The Tom Peters Group

THE EYE OF THE BEHOLDER

The Tom Peters Group

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Tom Peters

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CONTENTS

SYNOPSIS

In this article, I use the "total product concept" espoused by Ted Levitt as a starting point for a discussion of the discrepancy between insider and customer perceptions in three different types of industries. In Levitt's scheme, the generic product is the small center of four concentric circles. Next, radiating outward, comes the expected product; followed by the augmented product; and lastly, the potential product. Using diagrams and charts, I illustrate how the Levitt scheme can be particularized for technology-based companies, retail concerns and service organizations. These charts graphically illustrate how very far apart insider and customer views can be.

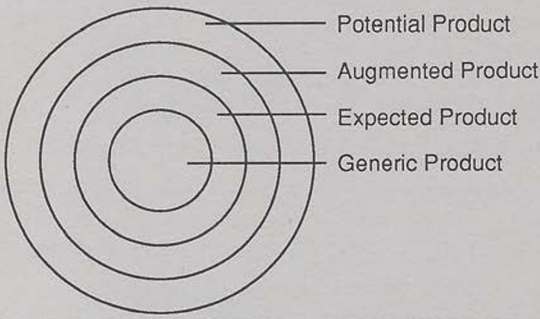
In technology-based companies, technical factors favored by insiders, such as technical reliability and special features, are contrasted with factors that customers consider important such as product support and company reputation. These factors are modified for retail concerns where insiders emphasize such merchandising factors as stylishness, presentation and variety. The factors that customers emphasize change to a lesser degree: Product support and company reputation are still important, but they now also include cleanliness and a "fun" atmosphere. In service organizations, service factors favored by insiders such as analytic skill and a particular, defined

ideology are contrasted with customer-oriented attributes such as the management of the relationship, attention by the senior person and attention to implementability issues.

Successful companies are those that come the closest to seeing the world as their customers do. Really understanding what your customer values offers opportunities for you to improve customer service and satisfaction, or even to create whole new markets.

Ted Levitt provides the diagram below (Figure 1) in his superb book, *The Marketing Imagination*; he calls it the "total product concept." His simple and compelling point is that the customer purchases "something" that is far beyond the plastic, metal and molecular arrangement of the fundamental "product" itself. I find this notion to be terribly helpful. In *A Passion for Excellence* we devoted two of our five "customer" chapters to this topic: "Perception Is All There Is" and "No Such Thing As A Commodity."

Figure 1
Levitt's Scheme



As you can see from Figure 1, Levitt invents a series of terms: generic product, expected product, augmented product, potential product. I am not wed to these terms, but like the notion they imply. Let's take an example. I usually begin my talks by describing Sewell Village Cadillac as the epitome of a firm that has taken a fairly mundane "product" (car peddling) and redefined it into a non-commodity winner.

I will not burden the reader with the detailed Sewell story. Suffice it to say that Sewell goes far beyond the average car dealership. Carl runs an approximately $100 million Cadillac dealership outside Love Field in Dallas, Texas (no other cars, one location). The dealership looks spectacular, starting with lovely chandeliers on the showroom floor and a marvelous floral arrangement that is changed daily. His startling merchandising format is doubtless aided by his regular use of a management consultant — Stanley Marcus, chairman emeritus of the Neiman-Marcus stores.

As attractive as the Sewell Village showroom floor is, the service bays may be even more attention-getting. They truly gleam, the result of several daily washings and a nightly waxing. The would-be customer is paraded through both the showroom and the sparkling service bays and then taken to the "preview room." It is about a twelve-by-twelve room off the showroom floor, decorated with lavish antiques. One sits on a beautifully appointed couch and is treated to a brilliant audio/video presentation. Only a small part deals with the Cadillac per se; most describes what it is like to become a member of the "Sewell Village Cadillac Family." This involves such extras as being given the home phone numbers of the senior people in the service department. If your car breaks down, one of them, night or day, will come out with a "loaner car" which you then keep until yours is repaired. (Yes, indeed, it's the little things. After a recent seminar, a woman came up and responded to my Sewell Village story. To my astonishment, she was the organizational development consultant who regularly teaches interpersonal dynamics to Carl Sewell's mechanics! In fact, wherever I go, I am invariably accosted by one or more Sewell customers, each ready to add a little more to the already amazing story.)

This brief snapshot of the Sewell Village story may provide a bit of a feel for the non-ordinariness of the operation. Now let's return to Figure 1. The generic product is, of course, the Cadillac (not much loved by consumers any more, the polls sadly tell us). The expected product, and there are no hard and fast definitions here, includes such things as Sewell keeping standard hours and having mechanics available. Next comes the augmented product — perhaps the "loaner cars" fit here. Finally the potential product area (the irregular border connotes no limits): the fresh flowers changed daily, the use of Stanley Marcus as a consultant, the interpersonal dynamics training for the mechanics, the sparkling service bays and so on. By the time one takes the journey all the way out to Ring #4, the "product" has literally been redefined. Carl Sewell is not selling cars, not selling Cadillacs; he is selling some combination of product, service, ease of doing business with, pleasantness of doing business with, that quite literally redefines the personal transportation/car purchase/service/ownership phenomenon.

In this brief paper, I want to sketch an extension to the Levitt notion. I will cast aside his four titles, but retain the idea of concentric circles. Figure 2 provides the basis for our discussion. I have taken three industry areas — technology-based companies, retailing, service operations — and developed a series of "product" (in the fullest sense) attributes.

First, I have divided the attributes into two major groupings: (1) technique-oriented attributes (somewhat akin to Levitt's "generic" and perhaps "expected" attributes) and (2) customer-oriented attributes (encompassing, mainly, Levitt's "augmented" and "potential" traits).

Let us begin with the technology-based companies. Paralleling Levitt's idea, I begin with a "generic" of sorts, T1 — the raw technical prowess included in the product. This is the computations per millionth of a second in a computer; the number of circuits on a microchip; a car's horsepower, acceleration or some arcane measure of gear box efficiency. Attributes T2, T3 and T4 are also technique oriented. That is, they are designed by engineers and built in by manufacturers. T2, for instance, is user-friendly technology (generic). The "mouse" and flexible operating system software in Apple's Macintosh computer are examples. T3, also a technical attribute, has to do with special features and variety of products — how many configurations (sunroof, no sunroof, etc.) or colors are available for the Ford Mustang SVO? T4 refers to technical reliability: Mean time between failures (MTBF) is a favored engineer's measurement here.

The customer, in the Levitt scheme, buys more than these four technique-oriented attributes. He or she also buys C1 through C7 — a series of customer-oriented attributes. For instance, C1 — company "good to do business with" (generic). One buys from Hewlett-Packard rather than from Joe and Harry's Instrument Company because of HP's generic reputation. If you're the section chief in an R&D lab, you don't have to do much justifying to your boss if you buy an HP instrument and it breaks down; buy from Joe and Harry and get a lemon, and your judgment is at least a little bit in question.

C2 moves us from good to do business with to easy to do business with. Do things come in soon after they're ordered? Can you rustle up your salesperson on a moment's notice? And so on. C3 is (service) reliability/responsiveness.

Figure 2

TECHNOLOGY- BASED COMPANIES

Technique-oriented attributes

T1 Raw technical prowess

T2 User-friendly technology (generic)

T3 Special features/variety of products

T4 Technical reliability

Customer-oriented attributes

C1 Company "good to do business with" (generic)

C2 Company "easy to do business with"

C3 Service reliability/responsiveness

C4 Company "pays attention"/"cares"

C5 Flexibility of product configuration

C6 "Fits and finishes"

C7 Support staff flexibility/responsiveness (e.g., accounting)

Figure 2 cont'd.

RETAIL FIRMS

Technique-oriented attributes

M1 Elegance (appropriateness) of design

M2 Timeliness/stylishness

M3 Quality/durability

M4 Variety

P1 Presentation/attractiveness/stylishness

L1 Location

Customer-oriented attributes

C1 Company "good to do business with"

C2 "Fun"/exciting to shop at

C3 Attractiveness (e.g., cleanliness)

C4 Service (friendliness/responsiveness/availability)

C5 Variety (e.g., sizes)

C6 Reliability/consistency

C7 Support staff responsiveness (e.g., delivery)

C8 Company "cares"

Figure 2 cont'd.

SERVICE ORGANIZATIONS

Technique-oriented attributes

S1 Analytic/technical skills

S2 Point of view/ideology

S3 Up-to-date skills

Customer-oriented attributes

C1 Company "good to do business with"

C2 Reliability/consistency/stability

C3 Management of relationship up and down

C4 Senior person attention

C5 Pays attention to implementability issues

C6 Company "cares"

Technical reliability (T4) is one dimension of quality, but everything breaks down sooner or later. When it does, how responsive is the vendor?

C4 is highly qualitative — the company "pays attention"/ "cares." Qualitative though it may be, it's something that every buyer can identify with. In a thousand little ways, a company shows interest or it doesn't. User conferences are one example: The company "cares" by first holding the conferences per se, then by the quality of the conferences. Or make an unexpected stop-by visit to a vendor's regional VP — does he or she genuinely wish to find out how things are going, or is it just a fly-by to show the flag. And on and on.

Flexibility of product configuration (C5) comes next. Beyond the variety of colors, will the company do a little something special for you? Not completely retool the product, but make a little modification? Tandem Computer, for instance, substantially modified a product to get some Federal Express business.

C6 is "fits and finishes." This is not special features (T3); nor is it plain vanilla technical reliability (T4). It's that thing we hear so much about in the car industry — the focus on the doors that shut with a solid "thud" and the gluing of gaskets. When one thinks of T4 (technical reliability), one thinks of, say, brake life in the auto industry. A major attribute of the Japanese success is not deemphasizing brake life, but giving virtual equivalent emphasis to the so-called "little things."

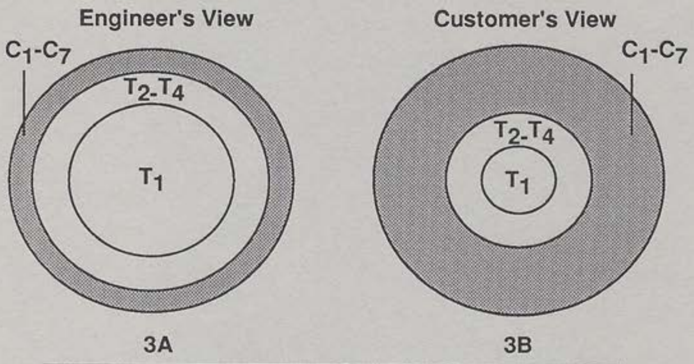
The last category — C7 — is labeled support staff flexibility/responsiveness (e.g., accounting). For instance, is the vendor's accounts receivable group relatively easy to do business with? Is the paperwork that accompanies an order accurate? A friend runs a bookstore, and has shifted a major amount of her business to Ingram, a book wholesaler that provides discounts that are slightly less attractive than those for purchases made direct from publishers. One reason: Ingram's orders are almost always correct when received. I'm told that it is an occasion for a celebration when a shipment from one of several major publishers bears even a vague resemblance to what was ordered.

I don't believe that these eleven categories — four technique-oriented, seven customer-oriented — are in any sense "correct" or all-encompassing. I would merely argue that they are plausible and "not bad."

Differing Perceptions

Now to the heart of the matter. Figures 3A and 3B transform these eleven categories into a series of concentric circles, reminiscent of Levitt. There is a vital twist, however. Figure 3A is the typical engineer's expert insider's view of what his or her company is selling. Figure 3B is the typical customer's view of what he or she is buying. And now the fun begins.

Figure 3



In the conventional science- or technology-driven company, as Figure 3A suggests, the scientists/engineers (scientists/engineers executives) are proudest of, and spend the most time dealing with, "raw technical prowess" — T1. They are not silly, however. They understand that reliability, features and user-friendliness are also important. Thus they see the T2-T4 ring as substantial. This, to them, just about sums it up. Of course, they hire salespeople and worry about service. So they do perceive a ring that encompasses C1-C7; but it pales by comparison to the the two prior rings.

The customer, I suggest, sees it very differently. (And, I might add, my experience clearly indicates that this is as true for the technical customer buying from a technical company as it is for the nontechnical customer buying from a technical company.) The customer, of course, is also interested in raw technical prowess — he or she can't afford to be too far behind the state of the art. Customers are substantially interested (about as much as the engineers) in the features/user-friendliness/reliability attributes, T2-T4. But they are especially interested in the C1-C7 attributes. In fact, it turns out that the two sets of circles, in my experience, are close to mirror images of each other. This is true of $800 personal computers, and it holds for $7 million-a-copy aircraft engines, too.

This would all be merely amusing were it not for the fact that so many science- or technology-based companies are run by engineers/scientists. (For instance, the week that I drafted this paper, *Business Week* reported that Sperry — since acquired by Burroughs — had turned its computer division over to a marketer to run; this is the first time in Sperry's history that a non-engineer has run the division! The stated reason: a last-gasp effort to catch up with IBM in some vital product areas.)

Engineers and scientists are not the only sinners — i.e., out of synch with customers — in this scenario. Marketers and other technician/analyst types (such as finance people) are almost as "bad." To be sure, the marketer, relative to the scientist/engineer, is likely to focus on the user-oriented (T2-T4) technique traits to a greater extent than on the T1 trait; but my observation suggests that he or she is almost as likely as the engineer/scientist to ignore the C1-C7 traits. That is, he or she is "user-oriented"/"marketing-oriented," but often in an abstract/technical sense (unless he is an IBM sort of marketer; but then, IBM's marketers are almost all former salespersons, not market technicians!

Some recent discussion with Apple Computer people highlighted a key point. That is, Apple sees itself as very much a customer-oriented company (though it insists on using the horrible word "user" rather than "customer"). The problem is that Apple views its breakthrough as a T2 breakthrough (i.e., user-friendly technology is Apple's narrow definition of customer-oriented). The "C" attributes of customer orientation have not, until lately, been considered of equal importance to, say, T2. For instance, much of the Apple II's success came from the exceptional availability of software, in particular the VisiCalc breakthrough. Since Apple as a corporation was not so directly involved in much of the applications software, it has systematically (albeit subconsciously, in the main) denigrated this point of view — to its detriment with the Apple III, Lisa, and now the Macintosh. Likewise, Apple has paid lip service to but not truly put the retailer at or near the top of its strategic priority list; retailers are clearly members of the lesser "C" set.

I shall be much more brief in the analysis of retailing and service. The issues are closely parallel. In retailing, the equivalent to the T1 for technology-oriented companies (raw technical prowess) is the set of factors I have labeled M1-M4 in Figure 4: elegance (appropriateness) of design, timeliness/stylishness, quality/durability, variety. The letter designation "M" stands for "merchant" — as in the merchant/merchandiser side of the house. Merchandisers' (buyers') beliefs are roughly analogous to those of engineers; life begins and ends with the timeliness and stylishness of the goods they purchase.

Obviously, the sensible merchant also pays attention to the P1 (presentation attractiveness/stylishness) and L1 (location) issues. These are also technique-oriented variables, factors that can be controlled via a sharp real estate department and a centralized stores organization that is up to date on merchandising formats.

In the retail world, there are also many "C" factors. Some are similar to those treated when we considered technology companies; for instance, "good to do business with." That is, you know what you're getting when you go into Mervyn's, Nordstrom, Wal-Mart or The Limited. Other factors are slightly different — such as "fun"/ exciting to shop at; this is the stated objective of The Limited Stores, and it is largely achieved.

Housekeeping factors play a role — attractiveness (e.g., cleanliness) is vitally important; in the grocery world, cleanliness ranks at or very near the top of the list in many surveys of customer concerns. And on the list goes — service (e.g., friendliness/responsiveness/availability of clerks); reliability/consistency; variety (e.g., limited or substantial size selection); support staff responsiveness (e.g., loading dock personnel); the company "cares."

Figure 4 bears a striking resemblance to Figure 3. The merchant's view (4A) ranks the "M" factors about as strongly (although perhaps not quite) as the engineer's view (3A) ranks the "T" factors. The presentation and location factors are indeed seen as important, but the customer — C1-C8 — factors are seen as less important.

Figure 4

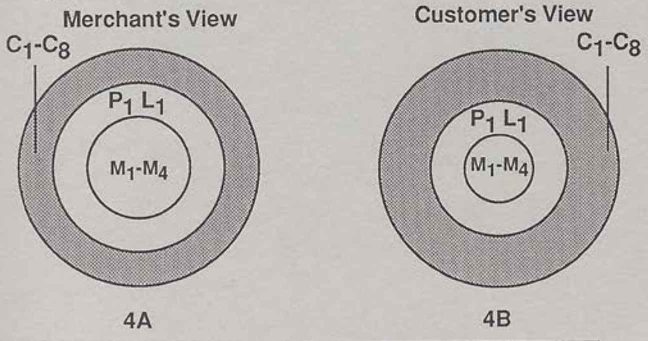


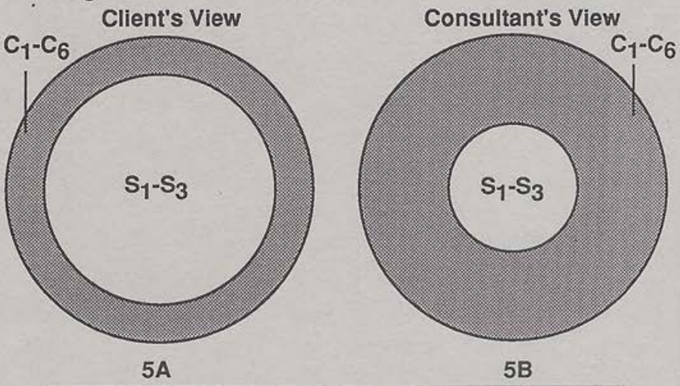
Figure 4B is slightly different from Figure 3B. That is, the retail customer may pay more attention to the M1-M4 factors than the technology-based company's customer does to the T1 factor. Yet the basic point is still the same: The two figures (4A and 4B) are, again, almost mirror images.

To deal with service company issues, I have taken a company and an industry with which I am intimately familiar — so-called "top management consulting." I was with McKinsey & Co. for eight years, the last four as a partner. I left with a sour taste in my mouth. I only mention it because I am about to say some very positive things about McKinsey, and do not wish what I say to be construed as a mindless product of a positive bias; to the contrary.

The analogy of top management consulting to technology-based and retail operations is rather surprisingly exact. There is a series of clear technique-oriented features: S1— analytic/technical skills; S2 — point of view/ideology; S3 — up-to-dateness of skills. Likewise, there is a series of customer attributes. Most are rather exactly consistent with the two previous examples: "good to do business with," reliability/consistency/stability, company "cares." Some are slightly different: management of the relationships up and down the organization, senior person attention, pays-attention-to implementability issues. Let me give a word on each. Customer-oriented consultants focus on managing the client relationship from chairman of the board to young manager in the strategic planning department, while less customer-oriented consultants focus on solving the narrow, technically posed problem/courting a person in the organization. There is also substantial variation in the amount of senior-person involvement; some contemptuously dismiss it as "handholding" with the client but others label it the key to success. Likewise, there is great variation in dealing with the implementability of suggestions — some believe that the point is to get the "correct" technical solution; others focus on bringing to light solutions that match the client's ability to absorb change. The S1-through S3-focused consultants believe that considering issues of implementability means "selling out" concerning the "S" factors; consulting firms focused on C1-C6 do not.

Figures 5A and 5B will by now be familiar. That is, the consultant team leader (equivalent to the mid-level engineer or merchant) views the world as largely technique/analysis-driven. Purity of analysis/argument overwhelms all other considerations. The client, as in retailing and in a technology-based business, is surely concerned with the

Figure 5



"S" factors. However, the "C" factors are decisive. One hires McKinsey, rather than Jane and Sam's Consulting Company, first because of McKinsey's credibility with, say, the outsiders on one's board of directors.

The consulting industry "standings" parallel those of the computer industry. McKinsey is the IBM of consulting. Its senior managers are those rare souls who pay more attention to the C-factors than the "S" factors. McKinsey's principal competitor of the past 15 years, the Boston Consulting Group, focused primarily on the S-factors. Their competence was high, to be sure, but in many ways they mirror the CDCs, Burroughs, et al. in the computer industry — good technology, questionable staying power.

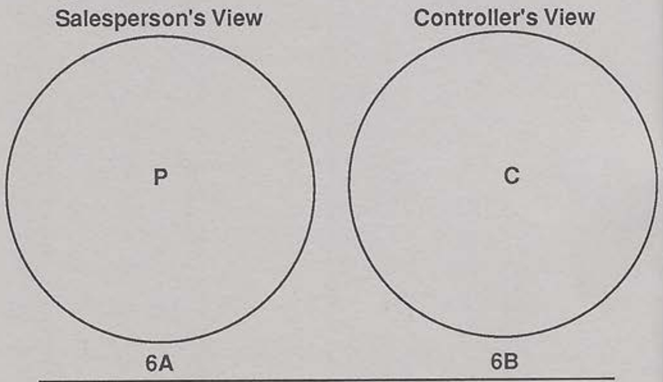
The Bottom Line: Opportunity for Redefinition

Let's talk results. It is my observation that the winners in all three industries (and many others not dealt with here) tend to be norm breakers. They come closer to seeing the world as their customers do. Those most intimately involved in setting strategic directions for these firms see their enterprises as Figures 3B, 4B and 5B suggest their customers do, rather than through the engineers' et al. glasses (3A, 4A, 5A).

An IBM, Raychem, Tandem, ASK Computers or Worthington Industries sees the "Cs" as at least as important as the "Ts." Most others don't. In retailing, a Nordstrom, Mervyn's, The Limited, Curtis Mathes, Giant, Stew Leonard's, or Publix surely pays urgent attention to the merchant side, but focuses equally (or more) on the store's side. That is, their view is pretty close to the customer view. One could argue that, on the other hand, Bloomingdales or Macy's, exceptional as they are, have failed to realize their ultimate potential because of a strong imbalance toward the merchant side and away from the stores' side. In the service industries, a McKinsey, SAS, Delta or Morgan Bank has particularly attended to the C-factors.

A discussion of specific winners and losers, however, is not the point of this paper (though it offers validation of our notion). Rather, the point is simply my consistent observation that there is, even in the best of companies, a pronounced difference of view existing between the insider — especially the engineer/buyer/designer/analyst, be he or she executive or journeyman — and the customer. (Incidentally, all the above understates the difficulty. Figures 6A and 6B depict the world view of two other "specialists," the salesperson and the controller. The salesperson, so it often seems, has a one-factor view of the universe; his or her "P-factor," encompassing 100 percent of that world, is price, of course! Likewise, the controller has but one concern: cost.) Whether one is on the IBM - Nordstrom - Giant -McKinsey side or the "bad guys" side (whoever they may be), the issue is equally important.

Figure 6



That is, mapping the differing perceptions of factors always provides an opportunity to improve/assess the reason behind a particular lost sale, a deteriorating pattern of customer relationships, or missed chances.

A dominant theme of our work has been: "The customer perceives service in his or her own [sweet, idiosyncratic, irrational, erratic, emotional, end-of-the-day, totally human] terms." Companies who not only learn to deal with this, but, more important, learn to create markets around it may have a rosy future indeed.

Addenda: Reality Check

It is doubtless true that it is inappropriate in general to personalize. On the other hand, we best understand our own situation. Thus I have chosen to add a narrow-band fourth activity — life on the speaking circuit, the subject of one of my own enterprises.

The analogy is interesting. There is a readily describable set of technique-oriented factors: (1) S1 (where S stands for "technical" substance — that is, is the material intellectually top notch); (2) S2 (timeliness — is the material relevant to current front-page issues); (3) S3 (delivery — is the speaker a showman capable of exciting groups of a thousand or more) and (4) S4 (generic tailoring —

does the speech give at least lip service to the problems of the industry represented).

Likewise, there is a series of customer-oriented factors: (1) C1 (national "rep" — is the speaker well known, such as a Gerry Ford or an Al Haig); (2) C2 (reliable — does the speaker make it all of the time and in time to prevent sleepless nights on the part of the conference arranger); (3) C3 (gets to know company/specifically tailors message — not just generic tailoring to the industry, but takes the time to get to know the company and its people and reflects that knowledge in the talk); (4) C4 (spends time with senior client people — visits before the speech or at least attends a breakfast before the speech); (5) C5 (support staff responsiveness — are all the people involved from the speaker's bureau and/or the speaker's company knowledgeable, thoughtful, caring, working to satisfy the client's specific needs).

On the right side of Figure 7 are two sets of concentric circles reminiscent of our prior discussion. From the speaker's point of view, the "S" factors may appear decisive — is his substance clever, timely, delivered with pizazz? Tailoring is of secondary importance (even the generic kind), and the customer factors, while taken into account, are of yet a lesser order.

Figure 7

FACTORS:

Technique-oriented

S1 "Technical" substance

S2 Timeliness

S3 Delivery

S4 Generic tailoring

Customer-oriented

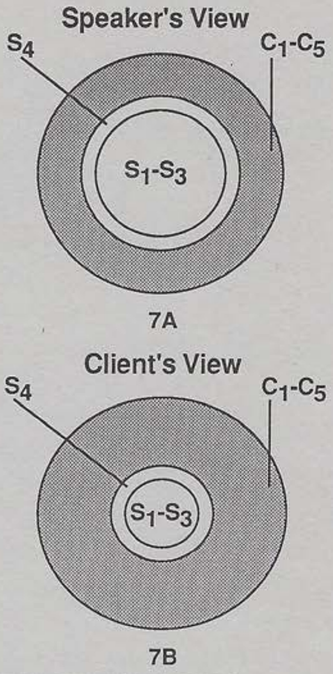
C1 National reputation

C2 Reliable (shows up/shows up early)

C3 Gets to know the company/ specifically tailors message

C4 Spends time with senior client people

C5 Support staff responsive



Now the client, once again, sees it differently. The "C" factors (especially national "rep" and reliability) simply overpower the technique-oriented factors. "Give me an Al Haig, guarantee that he'll show up, and I don't care what the hell he talks about!" That's pretty close to it.

I will digress here and speak of yet another variation on the perceptual difference theme — namely another version of the "speaker's view" (merchant's view, engineer's view, consultant's view) and client/customer's view.

Last year I had approximately 275 speaking dates; despite wind and rain and snow and sleet and thunderstorms and flu, I made 272 of them. Thus, I am — in my myopic view — a 99-percenter! (And I pat myself on the back regularly.) Sadly, my view is irrelevant! There is a case to be made, though it's not quite as extreme as I'm stating it here, that the public at large focuses on the three I missed, not the 272 I made. That is, the *San Jose Mercury News* and the magazine *Ad Week* both printed articles on events that I missed — suggesting that unreliability was my middle name. That is, and here we go again, from the speaker's view 272/275 represents an extraordinary effort (particularly if you, the client, knew as only the speaker does the degree of pain and agony required to get the ratio that high). From a prospective client's standpoint, however, three is the number of primary interest; the 272 is just a statistical footnote, perhaps at best suggesting that the speaker is overbooked — overstretched and unreliable!

Parting Thoughts

Perception is all there is, like it or not. I like it. For within these perceptual differences, and among those concentric circles of Levitt's and mine, lie a panoply of business opportunities, regardless of whether you are a banker or a steelmaker. It's an odd era. Times have been so tough, yet opportunities have never been so great. Amidst the growing din of new competitors and new efforts at product/service differentiation lies remarkable opportunity. The key to grasping it is honest self-assessment. The descriptive device outlined here will, I hope, provide you with a few clues.

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