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Defining the new business marketing culture. *Karl Kaufmann; H.M. Snider; Andrew W. Ballentine; Robert F. Lauterborn.*

Defining the new business marketing culture

M&MD: One advertising agency executive told us he believes business-to-business advertising has become more marketing-driven than manufacturing-driven, since it attempts to recognize ideas and offer solutions to customers' problems. Do you agree or disagree with that statement?

LAUTERBORN: I read an article that made the same point. The agency executive said that the CEO is now the marketing manager of his company-- whether he likes it or not-- in our kinds of businesses.

SNIDER: I think it should be that way. Years ago, when America discovered or invented marketing, it evolved into a function. Today, I think, as it reemerges, it's being viewed as more of an attitude or a philosophy. This means that everbody in a company has to be marketing-driven.

KAUFMANN: The pressures are on companies to get fast or get replaced by the competition. You don't have a lock on technology for very long. You've got to focus on marketing. That's what strategic planning and strategic business centers are all about. Our products at 3M are totally marketdriven.

LAUTERBORN: And understand it's a short cycle, if you're going to make any money. Today, hardly anything is "your' product uniquely, because technology is such that people can get in and out of businesses much quicker. So you lead time is not there. When you had a 10-year product life cycle which you could extend another 10 years with a few modifications, your concentration was on manufacturing efficiency. By doing this you were going to increase your margin and protect your markets by keeping your costs under control or even lowering your costs. You introduced a product, it was very successful, and then you successfully cost-reduced it.

You simply can't to that anymore. McGraw-Hill had these "seven steps to a sale.' That was a long and leisurely time frame. Today those seven steps to a sale are all still there. but you do them in week.

M&MD: What industries have really been in the forefront of becoming more marketing-oriented?

LAUTERBORN: The computer business, certainly.

KAUFMANN: High-tech businesses. They were totally market-driven from the beginning.

SNIDER: Going back to the question about when did it start, I wonder if marketing didn't really emerge when people started to lose the fascination with strategic planning.

I think other things led to it too. Today, we are clearly in a slower growth, maybe even a no-growth situation. When you have that kind of situation, I think it demands marketing, because you can no longer rely on something just being sold.

M&MD: This must mean tremendous changes in the organization. Have you seen it in your own companies?

LAUTERBORN: Companies in our industry are still technical businesses to a large extent, and I don’t find an awful lot of people who have classical marketing training moving into top positions. What I do find is that the people who are in the positions of responsibility for the business units are focusing on marketing; whereas, that might not have been the case before.

Talking about strategic planning, I think it was generally built on projections from the past. They would do big market analyses, and "what if's,' and computer models, and so on. The fundmental thing that was missing from most strategic planning was the marketing side. The weakness of most strategic plans I've ever seen was that the marketing was abstract: they were projections. There was no real fundamental understanding of the customer and what motivated him, and use patterns.

And so, in the process of "what is wrong with the strategic plan and why isn't it working?' you learn that the whole marketing side is built on assumptions that are false. I think that's one of the things that happened about strategic planning.

SNIDER: I think that the main difference between strategic planning and marketing is that strategic planning tended to deal with "what is,' while marketing tends to deal with "what might be' or "what could be.' The other difference is that strategic planning tended to deal with threats and address a threat here, a threat there; while marketing tends to welcome threats or welcome change, because that's what marketing is--dealing with change.

LAUTERBORN: Remember those great nine-box grids, where you had assumptions about harvest and growth and all that sort of thing? Well, more and more companies discovered that they could park some product line over here and harvest it. However, it's really hard to do that any more because of the compressed life cycles; and secondly, every once in a while some maverick manager would get into one of those harvest products and say, "What do you mean harvest? I can make money with it. I can grow this business. There is an opportunity here.' And he would aggressively address it in a marketing sense, and suddenly you discover that this product is our newest growth product and it's profitable.

M&MD: How does an industrial company use market research?

LAUTERBORN: You can do absolutely anything. The question is, what is it you need to know about your customer. I think that the short answer is that business-to-business companies use market research badly, or hardly at all across the spectrum. There are some exceptions, but in most cases it's a tool that is not being used well.

KAUFMANN: The key is in recognizing and understanding what you don't know first. And we're using market research for all the products of the business. We found very quickly that we thought we knew our market, and suddenly the whole thing changed on us. New people came into it with new imperatives. So we've got to go back out and we've got to use the tools that consumer research has taught us, in the business-to-business situations.

I think we began to realize that people who buy in the business-to-business situations are not very much different than when they're buying in consumer situations. They are still people, and the things that appeal to them in personal consumer purchases appeal to them just as well in the business-to-business situation. Therefore, it seems to me, adopting those consumer marketing techniques also seems to be a factor in the selection of media, in terms of the increasing use, for example, of television marketing.

M&MD: A recent survey on budgets and media usage showed that 53% of those responding planned to use more television than they had in the previous year. TV was the biggest gainer in the budgeting process. Is television really effective, or is it wasteful, and in some cases can it be an ego trip?

LAUTERBORN: Television is very efficient to do certain kinds of things. We have a program for paperboard cartons versus the plastic, where we discovered through a good deal of research that television is communicating instant awareness of the issue. If the issue is a little bit complicated, credibility comes through print. So, we're simply using them in tandem to do what we need to do.

SNIDER: We did a television commercial as recently as two years ago on industrial motors. It ran in prime time. The principal objective was image. We were using that particular product as an example of innovation from GE. We did the same thing with a computer-aided design system. We ran that computer-aided design commercial in Los Angeles over a period of ten weeks, once a week during a college football game. It was a very small media buy, but I think we closed something like $3 or $4 million worth of business in December on computer-aided design systems that were traced back to that television commercial.

LAUTERBORN: Really, the bottom line of everything we do in business-to-business marketing and communications is to create selling opportunities. When there is such an enormous range of potential buyers the best way to get at them is to have them come to you. You certainly can't send sales people out to call on everyone.

SNIDER: Salesmen will always say they know their customers. That's probably true. However, they don't always know their markets, the people that are really interested in that product. They only know the people they deal with.

KAUFMANN: If you ever let tactics lead objectives, you can make mistakes. It is not the selection of television that is the way you get at this; it's, "Where are my objectives, and how then can I best fulfill those objectives?'

M&MD: If there is increasing use of consumer media--radio and television, consumer type business magazines --how is that affecting the traditional role of the business press? Are you using trade publications more now than you did before, or less?

LAUTERBORN: I think they're still the best bargain on earth. But again, they have a role. They're a marvelously efficient delivery system and you can be so tightly selective that your plan squeaks. The dollars going into consumer media are not dollars coming out of trade press, in my opinion. I think there are a lot more dollars that ought to be put in the trade press.

SNIDER: The other point you have to consider, going back to Karl's point, is that people are people and behave pretty much the same way whether they're in a business situation or a consumer situation.

On the other hand, in a business situation there are at least two people involved in the simplest form: someone who specifies, and someone who decides. Now, people who specify look for specifications. Trade magazines are an excellent way to reach the specifier and give him all the details and all the information.

The other people that you need to reach however, are the decision makers. You can reach them in a number of different ways, probably with a different message, because they don't know specifications, they don't understand technology--they hire people to worry about that. They're concerned about the value of the brand. A great way to do that, of course, is through publications such as Forbes, Fortune, Business Week, Wall Street Journal. Television is also a good way to do that.

KAUFMANN: Now we've got so many other media choices. When you look at those choices, you say. "Hey, this can help, this can reinforce, this can build on.' You've got cable and in-home cassettes, teletext, all the electronic markets.

M&MD: Are any of you looking a cable for business-to-business adver tising?

KAUFMANN: I think in business-to-business we're more "show me first before we jump into something like that. It's been very difficult for cable to show us that narrow target audience with the proper vehicle to get involved with it. They will.

LAUTERBORN: I think operating at the same time is a tremendous pressure to bring advertising results and marketing communication results down to the bottom line.

Now, we're seeing that even though an ad delivered 500 qualified leads, in six months at such-and-such a cost, it's not necessarily successful unless those leads are being converted into business.

KAUFMANN: I really think that the trade press may have some good reason to be threatened by all the new media we are experimenting with. They have to stay on top of their market, they've got to prove themselves editorially better than they have before, they've got to prove to us that they are reaching the people who influence and make decisions.

LAUTERBORN: The individual salesman of a magazine has a very different role now than he used to have. He can't just come in and trot out the latest BPA statement. He really needs to understand what our businesses are and what it is we're trying to accomplish, and come to us with ideas. More and more we talk about the shift in our economy from "thing making' to ideas, the "information revolution.'

He has to come to us and he has to sell ideas, he has to understand what we're trying to accomplish, and he has to find ways that his magazine can uniquely help us to do it--whether it's providing us with information we don't have, or whatever.

Also, I disagree that there's a very large movement to consumer media. I think that some of the tremendous growth in business-to-business has been in areas that tend to be high-tech and that tend to lend themselves toward typewriters, new business office equipment, and that sort of thing. Growth in those categories has just naturally used consumer media.

KAUFMANN: But that sales rep has got to sell not just against his next competitor, a business-to-business magazine. He's got to know these other kinds of media that are available to us, and he's really got to sell against those too when he comes to us.

LAUTERBORN: It isn't so much selling against us; it's helping us to sell. I don't think it's being done.

On the other hand, the pressure to understand our customers better, the pressure toward marketing, is a wonderful opportunity for them. It may well be that ten years ago, if they had come in with all this market data, a lot of people would have yawned. We were interested in efficiency in manufacturing. The deep desire for knowledge about the market and about individual customers wasn't there. Now it is. They are wonderful depositories of knowledge about our marketplaces, and they could help us.

M&MD: Where does direct marketing fit into the media budget?

LAUTERBORN: We have a product called PortaCool, which is an insulated bag that holds two six-packs. It's sold without a sales force. We run advertising in trade magazines that reach, for instance, beer distributors or beverage wholesalers. The response is to an 800 number. It's sold directly over the phone. We don't have a sales force at all. That's direct marketing of a sort.

SNIDER: I would hope that someday, we'll be able to do direct selling for a lot of industrial products. Only a couple of years ago, someone from IBM said--and I thought it was a marvelous quote--something to the effect that "no salesman should sell a commodity product.' There are many industrial products of a substantial size and dollar value that can be just sold over the phone.

M&MD: How do you rate trade shows? Are they as important as they once were, or has their role and function changed?

LAUTERBORN: I think trade shows used to be--"Why are you in a trade show?' "We're there to fly the flag.' And then you get three guys in blue suits and a card table and hang a couple of things up on the wall and that would be a trade show. Today, when we go into a trade show, it's an integral part of what we're trying to do in a market. It's carefully evaluated as to who will be there. The show itself is carefully put together.

Again, the justification for the investment that's required to go to a trade show is does it pay off? Have we made specific sales we can trace to this that makes it a good investment?

KAUFMANN: It goes back to how do you reach people. There are certain kinds of functions and people who are hard to reach by a sales force. Design engineers--and the whole health care field--hardly ever see sales people, but they do go to shows.

M&MD: Could you take a product and give us some idea what the objective was and how the media budget was developed?

LAUTERBORN: About 18 months ago, we introduced a major breakthrough in corrugated containers.

We needed to get the information that this product exists out very quickly to as many people as possible. Then, working from the responses that would come back, to qualify them; go after the ones that have the most potential.

It's so fundamentally different from others [containers] that we also decided that we needed and would move more quickly if we had a fairly high-level awareness of it. Now we're talking Wall Street Journal advertising for a corrugated container.

We built the budget on the basis of who we need to reach. And we wanted a significant frequency. Then you back up and say, "That's got to cost "Y." And then, there was some negotiation about that. So we built up the budget. We didn't say, "Well, we're introducing this product and we're going to spend $50,000 advertising,' or something of that sort. We built up the budget, which is rather a lot more than $50,000 based on what it was expected to perform.

The return on investment, the last I looked, or the incremental profit dollars from what we spent on that program were something like 20-to-1, directly traceable to leads from that.

KAUFMANN: If you look at 3M's Post-It, which is an example, the objective was to build addiction. We wanted to get people addicted to that little yellow piece of paper. If you try to sell people on the use of it, they'd look at it and say, "I don't know. Where would I use that? Why would I use it?' But, if you give them a sample pad and say, "Use it for whatever you want,' and they start using it, all of a sudden, it's like popcorn, they're coming back to buy it. And it permeates the whole organization--"Where did you get those?' They end up sampling it. This works anywhere in the world.

SNIDER: Maybe what's driving this change in annual budgets and more receptivity to new things along the way has been the fact that we are moving from a manufacturing mentality to a marketing mentality. What a lot of people are coming around to realize now is that the investment that they put in their manufacturing facilities, in their mill, is no less important than the money they invest in their markets. More and more people are realizing that marketing is an investment, just like a lathe or any other piece of equipment. Unfortunately, the tax advantages aren't there.

M&MD: Do you think that the agencies fully realize the changes in the business-to-business field?

SNIDER: The greatest amount of our money, of course, is spent through BBDO for the consumer products and Jim Johnston currently on our program for business. Our in-house agency does a bit of advertising, plus some outside agencies too. It's getting very fashionable for agencies to start business-to-business departments or divisions. But I, frankly, don't see much happening. Of course, I have a very narrow view of business-to-business. I think that print is such an important part of business-to-business, and so few agencies in my opinion really have people who are capable of writing, or even who want to write. Television is just so much more fun to do any you can't put a print ad on your reel.

You can be a great writer, but you're not going to write great copy unless you can think. There are very few agency writers who really understand the businessman or the specifier. There are exceptions, but I don't think they really understand how that thought process goes.

LAUTERBORN: You really have to train your agency. It's easier in consumer because all of them are consumers. Very few of them buy rolls of industrial paper. And so, you have to help them to understand your businesses. I don't know that it matters a whole lot whether you're using a business-to-business agency or a large consumer agency.

We find that, at least for the chunk of our business that's related to the package goods business, agencies often know a good deal about our customers' businesses. Ogilvy knows more about the General Foods and the Campbells of this world, the people we sell to, than a business-to-business agency might. That's sometimes useful. They understand it one notch beyond. That, particularly as we are looking more and more toward our markets and understanding our markets, is a helpful characteristic.

KAUFMANN: Their responsibility is the advertiser's responsibility. Most of the problems that have come about when we get conflict in our agencies is our fault; we have not brought them into the business, we have not taught them our business, so that they can respond the way they ought to respond and understand what they're supposed to do.

SNIDER: We just had a meeting right before Christmas to review advertising with the Chairman, and Jim came along with us. He was a part of that process. Hear it direct, or get the abuse direct, as the case might be.

LAUTERBORN: Perhaps a big difference between consumer and business-to-business advertising, is that our concern is to help somebody else make money. Except for banks and financial institutions, that's not the role of consumer advertising; it's satisfying other wants and needs. That may be the common denominator.

M&MD: How do you think media usage will change in the next five years?

KAUFMANN: I don't think that you can say which media are going to be there. But, we're going to see opportunities that we have not seen before. And we're going to try them.

LAUTERBORN: I think that's an interesting point. People in jobs like ours pay more attention to media options than we used to, because we never really had that many media options.

I don't think the fundamental patterns will change, though. I agree with Bart that print is the fundamental core of business-to-business communications, and always will be.

SNIDER: More and more we'll look at different options. I know I'm somewhat troubled right now by the fact that, just looking at the major business publications, they are getting so full-- I won't say cluttered. The Wall Street Journal is a limited 64 pages, and it's tough to get in. You make your reservations a year in advance now. The business magazines, of course, are expandable, they're not limited; but, if you look at them, there is just so much there. You've got to look for other places where you can really break through. You try to break through creatively, of course. But, sooner or later, you've got to look at alternatives. But I think they need to be measurable somehow.

LAUTERBORN: Again, ultimately the measurement is "do we make money by using this?'

SNIDER: Yes. But there's a softer value, too, that you cannot measure-- well, maybe you can, but it's certainly more difficult to measure. That's looking at television versus print. You can sit down with print and you can say, "I know that person called me because of the ad that I ran in Industry Week.' On the other hand, if you run something on television, you really don't know--and may never know--what the impact of that television commercial was. It could have done a lot of good for you. It could have gotten that salesman in. But the salesman might never know that it was the television commercial that made that sale easier.

LAUTERBORN: Of course, both of you guys get to hedge your bets, since you have large consumer products operations, so all the television theoretically supports not just your consumer products operations, but . . .

SNIDER: Yes. But there can be a down side too. If you look at General Electric, we are 20% consumer products and 80% basically capital and business products. And yet, if you look at the balance, the mix of our media, it's heavily skewed toward consumer. So, are you really representing the enterprise as a consumer organization? You become "the light bulb guys that want to sell me a nuclear reactor,' or something like that. There's a down side to that too.

M&MD: Do you think your tv advertising will be increasing?

KAUFMANN: It may. When you realize a couple of things--how many buyers of products out there even remember a time when there wasn't television? Those people out there making the decisions grew up with television as part of their lives. If those things that they expect to get on television are the things that we want them to get from our companies or our products, we're going to have to use television.

LAUTERBORN: Aren't those the same people who have the remotes and the VCRs, and are zapping away the commercials?

KAUFMANN: They may be.

LAUTERBORN: And network usage is going down rapidly--you know, it's one thing to say, yes, they're used to television. Certainly, their use of television is very different than it was.

KAUFMANN: Yes. But they still expect to get information from television. If you ask them, they always rank it quite high.

SNIDER: And, furthermore, that kind of advertising won't be zapped. It's information advertising.

M&MD: That comes back to your saying that if you don't educate your agencies, you don't get the results. But it's also what Bart's saying, that there aren't enough people out there who can write and create good ads.

SNIDER: We could change. Thinking is harder than writing.

KAUFMANN: If we could change CPM from cost per thousand to cost per memory, then I think we've got the way to put the monkey on the right back. The cost per memory is the responsibility of the advertiser to provide information to the writer and creative people about the business and the market. Cost per memory depends on the ability of your agency to create something that is memorable and not junk. It is incumbent upon the media departments to place that in the right places where it can be seen and remembered by the right audiences.

LAUTERBORN: But the buck stops with the advertising manager. I really think it's our responsibility. I think the stuff that's lousy is our fault. The agency may have done it, but you bought it. The marketing manager or the general manager of the division may have said, "This is what I want to do,' but you didn't change his mind.

M&MD: Are you still relying heavily on your advertising agencies for media selection, or are you getting more involved in it?

LAUTERBORN: I don't want to see the latest BPA statement. If all the guy's going to do is deliver numbers, then he'd better deliver numbers to the agency. But I want the guy to come in and understand my business and say, "Here is a unique way my property can help you accomplish the objective,' once he understands what you're talking about.

SNIDER: This goes back to the point we were talking about. There's a difference of selling. There's a specifier, and the media is responsible for delivering to the media departments all the right numbers so that they can do a media plan.

Then it comes to the ad manager who looks at it from a slightly different point of view: "Do I really feel that I want to be in that book? Are my peers there? Are my competitors there?'

M&MD: Bart, the current campaign that GE is doing appears only in The Wall Street Journal and The New York Times. Was that decision made by you, or did Jim Johnson and his agency have a role in where those ads would be placed?

SNIDER: Ours is a peculiar kind of situation. I guess you have to understand a little bit of the background.

First of all, we knew we had to reach senior people; that's what we set up as our target. There are several magazines --Forbes, Fortune, Business Week-- which do a very nice job of reaching those folks, as does The Wall Street Journal. However, our answering center was only going to operate from 8:00 in the morning until 8:00 in the evening. Most people read The Wall Street Journal during the business day. I think they tend to take the magazines, and perhaps read them on the train, or read them in the evening, or on the weekends. If they see the ad at those times and say, "I want to call,' we're not open, and then they might forget by the next day or by the following Monday morning. That's not to say that those magazines don't have a role to play. In fact, I'll probably be runnng in them before the year is out.

One of the nice things about direct marketing is that you try something, and if it works you keep on doing it. If it doesn't work, then you stop doing it and you go on to something else. So, we're learning about what works.

M&MD: Has the organization had to change to accommodate this increased emphasis on marketing?

LAUTERBORN: Absolutely. There was a time when manufacturing said, "This is what we make and this is how we make it,' and we hired some guys to sell it. Now the product specifications are determined according to customer needs and marketing is very much a part of the process with manufacturing.

About 18 months ago, we formed a corporate marketing operation. Our function was transferred from corporate communications to this marketing operation at International Paper, even though I still have responsibility for corporate advertising.

M&MD: How is it structured?

LAUTERBORN: The guy running it was in charge of international marketing. We simply combined the functions so it's all marketing. Actually, his title is vice president of marketing services. It provides support both in direct selling situations, particularly where they're corporate--our company and someone else's company--the things that are multi-divisional, or the things where the strengths of one division can be used to help another division.

We obviously have responsibility for all advertising and product publicity, marketing publicity, as opposed to corporate publicity. We are involved in marketing communications planning, in setting up customer meetings.

M&MD: How does it work? Does a division come to you for help, or do you go to it? Has it been a difficult process of integration?

LAUTERBORN: Actually, it has gone quite quickly for 18 months. The organizations structure was a recognition of a need that was being recognized already and that some people were already doing. Most of the initiation is coming from the businesses.

SNIDER: GE has been a very decentralized organization. We moved away from any kind of centralized marketing function. Every department, division had its own marketing/sales operation. Then, when (CEO) Jack Welch recognized the emerging trend toward marketing, he established a corporate marketing function.

There are cases where our people are called in to do special marketing projects. On the other hand, we have our own discretionary funds to operate from, where we can take a look at things, either that the chairman wants us to look at, or that we think may be opportunities for some changes.

It is a slow process, but it's soming around.

LAUTERBORN: One of the questions you asked earlier about market research--there is in this organization a job slot we haven's filled yet for Director of Corporate Market Research. There is a recognition that there is a need for that. The individual businesses have been doing things on their own, but most of the research you would do in any given business area would really benefit far more than any one division doing it, and it could probably be done with less duplication.

M&MD: Karl, are you structured the same way?

KAUFMANN: Yes. I'm part of an organization called Staff Marketing Services reporting directly up and through the corporate vice president for marketing. That was his title. It has just recently been changed because public relations was off in a different area. They are all combined now. He is the vice president for corporate marketing and public affairs, so he has all of those functions under him now, which gives it more power within the organization.

We operate the same way. We are there to do several things: One, do those things for the divisions that they cannot do for themselves, two, to be on the leading edge of the technologies of marketing that are there; three, to sell our services to them; and four, finally, to protect the company from itself. What happens usually, is at the division level you start out selling your services, and if you can build credible products that they use and like, they will come back to you; and they tell their neighboring division, and they come to see you too.

But, at the same time, the recent recession knocked out some people whom we didn't replace. All of a sudden, the divisions are out there saying, "I don't have the resources, nor can I hire the resources, within my division to do this kind of work or these kinds of things. Aha, I'll go to staff and ask them to help me.' That helps us.

M&MD: How big is your operation?

KAUFMANN: In Staff Marketing Services, which includes corporate communications, international marketing, market research, trade show and convention and meeting planning, corporate identity and the policy group, I think there must be 120 of us.

I think an important point is that the vice president of marketing services reports directly to the CEO.

M&MD: How about you, Bart?

SNIDER: My boss has unlimited access to the chairman. However, he reports organizationally to the sector executive for consumer products.

The interesting point about this organization is that we are the only corporate function within the General Electric Company that is positioned within operating components. We do not report to a corporate staff officer. We are part of operations. So that, where we report may appear strange, the idea that we are considered an operational component gives us operating credibility.

M&MD: What is the biggest problem facing business-to-business marketers today; and the other side of that coin, what has been the biggest break-through?

LAUTERBORN: The biggest problem is making money. For most of the large industrials, compounded growth rate isn't there anymore. At the same time, there are tremendous cost pressures. It costs nearly $1 billion to build a paper mill today. The cost of energy is 10 times what it was 10 years ago. So, you have growth slowing down, you have costs increasing, and so the problem is making money.

KAUFMANN: And because that's the greatest problem, what's the root cause? You've got more competition from all over the world.

SNIDER: I'm not sure what the greatest breakthrough has been. I think the biggest problem has been changing attitudes. It goes back to where you started this discussion, which was would you rather own a market or a mill. The issue is getting people who have come from a selling mentality, a push mentality, to put themselves in the customers' shoes and ask, "How do I change that mill to accommodate the market?'

If you've got a manufacturing mentality and you're sitting there and 50% of your production is a particular product, you tend to become line extenders. It's very difficult to say, "I want this radical new product that is going to displace that whole 50%. I know it will sell out there, the market wants it, but can I let go of this to do this?' It's a scary thing for people to do, and yet it's the only thing you can do.

I don't know if this is as big a break-through, but the other thing that's happening is that businesses are realizing, as they become more market-focused, the need to develop strong relationships with their customers, with their markets. This is as opposed to what we've been through for 20 years, which is just selling or transaction, "need any motors today?' kind of thing.

Companies are going for fewer, higher-quality suppliers, more broadline suppliers, and really looking for relationships.