



# TBM

# Survey Results

SME TORONTO Monthly Meeting 22<sup>nd</sup> Nov 2012



## Take Back Manufacturing

## TBM Self Positioning Survey

TBM SURVEY

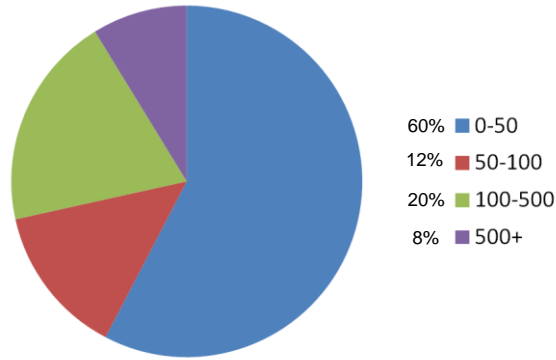


Do You Care  
About Manufacturing  
in CANADA??



THEN PUSH HERE

## How many people are in your business?

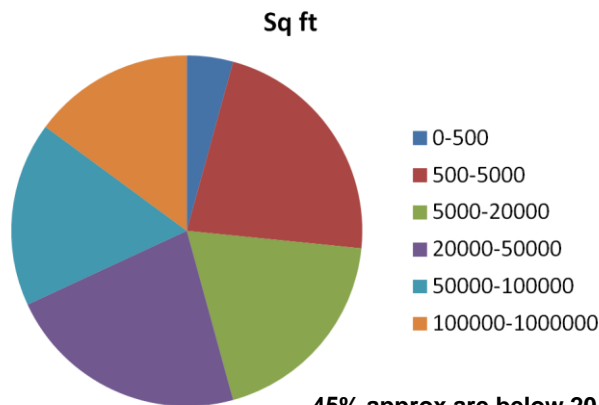


TBM SURVEY RESULTS

478 participants



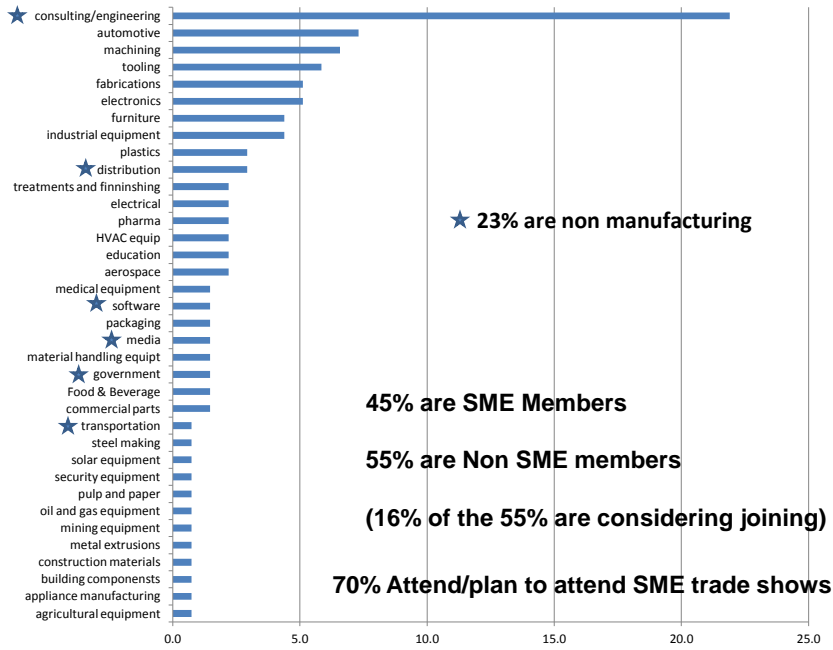
## Size of manufacturing facility



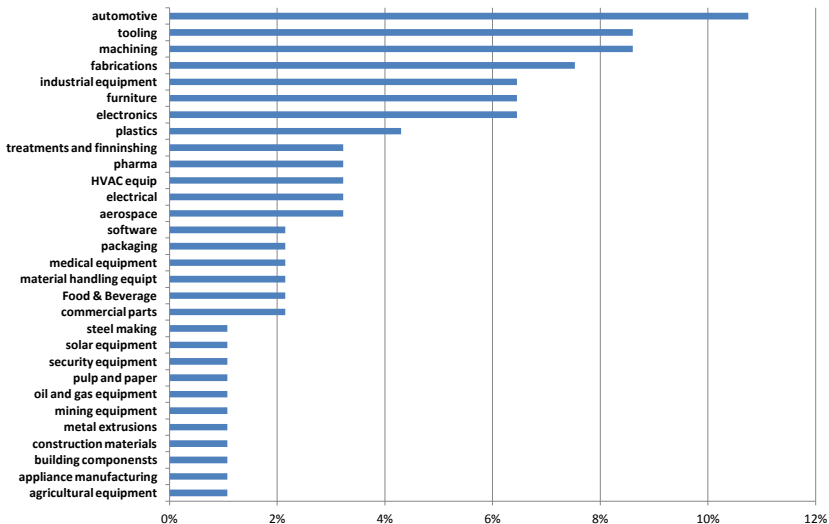
78% of these manufacturing sites design own product.



Participants...What is your business sector?

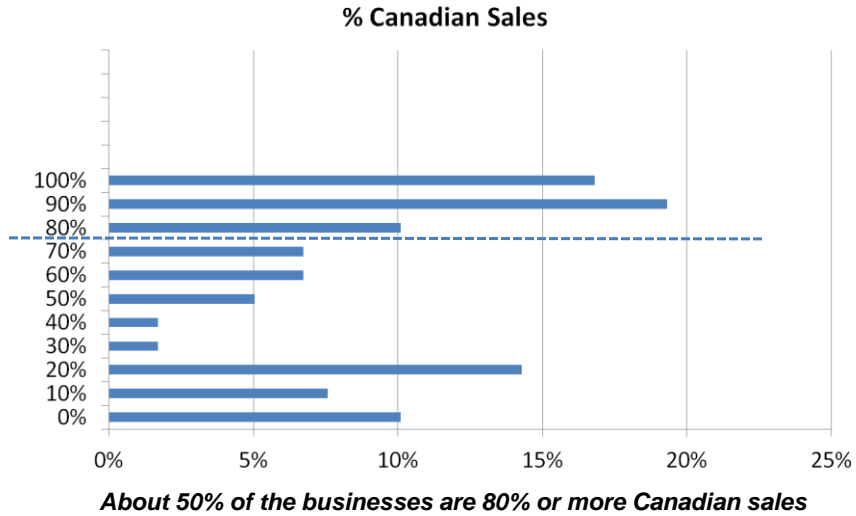


Manufacturing participants only by sector



(389 Participants)

Canadian versus International business?



**Primary location of the key functions?.**

Discipline	Canada	USA	EU	OTHER
R&D	78%	15%	5%	2%
Product Design	78%	14%	4%	4%
TESTING	78%	15%	3%	4%
Manufacturing	86%	5%	3%	6%
Distribution	68%	22%	3%	7%
Service	70%	21%	3%	6%



# Were you aware of the Take Back Manufacturing initiative?

# 65%



## KEY QUESTIONS WE ASKED?

Are you concerned about global competitiveness?	<b>87%</b>
Do you feel you can compete with the global economy as a Canadian manufacturer?	<b>66%</b>
Are you concerned about the decline of manufacturing in your sector?	<b>82%</b>
Do you feel pressure from the level of the Canadian dollar?	<b>73%</b>
Are you satisfied with local government support for your industry?	<b>44%</b>
Are you satisfied with Federal government support for your industry?	<b>43%</b>
Do you feel your business is under capitalized?	<b>62%</b>



# Do you Offshore Partnerships?

Do you have any offshore partnerships?	<b>45%</b>
How satisfied are you with these offshore partnership?	<b>45%</b>



If your company were to engage in an effort to Take Back Manufacturing, what would you need the most help with?

Calculating total real cost of production (Balanced Sourcing)	<b>42%</b>
Productivity Improvements	<b>68%</b>
New product development and innovation	<b>49%</b>
New product introduction	<b>35%</b>
Workforce training and development	<b>65%</b>
Information/education on new technologies	<b>53%</b>



## Which of the following process improvements are you planning to pursue?

[Lean thinking and implementation]	<b>60%</b>
[Six Sigma]	<b>29%</b>
[ERP Class A]	<b>9%</b>
[ISO]	<b>26%</b>
[Productivity through computerization]	<b>27%</b>
[Innovation systems for products and processes]	<b>47%</b>

## Improvements .. & how/where to get them?..

46%	Are you satisfied with your profitability?
57%	Do you have a detailed plan to increase your profit margin?
66%	Do you know (in detail) where the bottlenecks and productivity waste factors are in your business?
60%	Do you have a clear vision of what to do to get those improvements
52%	Do you have an Evolution plan and detailed project activities for your business improvements
58%	Do you have a system to measure the improvements
49%	Does a clear vision for improvement and toolkits to make them happen exist at all levels in your organization
52%	Do you have a key person dedicated and assigned to make such improvements happen?
55%	Is your organization physically arranged and culturally positioned to eliminate waste
50%	Have you fully assessed the effectiveness of your operating practices to support the changes needed.
49%	Do you have a formal global sourcing strategy and plan
55%	Do you have effective project management of all new products and associated processes

## 3 biggest challenges ?

### TOP 10

- 3.3% Energy costs
- 3.6% Material costs
- 3.6% Other
- 5.4% Legislation (Safety/environmental/products)
- 5.8% Investment
- 6.2% High \$ DOLLAR
- 7.6% Productivity
- 12.7% Offshore competition
- 13.4% Economic demand
- 15.2% Skill shortage

### The Others

- 0.4% international regulations
- 0.4% material quality
- 0.4% Offshore quality
- 0.4% quality of imports
- 0.4% unionism
- 0.4% US protectionism
- 0.7% Distribution issues
- 0.7% IP control
- 0.7% liquidity
- 0.7% market barriers
- 0.7% material sources
- 0.7% product launch
- 0.7% Supply base availability
- 1.1% government regulations
- 1.4% delivery
- 1.4% lack of supply base
- 1.4% logistics and transportation costs
- 1.4% Quality issues
- 1.4% technology gap
- 1.8% customer satisfaction
- 1.8% lack of government support
- 1.8% taxes
- 2.2% managing change



## How interested are you in educational assistance for the following?

- 57% Understanding how to Improve Total Business Cycle Time to satisfy the customer.
- 60% LEAN thinking Implementation....simplify your operational and material support systems?
- 44% Having e a Certified LEAN instructor as part of your operating team
- 43% Nominating some -one to Train as a certified LEAN instructor.
- 50% Installing a LEAN performance measurement system
- 52% Installing a Cost of Poor Quality system..... how to measure and improve for business success.
- 51% Installing Total Productive Maintenance and Calibration systems.
- 45% Implementing Statistical Process Control (SPC) as a strategic weapon for process improvement.





## How do you perceive your organizations current improvement systems?

- 27% You have a supervisor in a LEAN environment training program?
- 38% You know how to plan, measure and maximize the flexibility of your work force?
- 31% You have a training program for Operational Point meeting/Visual operations and 5S principals
- 45% You have tools to perform Problem solving and team building within your organization?
- 34% You have tools to conduct Project leadership for success



## Apprenticeship systems

- 25% .....Do you have a policy and system that supports Apprenticeships?
- 44%..... Are you interested in adopting an Apprenticeship process to Re-life your workforce?



## New Products

- 56% Are you interested in processes to minimize New Product Introduction time and budget over-runs?
- 38% Do you need a new product procedure that includes emphasis on Design for Manufacture?
- 47% Are you satisfied with your design CAD/CAM/CIM tools to allow you to compete?
- 30% Are you satisfied with your manufacturing capital and tools to allow you to be NPI competitive?



## Innovation

- 56% Are you interested in a process to install an innovation culture in everything you do?
- 19% Do you have a trained leader who has been educated in innovation techniques?



## Supplier Performance

- 42% Do Supplier deliveries arrive at the right time, with the correct quantities and quality!
- 30% Do you have a supplier certification and measurement program
- 40% Do you understand the benefits and hidden costs of going offshore or out-sourcing versus staying in-house?
- 34% Have you applied "balanced sourcing" for your local capability with that which is available offshore?
- 18% Have you been considering any re-shoring activities?



## How Much are you interested in the following technology subjects?

- 45% Robotics application design and programming workshop
- 47% CNC machine tool application and programming workshop
- 46% CAD/CAM implementation workshop
- 47% Automated inspection/test and QC systems workshop
- 45% Rapid prototyping systems
- 47% Advanced fabrication programming and processes
- 46% Advanced computer aided process planning (CAPP)
- 43% GD&T made easy
- 45% The Computer Integrated Business...ERP/CAE/CAD/CAM/CAPP/CAT/CAI etc

# Training

21% Does a training road map exist for your entire organization and is the plan being executed?

52% Are you interested in a seminar on the new role of the Manufacturing Engineer in the global environment?



## Some Comments about TBM from the participants..

### GOVERNMENT POLICY

- The greatest threat to Canada is our Government and politicians...they need to finally wake up and learn about the real world.
- If the government is not with us they will destroy us.
- Federal and Provincial governments resolve to take manufacturing seriously.
- Government supporting and implementing fair trade agreements with the US.
- Federal & provincial government should better support Canadian industries by buying their products.
- US A provide financial incentive to a company when they create the job in the state.
- Government should support the local manufacturer to invest in capital & become competitive.
- Government controls Workman compensation, Minimum Wage, health & Safety, Environmental policies that drive CEO's to go Offshore to avoid these costs and to profit.

### PRODUCTIVITY

- Need Latest equipment, technology know-how and training
- Corporate culture is very focused on profitability. No investment will occur until orders are received.
- The path to profitability must be short (less than 1 quarter), longer term is not an option.

### EDUCATION

- We need to encourage Made in Canada.
- Help young high school student to understand about manufacturing industry
- Some professional level promotional tools (videos and training) to encourage and teach about manufacturing would be great.



## Some Comments about TBM from the participants..

### INFORMATION

- We need to Understand the current short-falls and challenges other manufacturing companies are facing.
- Can local suppliers compete with some international suppliers on manufacturing including prices, and delivery time?
- A list of manufacturing companies locally that we can add to our supply chain
- Trends in other industry sectors particularly related to regulations.
- Canada businesses needs to understand true cost of offering competitive footprint in the local market.
- What current government initiatives are currently being offered.

### OTHER

- My company has already announced closing the facility & move it to Alabama due to lower labor rates.
- We feel that it is an excellent initiative!
- We fully support the TBM direction.



# QUESTIONS?/COMMENTS?

