Reinventing the Hardwood Industry One Company At a Time

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 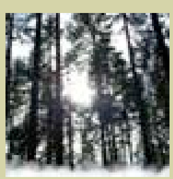  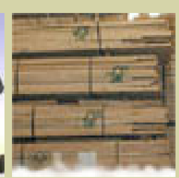 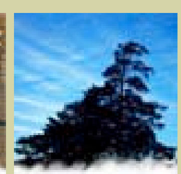

Reinventing the Hardwood Industry One Company At a Time

Introduction

At one time the term "colony" was loosely defined as: *any geographic region that exported raw materials to the "home country" and then purchased those materials back as value added products*. By that economic measure, the U.S. is quickly becoming a colony of Asia.

Obviously there are alternative definitions of a colony, but in many ways the term conveys a form of economic interdependence that we are seeing develop today between various nations around the globe. It is becoming increasingly common for China, as an example, to purchase their hardwood lumber in the U.S. and sell it back to us in the form of furniture, cabinets, and other value added hardwood products. There are costs and benefits to this reality. Unfortunately, however, the majority of costs are borne by the U.S. hardwood products industry while many of the benefits are received by China. In recent years the domestic furniture industry has been decimated by increased importation and a similar impact is starting to be felt by the cabinet industry.

To many hardwood companies the situation looks hopeless; it appears impossible to compete with overseas firms that pay cents on the dollar for labor and, in many cases, have fewer regulations to contend with. While direct competition in such an environment may prove extremely difficult to impossible, change, so as to shift out of a directly competitive mode, can improve the business outlook.

Yet change, a difficult challenge under any conditions, can only occur if we do something different. And dramatic change can often occur only by doing something dramatically different. In addition, some of the approaches needed to address this conflict may seem absurd to some, in that many possibilities include actually raising per unit cost, through an increase in the number of products or services offered and/or through investment in shorter lead times and more skilled leaders. Yet, as Einstein said, only those willing to attempt the absurd can ever achieve the impossible.

We suggest that there are two keys to competing in this ever-competitive world: a) providing organizational leadership that is multidimensional, relationship-centric, and bottom line focused rather than fixated on gross margins, and b) creating an organization that is able to learn and adapt to change rapidly. There are a number of very good books that discuss this: *Good to Great*[1] and *The Fifth Discipline*[2] are excellent examples. We also suggest that it is important to look outside the firm for help rather than "putting your nose to the grindstone" or "shoulder to the wheel." Working harder won't help. Working smarter is the only solution.

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[1]Collins, Jim, 2001. *Good to Great: Why Some Companies Make the Leap... and Others Don't.*
[2] Senge, Peter. 1990. *The Fifth Discipline: The Art and Practice of The Learning Organization.*

Setting the Stage for Change

Grieving – get over it and move on
In a previous article we discussed the need to grieve and move on[3]. A key question that should be asked of every leader of every company struggling to compete today is "what is your story?" Often what we hear is the story of a great company with a great history making great products that is suffering because of: increased costs of raw materials, increased regulations (including environmental), and competition from "abroad" that has unfair advantages due to extraordinarily low labor costs, easy access to capital, and few if any regulations to deal with. Unfortunately, although all these things may be true, these are in reality only a few of many issues in life that we individually have very little control over. However, at a certain point[4] there is no benefit to the speaker to dwell on these issues. The question should be asked "so if this is reality, what are you going to do about it?" An alternate question might be "how can the company's story be told in a way the better serves it?" That is, what is the positive side of the story? The simple truth is that if leadership cannot answer these questions then they need outside help. In any case companies cannot dwell very long on issues they have no control over; a new vision is needed and the quicker it is developed the more likely the potential success. That new vision is unlikely to be developed without significant external input – that is without the benefit of new eyes, new perspectives, and new approaches to problem solving.

Invest in People
The primary investment a hardwood products company must make to survive the current climate is in people. A company or corporation must invest in people both to improve the capabilities of existing individuals and to seek out creative, fast-learning leaders that can help the company through transition. Increasingly knowledge is power, and the ability to have the brightest and best minds working on a company's issues is critical to resolving the complex problems associated with significant change. *And a key to finding great leaders is to not limit the search to individuals within the hardwood industry!* The organization needs individuals that are good at organizing and leading people, not necessarily ones that have great experience within a specific business segment, e.g. cabinets. People issues rarely change across industries. It might be noted that Home Depot hired its last two CEOs from General Electric, a very different industry.

Make more decisions, faster
The information age has had a huge impact on many things, not the least of which is the degree to which good information is available to make many good decisions quickly. Today, it is critical that businesses recognize this change and all its implications. The first and foremost implication of this trend is recognition that old-style, top down leadership is too slow and too linear for current market needs. In a Dovetail

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[3] *Grieve; Get Over It, and Get Going - Facing Organizational Change*. Dovetail Commentary. Dr. Jeff Howe, February 2006, *Available at:* http://www.dovetailinc.org/DovetailComm0206.html

[4] Indigenous groups often use the guideline that you only listen to a negative story three times after which you ask the person to retell their story in a way that better serves them.

Commentary[5] we discuss how today's top leaders are skilled at multi-tasking and focused on creating and managing the team process through which a great many more decisions can be made and a great many more activities can be prioritized. The key recognition is that the purpose of team leadership is not to be social, but to simply get more stuff done more quickly.

Listen First – Act Later
Often one of the best first steps in resolving complex business problems is to talk to customers; and in the process letting them do most of the talking! The same kind of discussion can be useful with a former customer (one, for example, that shifted last year to a foreign supplier). It is worth noting that regular discussions with, and visits to, customers are a daily part of doing business for highly successful firms. Also, finagling an invitation to visit manufacturing operations can sometimes enhance the discussion and provide more chances for learning.

Things to listen for or to inquire about include:

- What are their clearly unmet needs (e.g. their complaints)?
- Do they have any unrecognized needs (e.g. if you could shrink their lead times would it save them space, money)?
- Do you have a really clear understanding of their operations and what kinds of attributes (of product or service) might enhance their performance?
- Is some other company servicing them extremely well (in their opinion) even if it is in another product or service they purchase?
- Are they also struggling to compete (are they competing with companies getting cheaper products from overseas , such as from one of your competitors?)

If you aren't actively solving your customer's problems and making them more successful you aren't likely to succeed over the long term. If your customer is also struggling, your problem is compounded. If that is the case then the first thing you may need is a new customer(s)!

In general, it is important to align your company with vendors and customers that are progressive and proactive about serving the marketplace in the face of great change. In essence the idea is to align with winners!

This may sound simple, but it is often very difficult to achieve for very human reasons. The old saying that misery loves company is just as true in business as anywhere else. It is not uncommon to hear entire business or trade associations take on a defeatist story, when what their members really need are options, new strategies, new direction, and visionary rethinking. Just because buggy whips went out of style doesn't mean customers stopped using leather!

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[5] *The Real Meaning of Team*. Dovetail Commentary. Dr. Jeff Howe, January 2007. *Available at:* http://www.dovetailinc.org/DovetailComm0107.html

Understand foreign competition

For many years, and to a certain extent even today, domestic companies have viewed foreign businesses as competing based on price only, with poor quality and poor service being "the price you'll pay in the long run." This is no longer necessarily the case. Studies have shown that first piece quality performance of Chinese products generally exceeds that of U.S. manufacturers, and that customer satisfaction (the true measure of performance) is often higher for imports than for domestically produced goods. Underestimating the competition can be a fatal mistake.

There is no question that foreign labor is often significantly cheaper. But, any assumption that this is due exclusively to the poor skills and/or training of employees lacks the recognition that individuals with engineering backgrounds or other high levels of education and training are available at costs significantly less than basic labor rates in the U.S. as well. So that cheap product you're competing with may have been designed by someone with a PhD and assembled by a well educated and accomplished craftsman.

Another widely held misperception is that competing products are being manufactured by laborious and imprecise manual processes in sweatshop conditions in primitive developing countries. Yet, although this is certainly the case in some instances, it is also true that gleaming state-of-the-art manufacturing facilities are quickly becoming the rule rather than the exception.

Of primary importance is to not assume your competition is inferior! For years the American auto industry assumed that Japanese automakers were inferior and unlikely to be serious competition; and they blamed early losses in market share to "cheap labor rates."

In the next few years, it is highly likely that Toyota will not only become the largest automobile manufacturer in the world, but the largest automobile manufacturer – *in the U.S.!* They have achieved this not by being the cheapest, but by simply and consistently having the highest customer satisfaction rankings in the automobile industry. Every year they have the fewest customer service issues, fewest recalls, and highest resale rates of any manufacturer. Domestic auto manufacturers are struggling to catch up and, in some cases, to convince lost customers that the quality of their products is markedly better than in years past.

Foreign competitors are no different than other competitors. They have weaknesses as well as strengths, and they both face competitive disadvantages and enjoy advantages. Knowledge, it is said, is power. Knowledge is also an essential element in successfully competing in a global environment. Information is everywhere if you look for it, and more readily obtained today than at any time in history.

Thing NOT to do

The main thing that companies need to avoid is the assumption that producing something cheaper is the solution to maintaining or regaining market share. Investing in new high efficiency, high capacity machinery is often simply digging the financial hole faster. A focus on gross margin could be exactly the opposite of what you need.

It may be that the best solution is actually to slow down manufacturing and to add more varieties, more options, and more bells and whistles; in other words, the best path may be to shift away from a commodity environment to a niche-oriented customized products strategy.

As Ikea discovered, the key to successful manufacturing was in controlling the customer interface such that they could stay in the forefront of customer's needs and interests. As a result product design, marketing and sales became the critical link.

Strategic Planning

Much has been written about strategic planning and the first step in the process – the obligatory revisiting of mission and vision, and the subsequent identification of strengths, weaknesses, opportunities, and threats (see Dovetail Reports July[6] and September 2005[7]). Rather than retracing a complete discussion about the strategic planning process, we offer several key observations.

Mission/Vision

We've all been part of one of those planning sessions in which scant attention is given to the mission and vision of the organization. The mere mention of mission is enough to induce glazing of eyeballs and the stifling of yawns. Yet, serious attention to mission/vision is critical in planning – and especially within firms facing significant challenges.

We suggest that attention to mission/vision is not only an essential element of planning, but that the best place to have the mission/vision discussion may be in the middle of the SWOT analysis (more on this later).

[6] Howe, Jeff. July 2005. *Organizational Vision & Planning: If you don't know where you're going, any path will get you there!* Available at: http://www.dovetailinc.org/DovetailVision0705.html

[7] Howe, Jeff. September 2005. *Creating Great Plans - Planning Processes that Work!* Available at: http://www.dovetailinc.org/DovetailPlan0905.html

The SWOT Analysis

A SWOT analysis is much more (or should be) than the filling of flip charts on a tight schedule at the beginning of a planning meeting. As the name implies, what is called for in a SWOT analysis is identification of strengths, weaknesses and so on as part of an informed, analytical discussion regarding company organization and performance. With this in mind, consider the following:

1. A meaningful SWOT analysis requires preparation. Information gathered from talking with customers, industry observers, consultants, your accountant and others is needed to provide validation of perceptions.
2. Evaluation of strengths must involve people from outside your company and even from outside your industry. It is vitally important to understand that in a SWOT analysis it doesn't matter if your management team *thinks* you are good.
3. In enumerating strengths, keep in mind that unless a strength is viewed as such by customers, and something that customers care about, it is largely irrelevant.
4. In identifying both strengths and weaknesses, frame your thinking in terms of what is known about the competition and about successful companies regardless of industry. Look to successes and evaluate your company relative to them.

With regard to weaknesses, it is essential to

1. Be brutally honest.
2. Take a hard look at the management team, including in the mirror. Ask yourself, do I have the leadership skills needed going forward? Is the organization at a crisis point?
3. Again, inform your evaluation with numbers. Gather specific information:
    - What is your pre-tax net? (as opposed to volume and gross margin)
    - Who is your favorite customer and why?
    - Who is your most profitable customer? How much did you make from them over the past three years? Is this customer thoroughly satisfied with your performance?
    - Who is your least favorite customer and why? Is this customer important to your bottom line? If so, have steps been taken to figure out why you don't like to do business with them?
    - Do you have customers who don't contribute to your bottom line? Do you have a plan for getting rid of them?
    - What are your most profitable products (again using pre-tax net)? Least profitable?
    - Develop a values/profitability grid for products, customers.

Moving to identification of opportunities and threats should occur only after strengths and weaknesses have been identified, thoroughly examined, and reconsidered in light of available data and perceptions of those external to the company. This means that if you have entered the SWOT analysis without the necessary preparation, it will probably be necessary to stop at this point, leaving the opportunities and threats discussion to another day.

Unless strengths and weaknesses are really known and understood, there is little foundation for realistically identifying threats and opportunities.

Opportunities/Threats

It is human nature to frame the possible in the context of what is, and to think how change could be accommodated with a minimum of inconvenience or disruption. And so it is that when strategic planning processes reach the point of identifying opportunities, the discussion is often limited to thoughts of doing more of what you have been doing, or of incremental rather than bold or fundamental change. Yet it is worth considering that incremental change is likely, at best, to lead to incremental improvement.

As you begin to consider opportunities, it is worthwhile revisiting your mission and vision. In fact, this is often the best place in a strategic planning agenda for the mission/ vision discussion to take place. The most fruitful consideration of opportunities often occurs in an environment in which thinking includes the possibility of expanding the vision. In any event, in preparing for the SWOT discussion it is a good idea to let participants know well ahead of time that as part of the discussion there is a place for thinking big, and an interest in bold and even brash ideas as to what might be done. The discussion might, for example, be kicked off by posing one or more of the following questions:

1. What is it we do that makes the most money, and those things that make the least? What steps could be taken toward doing more of the former and less of the latter?
2. Thinking about our best customers, what can we do to give them more attention and to bring more value to the relationship?
3. Thinking about the entire customer base, are there customers who year after year add little to the bottom line, or that require extraordinary attention per unit of sales, or both? If such customers were to be "fired" how might we use the time freed up more profitably?
4. Given the time to pursue a relationship, are there companies that we would like to have in our customer base? What might be done to court their business?
5. What is our chief competitor's Achilles heel? What might be done to capitalize on weaknesses, to attract the interest of their best customers?
6. Are there markets that we don't now serve that mesh with the skill-sets within our company?
7. What processes or mechanisms might be developed to ensure or enhance continual examination of and attention to factors that either hinder or help

profitability? Is there a set of measures that can be regularly revisited that will help us to focus on profit on an ongoing basis?

8. Rather than thinking about how to achieve incremental reduction in the cost of goods sold, what could be done to enhance the value of products to customers?
9. Pursuit of increased production rates in order to reduce per-unit costs has long dominated thinking. However, what benefits might accrue from slower production rates, and/or more flexibility in machine centers?

With respect to threats, here too, brutal honesty is required. The beginning point for this discussion is the list of weaknesses developed earlier. Remember that your competitors are likely to be looking at your weaknesses just as you are looking at theirs. Thus, an ongoing weakness in your firm provides over time an almost irresistible target for competitors.

Rather than moving quickly past the discussion of threats, it is important to develop a plan for following up to better understand the nature and significance of the threats that have been identified. In this regard it is important to read extensively, and to listen to what others are saying – in industry, government, and academia. It is likewise important to consider contrarians' views and to look outside your market niche and your industry for information.

Developing a Plan

The goal of any systematic planning process is translation of concepts to tangible strategies, and strategies, in turn, into actions. In general, there are four possible strategies for meeting intense competition:

<u>If You Can't Beat 'Em, Beat 'Em – The Tanya Harding Approach</u>

This method of dealing with competition involves going head-to-head with primary competitors, pursuing the same markets and with similar products, and sometimes even using similar approaches and strategies. This is, however, a risky method, and it is essential to consider carefully what it will take to win this kind of competition, the strength of financial reserves within your company and your competitors, and how your competitors might respond.

<u>If You Can't Beat 'Em, Buy 'Em – The New York Yankee's Approach</u>

A proven strategy, assuming sufficient cash reserves or borrowing power, is expansion through acquisition of competitors. Master Brand Cabinets provides a wood-industry example of this strategy.

The roots of Master Brand lie in the American Tobacco Company that began in the 1960's to diversify its assets. In 1988 the conglomerate American Brands acquired fifteen companies, including Aristokraft, the nation's fifth largest cabinet manufacturer, with sales between $130 and $140 million. For the next ten years, Aristokraft sales grew slowly and the company more or less maintained its market share. But in 1998, major acquisitions by American Brands, and the creation of MasterBrand Industries changed the competitive landscape. The first acquisitions were Schrock Cabinet Company and Diamond Brand Cabinets, a move that increased annual sales to $400 million. Further acquisitions, coupled with new construction and expansion, occurred in 1999, 2001,2002, and 2003. Today, MasterBrand Cabinets, Inc. is the 2nd largest kitchen cabinet manufacturer in North America, with sales of about $1.7 billion. The company consists of eight primary divisions, including Aristokraft, Schrock, Kitchencraft, Omega, and Homecrest.

If You Can't Beat 'Em, Do Something Else – The Owens Forest Products Story

Owens Forest Products, Duluth, Minnesota is a sterling example of a firm that reinvented itself. Company founder Bob Owens began work in the logging and sawmilling segments of the wood products industry before founding Owens Forest Products in 1974 as a one-man wholesale lumber company. The wholesale enterprise grew to include a number of sales people, but over the years competition in wholesale distribution steadily became more intense. Faced in the early 1990s with a crisis, Owens turned to his outside Board of Directors for advice. They came up with a bold solution: move further toward the end-user, creating value-added products. In response, a new division – Heritage Veneered Products – was formed in 1992 as a manufacturer of high quality architectural doors. The division, that manufactured only one product in 1995, offered some 30,000 styles and variations in its door product line just ten years later. The 230,000 square foot facility located in Shawano, Wisconsin currently produces an average of 1,200 doors each day.

Success, it is said, begets success, and so it should not be surprising that Owens opened a new manufacturing division in 2001 to manufacture a patented plank hardwood flooring product, and that sales have grown rapidly since initiation of the venture. A new manufacturing facility was opened in 2005, again in Shawano.

Owens Forest Products places a high priority on both its customers and employees, and is an organization known for doing everything possible to empower those who work for the company. It is also a firm dedicated to continuous improvement, using lean manufacturing techniques throughout its plants and with its suppliers to increase efficiency, reduce lead times and inventory, and minimize paperwork.

Owens currently employs 200, with annual sales of $41 million.

If You Can't Beat 'Em, Join 'Em – The Ashley Furniture, IKEA Approach

Ashley Furniture Industries, Inc.

Imagine beginning the 1980s as CEO of a highly successful furniture plant with a more than 130 year history, only to see markets literally evaporate in the face of foreign competition over a span of a few short years. That's the story of Ashley Furniture. The Sheboygan Falls, Wisconsin-based firm, which employed 250-300 workers and had $16 million in annual sales in the early 1980s, began to see a rapid erosion of its customer base as significant quantities of wooden furniture began entering the U.S. from China and other developing countries. As the market share for imported furniture rose from only a few percent to more than 55 percent in less than two decades, a crisis outlook developed within the company. Though still employing 265 workers in 2001, it was becoming increasingly obvious that seeking to do more of what the company had done in the past was not going to work. What to do?

In 2003, an emotionally-charged and bold decision changed the course of the now 155-year old firm. Ashley closed the last of its domestic manufacturing facilities, shifted manufacturing of furniture parts to China and South America, set up assembly and upholstering plants, and established furniture distribution centers within the U.S. As a result of dramatic reductions in manufacturing costs, and the ability to market furniture at significantly reduced prices, sales began to rise immediately. In 2005 Ashley became the largest wooden furniture company in the U.S., with sales of $2.72 billion. Today employment within Wisconsin currently totals 3,800, with the number of employees internationally in excess of 11,000. The company also operates 261 "Ashley Furniture HomeStores" in the U.S., Canada, and Japan.

IKEA

Dating back to 1943, when an enterprising 17 year-old Swede began selling a variety of consumer goods out of his home, IKEA today is a global giant. The firm first began designing furniture in 1955, and from the outset sought to provide affordable contemporary products for aspiring middle class consumers. What this meant was cost-focused design, implementation of "flat-pack" or customer-assembled furniture, and use of low-cost manufacturing materials such as particleboard and fiberboard. Also, from the very beginning, manufacturing costs were contained by concentrating manufacturing operations within developing nations. Thus, though a Swedish company, virtually none of IKEA's products are manufactured there.

IKEA today operates more than 250 stores in 34 countries, including China and Russia, and annual sales are approaching $20 billion.

In the mid-1990s IKEA introduced flat-pack houses aimed at first-time home buyers, using the same principles employed in designing and producing furniture. Though sales are currently limited to the Nordic countries and the UK, IKEA dwelling units may become marketed more widely within the near future.

Developing a Marketing Plan

It is always surprising to find companies that are very capable of focusing their attention on extremely small operational details, but that are concurrently managing their marketing programs at the most superficial level. In effect, such companies very carefully manage their expenses while leaving their income to the relative winds of chance.

To be successful today companies must be cross-functionally secure and effective, meaning they can leave nothing to chance.

For marketing this simply means that firms must implement a complete marketing plan with all four aspects of marketing carefully considered, coordinated, and detailed out. For some companies this is a return to marketing 101[8]; for others it is simply filling in the gaps left by incomplete plans. Of the four aspects of marketing (product, promotion, price, and place/channel), many hardwood companies appear comfortable with and competent with regard to only the first two: product and promotion. This is not to say they do a great job at either of these. Rather it is simply to say that they at least know they need something to sell, and that products ought to get promoted somehow.

Strategically, what is often least discussed is the channel or method of distribution. Changing times require that a company rethink why they have the kind of customer they do. For example, why do they go through distribution? Or, why do they sell to retail? There were generally very good reasons for choosing the current approach - originally. However, changing times may require a rethinking of this approach, especially if the only reason you can come up with is "because we always have done it this way" or "they're the only customers we know."

Matching your customer's needs with your abilities is a very strategic activity. Every company in the marketing channel provides different functions to the end user, whether it is delivery, variety, credit, timeliness or any of the other myriad of benefits a customer might perceive from a product and service. The key is in matching your organizational strengths and interests with those of not just individual customers, but with the whole channel (e.g. wholesale) that you are trying to serve.

Strategic Pricing

The pricing of products is another highly neglected activity. The pricing of a company's products should be approached strategically. Yet, it is often done based on the competition (giving them your market power) or on some kind of mark-up from cost. Either of these approaches grossly simplifies the reality of the normal product mix.

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[8] Howe, Jeff. August 2005. *Fundamentals of Marketing - Managing Markets, Products, Channels and Programs.* Available at: http://www.dovetailinc.org/DovetailMktg0805.html

Pricing is the strategic process of aligning the customer's financial expectations with those for your product or service. A customer's perception of your product's value has no real relationship to your cost or that of the competition, unless you make it so by aligning your price with others or by making your product effectively indistinguishable from the competition! This is particularly true for all those products and services that you provide that are not part of the 80% of the business that is your core volume.

How often have you heard of a company sending the little extras along for free? Actually, every penny you can get for those "little extras" goes straight to the bottom line.

And how often have you heard the story about the customer who felt a little guilty because they got something for free that they *actually offered to pay for*? The misperception by the company is that the customer is "extra" happy because he or she got something for free, and thus will be a long time customer. This may not always be the case.

Good pricing strategy includes an understanding of the perceived emotional value of the product. Pricing isn't a simply rational process (Who'd have ever guessed we'd be paying more per ounce for tap water than for beer?).

Finally, it is critical that the pricing strategy not only recognize the costs incurred by the company in creating the product or service, but also any costs or efforts incurred, or avoided by the customer in obtaining and using the company's product. These are potentially critical benefits that can be recognized by the pricing strategy. The entire convenience industry exists because someone realized that people would pay significantly more to have certain items readily available and easily accessible to them.

The overall key is to focus the same attention to detail on marketing programs as is applied to other aspects of the business. This detail is demonstrated by a comprehensive marketing plan.

The Bottom Line

Revitalizing the hardwood industry is not about piecemeal incremental change. It is about thinking holistically about the entire organization: where it is going (vision), how it is led (new leadership) and the ability to react much more quickly to the "drive-through" demands of the current marketplace. Quick reactions are based on people making quick decisions, and quick decisions require good people and comprehensive plans that provide the backbone and guidance for those decisions.

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