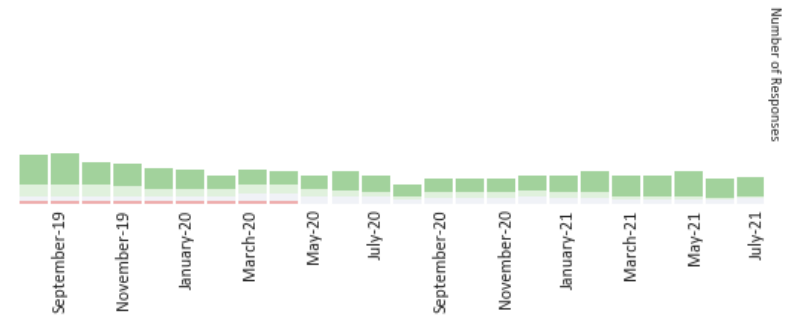
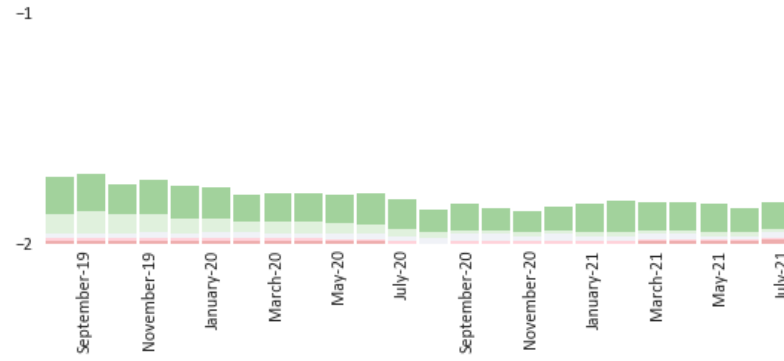
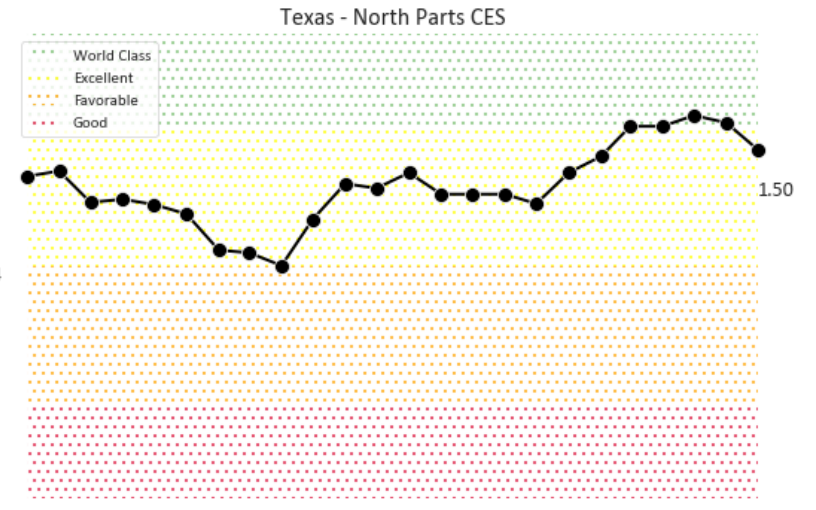
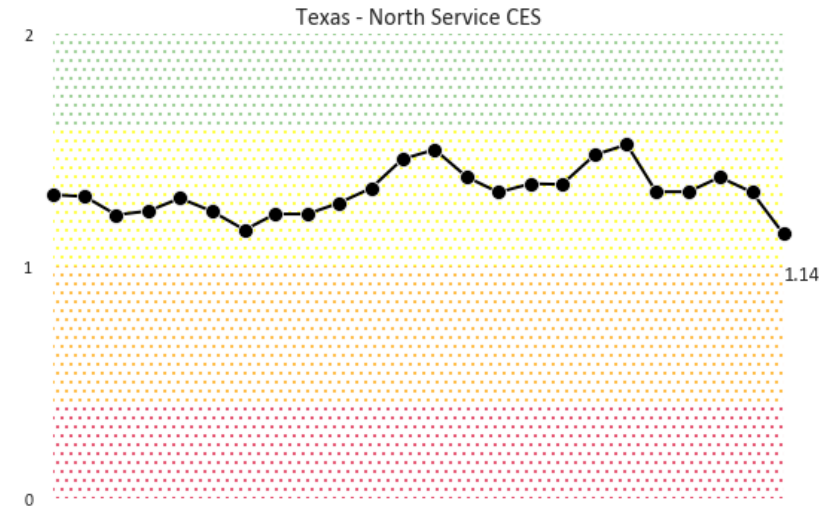
Texas-North CSAT

- Service & Parts maintained Excellent CSAT for 2 years
- Parts CSAT significantly higher than Service CSAT



Texas- North CES

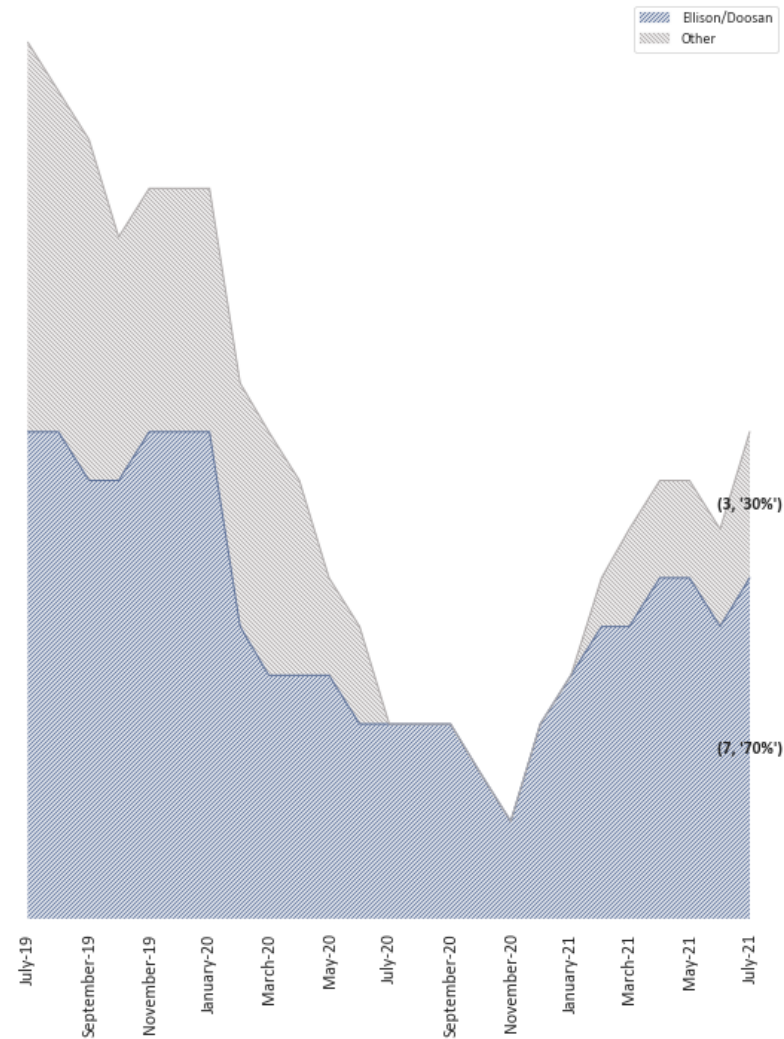
- Service & Parts maintained Excellent CES for 2 years
- Parts CES significantly higher than Service CES



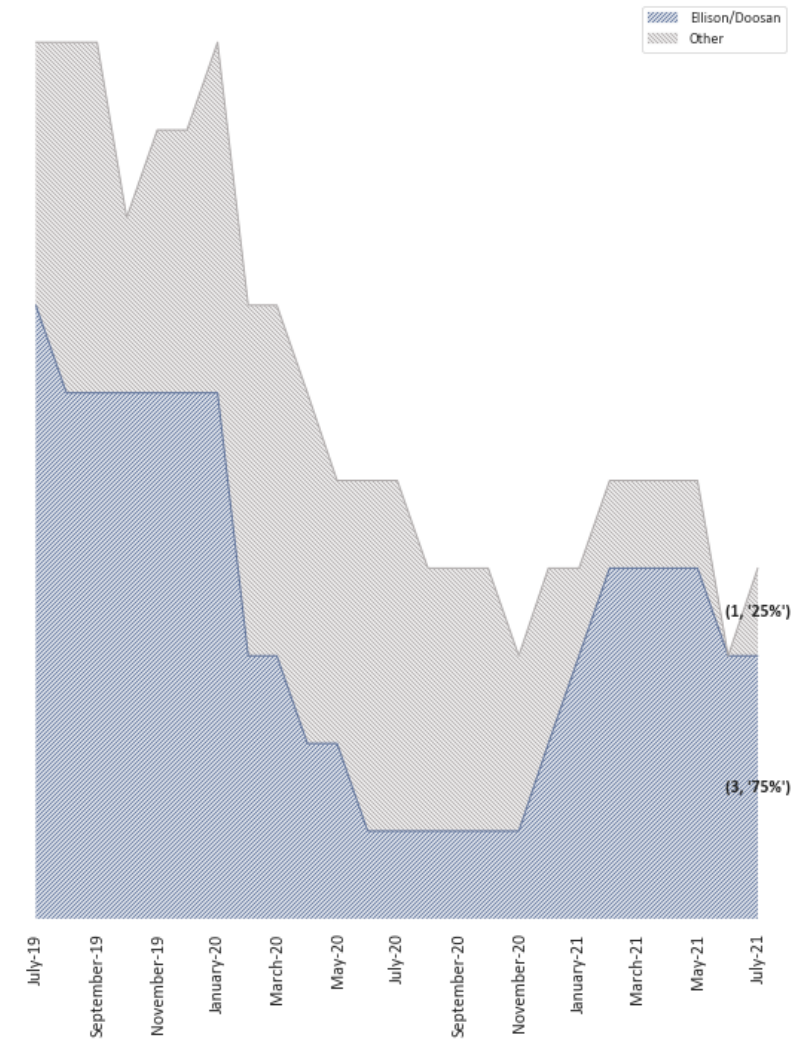
Best Vendors in Texas-North

- Service rated best in 70% of responses (Favorable)
- Parts rated best in 100% of responses (World Class)
- Other service organizations mentioned: Mazak, Tomel, Citizen, Hartwig

Which vendor has the best Service Organization? (Texas - North)



Which vendor has the best Parts Organization? (Texas - North)

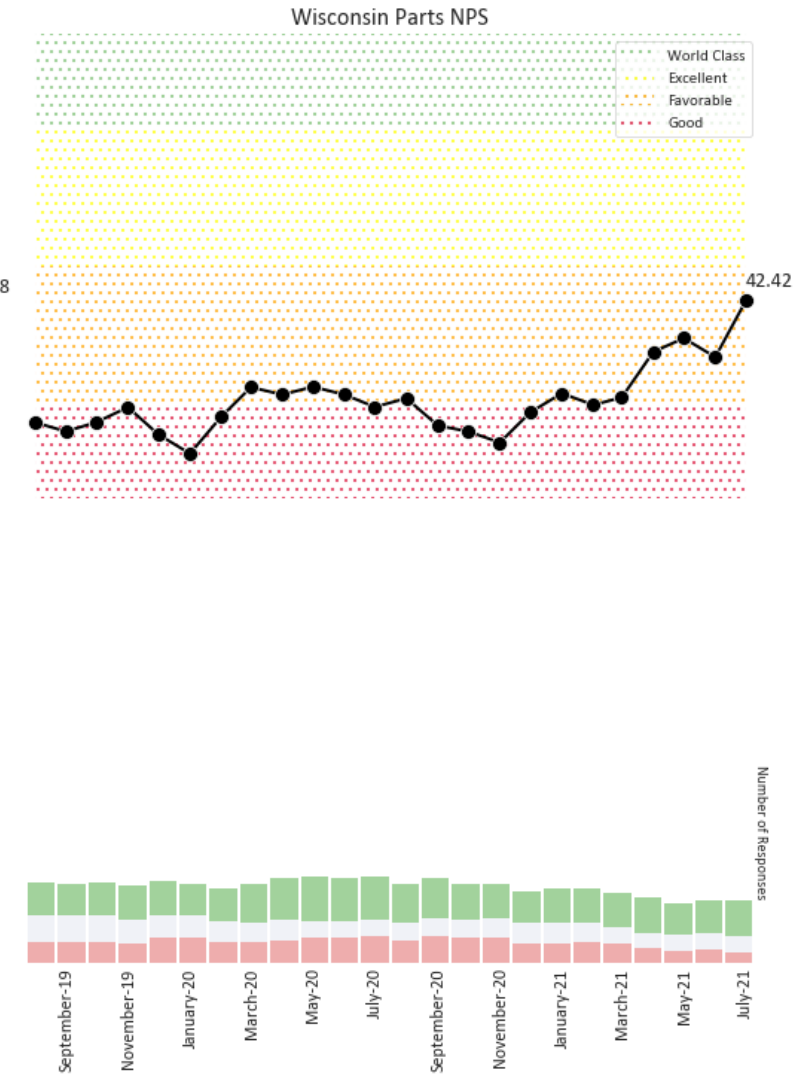
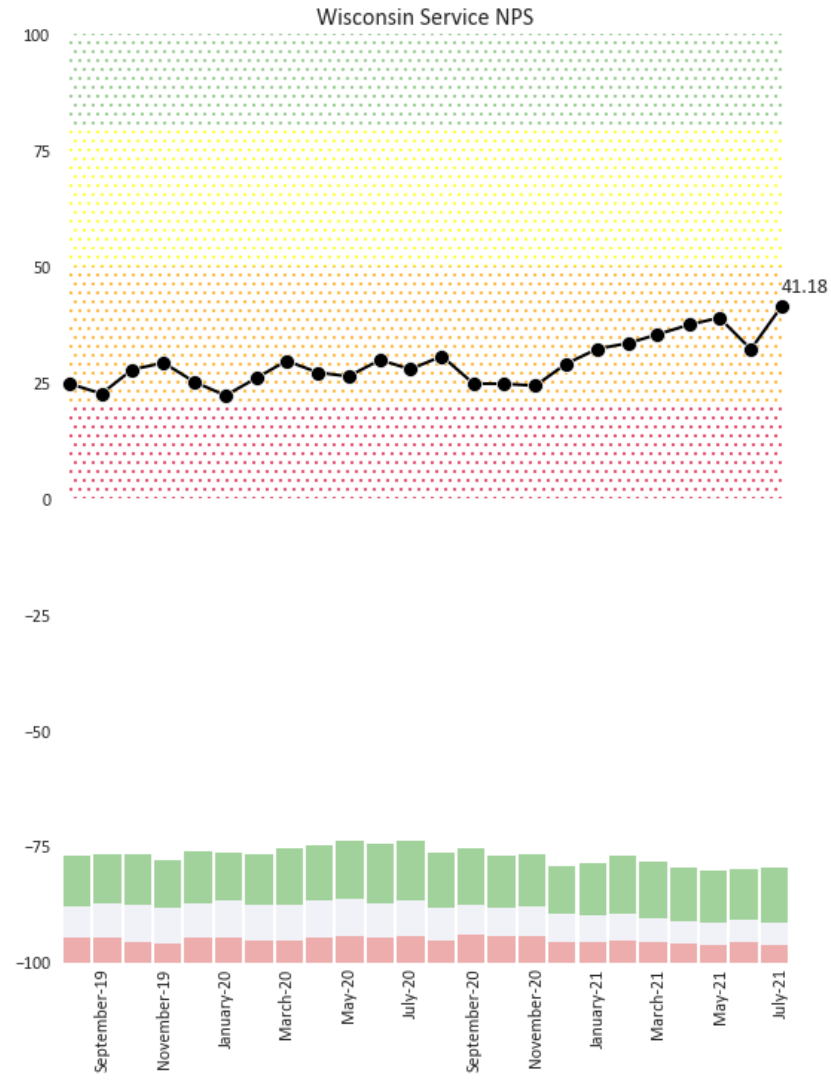


Texas-North Open-Ended Comments (July)

- Absolutely the best experience in purchasing a new machine that I could have asked for. I knew which machine I wanted so Bill sent me the info I was looking for along with a couple other recommendations based on what we're doing. Phenomenal team work throughout! I didn't have to worry about a thing! (Promoter)
- When installing my new machine, the ellison tech burnt up the electronics before finishing the install. I am having to setup an account with Fanuc to get "Warranty" parts before I have touched the machine. Absolutely ridiculous! (Detractor)

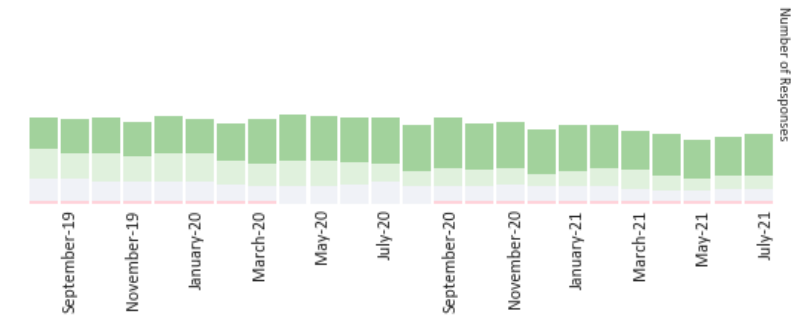
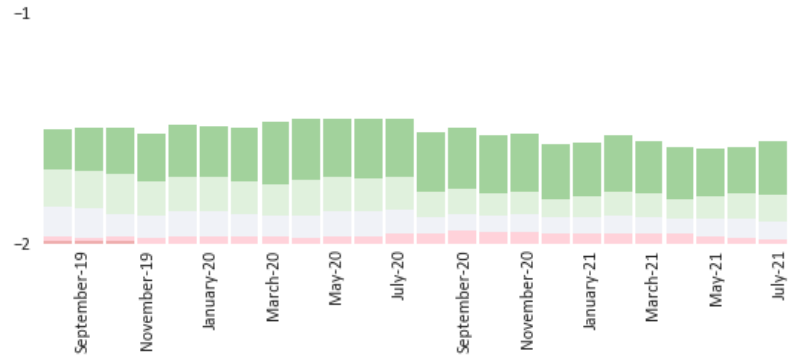
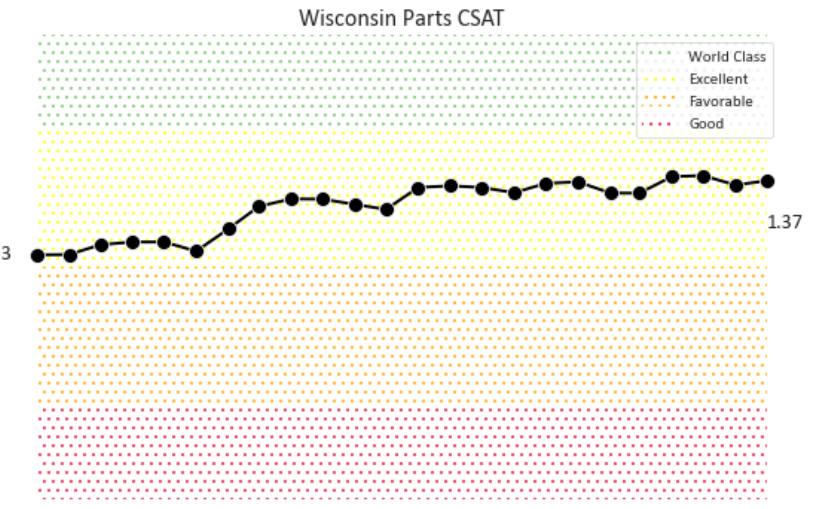
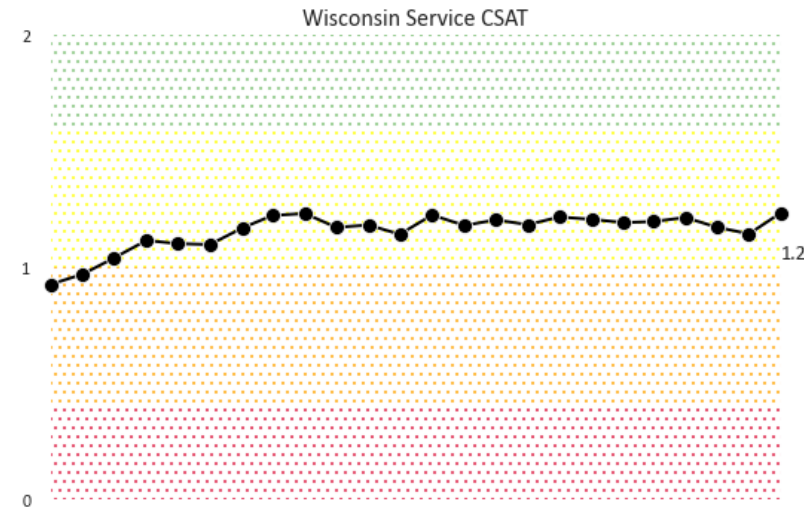
Wisconsin NPS

- Service has maintained Favorable NPS for the last 2 years
- Parts NPS started out Good, now Favorable
- Service & Parts NPS about the same



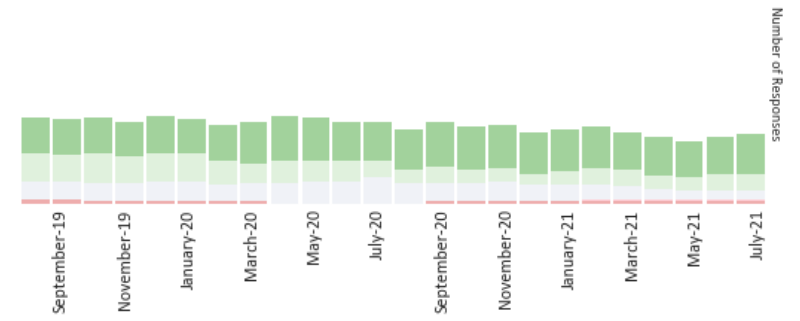
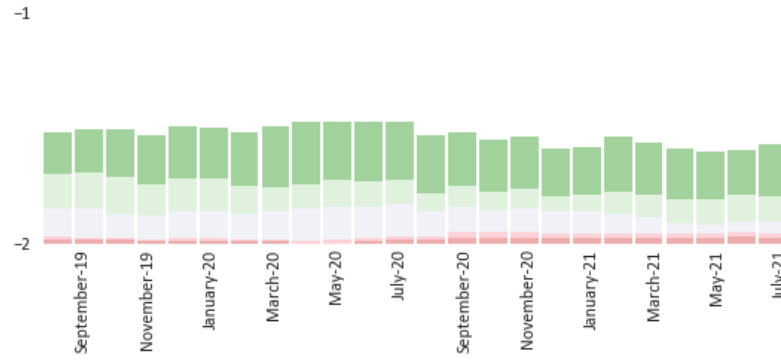
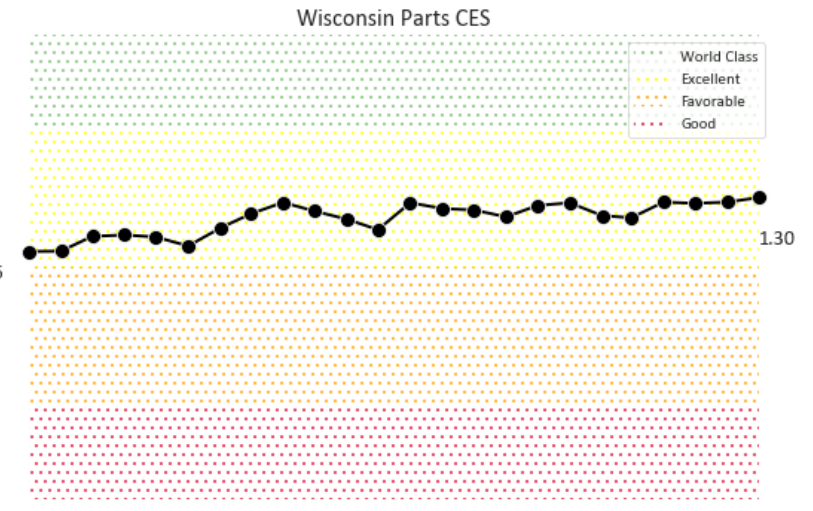
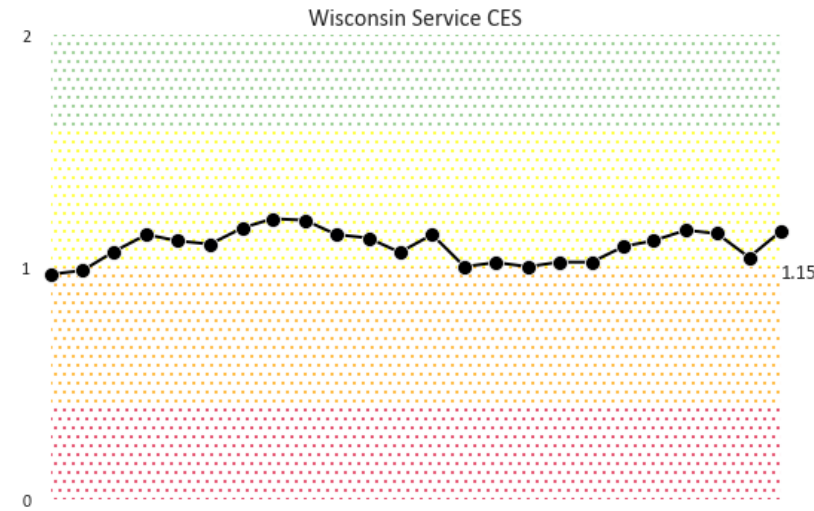
Wisconsin CSAT

- Service CSAT started off Favorable, now Excellent
- Parts has maintained Excellent CSAT for 2 years
- Parts CSAT slightly higher than Service CSAT



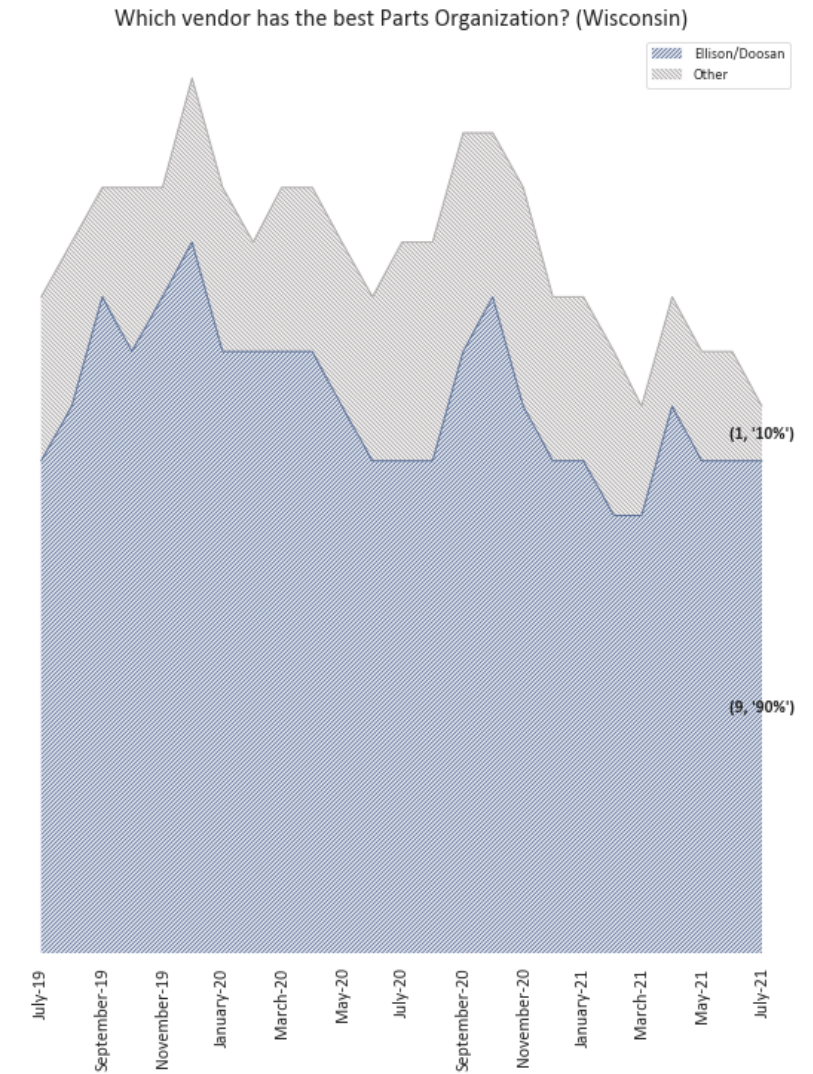
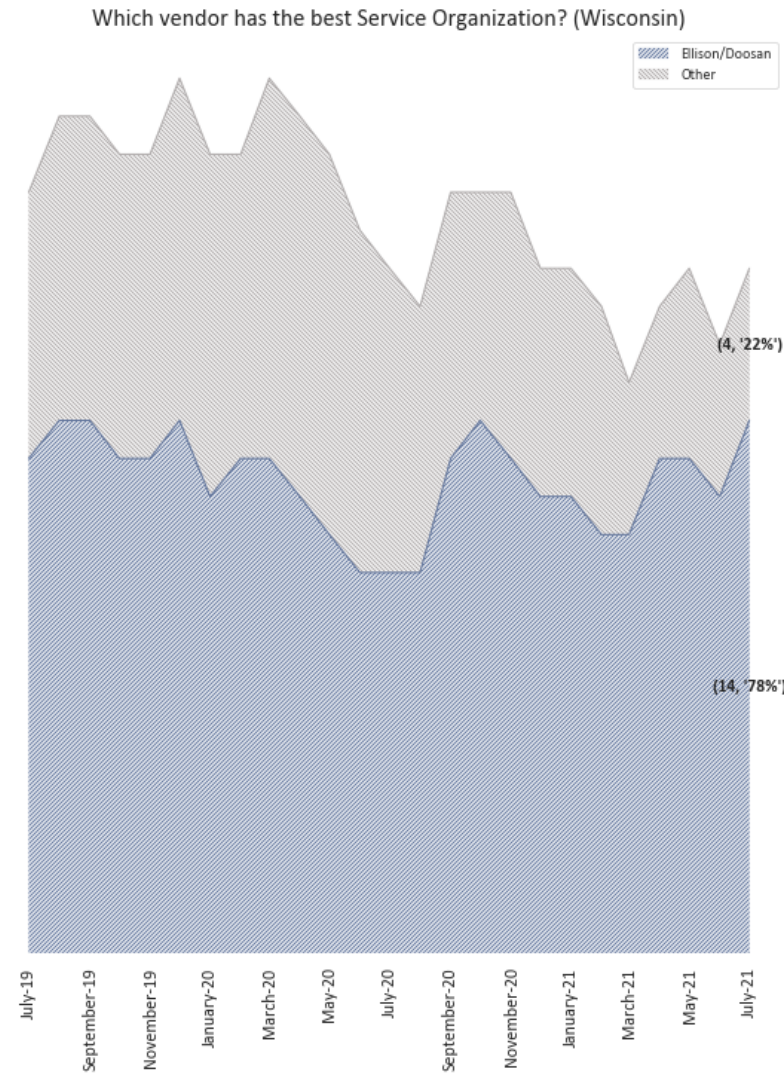
Wisconsin CES

- Service CES started off Favorable, now Excellent
- Parts has maintained Excellent CES for 2 years
- Parts CES slightly higher than Service CES



Best Vendors in Wisconsin

- Service rated best in 78% of responses (Excellent)
- Parts rated best in 90% of responses (World Class)
- Other service organizations mentioned: Haas, Globetec, Mitsubishi, Mazak

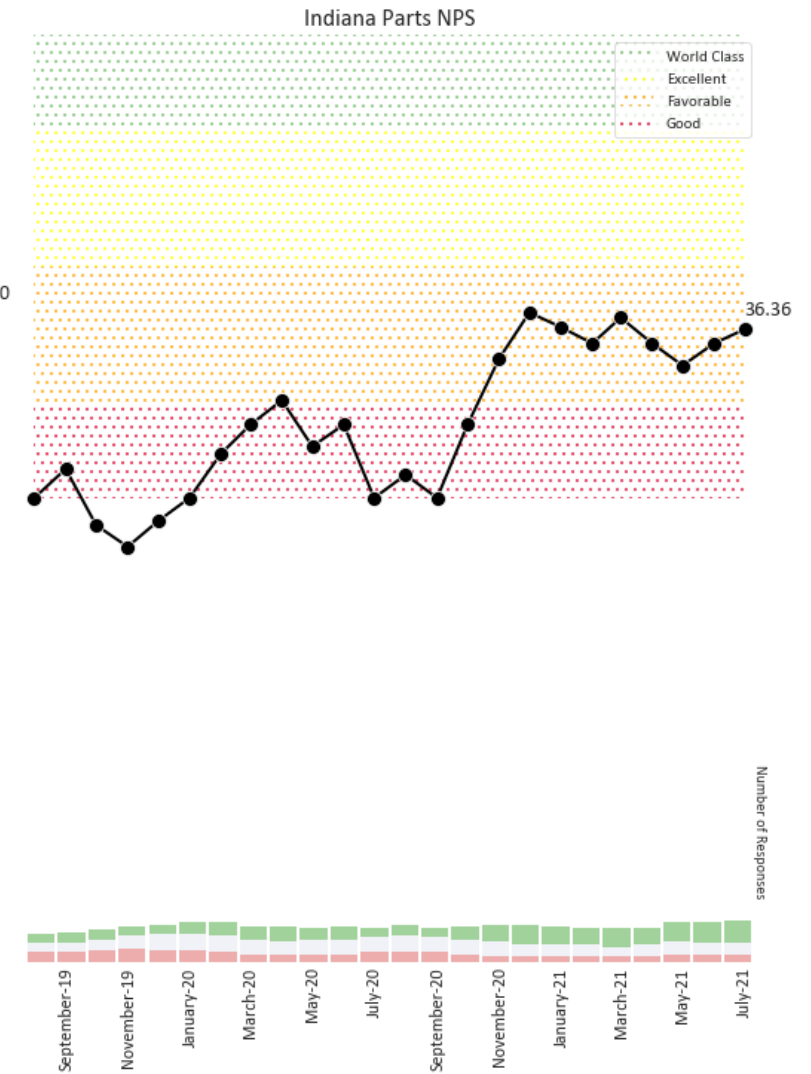
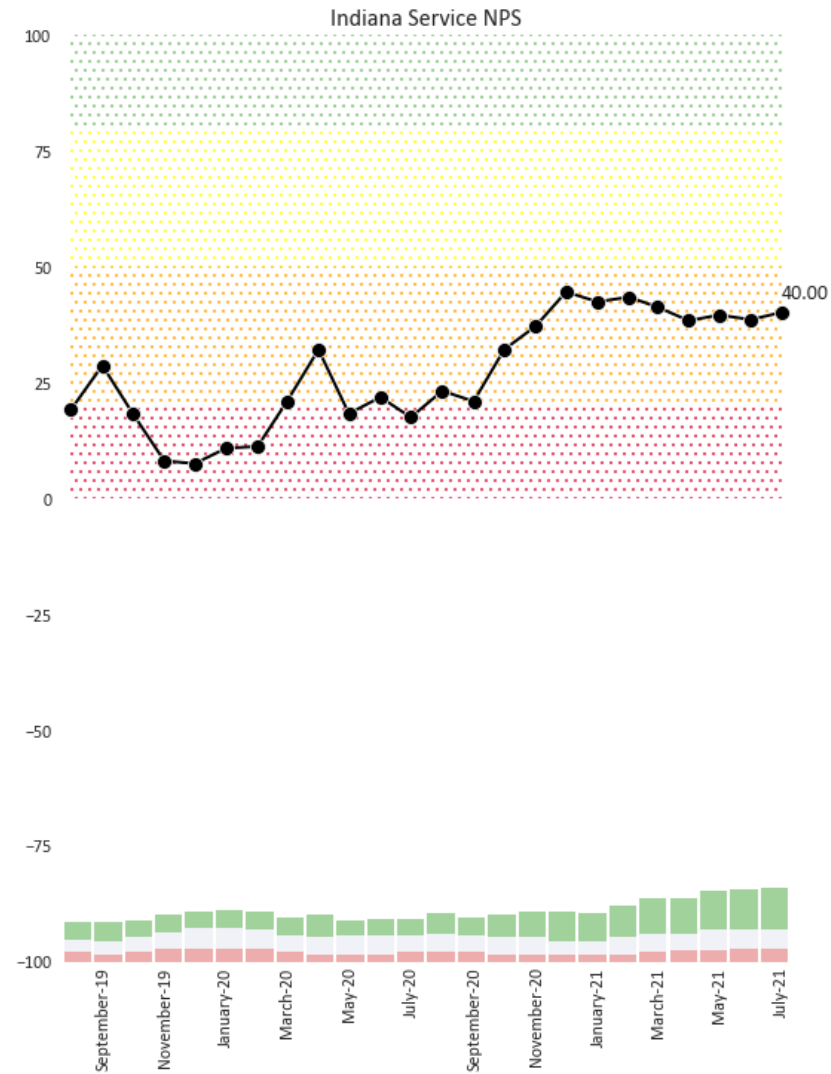


Wisconsin Open-Ended Comments (July)

- Every person that i have had contact with has been awesome to work with! Special thanks to Jill Smith, Patti Hernandez and Tim Baer. (Promoter)

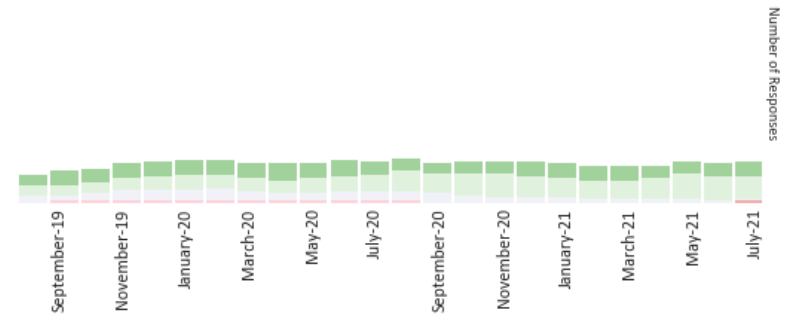
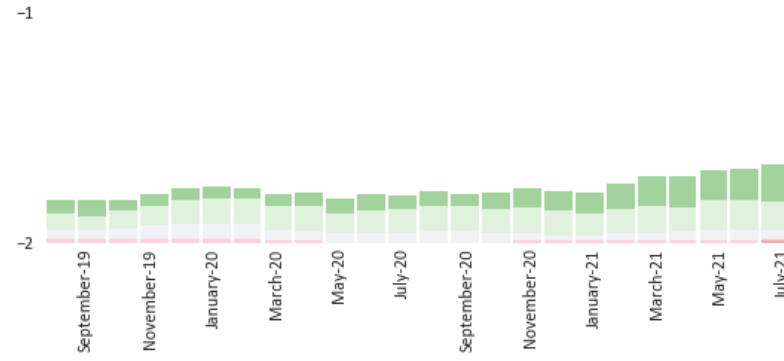
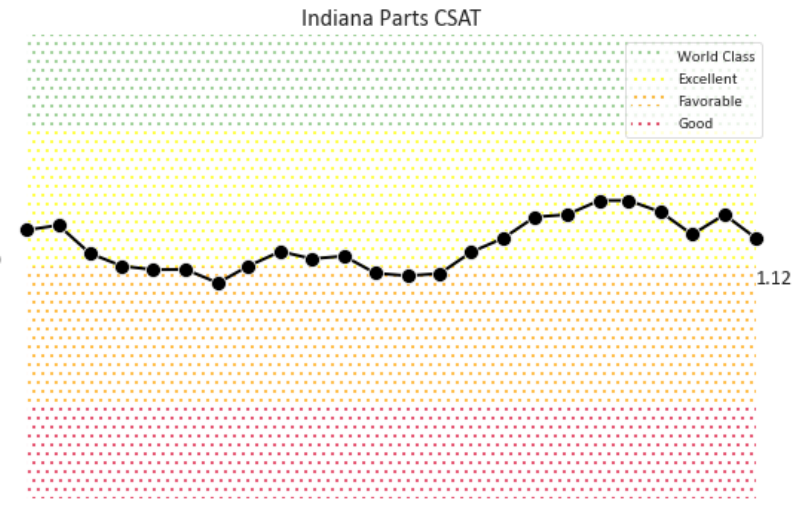
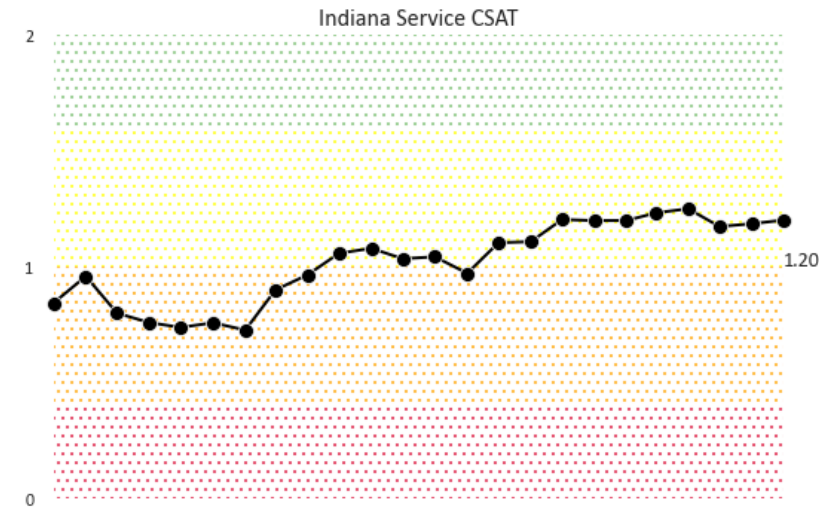
Indiana NPS

- Service & Parts NPS started out Good, now Favorable
- Parts NPS slightly higher than Service NPS



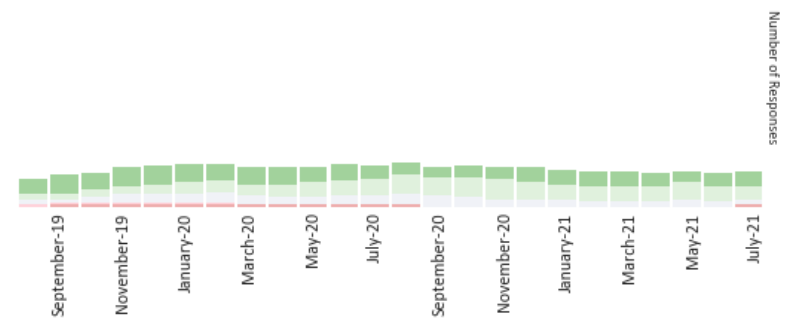
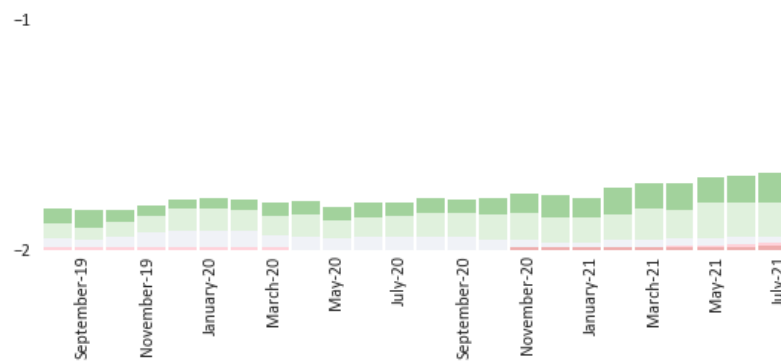
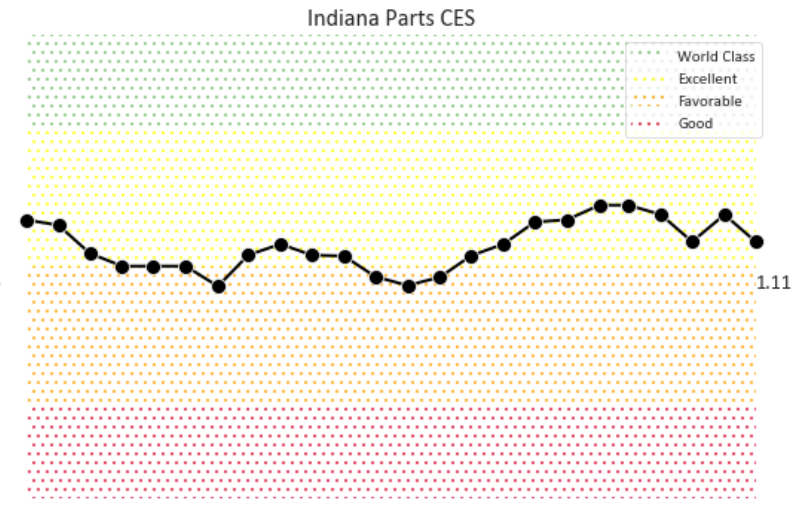
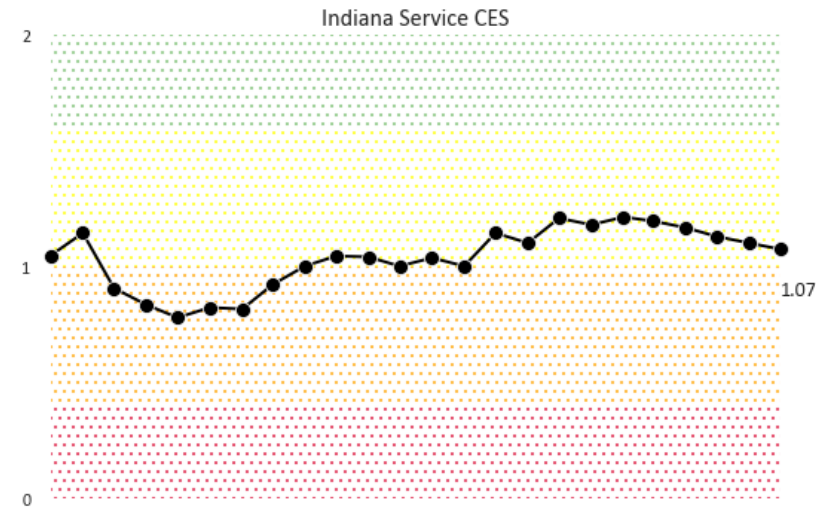
Indiana CSAT

- Service CSAT started off Favorable, now Excellent
- Parts CSAT started off Excellent and is still Excellent
- Service CSAT slightly higher than Parts CSAT



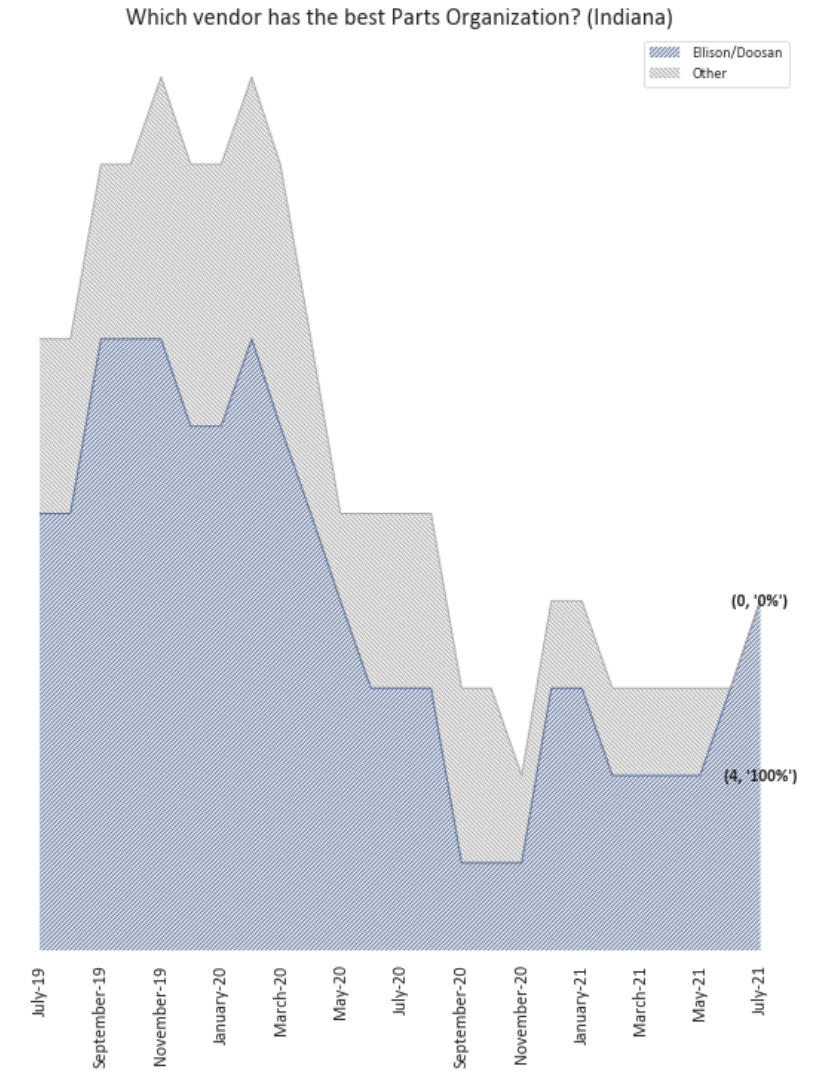
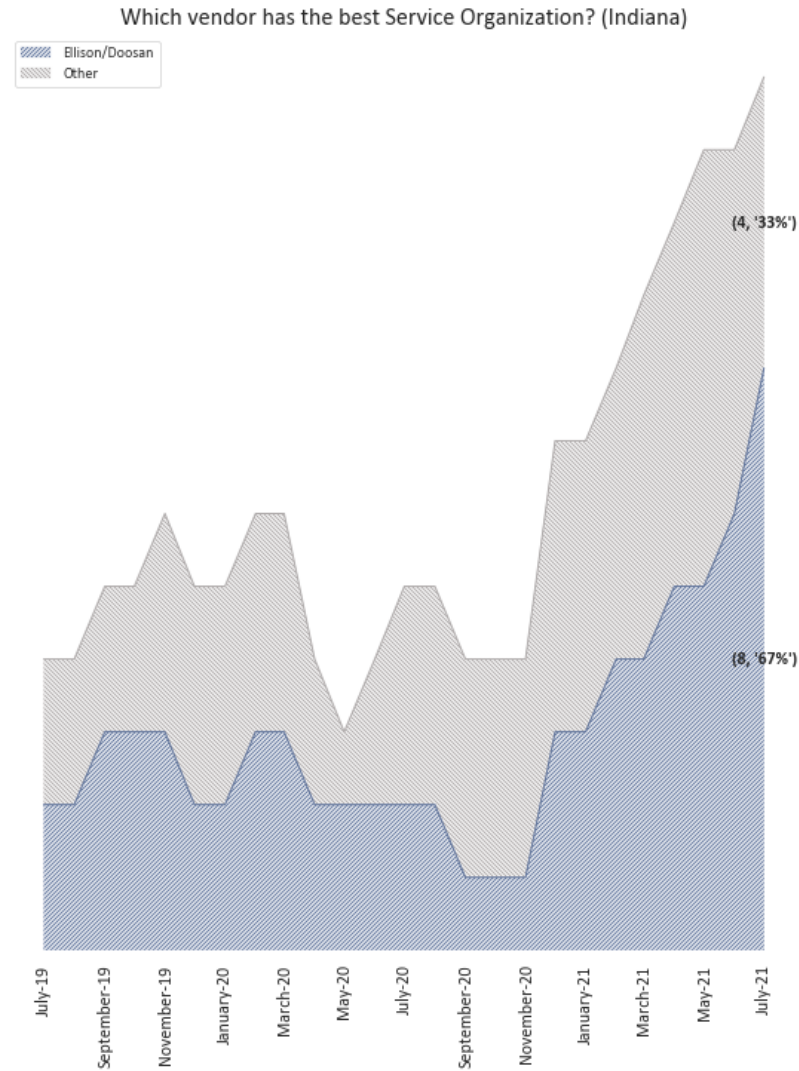
Indiana CES

- Service & Parts CES started off Excellent and are both still Excellent
- Parts CES slightly higher than Service CES



Best Vendors in Indiana

- Service rated best in 67% of responses (Favorable)
- Parts rated best in 100% of responses (World Class)
- Other service organizations mentioned: DMG Mori, Gosiger, MC Machinery

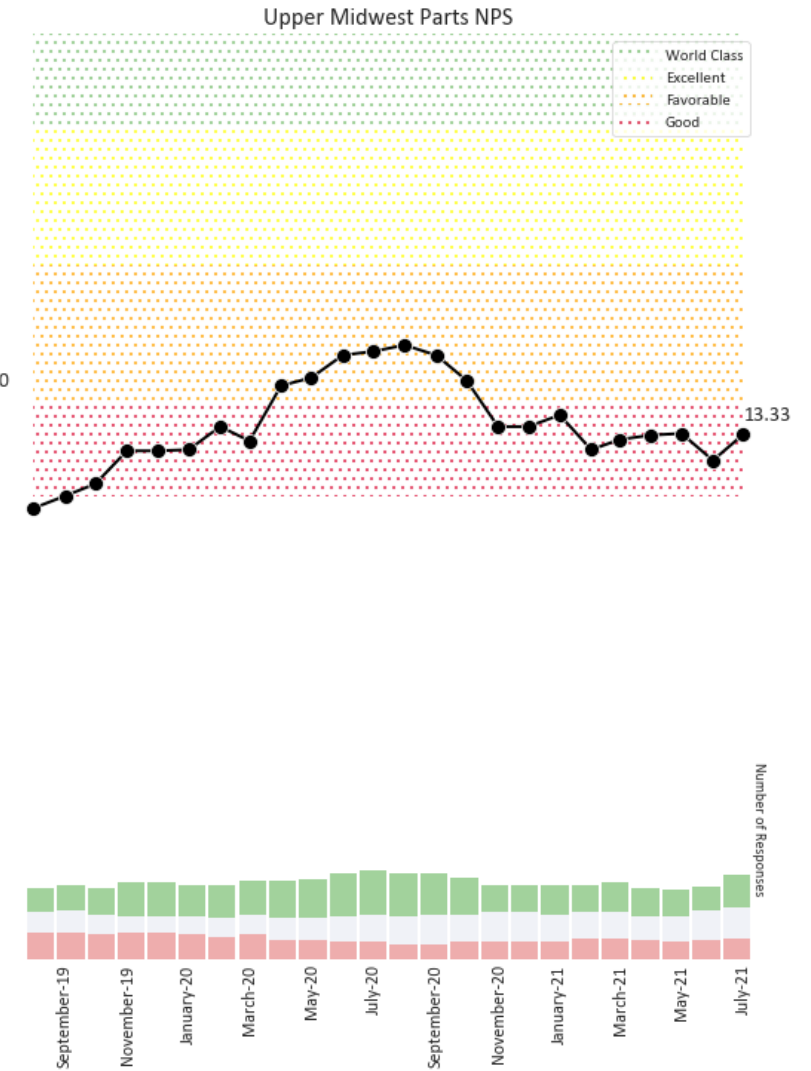
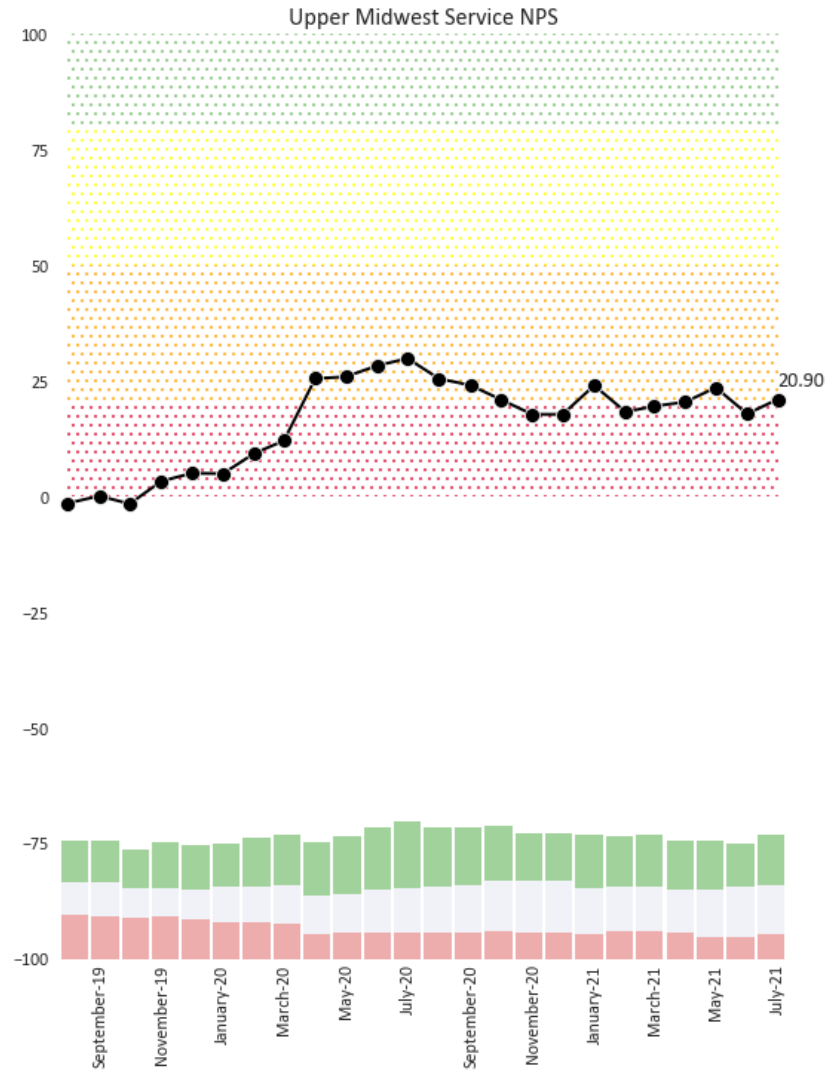


Indiana Open-Ended Comments (July)

- You guys are the best ever! (Promoter)
- My Doosan Lathe has been without the use of the tail stock and still no one knows what part to order to fix the problem and this is causing me to have some of my orders canceled from my customers. (Detractor)

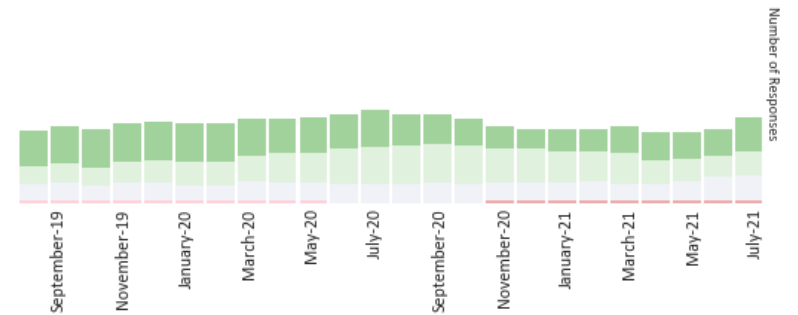
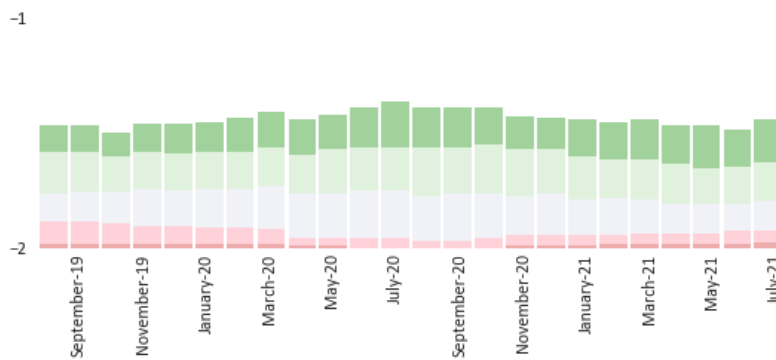
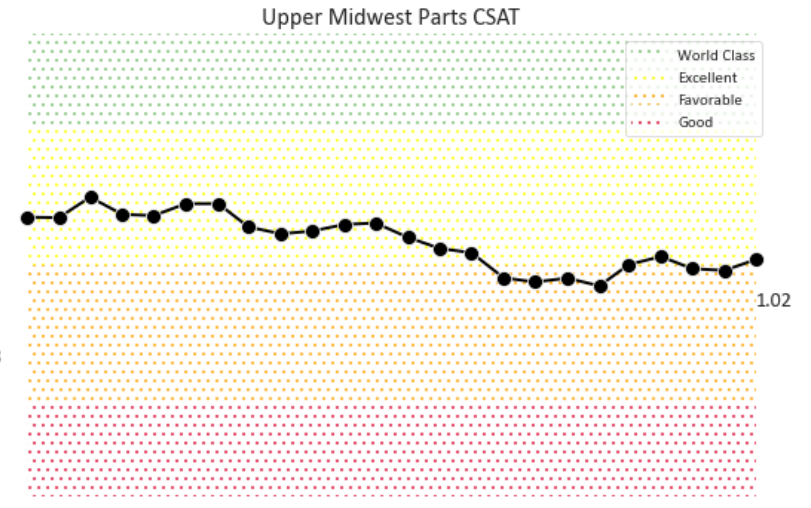
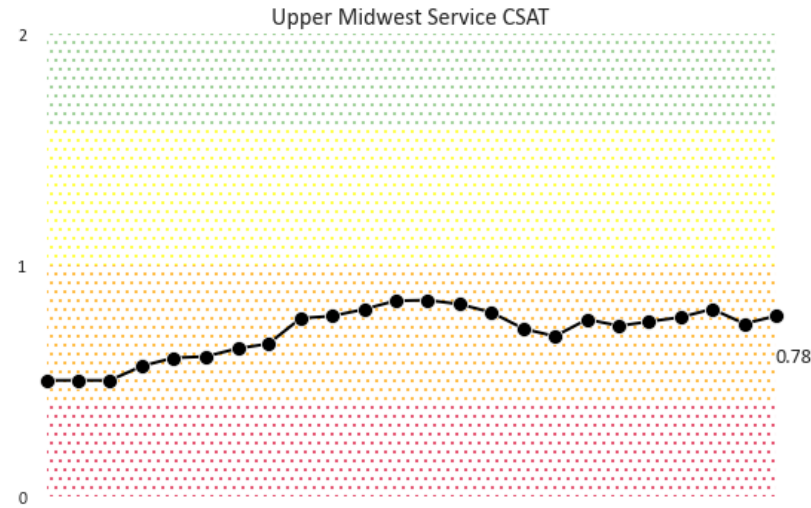
Upper Midwest NPS

- 3rd-lowest NPS in Service Organization
- Service NPS started out less than Good, now Favorable
- Parts NPS started out less than Good, now Good
- Service NPS relatively higher than Parts NPS



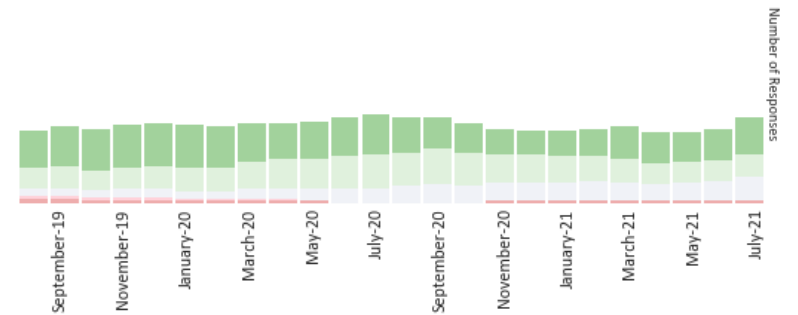
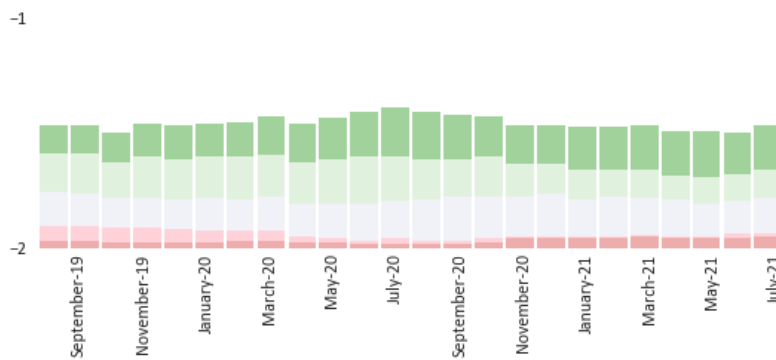
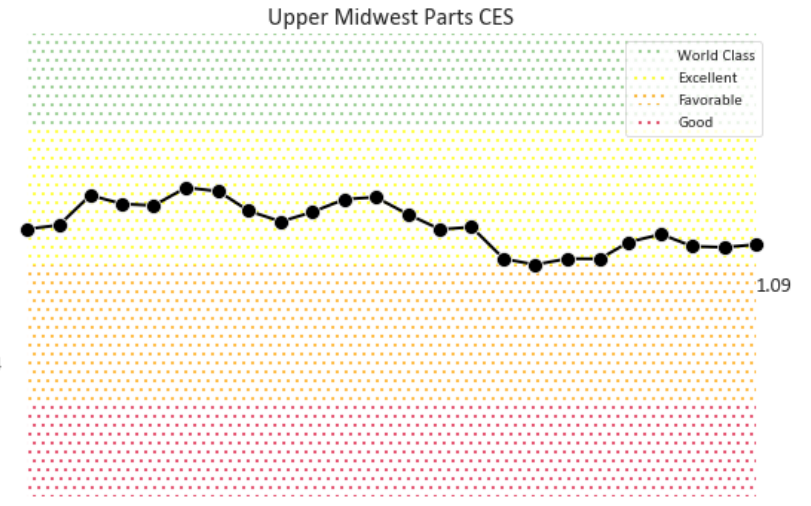
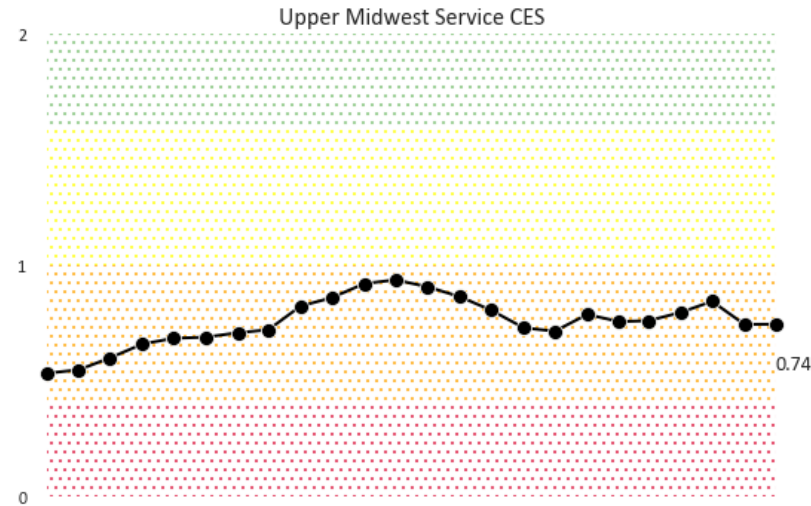
Upper Midwest CSAT

- Service maintained Favorable CSAT for the last 2 years
- Parts CSAT started off Excellent and dipped to Favorable, now Excellent
- Parts CSAT relatively higher than Service CSAT



Upper Midwest CES

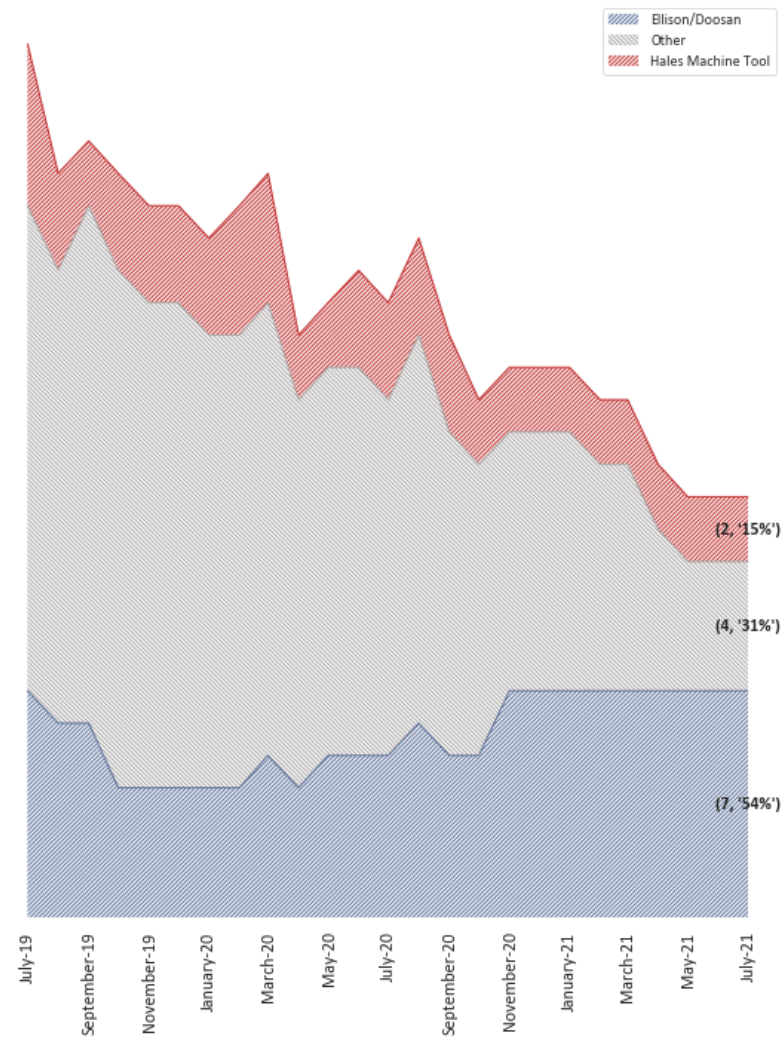
- Service maintained Favorable CES for the last 2 years
- Parts CES started off Excellent and dipped to Favorable, now Excellent
- Parts CES relatively higher than Service CES



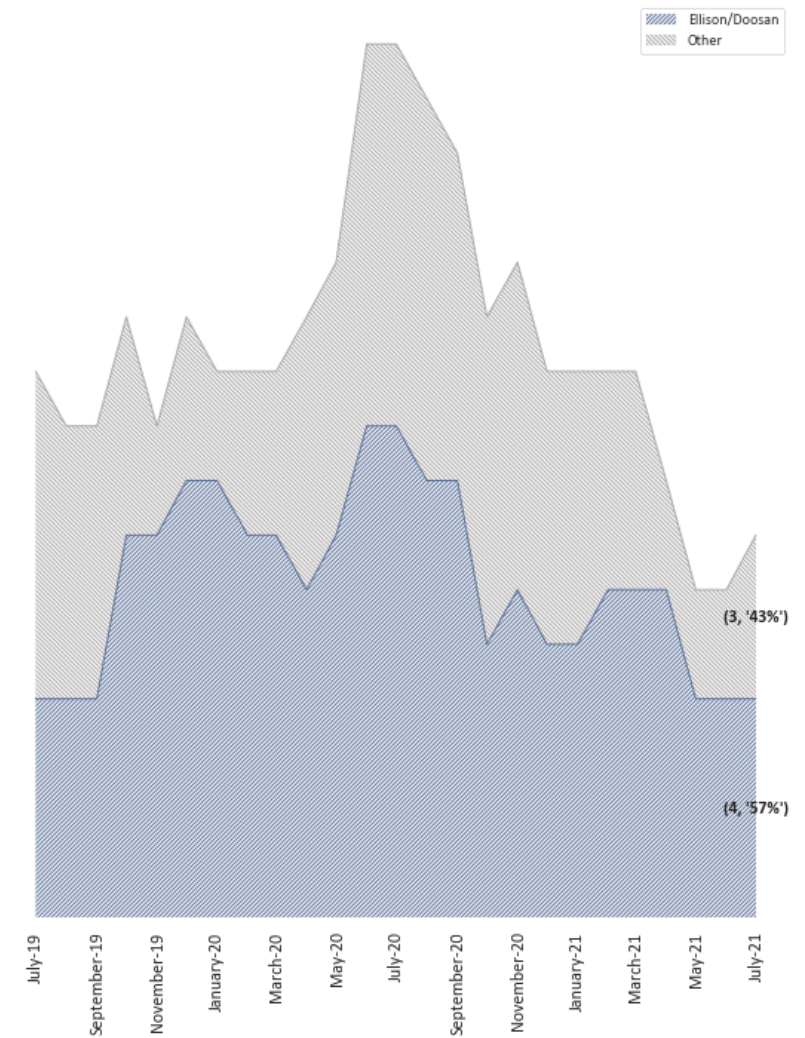
Best vendors in the Upper Midwest

- Service rated best in 54% of responses (Good)
- Parts rated best in 57% of responses (Good)
- Biggest competitors: Hales Machine Tool, Productivity

Which vendor has the best Service Organization? (Upper Midwest)



Which vendor has the best Parts Organization? (Upper Midwest)

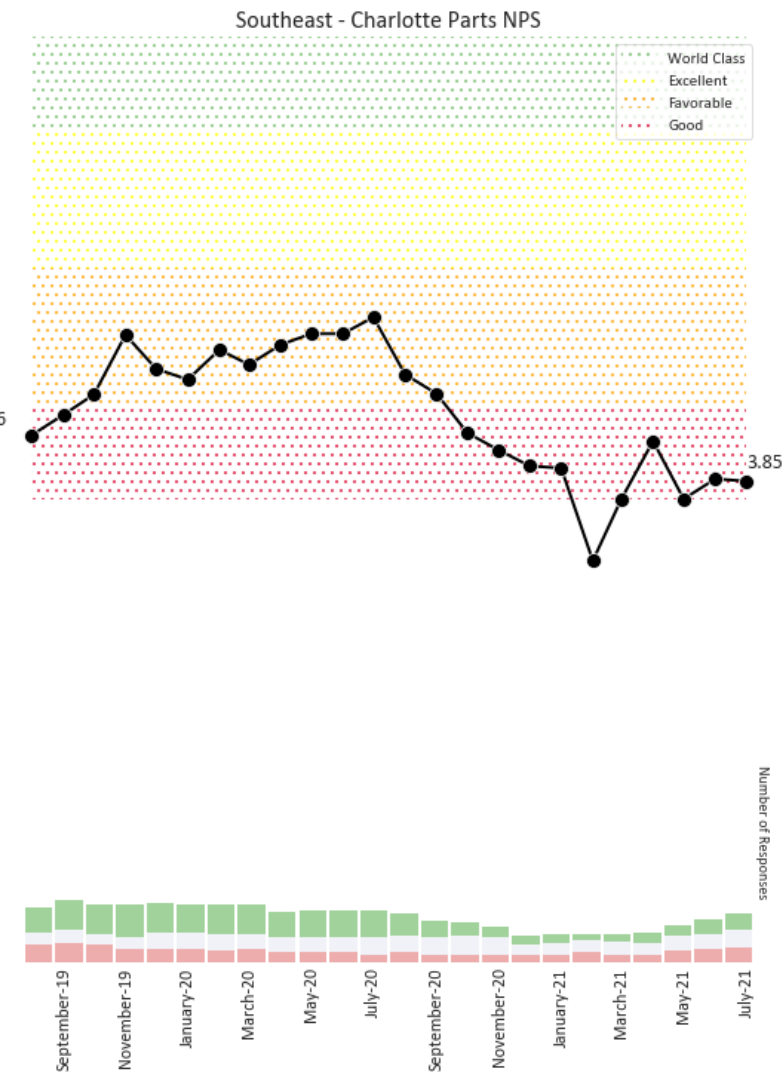
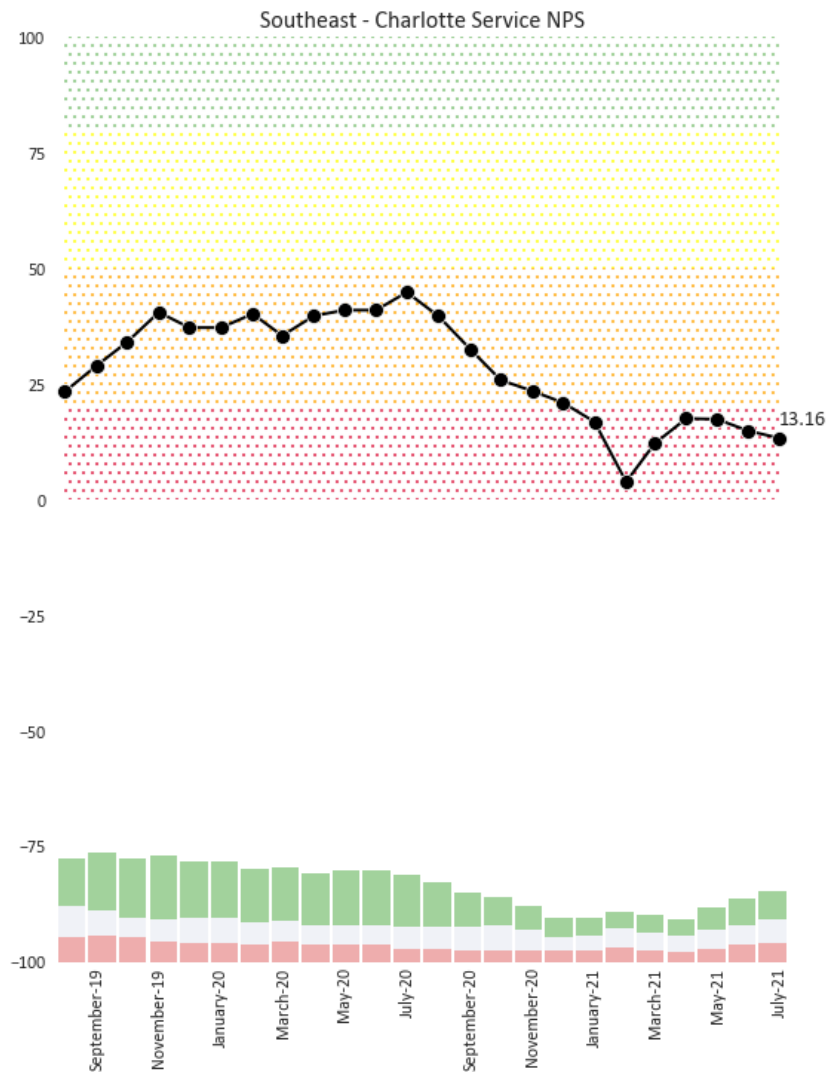


Upper Midwest Open-Ended Comments (July)

- Email quote process was very easy and response time was quick. (Passive)
- We have all Mori's and are still on the fence about Doosan. I am not impressed with Mori since the separation, so our path when we purchase new equipment is still in the air. (Passive)
- Your service dept. is way under staffed. We've had several times our machines have been down, and had to wait several days to get them up and running again. This costs us a lot of money. (Detractor)

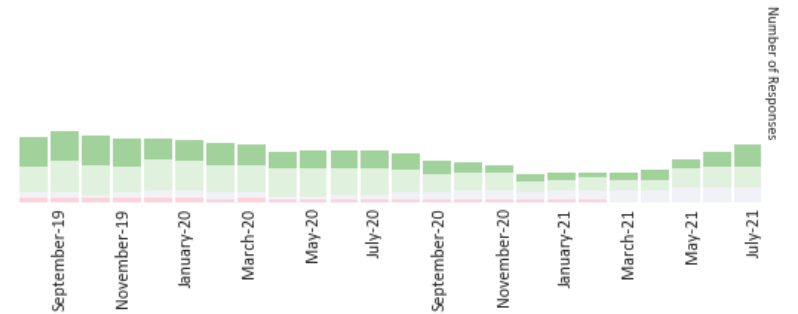
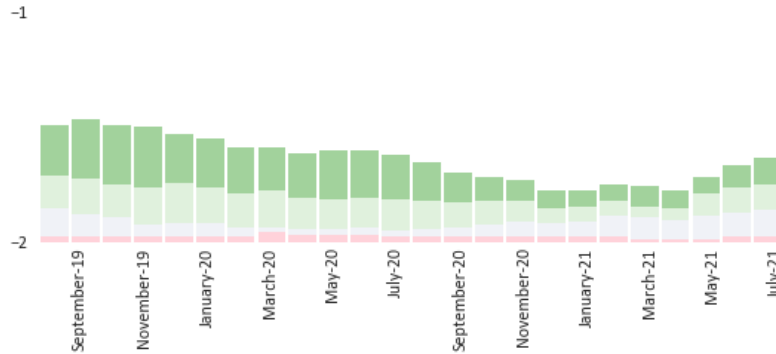
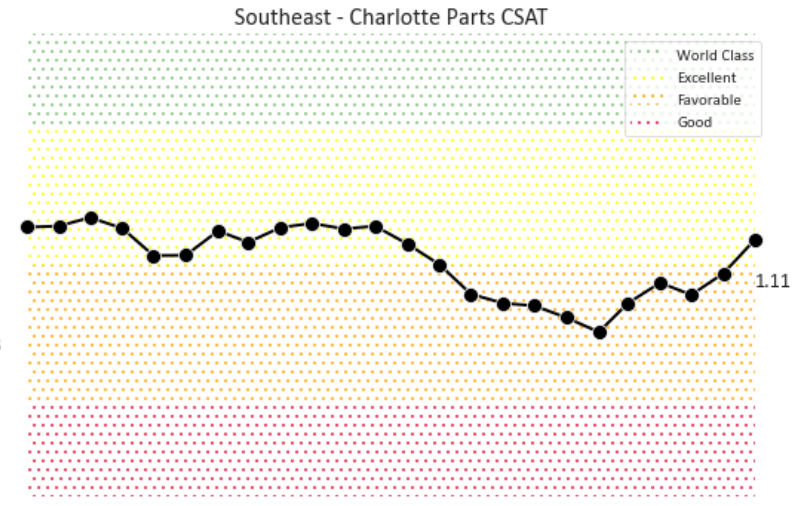
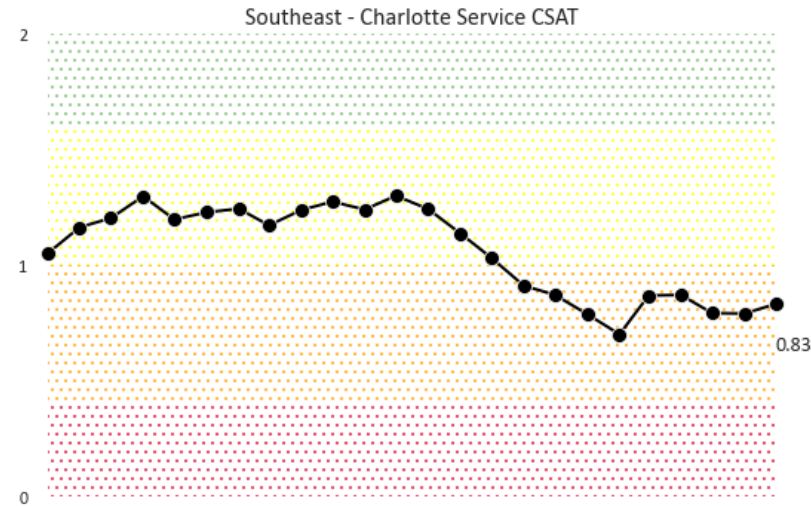
Charlotte NPS

- 2nd-lowest NPS in Service Organization
- Service NPS started out Favorable, now Good
- Parts NPS started out Good, now back to Good
- Service NPS relatively higher than Parts NPS



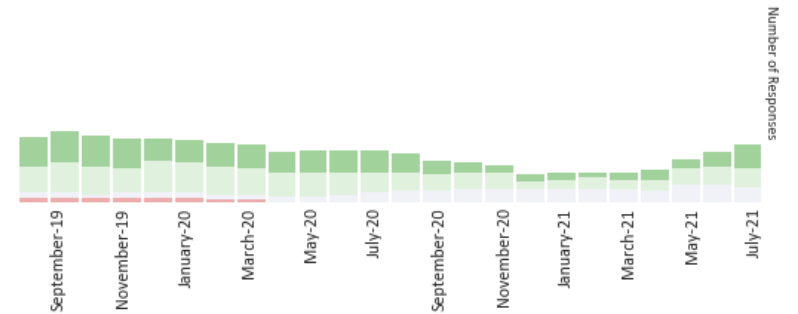
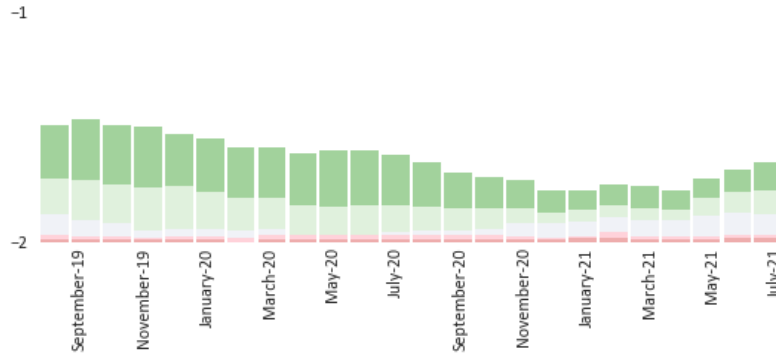
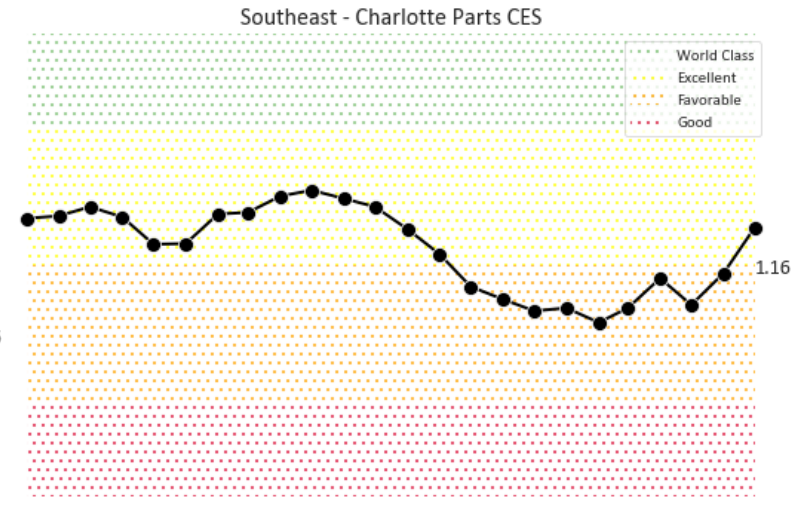
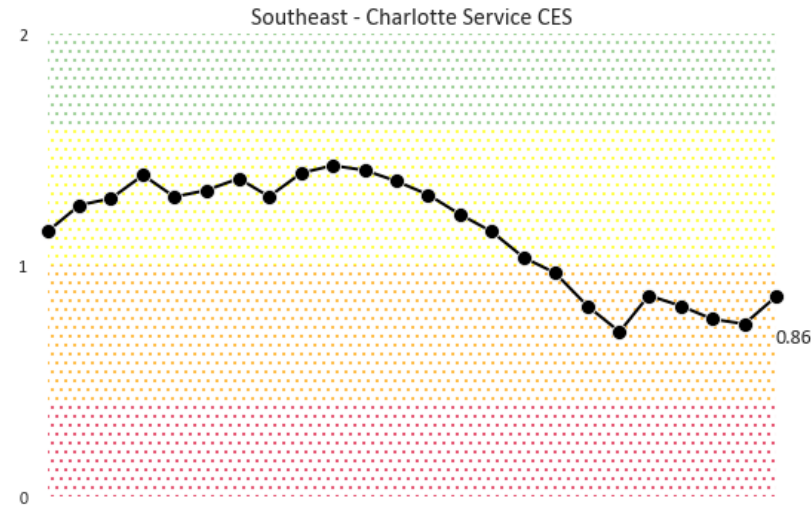
Charlotte CSAT

- Service CSAT started out Excellent, now Favorable
- Parts CSAT started off Excellent and dipped to Favorable, now Excellent
- Parts CSAT relatively higher than Service CSAT



Charlotte CES

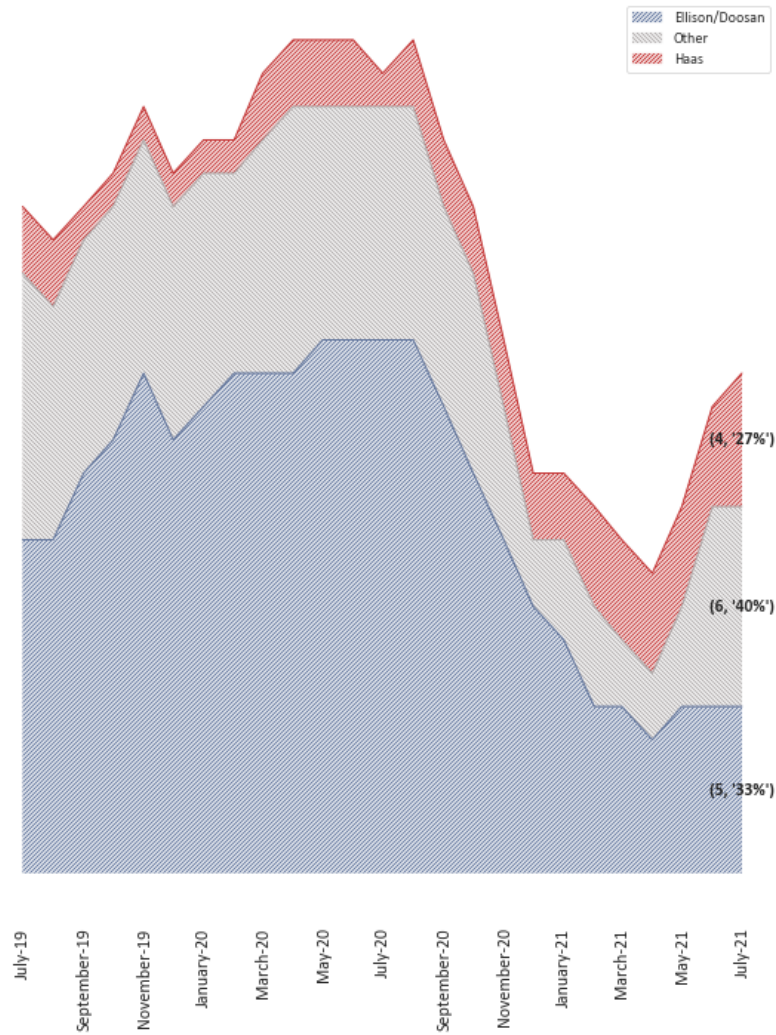
- Service CES started off Excellent, now Favorable
- Parts CES started off Excellent and dipped to Favorable, now Excellent
- Parts CES relatively higher than Service CES



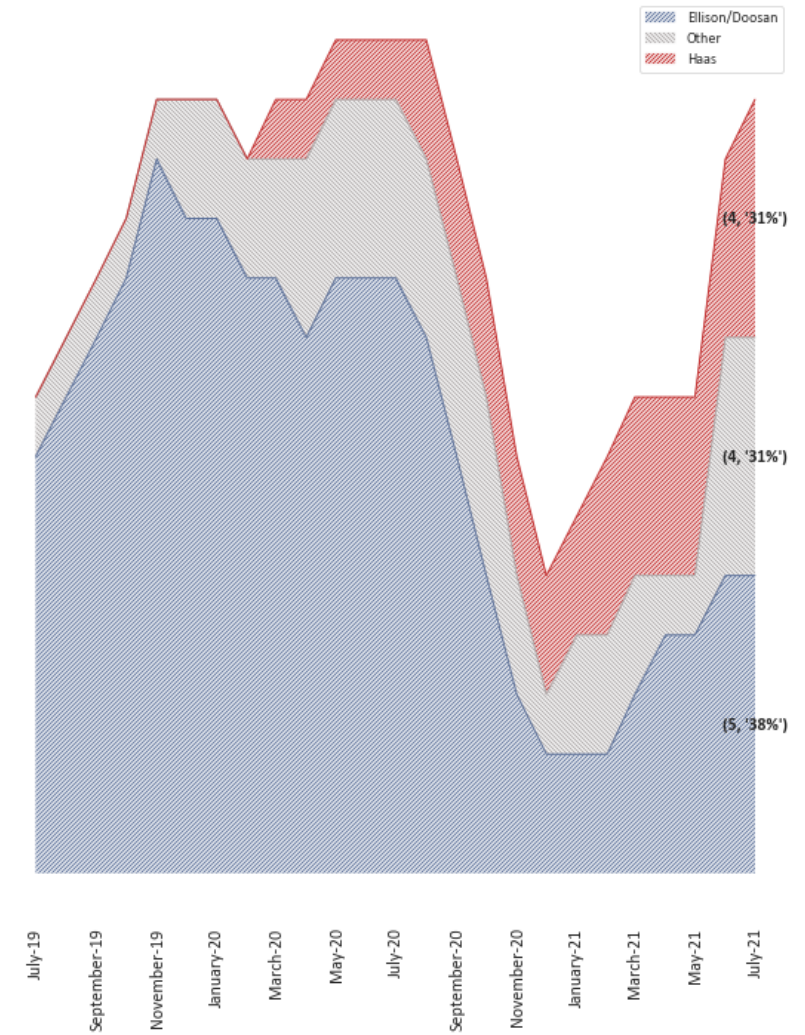
Best Vendors in Charlotte

- Service & Parts rated best in less than 38% of responses (less than Good)
- Biggest competitor: Haas

Which vendor has the best Service Organization? (Charlotte)

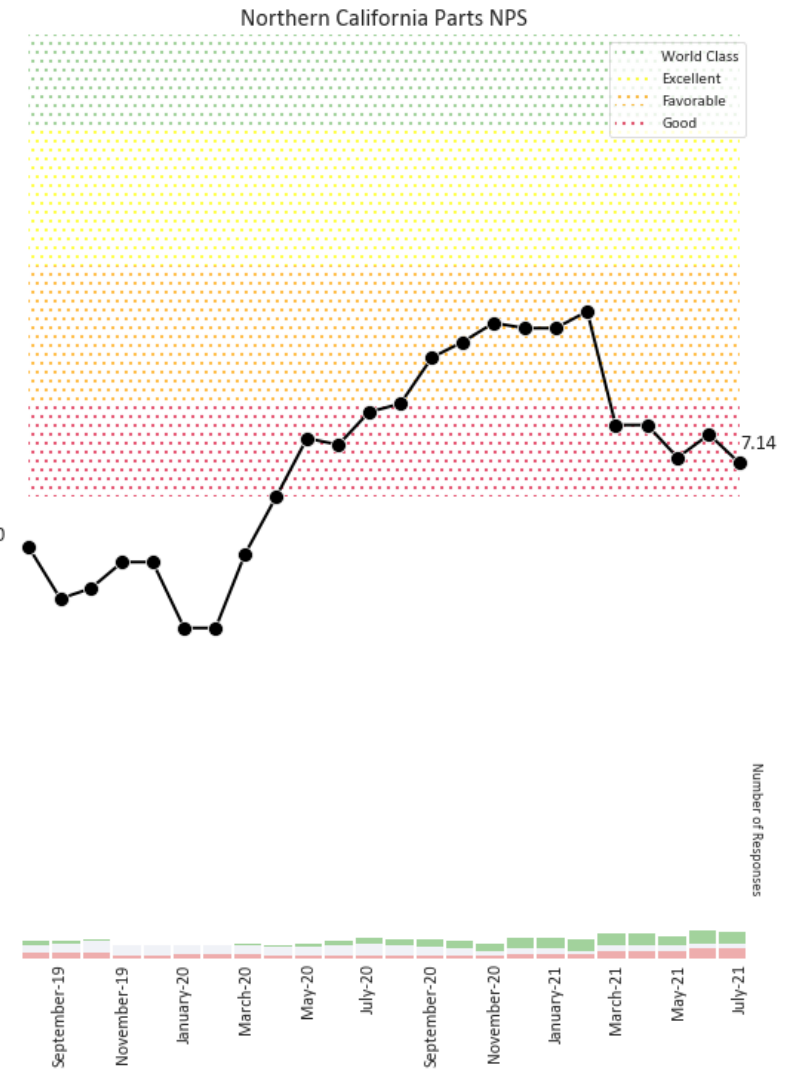
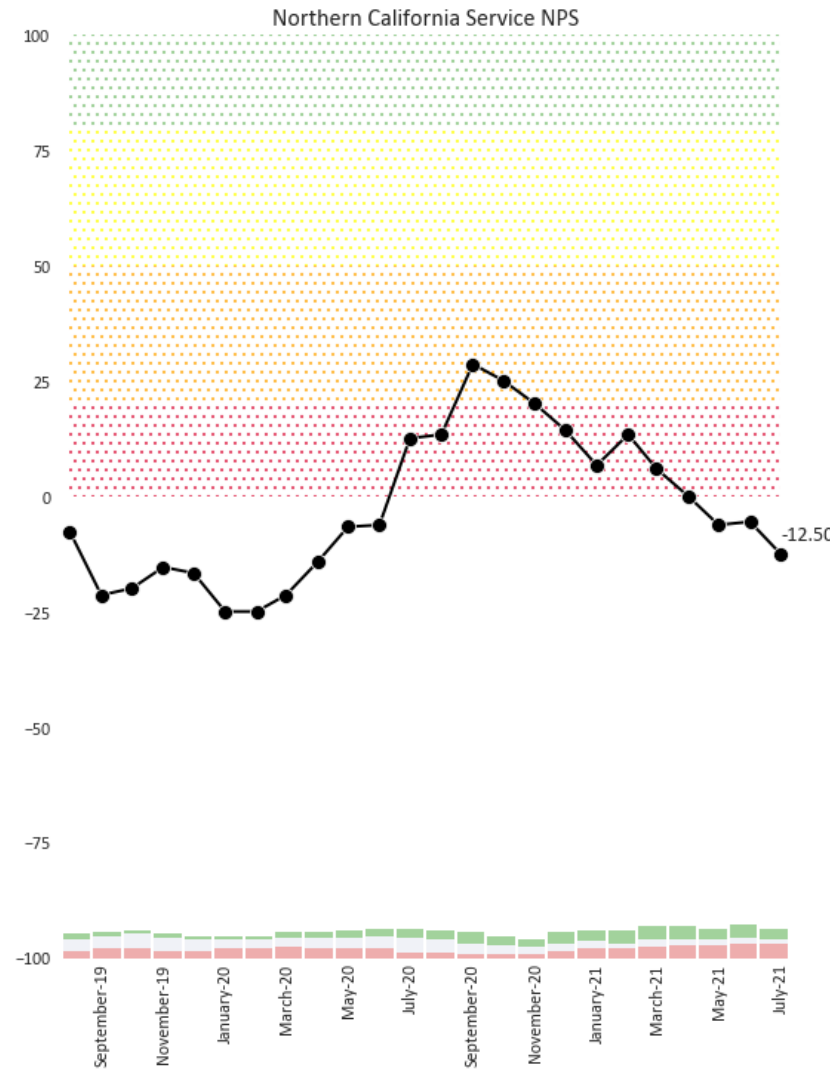


Which vendor has the best Parts Organization? (Charlotte)



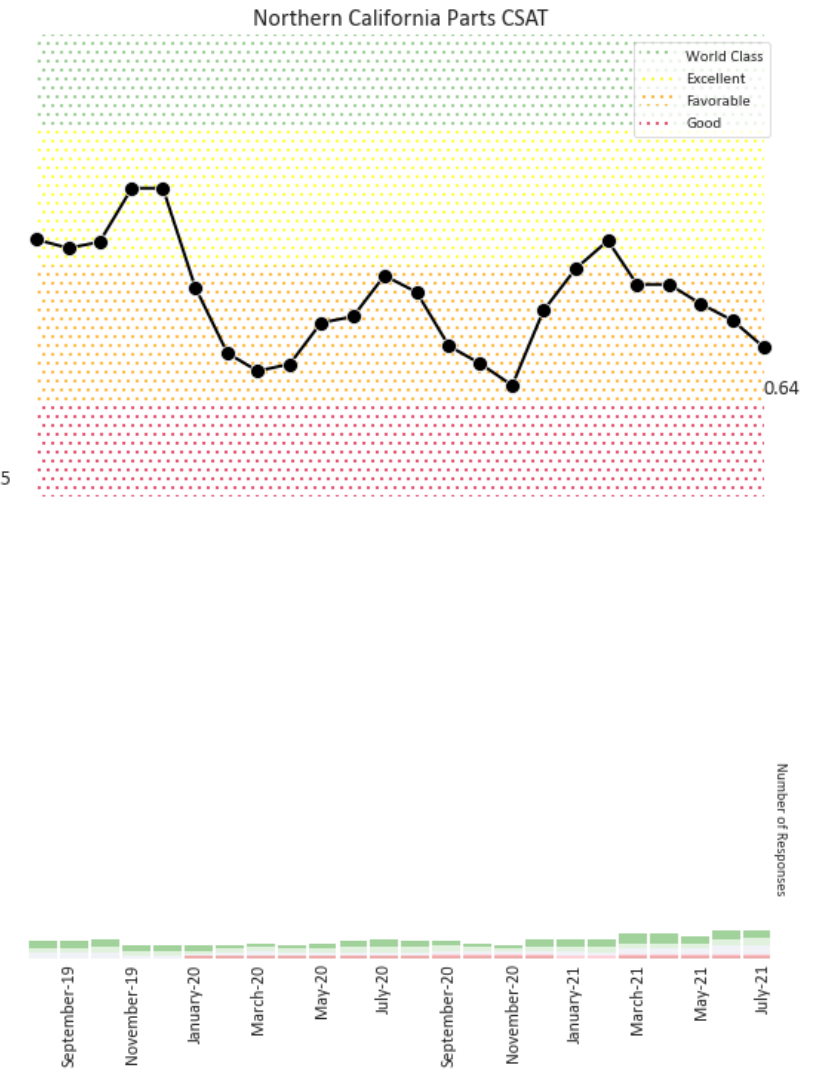
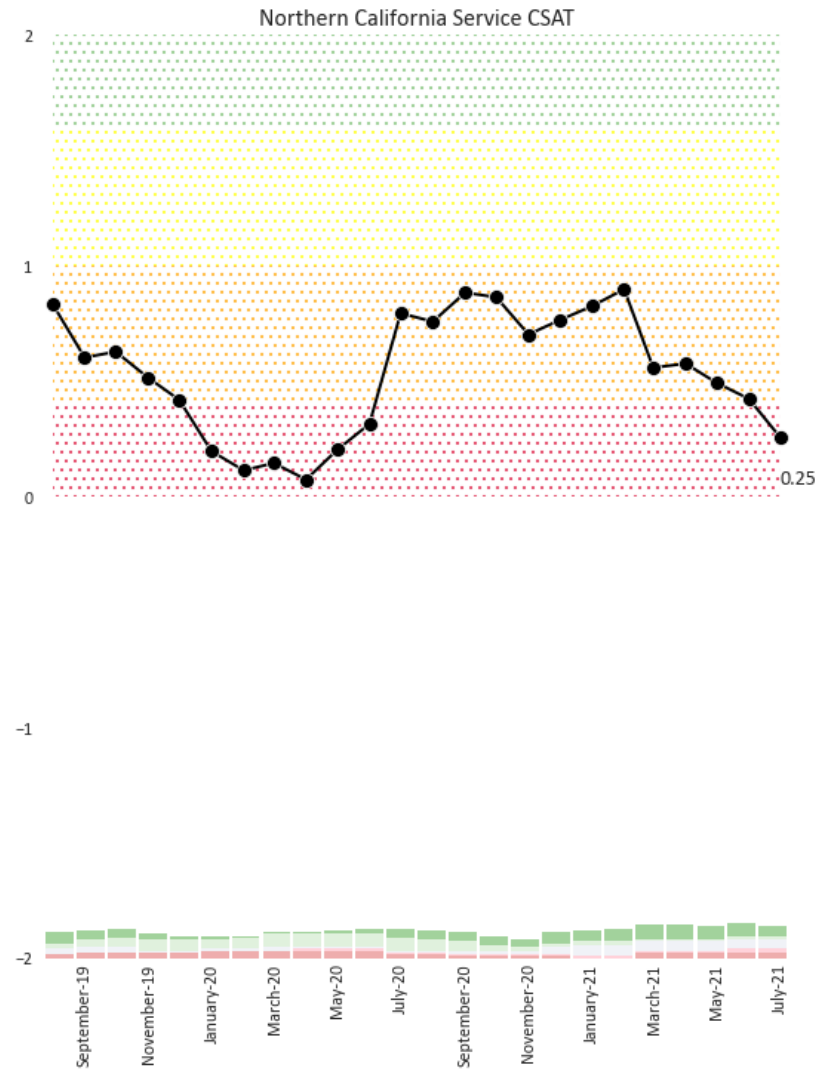
Northern California NPS

- Lowest NPS in Service Organization
- Service NPS less than Good and rose to Favorable, now less than Good
- Parts NPS started out less than Good and rose to Favorable, now Good
- Parts NPS significantly higher than Service NPS



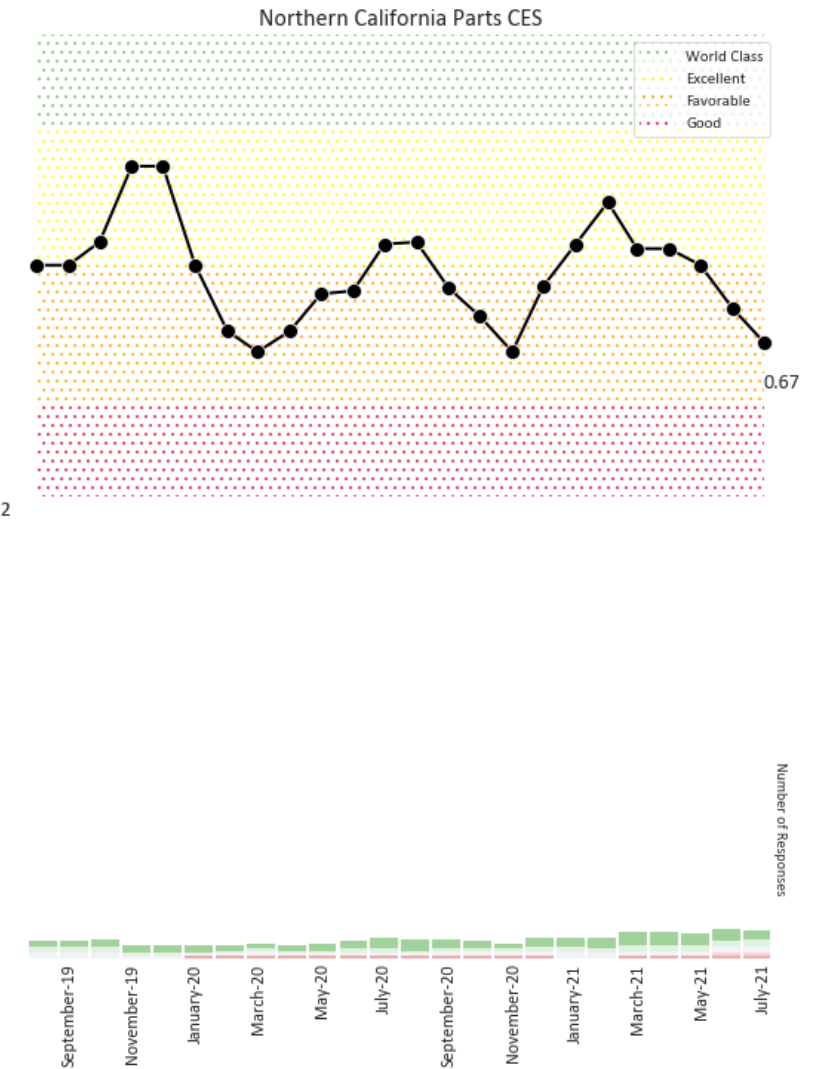
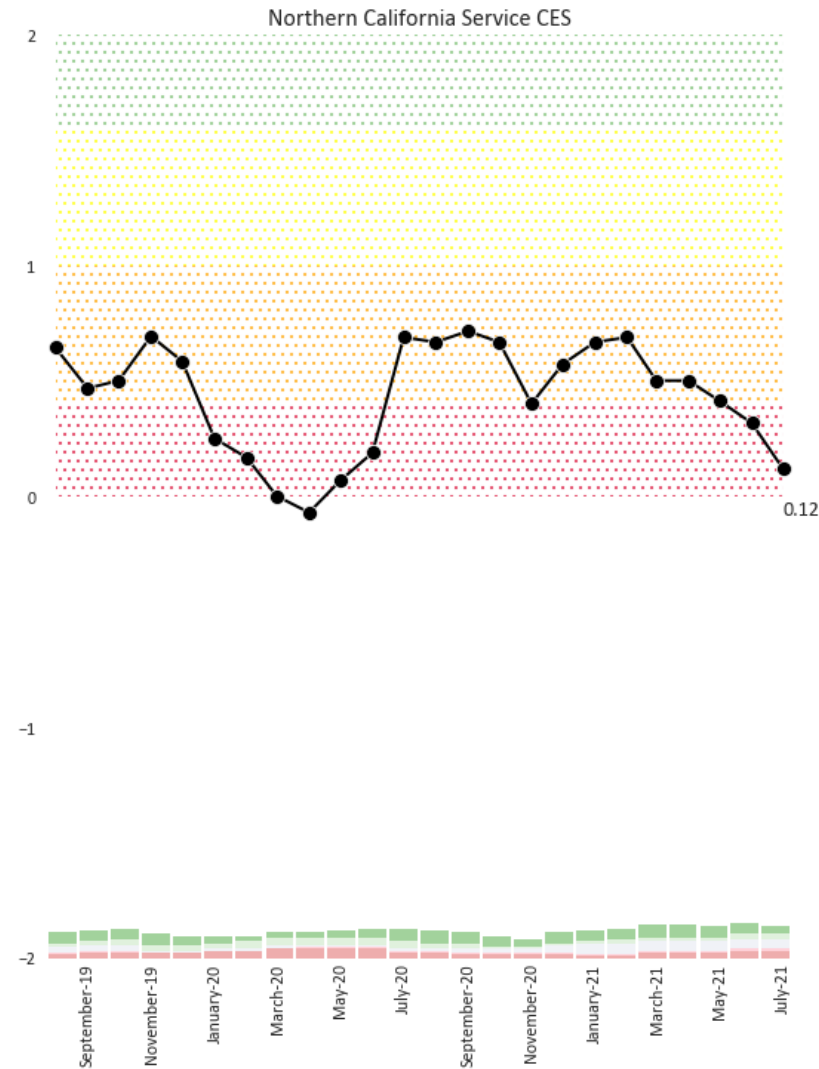
Northern California CSAT

- Service CSAT started out Favorable, now Good
- Parts CSAT started off Excellent, now Favorable
- Parts CSAT relatively higher than Service CSAT



Northern California CES

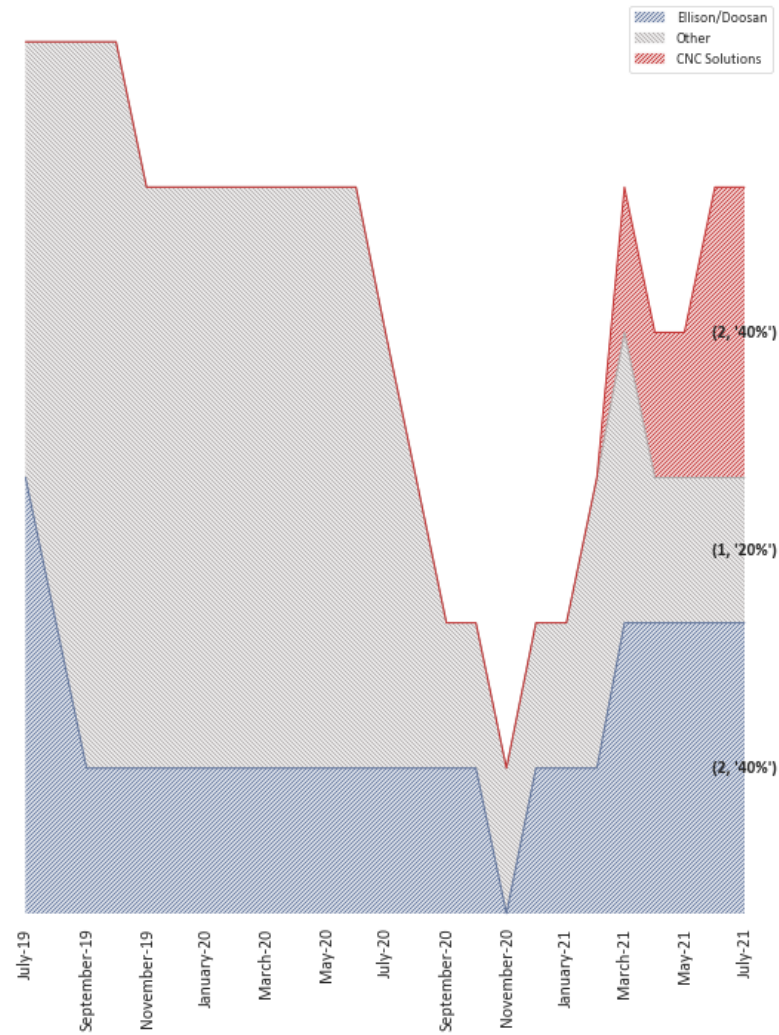
- Service CES started out Favorable, now Good
- Parts CES started off Favorable, now Favorable
- Parts CES relatively higher than Service CES



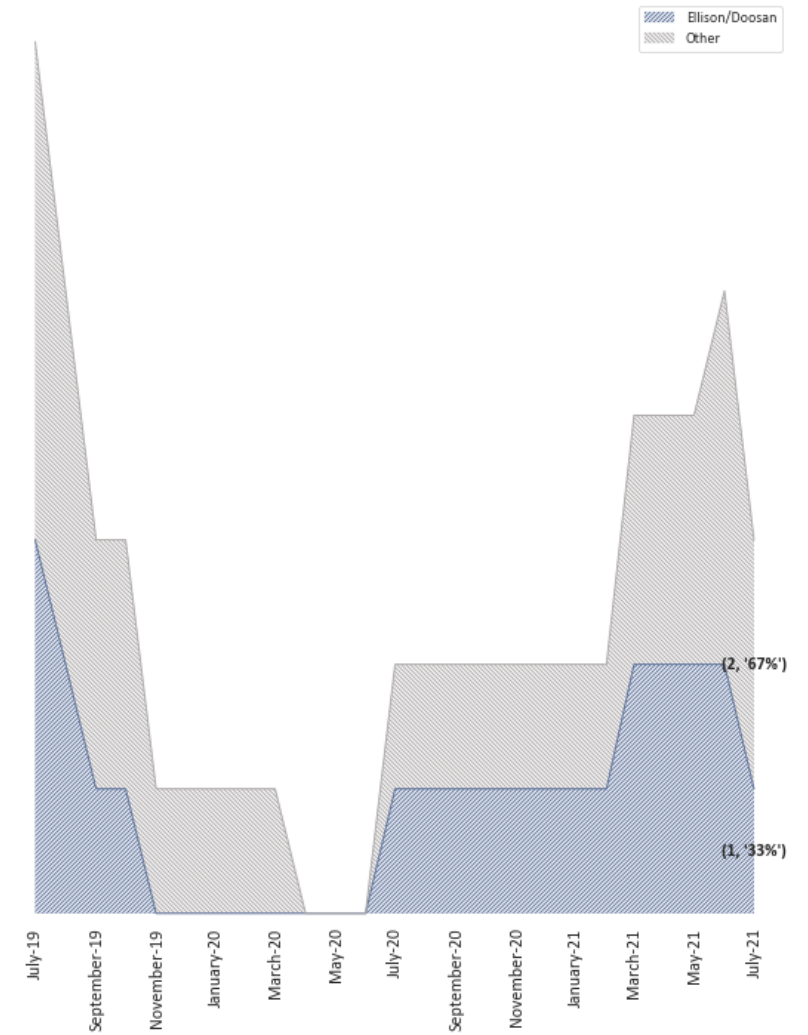
Best Vendors in Northern California

- Service rated best in 40% of responses (less than Good)
- Parts rated best in 50% of responses (Good)
- Biggest competitor: CNC Solutions

Which vendor has the best Service Organization? (Northern California)



Which vendor has the best Parts Organization? (Northern California)



Northern California Open-Ended Comments (July)

- Our shop is exclusively Doosans (Passive)