



cutting through complexity

Western States Contracting Alliance Office Furniture Benchmarking Report

State of Utah, Division of Purchasing

October 16, 2012



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Project Mission Statement and Scope

Mission Statement

KPMG LLP 's office furniture benchmarking project will conduct a review of the awarded WSCA cooperative contract against other public contracts that are currently available to member states. KPMG will seek to verify whether the new WSCA contract represents significant potential cost savings over other alternatives.

Scope

To achieve the State's objectives, KPMG will:

1. Seek to understand the procurement strategy, by interviewing Utah procurement leads, and examining all relevant documents from the recent solicitation and responses;
2. Benchmark alternatives, examining a representative sample of other current public sector office furniture contracts (to the extent possible, control for variance with respect to terms, anticipated volumes, offered quality levels, and other Total Cost of Ownership elements);
3. Assess the potential impact of language in Section 1 of the WSCA RFP, which specifically reserves the right of member states to engage in further negotiations with awarded vendors; to participate in parts of, or the entire contract, or to use other contracts.
4. Prepare and present a summary report in the form of a detailed PowerPoint presentation outlining the range of alternatives contracts examined, methods of analysis, and a summary of results.

Categories

- KPMG obtained contract data from states provided by the State of Utah and others in order to develop analysis of their pricing in the WSCA contract categories of:
 - Systems
 - Seating
 - Desks and Tables
 - Filing, Storage, and Case Goods

States and Organizations

- There are 15 states and 3 cooperatives in the initial sample:
 - Minnesota (WSCA Sourcing Team)
 - South Dakota (WSCA Sourcing Team)
 - Arizona (WSCA Sourcing Team)
 - Nevada (WSCA Sourcing Team)
 - Connecticut
 - U.S. General Services Administration (GSA)
 - Montana
 - New Hampshire
 - New Jersey
 - New Mexico
 - North Dakota
 - Ohio
 - Vermont
 - Pennsylvania
 - Michigan
 - Utah
 - US Communities
 - NJPA

Benchmarking Samples

- The analysis centers around four suppliers, based on the WSCA contract:
 - Herman Miller
 - Allsteel
 - Steelcase
 - HON
- Of these states and cooperatives:
 - 13 selected Herman Miller
 - 12 selected Allsteel
 - 11 selected Steelcase
 - 9 selected HON
- Michigan is the only state in our sample who did not select the four suppliers included in the WSCA furniture contract
- Analysis of the category and supplier pricing was limited by the states' selection of the suppliers for each category
 - Analysis was concentrated on like-supplier pricing rather than cross-supplier discounts

| States & Organizations | Suppliers Currently Used | | | |
|------------------------|--------------------------|----------|-----------|-----|
| | Herman Miller | Allsteel | Steelcase | HON |
| Minnesota | x | x | x | |
| South Dakota | | x | | x |
| Arizona | X | | | |
| Nevada | | | x | |
| Connecticut | x | x | x | x |
| GSA | | x | | x |
| Montana | x | x | | |
| New Hampshire | x | x | | x |
| New Jersey | x | x | x | x |
| New Mexico | x | x | x | x |
| North Dakota | x | x | x | |
| Ohio | x | x | x | x |
| Vermont | x | | x | x |
| Pennsylvania | x | x | x | x |
| Michigan | n/a | n/a | n/a | n/a |
| Utah | x | x | x | |
| US Communities | x | | | |
| NJPA | | | x | |

Our Approach

- The analysis included office furniture contracts from 15 states, 3 cooperatives (including the U.S. General Services Administration [GSA])
- Contracts were obtained from the publicly available databases on each organization's website or via phone calls with contacts provided to us by the State of Utah
- A tracking methodology was developed to document key contract data in one summary matrix in order to draw initial conclusions, which was then utilized as a mechanism to identify the optimal criteria and methodology to benchmark each of the contracts
- Analysis was conducted to identify both similar and dissimilar benchmarks--between states/cooperatives and suppliers--as well as across the individual categories and subcategories
- Comparative results were provided only where there were relevant sample states and organizations to include for each subcategory, due to the inconsistencies of manufacturers across state contracts
- Findings were organized by category and manufacturer followed by relevant subcategories, where applicable
- Findings include a minimum and maximum discount relevant to the category and subcategory for the applicable sample states and cooperatives
- Volume-driven discounts were measured by a minimum and a maximum , not taking into account actual volume levels. This approach was used to allow for the full spectrum of volume discounts to be used in the sample.
- WSCA 's contract discounts are provided for each category/manufacturer combination to provide visibility into how WSCA's contract scored for each

Approach - Data Assumptions and Standardization

■ Shipping

- Only contracts with basic shipping are included in the analysis
- Basic shipping is defined as dock delivery; no additional spot delivery, installation, or design fees included

■ Volume discounts

- Varied discounts between contracts were combined through simple averaging to reduce to 3 tiers
- The maximum number of volume discount tiers requiring rationalization in a contract was 5
- “Negotiable Rates” for higher volumes were treated the same as the highest discount explicitly stated

■ Contract data extraction

- Contracts are office products-based according to discount level, not category or subcategory
- In order to create a category/sub-category comparison, it was necessary for KPMG to extrapolate the office products (where applicable) and categorize them by category/subcategory. This was accomplished through product research via the manufacturer’s websites
- The highest data view is by state because of the varying number of data points under each contract
- New Mexico and Ohio used the U.S. General Services Administration (GSA) contract terms as benchmarks and this data was duplicated in our sample data for all three contracts (GSA, NM, OH)

■ Category and Subcategory mapping

- The only description provided was the product/brand name
- It was assumed that each product line is associated with one Category and Subcategory, based on product research
- All product lines were benchmarked to WSCA categories but due to limitations in the WSCA contract, not all could be benchmarked at the subcategory level (i.e. they didn’t exist in the WSCA or state/cooperative contract)

■ Data Analysis

- Analysis is only provided against the WSCA contract when 3 or more states/cooperatives are represented
- Analysis is provided by state when the contracts are relevant and comparable to the category or subcategory
- Categories were analyzed and compared by manufacturer based on the assumption that list price variance between manufacturers exist
- Contract comparison was not done across manufacturers due to the assumption list pricing was not consistent

Benchmarking Analysis

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Benchmarking Analysis

Key Findings - Median State Contract Discount vs. WSCA

Green=WSCA is better / Red=State is better / Black=Same median as WSCA / Blank=No data point used in analysis

| | Allsteel | | | | Herman Miller | | | | HON | | | | Steelcase | | | |
|----------------|----------|------|------|-----|---------------|------|------|-----|-----|------|------|-----|-----------|------|------|-----|
| | Sys | Seat | Desk | FSC | Sys | Seat | Desk | FSC | Sys | Seat | Desk | FSC | Sys | Seat | Desk | FSC |
| Arizona | | | | | -9 | 4 | 1 | 4 | | | | | -4 | 4 | 10 | 1 |
| Connecticut | -13 | -8 | -11 | -6 | -12 | 0 | -2 | 0 | -18 | -2 | -5 | -9 | -13 | -4 | 0 | -3 |
| GSA | -5 | 2 | -2 | 4 | | | | | 3 | 6 | 3 | 3 | | | | |
| Michigan** | | | | | | | | | | | | | | | | |
| Minnesota | | -3 | | | 5 | -1 | | 7 | | | | | | -5 | | |
| Montana | -9 | 0 | -4 | -2 | -3 | 17 | 8 | 10 | | | | | | | | |
| Nevada | | | | | | | | | -28 | -14 | -17 | -20 | -8 | -6 | | -5 |
| New Hampshire* | | | | | | | | | | | | | | | | |
| New Jersey* | | | | | | | | | | | | | | | | |
| New Mexico | -5 | 2 | -2 | 4 | | | | | 3 | 6 | 3 | 3 | | | | |
| NJPA | | | | | | | | | | | | | -3 | -3 | 1 | 0 |
| North Dakota | -4 | | | | 2 | | | | | | | | 6 | | | |
| Ohio | -5 | 2 | -2 | 4 | | | | | 3 | 6 | 3 | 2 | -3 | -4 | 1 | -10 |
| Pennsylvania | -6 | -7 | -9 | -8 | -20 | -5 | -6 | | -14 | -6 | -9 | -12 | -10 | -5 | -3 | -5 |
| South Dakota | -16 | -7 | -11 | | | | | | 1 | 4 | 1 | -2 | | | | |
| US Communities | | | | | -9 | -1 | 5 | -1 | | | | | | | | |
| Utah | | -3 | -2 | -2 | 5 | 1 | -2 | 3 | | | | | -13 | 2 | 5 | 7 |
| Vermont | -5 | | | -1 | -1 | | | | | | | -2 | | | | |

Example: CT has 13% less of a discount with Allsteel for systems but is on par for Herman Miller seating.

***Shipping Terms were calculated differently **No contracts with these four manufacturers**

Benchmarking Analysis

Key Findings - Minimum State Contract Discount vs. WSCA

Green=WSCA is better / Red=State is better / Black=Same minimum as WSCA / Blank=No data point used in analysis

| | Allsteel | | | | Herman Miller | | | | HON | | | | Steelcase | | | |
|----------------|----------|------|------|-----|---------------|------|------|-----|-----|------|------|-----|-----------|------|------|-----|
| | Sys | Seat | Desk | FSC | Sys | Seat | Desk | FSC | Sys | Seat | Desk | FSC | Sys | Seat | Desk | FSC |
| Arizona | | | | | -28 | 0 | -5 | -4 | | | | | -12 | 0 | 12 | -1 |
| Connecticut | -22 | -12 | -10 | -5 | -22 | -1 | -1 | 0 | -19 | -5 | -6 | -6 | -15 | -3 | -3 | -4 |
| GSA | -13 | 0 | 1 | 6 | | | | | 2 | 3 | 3 | 5 | | | | |
| Michigan** | | | | | | | | | | | | | | | | |
| Minnesota | | -5 | | | 7 | -1 | | 14 | | | | | | -1 | | |
| Montana | -13 | -4 | -5 | -1 | -1 | 21 | 16 | 17 | | | | | | | | |
| Nevada | | | | | | | | | -27 | -14 | -14 | -14 | -10 | -5 | | -6 |
| New Hampshire* | | | | | | | | | | | | | | | | |
| New Jersey* | | | | | | | | | | | | | | | | |
| New Mexico | -13 | 0 | 1 | 6 | | | | | 2 | 3 | 3 | 5 | | | | |
| NJPA | | | | | | | | | | | | | -17 | 0 | 1 | 0 |
| North Dakota | -3 | | | | -3 | | | | | | | | 5 | | | |
| Ohio | -13 | 0 | 1 | 6 | | | | | 2 | 3 | 3 | 3 | -17 | -3 | 1 | -4 |
| Pennsylvania | -8 | -14 | -16 | -4 | -18 | -6 | -5 | | -19 | -6 | -6 | -6 | -15 | 1 | 1 | 1 |
| South Dakota | -16 | -7 | -9 | | | | | | 2 | 2 | 2 | 2 | | | | |
| US Communities | | | | | -18 | -6 | 9 | -4 | | | | | | | | |
| Utah | | -5 | -1 | 3 | 7 | -3 | -6 | 4 | | | | | -12 | 0 | 6 | 13 |
| Vermont | -4 | | | 5 | 1 | | | | | | | 3 | | | | |

Example: CT has 22% less of a discount with Allsteel for systems but is on par for Herman Miller Filing, Storage, Case Goods (FSC).

*Shipping Terms were calculated differently **No contracts with these four manufacturers

Benchmarking Analysis

Summary Key Findings

- Out of the entire sample of 18 states and cooperatives (including GSA), only Michigan did not have a single contract with any of the four WSCA manufacturers. The remaining 17 states and cooperatives were kept in the sample.
- WSCA is a strong, competitive contract, that clearly wins against the other states and cooperatives in many categories for both the minimum and maximum discounts.
- Of the minimum discounts, WSCA's contracts are the most competitive in the most states/cooperatives. HON has the fewest state contracts with more competitive minimum discounts.
- WSCA's minimum discounts are more competitive (primarily in the systems category) across the four manufacturers by as much as:
 - Allsteel - 22% Connecticut systems
 - Herman Miller - 28% Arizona systems
 - HON – 27% Nevada systems
 - Steelcase – 17% Ohio systems
- Given a state's likeliness to purchase furniture in smaller increments, the measure of minimum discounts shows the best value to a state. The minimum discounts offered in the WSCA contract represent the best overall value for participating states against their peers in this sample
- With administrative costs in mind in the median discount findings, currently WSCA offers:
 - the best Allsteel contracts, except in two categories in four states
 - a fairly competitive contract in some categories with Herman Miller
 - a better contract than half of the sample contracts with HON and Steelcase

Benchmarking Analysis

Summary Key Findings, Continued

- If a state would like to buy:
 - Allsteel using the average **minimum** discount, they should go to the WSCA contract for Systems, Desks and Tables, and Seating
 - Herman Miller, they should go to the WSCA contract for Systems, but evaluate their options against the WSCA contract, if using the **median** discount, in the other three categories
 - HON, they should evaluate their options against the WSCA contract in all four categories
 - Steelcase, they should go to the WSCA contract for all three categories except for Desks and Tables
- For projects that include purchases in multiple categories, the optimal solution might be to use multiple contracts, but states will also need to account for the additional administrative costs of such a strategy
- GSA, NM and OH were found to be identical because those states utilized GSA as their benchmark and obtained contract pricing that was consistent with the GSA pricing
- The shipping terms for New Hampshire and New Jersey were structured differently, not allowing a direct comparison (use of spotted and platform delivery changed the discount levels)
- Each contract in the analysis included shipping in the pricing and was not an exclusive contract, allowing each state or cooperative to participate in new contracts or existing contracts with other states and cooperatives without penalty
- The WSCA contract beat the contracts with all four manufacturers in Connecticut and Pennsylvania, significantly more than other states and cooperatives

Benchmarking Analysis

Summary Key Findings, Continued

- WSCA could strengthen overall discounts with some manufacturers in certain categories (in both the minimum and maximum discounts). States with the most categories that are more competitive **overall** than WSCA include:
 - Utah (Herman Miller systems; Steelcase desks and FSC)
 - Arizona (Herman Miller seating, desks, systems; Steelcase desks)
 - New Mexico (Herman Miller FSC; HON all categories)
 - Ohio (Allsteel FSC; HON all categories; Steelcase desks)
 - Montana has three significantly more favorable contract discounts overall than WSCA, all with Herman Miller
- With respect to the language in Section 1 of the WSCA RFP:
 - The WSCA contract explicitly reserves the right for participating states to negotiate additional global discounts in any category with manufacturers at the time that they put participating addenda in place
 - It is our perspective that, although states may wish to exercise this right, we do not believe that the presence of this clause likely suppressed the discount rates that the WSCA contract achieved
 - Overall, the WSCA rates are competitive, as described herein
 - Nearly every state contract that was examined includes similar language permitting contract users to negotiate further discounts, which is a common practice with multiple award contracts
 - Given that none of these contracts includes specific volume commitments, our view is that these clauses (including WSCA's) are taken by the manufacturers simply as part of the competitive landscape. This is not likely to have a significant impact on the discounts offered

Category Analysis

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Systems Category

For All Manufacturers

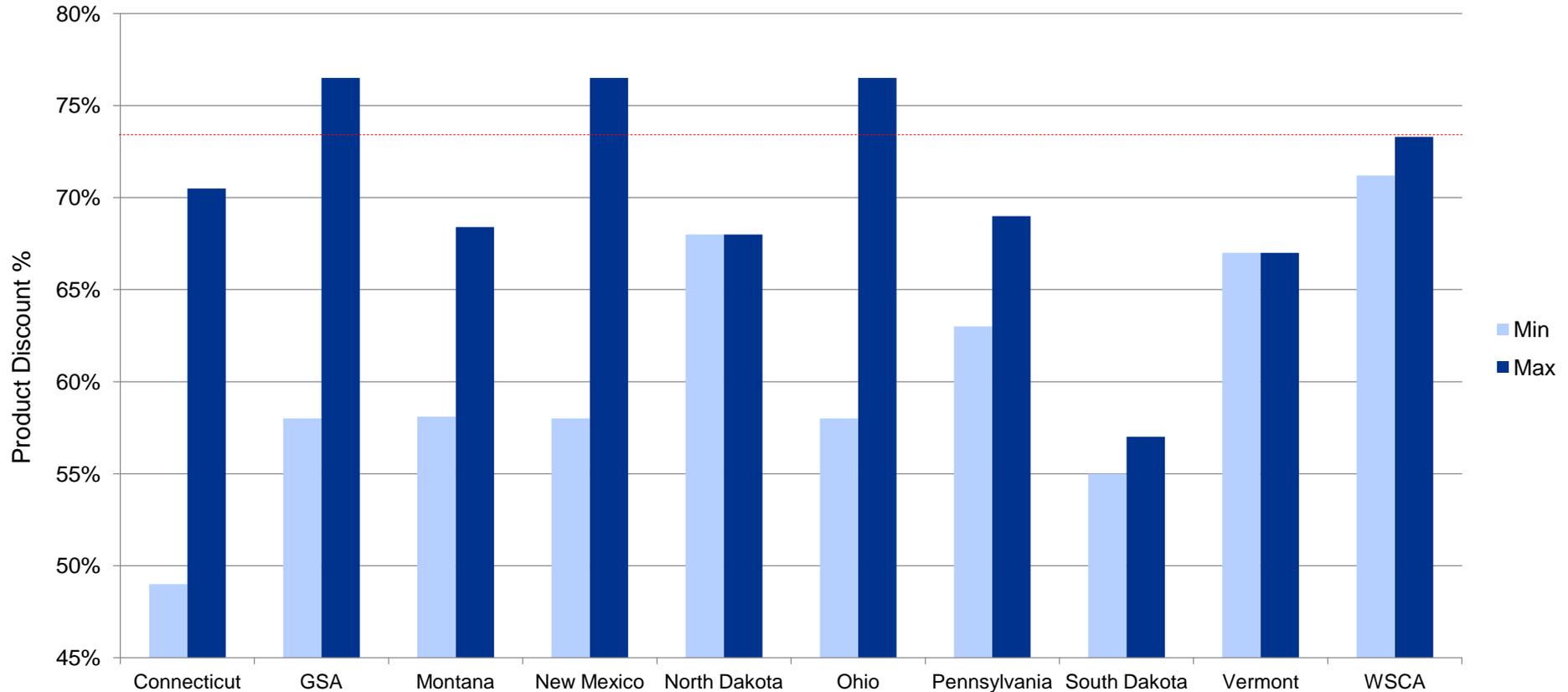
Systems Category Summary Findings

- WSCA generally has a higher minimum discount across the Systems category
- WSCA's discount range is almost always smaller than the other states, with the exception of flat-discount contracts
- WSCA's Allsteel maximum discount is more competitive than all contracts in the analysis with the exception of GSA, New Mexico and Ohio
- With the exception of Herman Miller, Ohio's maximum discount was more competitive than WSCA's for all manufacturers
- WSCA is competitive with all manufactures maximum discounts with the exception of Steelcase
- Steelcase is the manufacturer with the most significant variance across maximum discounts for Systems

Product Category: Systems

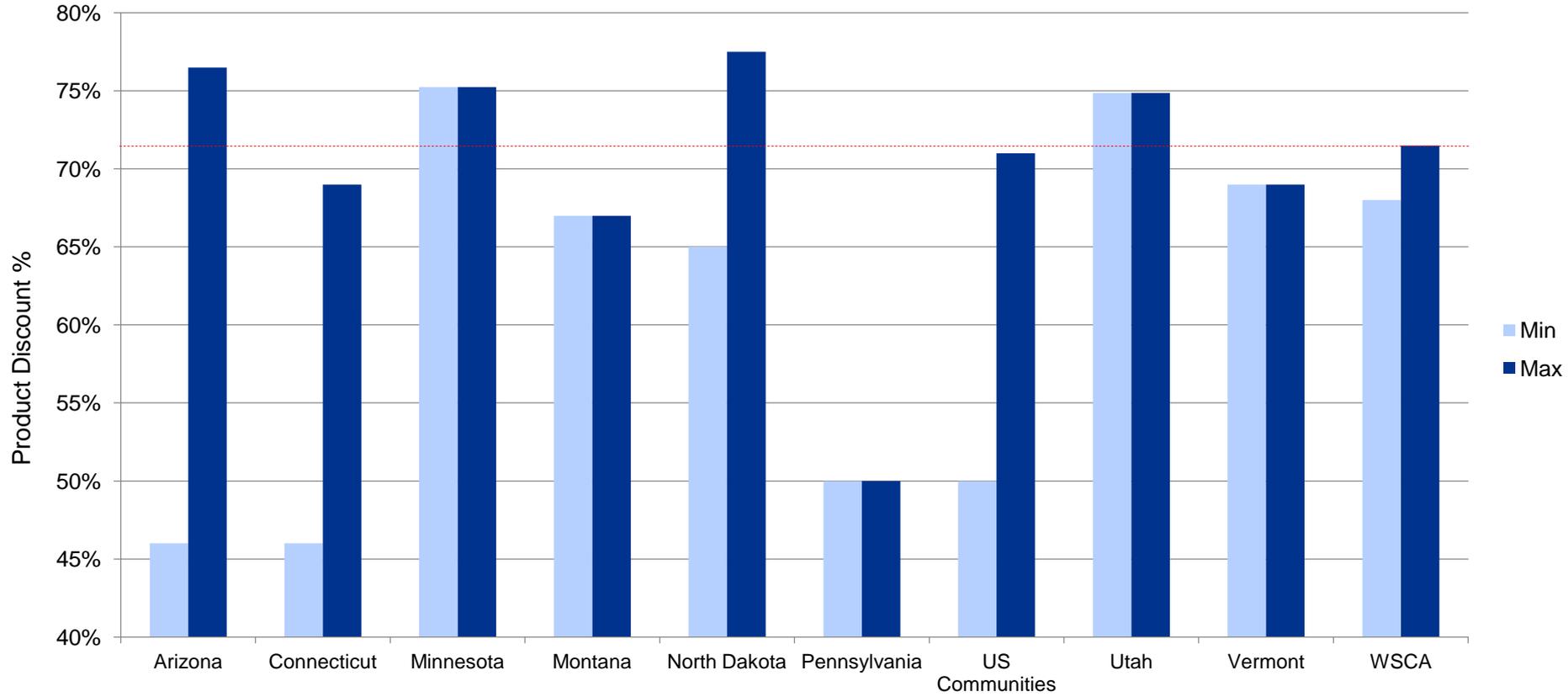
Allsteel Systems

- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Systems Herman Miller Systems

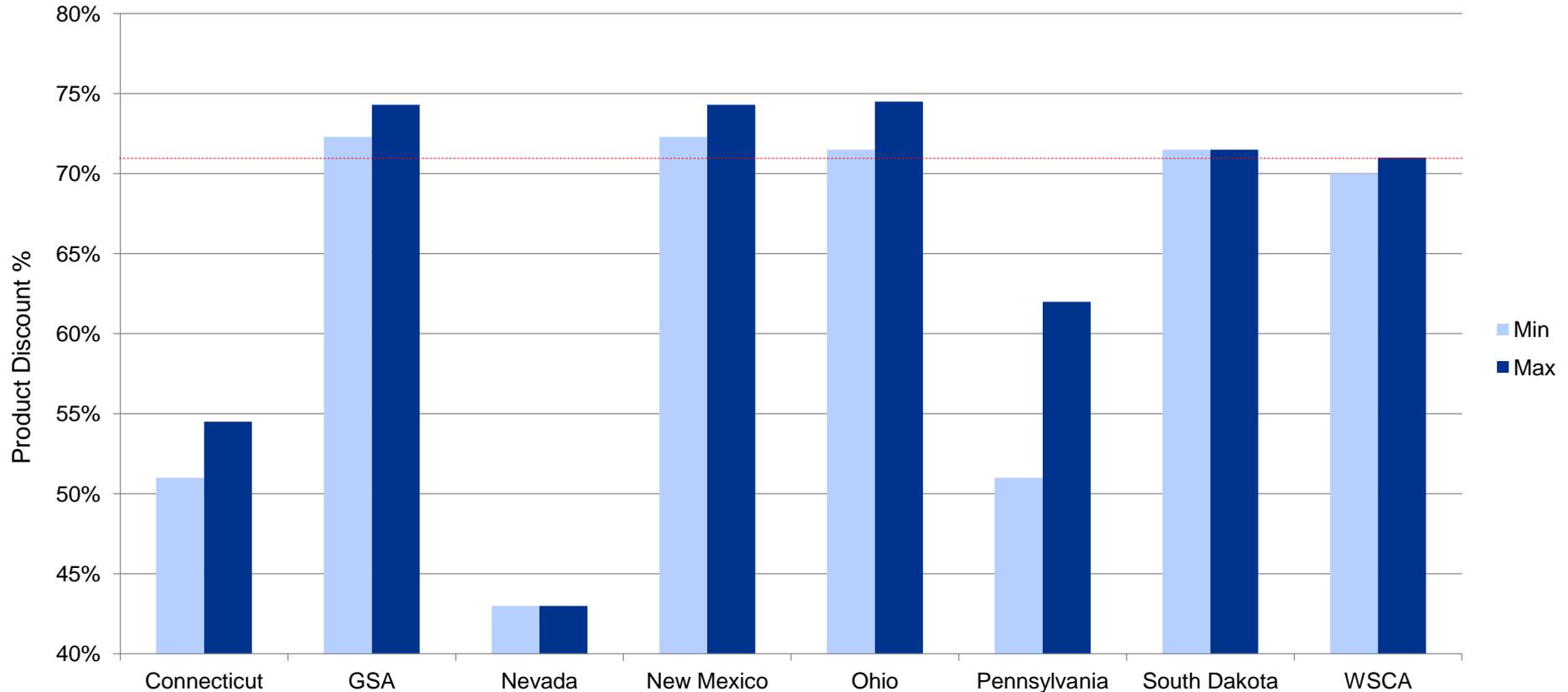
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Systems

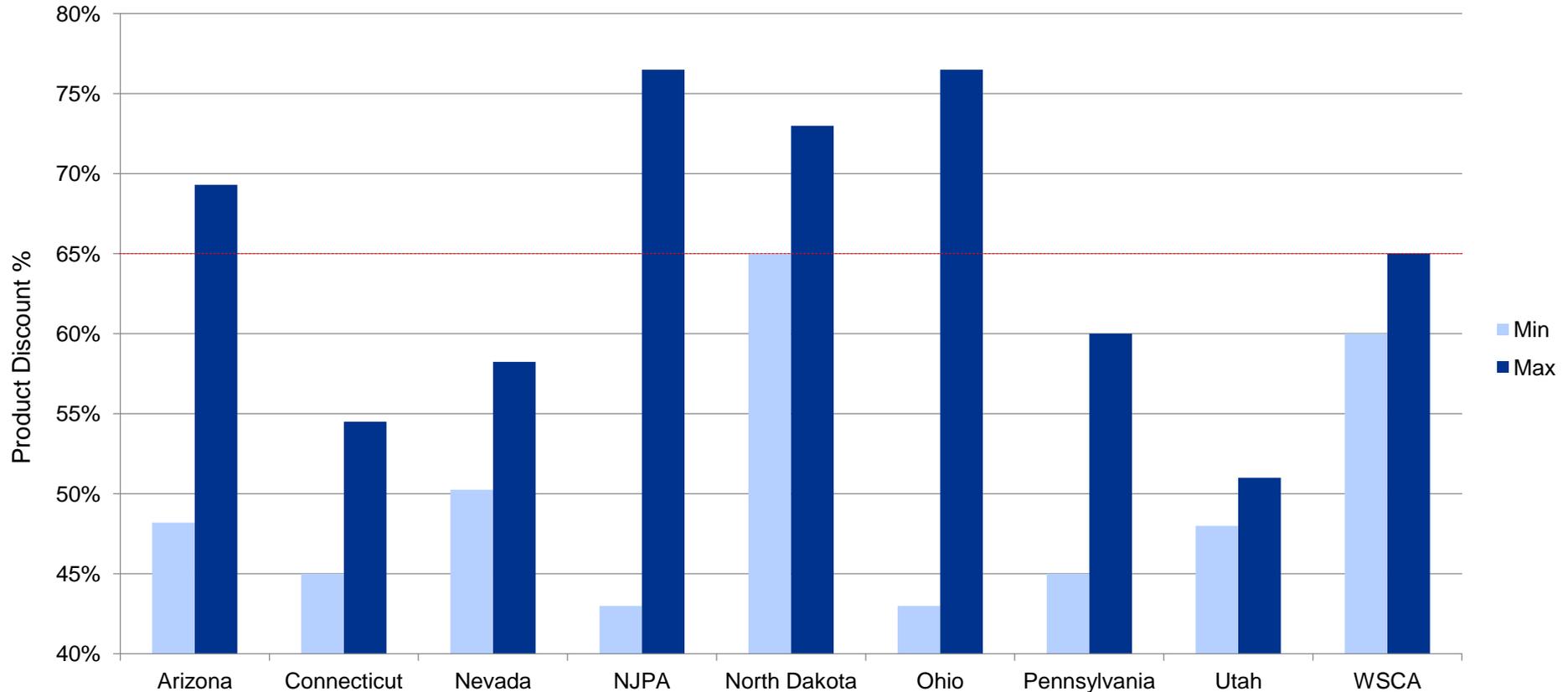
HON Systems

- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Systems Steelcase Systems

- Allsteel
- Herman Miller
- HON
- Steelcase



Seating Category Summary

For All Manufacturers

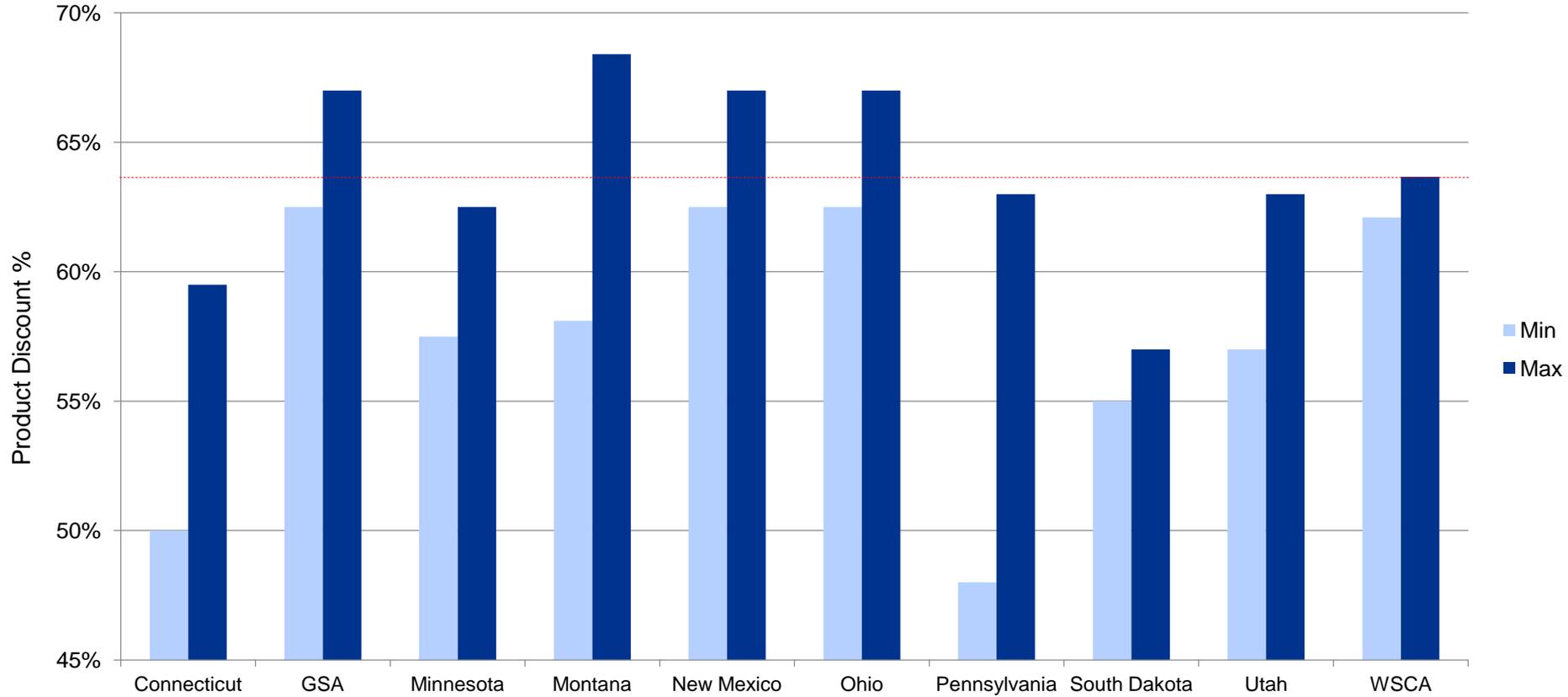
Seating Category Summary Findings

- WSCA almost always has a smaller range of discounts (except flat contracts)
- WSCA has a higher minimum discount on average for the seating category
- Allsteel has a relatively higher discount across all contracts in all states
- WSCA is least competitive with HON and Steelcase contracts compared to the other states
- The most competitive maximum discounts are found with Herman Miller in Montana and Steelcase in Arizona
- Allsteel offered the most seating category discounts across the categories of the sample states/cooperatives

Product Category: Seating

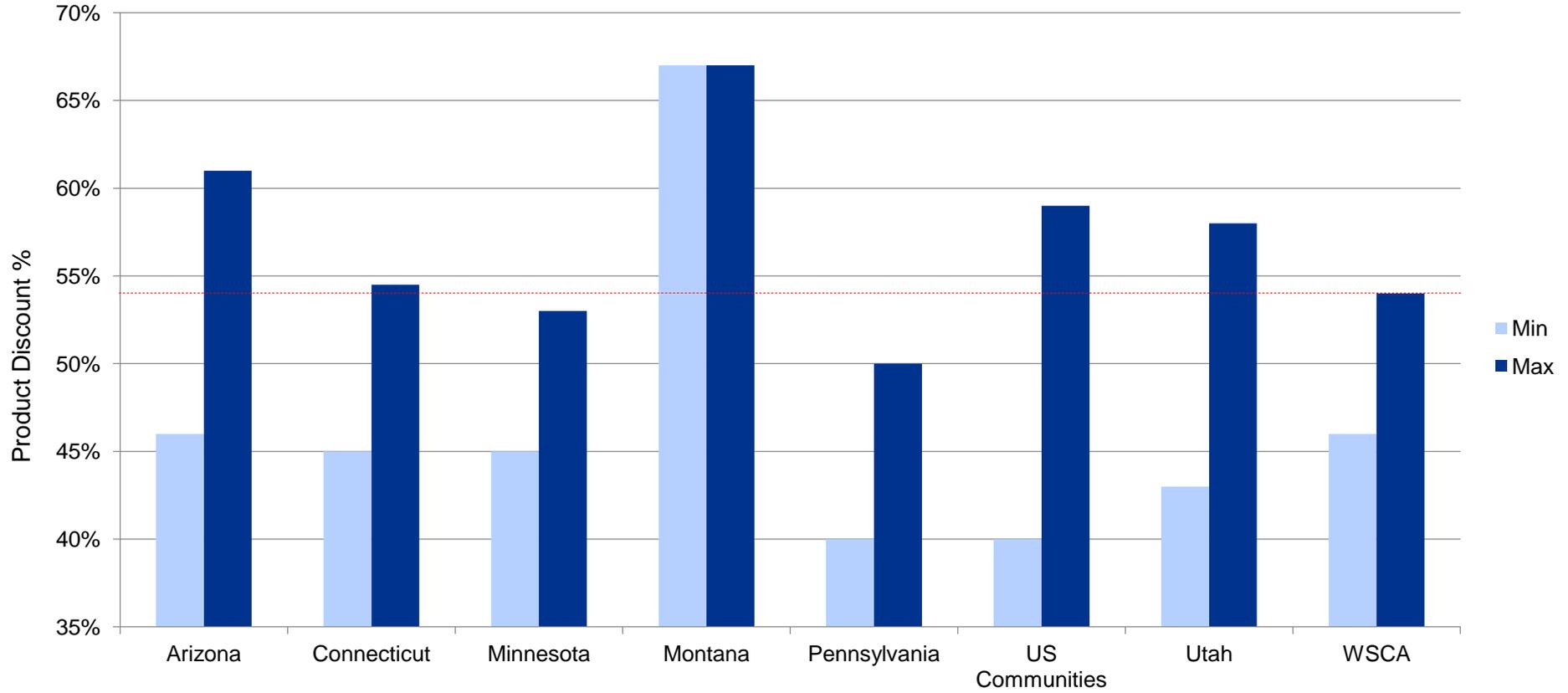
Allsteel Seating

- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Seating Herman Miller Seating

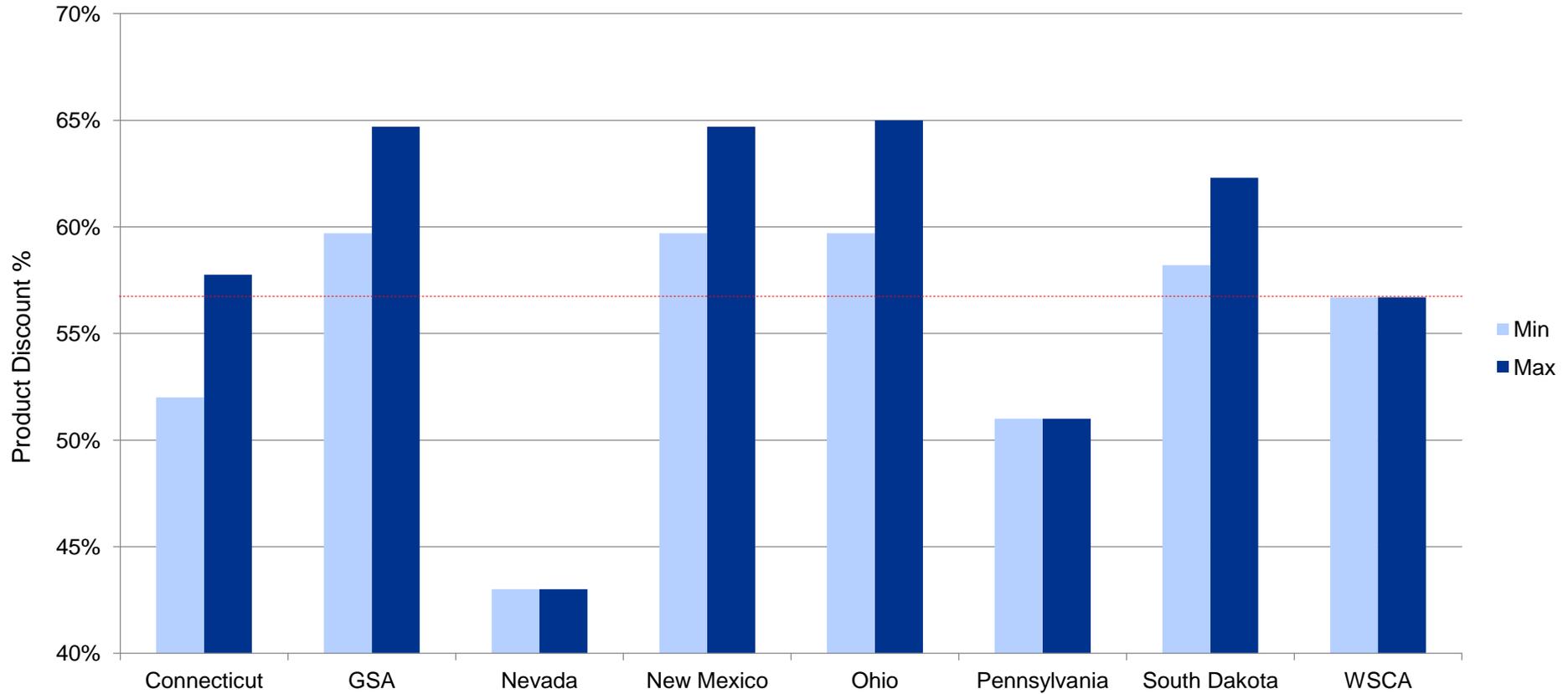
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Seating

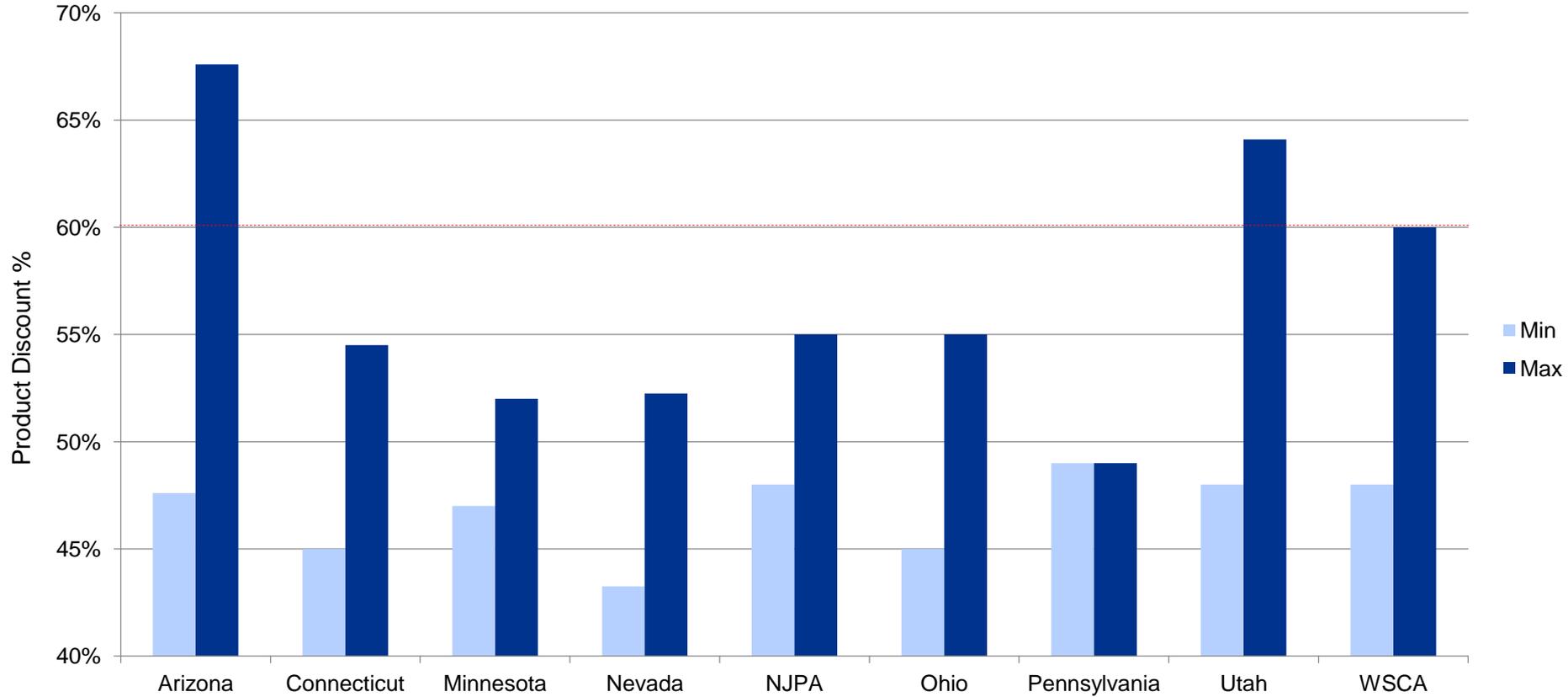
HON Seating

- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Seating Steelcase Seating

- Allsteel
- Herman Miller
- HON
- Steelcase



Desks and Tables Category Summary

For All Manufacturers

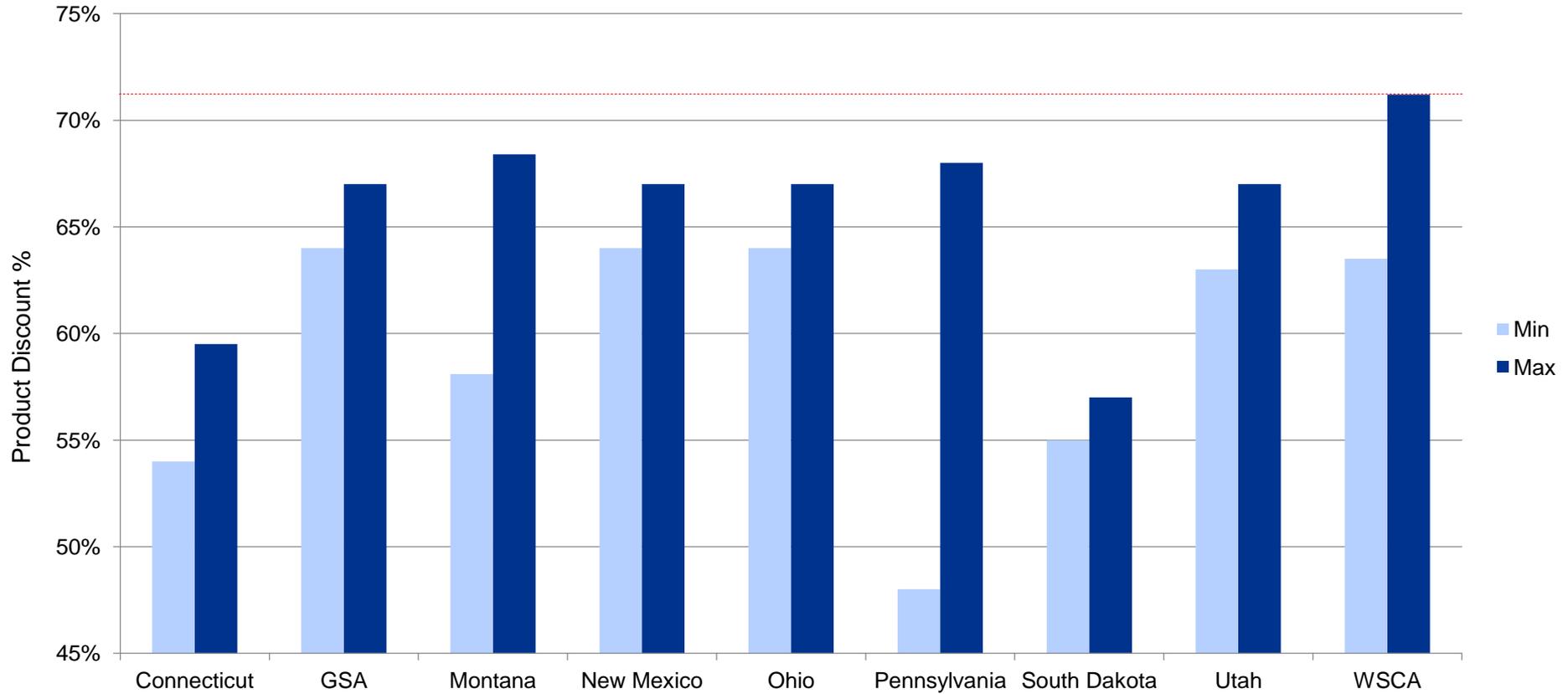
Desks and Tables Category Summary Findings

- WSCA has the best Allsteel contract
- With the exception of Arizona, WSCA has a competitive contract with Steelcase, but has no significant advantage compared to the discounts of the other states/cooperatives
- WSCA has contracts with Herman Miller and HON that are more and less competitive (in the middle) than the discounts of the other state/cooperative contracts
- WSCA has no clear advantage in the Steelcase contract
- WSCA has a significantly more competitive contract with HON than Pennsylvania or Nevada
- WSCA has a lower minimum and maximum discount with Herman Miller than US Communities

Product Category: Desks and Tables

Allsteel Desks and Tables

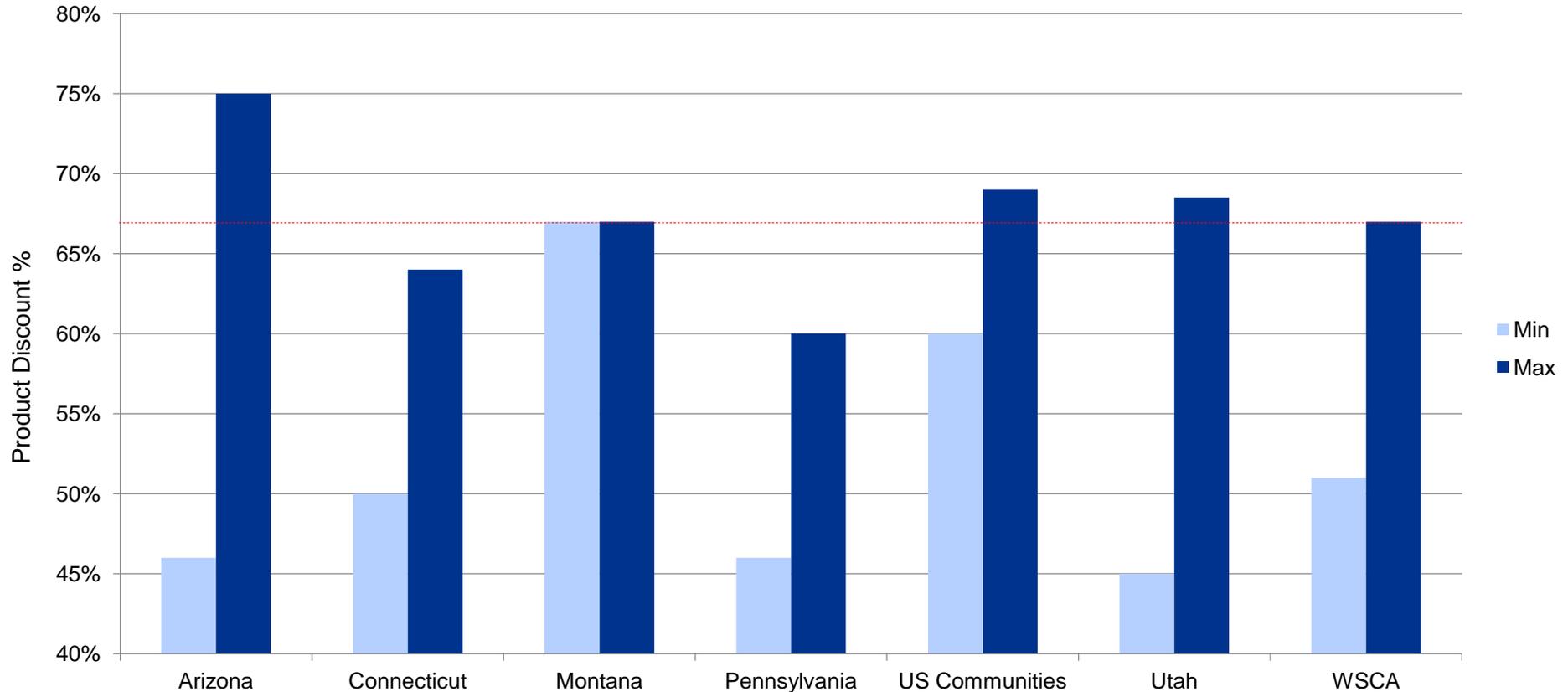
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Desks and Tables

Herman Miller Desks and Tables

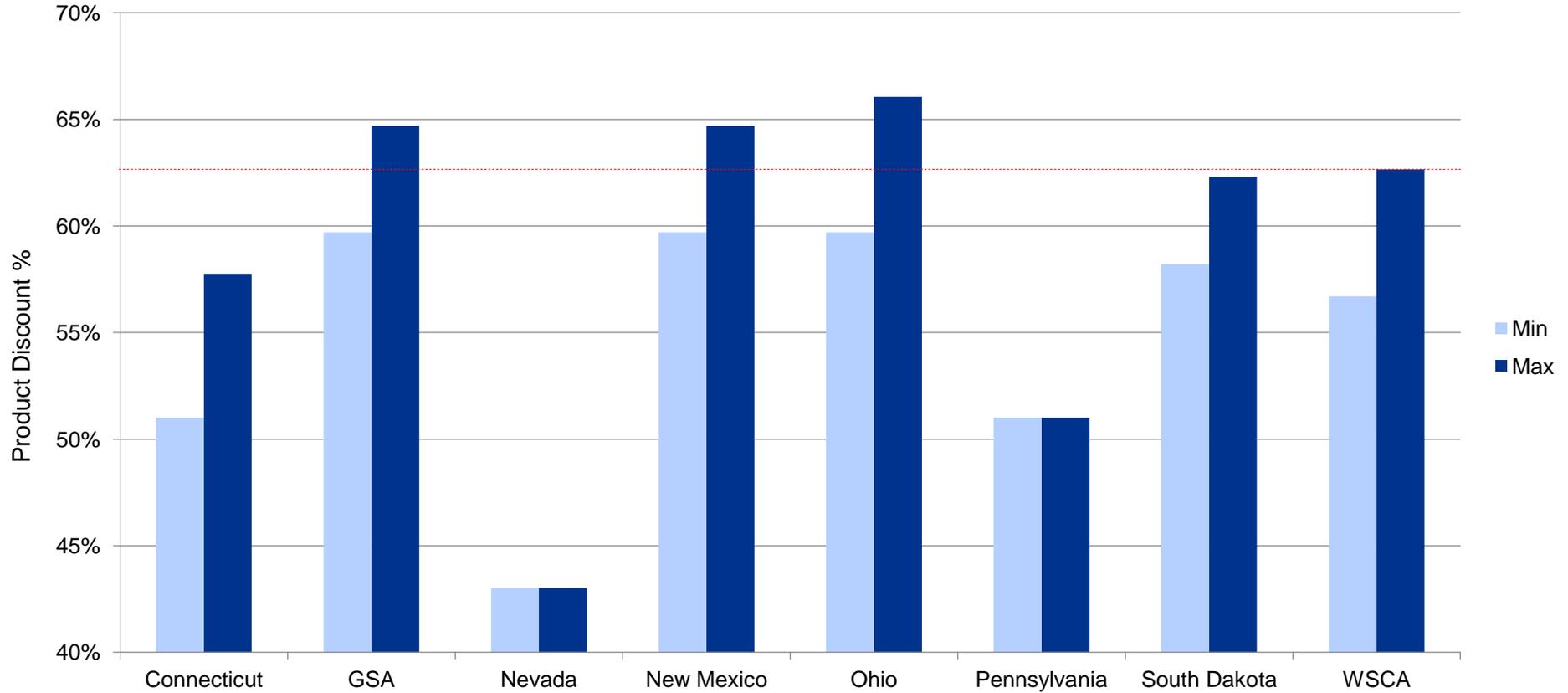
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Desks and Tables

Hon Desks and Tables

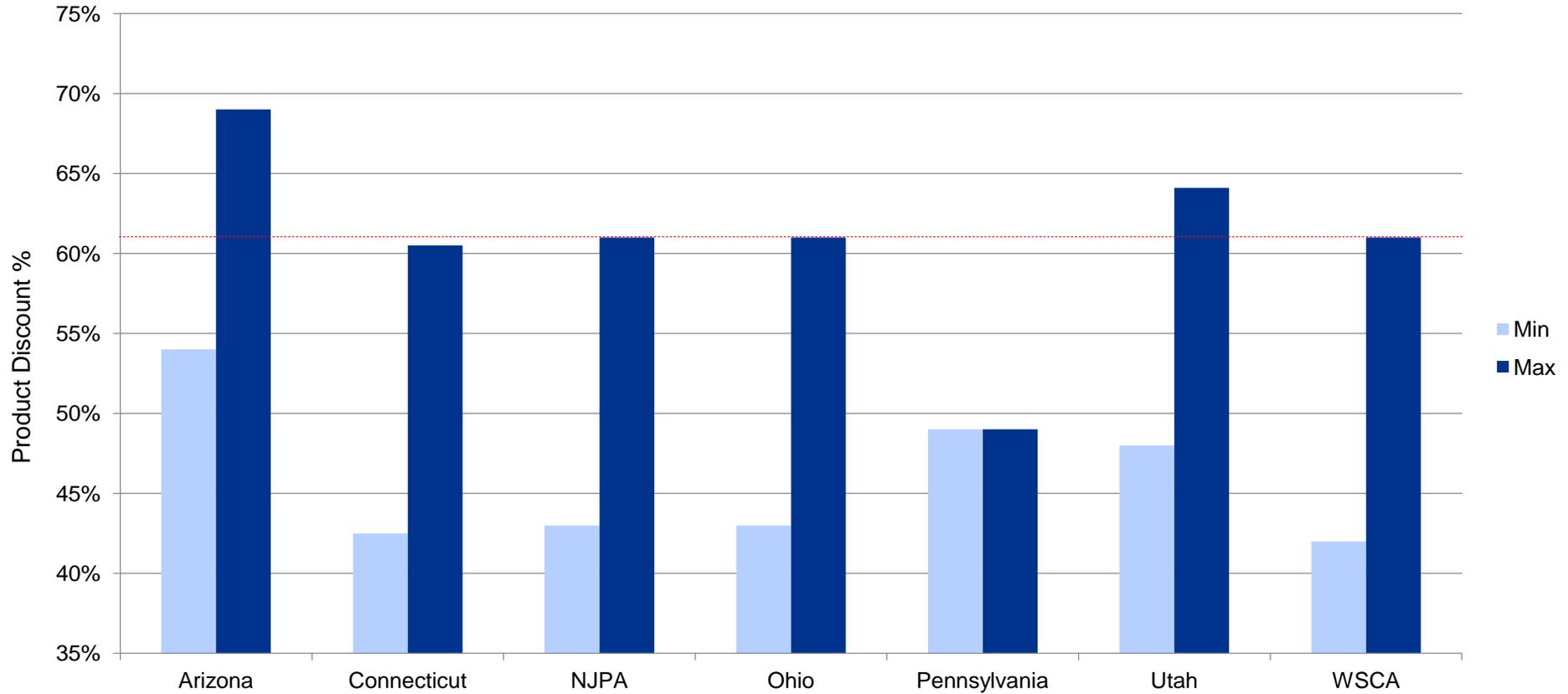
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Desks and Tables

Steelcase Desks and Tables

- Allsteel
- Herman Miller
- HON
- Steelcase



Filing, Storage, Case Goods Category Summary

For All Manufacturers

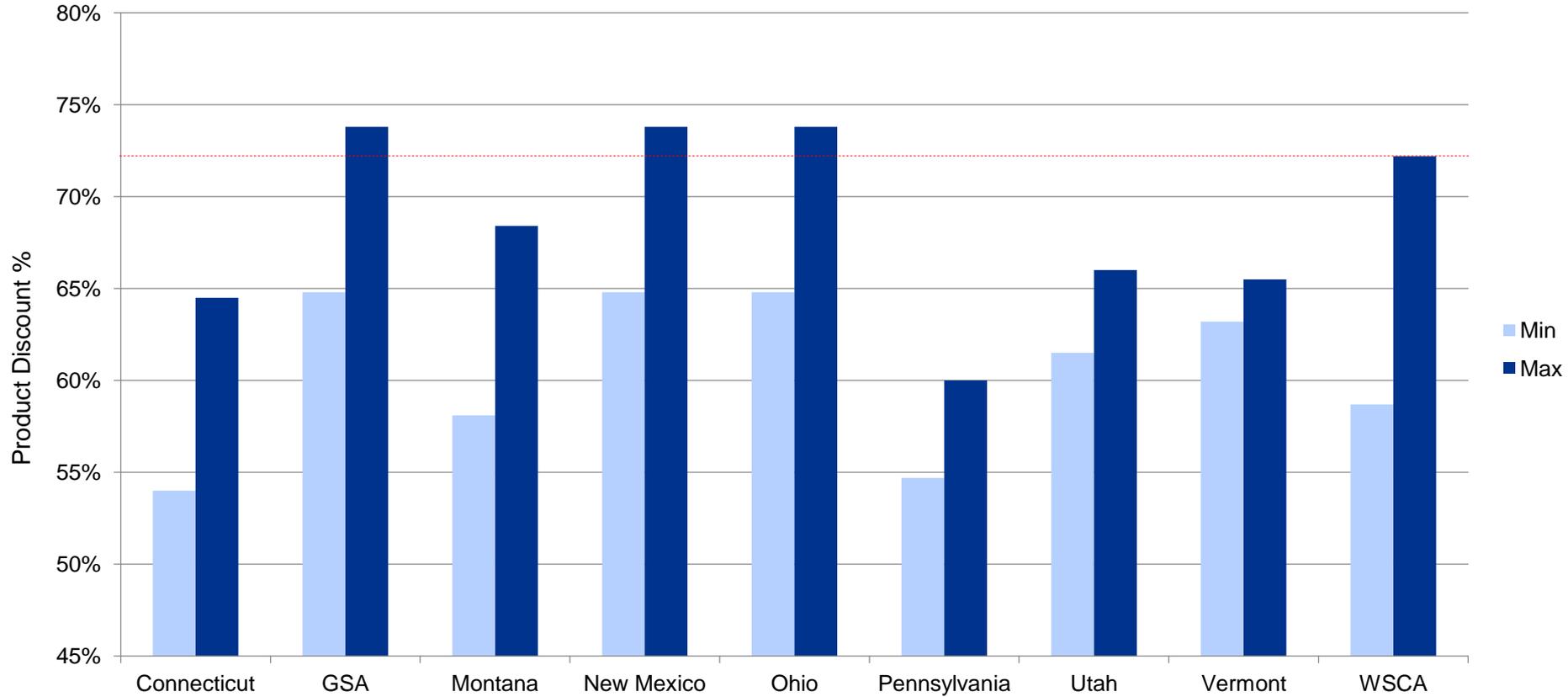
Filing, Storage, Case Goods Category Summary Findings

- WSCA almost always has a smaller range of discounts (except flat contracts)
- WSCA has a fairly competitive minimum discount, on average
- WSCA's contract with Herman Miller has a more competitive minimum discount, but a less competitive maximum discount than US Communities contract
- WSCA has the same discount as NJPA with Steelcase
- Steelcase does not offer a minimum discount above 62%
- Connecticut was the only state to have contracts with all four manufacturers in this category
- WSCA's discounts were more competitive than Connecticut's discounts with three of the four manufacturers, while having the same discount with only one

Product Category: Filing, Storage, Case Goods

Allsteel Filing, Storage, Case Goods

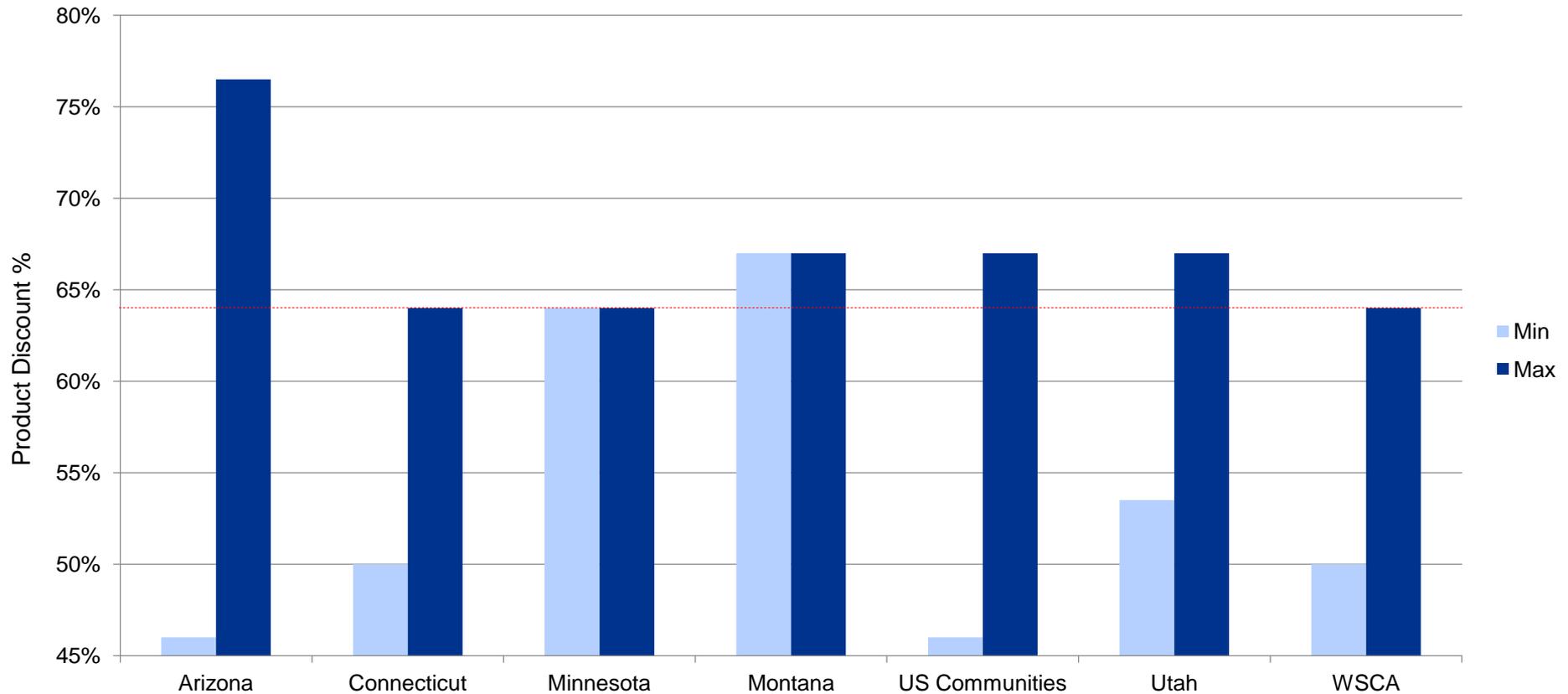
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Filing, Storage, Case Goods

Herman Miller Filing, Storage, Case Goods

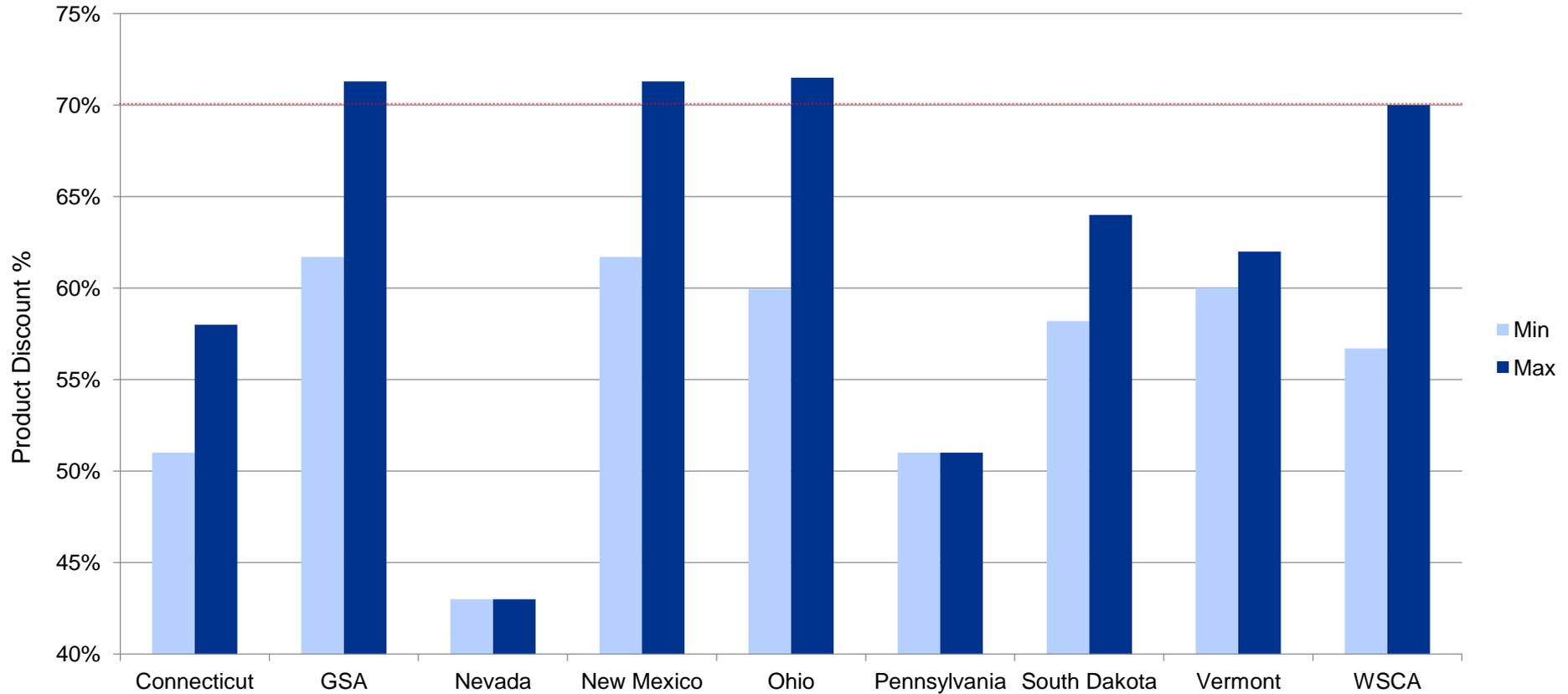
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Filing, Storage, Case Goods

HON Filing, Storage, Case Goods

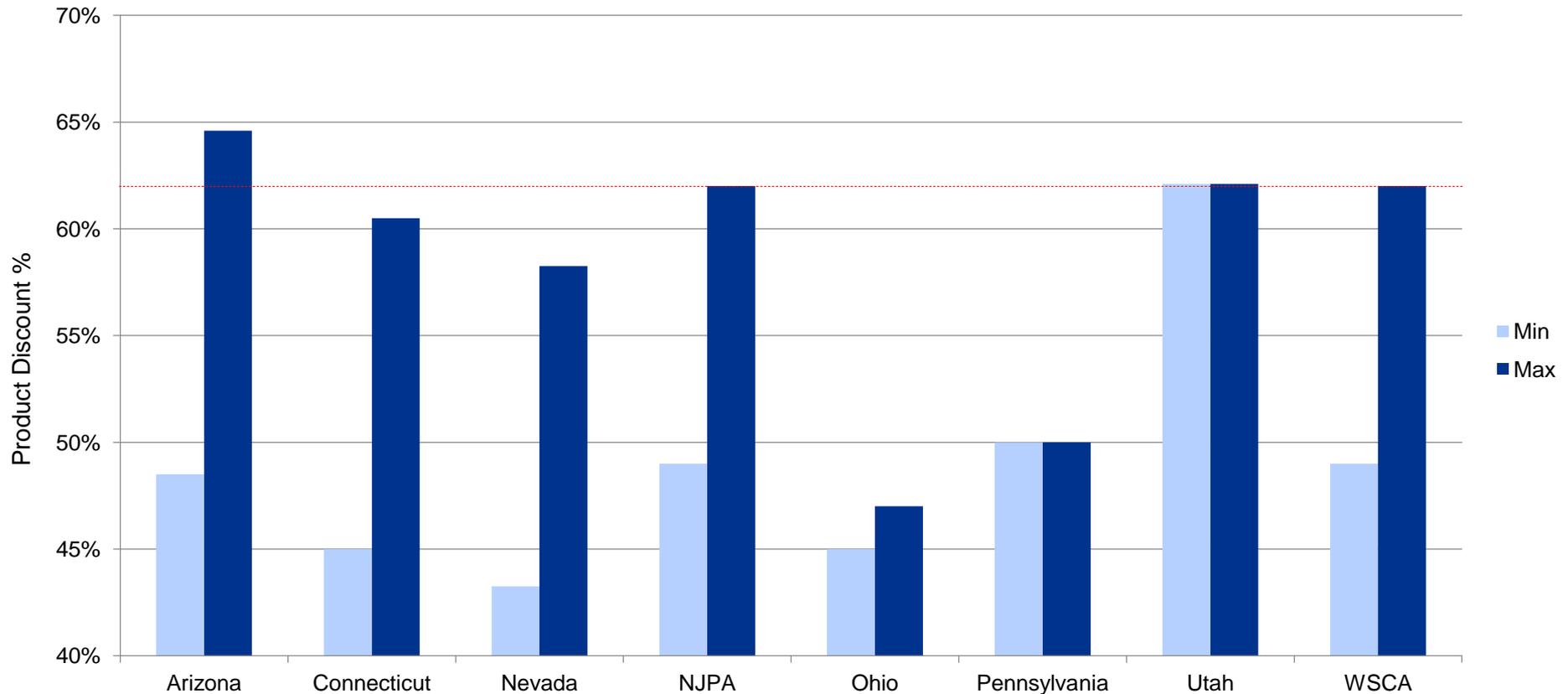
- Allsteel
- Herman Miller
- HON
- Steelcase



Product Category: Filing, Storage, Case Goods

Steelcase Filing, Storage, Case Goods

- Allsteel
- Herman Miller
- HON
- Steelcase



Sub-Category and Product Line Analysis

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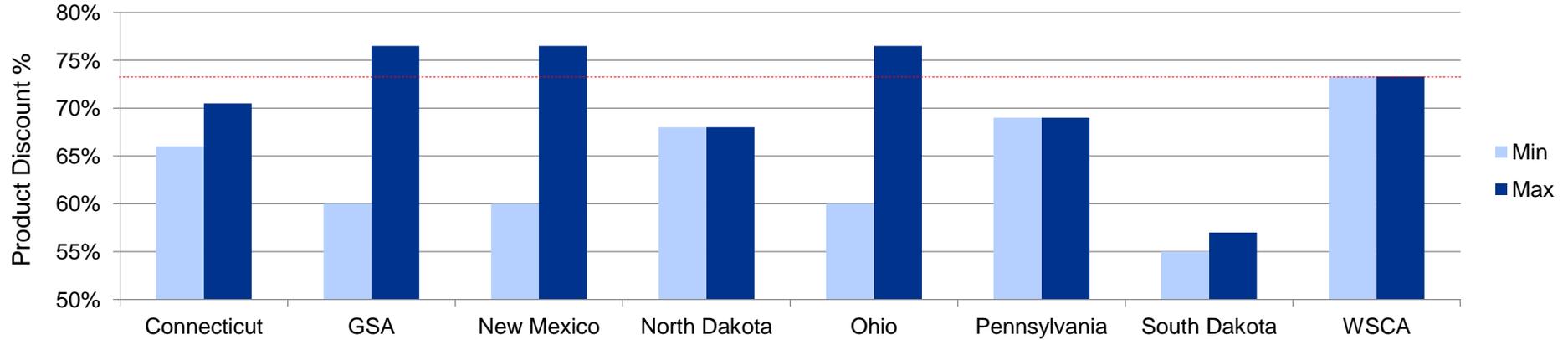
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Systems Category

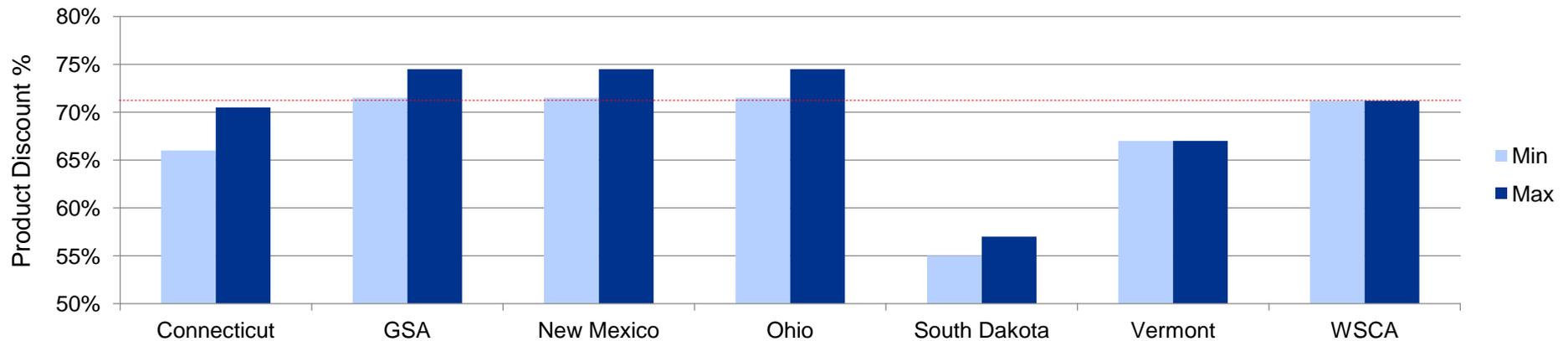
Subcategory Summary

For Manufacturer: Allsteel

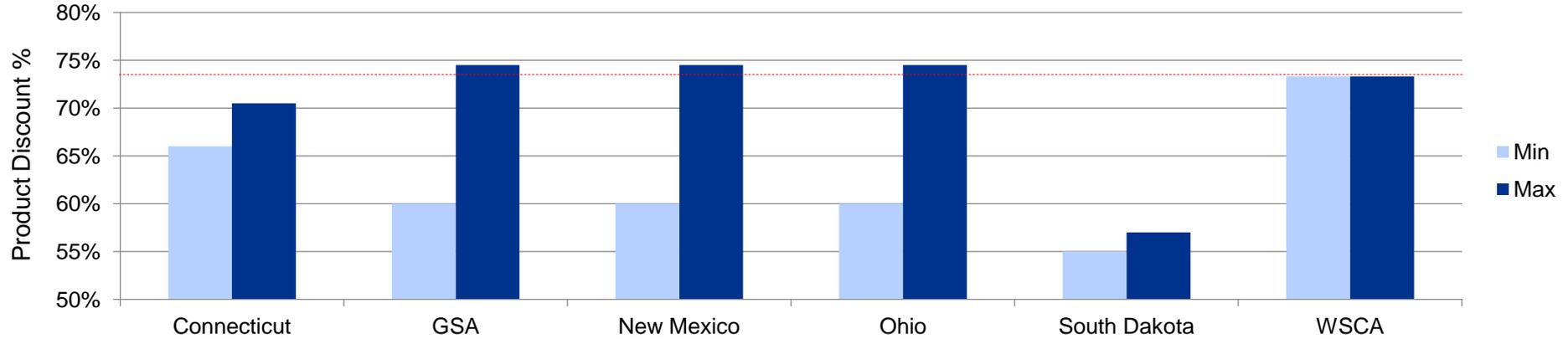
Subcategory: Frame & Tile



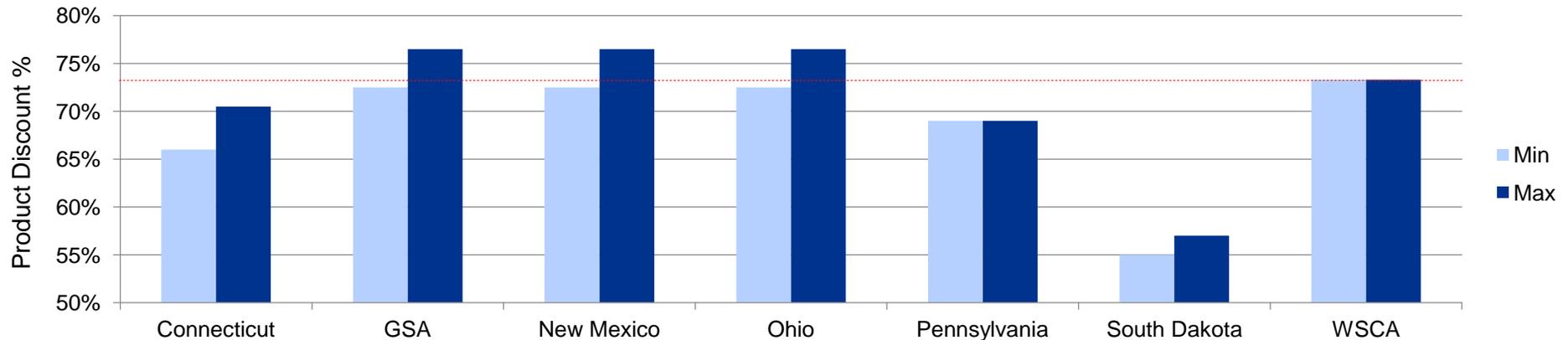
Subcategory: Monolithic



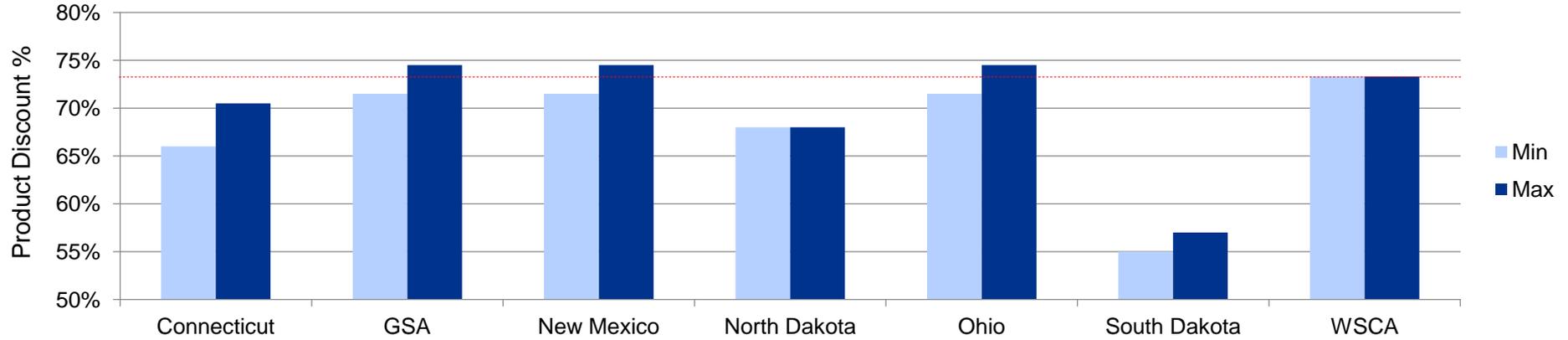
Subcategory: Frame & Tile – Product Line: Align



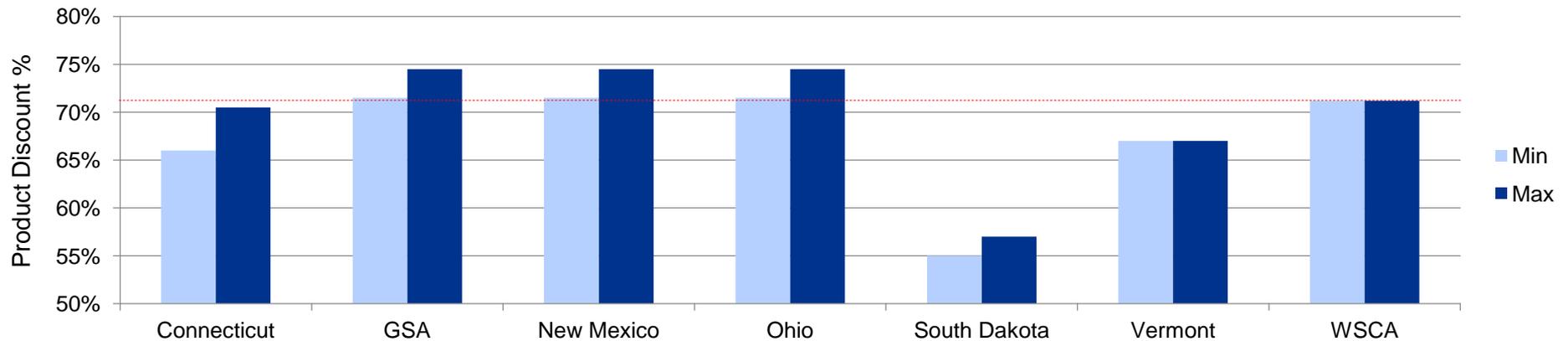
Subcategory: Frame & Tile – Product Line: Stride



Subcategory: Frame & Tile – Product Line: Terrace



Subcategory: Monolithic – Product Line: Concensys

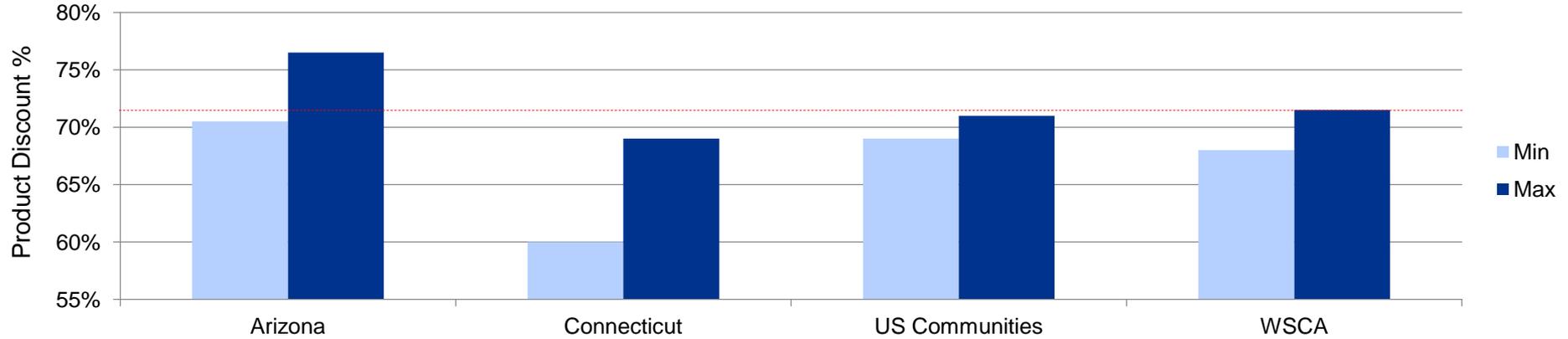


Systems Category

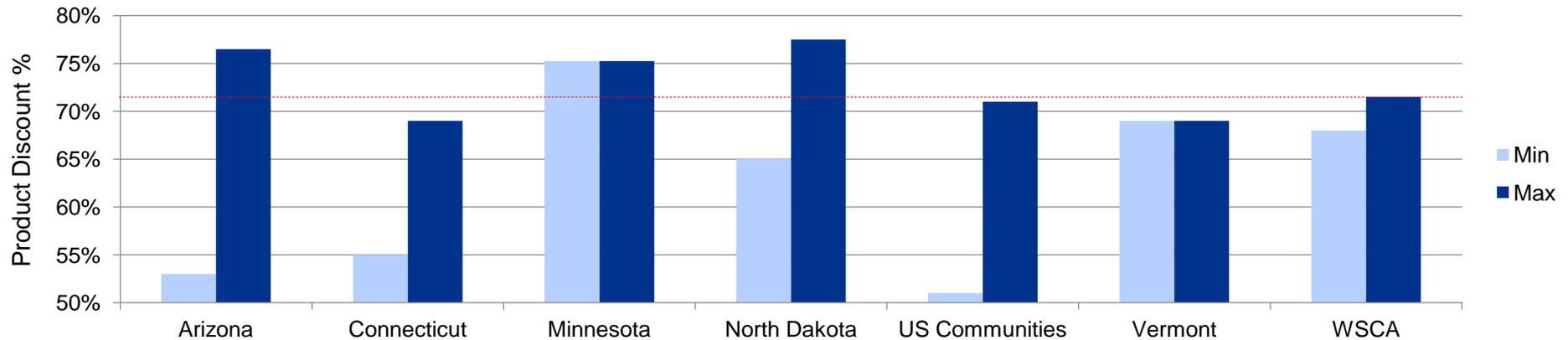
Subcategory Summary

For Manufacturer: Herman Miller

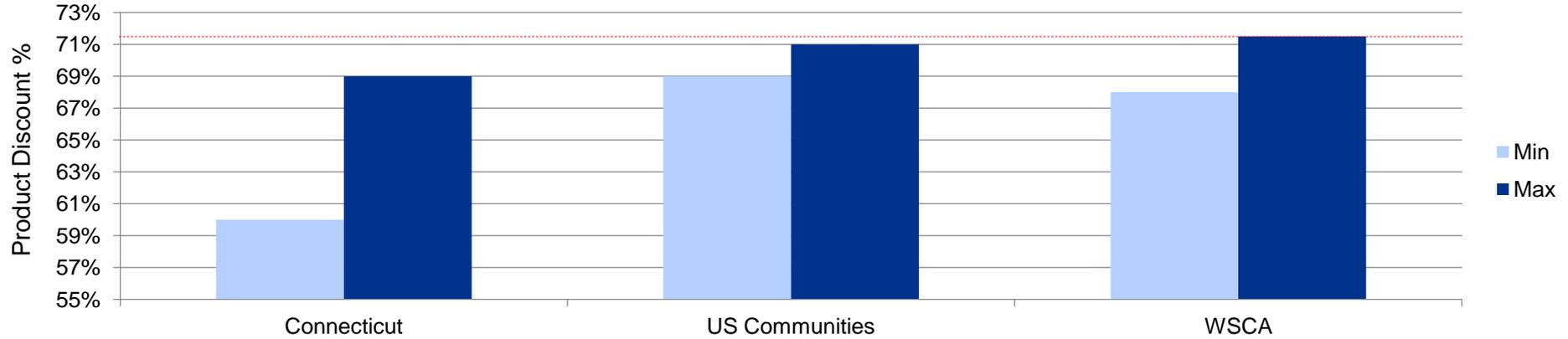
Subcategory: Frame & Tile



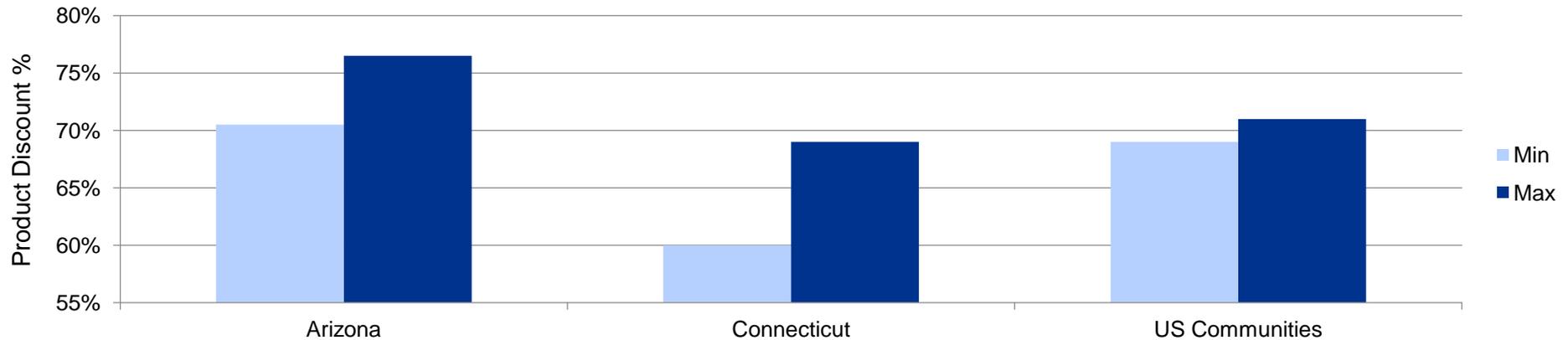
Subcategory: Monolithic



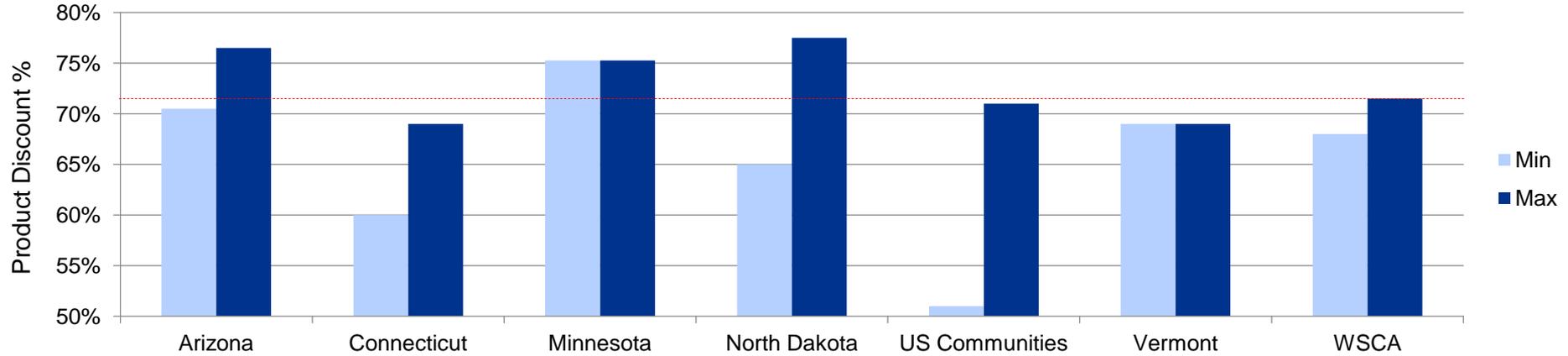
Subcategory: Frame & Tile – Product Line: Canvas



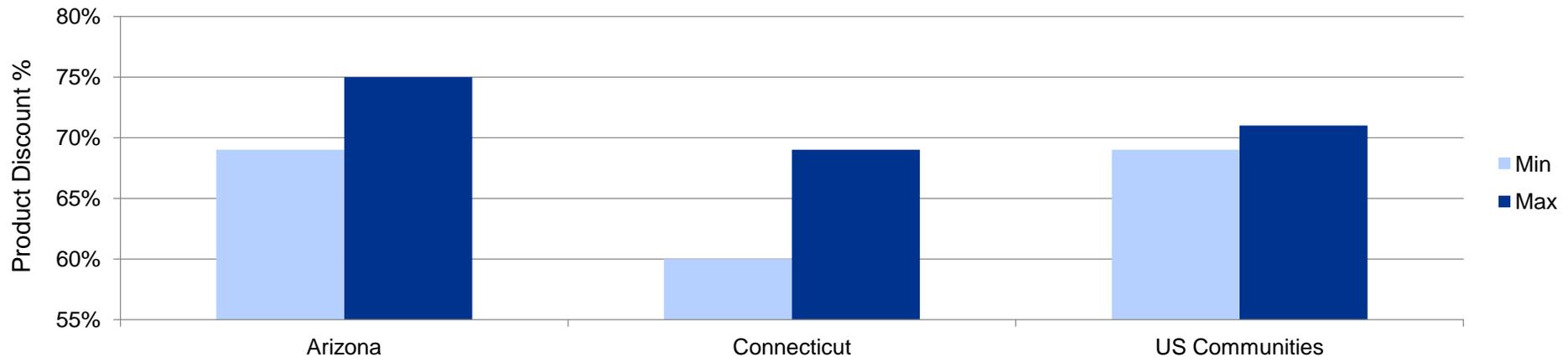
Subcategory: Frame & Tile – Product Line: Prospects



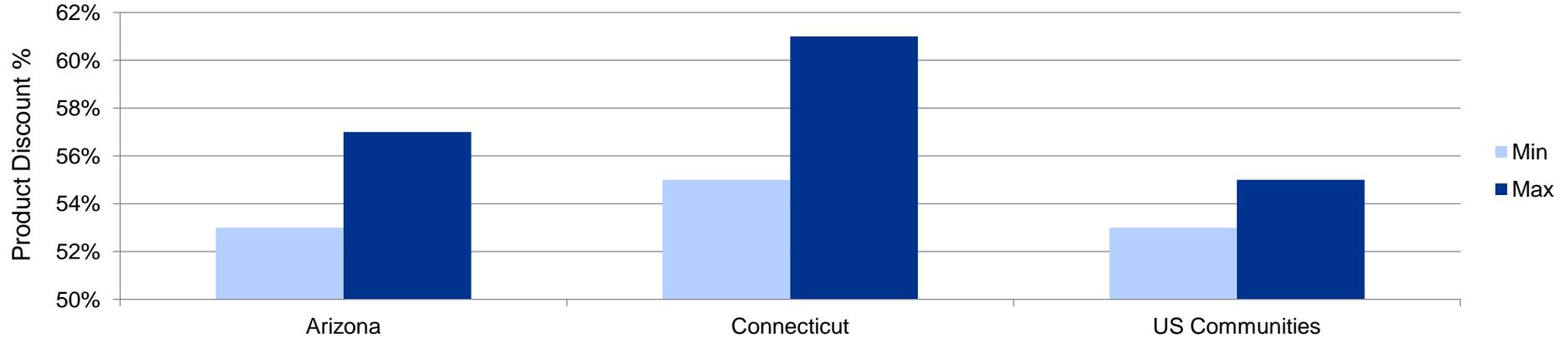
Subcategory: Monolithic – Product Line: Action Office



Subcategory: Monolithic – Product Line: Ethospace



Subcategory: Monolithic – Product Line: Resolve

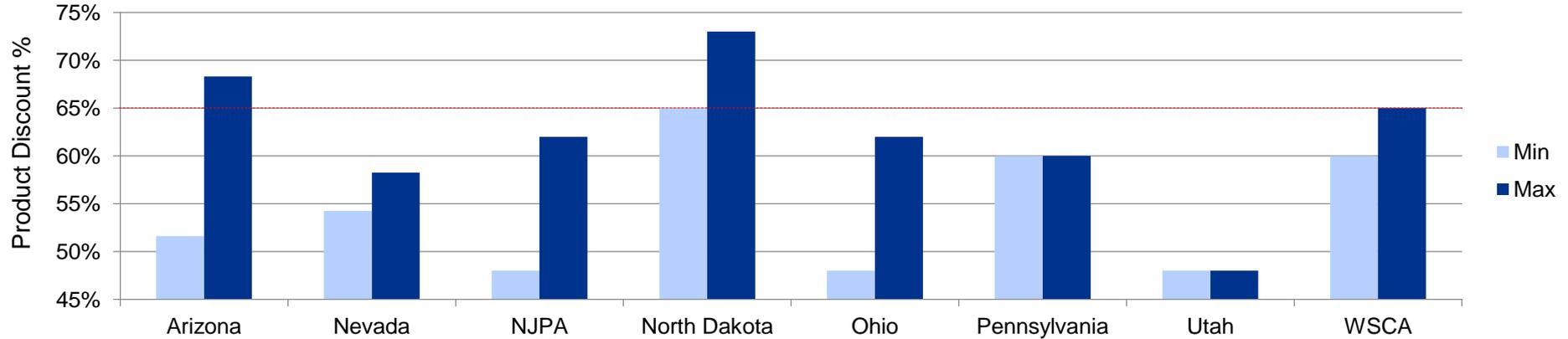


Systems Category

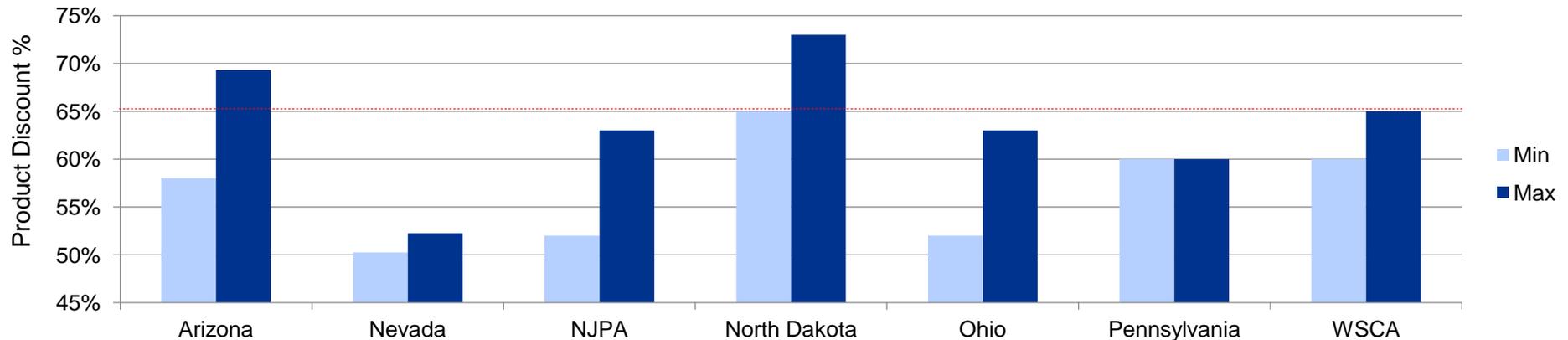
Subcategory Summary

For Manufacturer: Steelcase

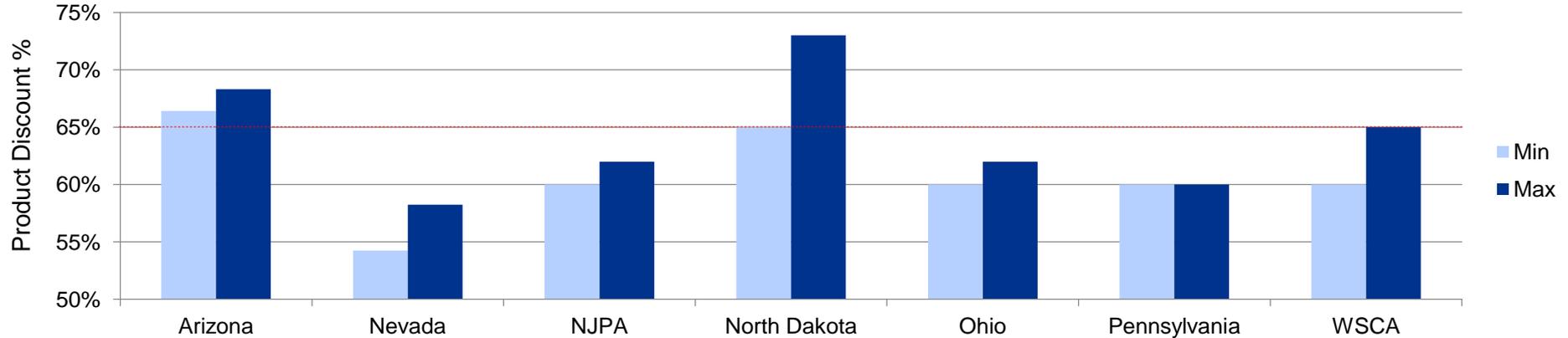
Subcategory: Frame & Tile



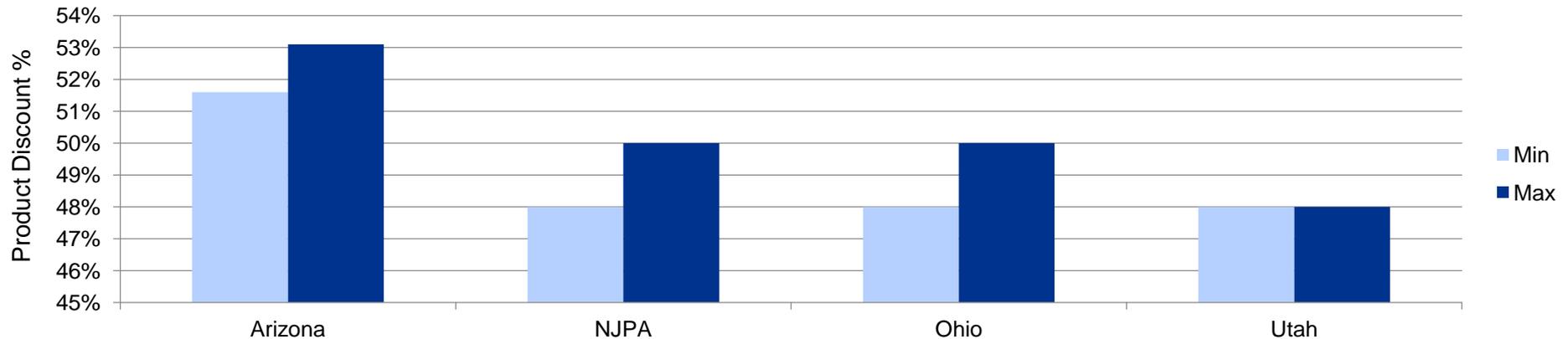
Subcategory: Monolithic



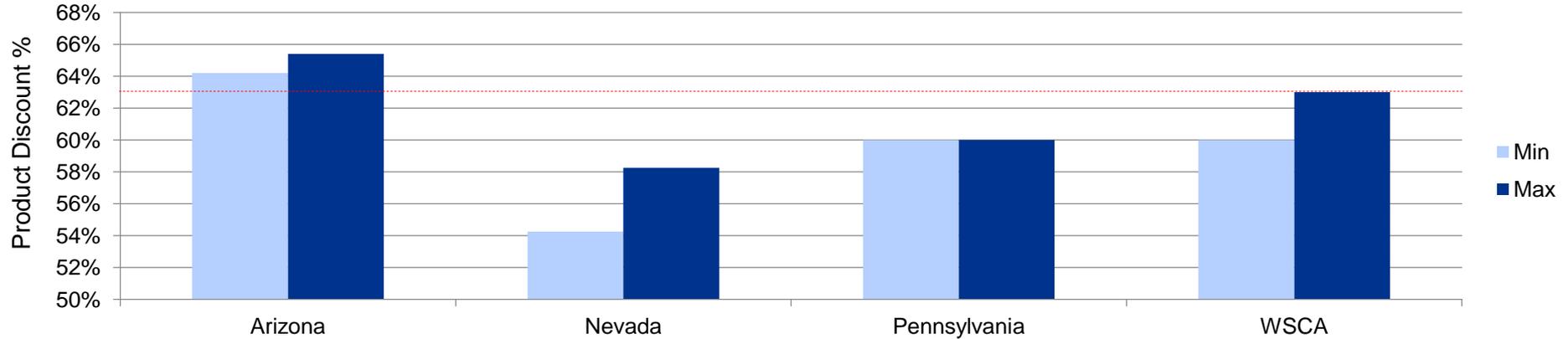
Subcategory: Frame & Tile – Product Line: Avenir



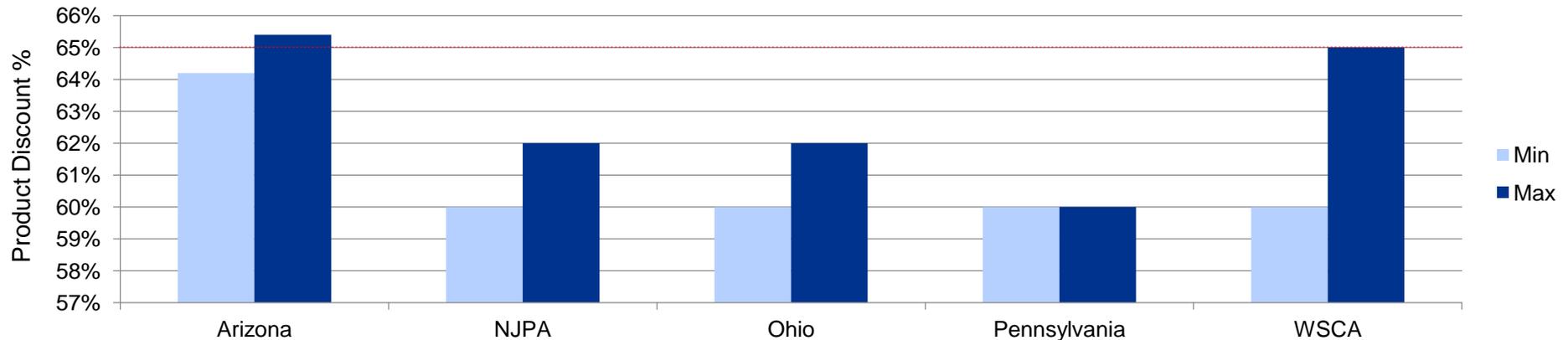
Subcategory: Frame & Tile – Product Line: Coalesse



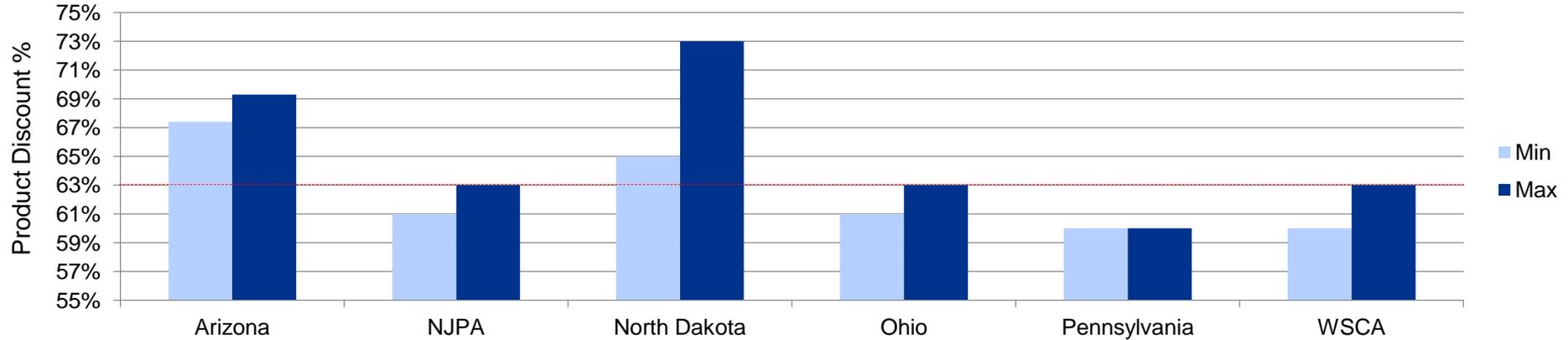
Subcategory: Frame & Tile – Product Line: Montage



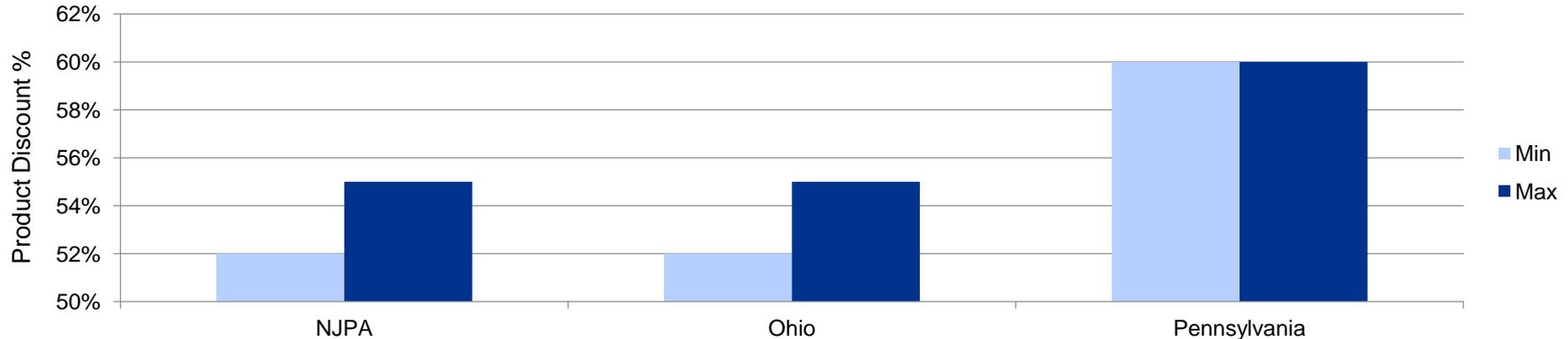
Subcategory: Frame & Tile – Product Line: Series 9000



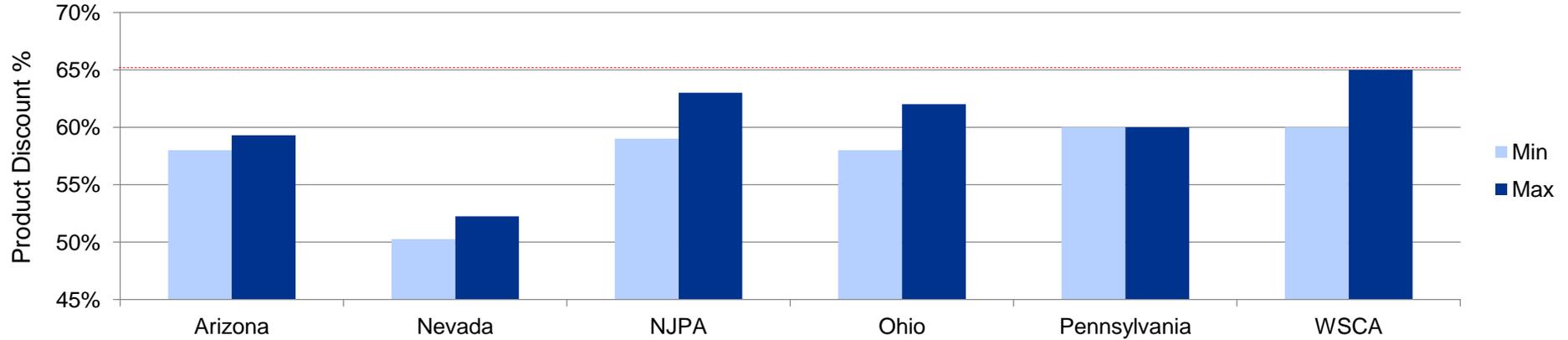
Subcategory: Monolithic – Product Line: Answer



Subcategory: Monolithic – Product Line: Elective Elements 6



Subcategory: Monolithic – Product Line: Kick



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Seating Category

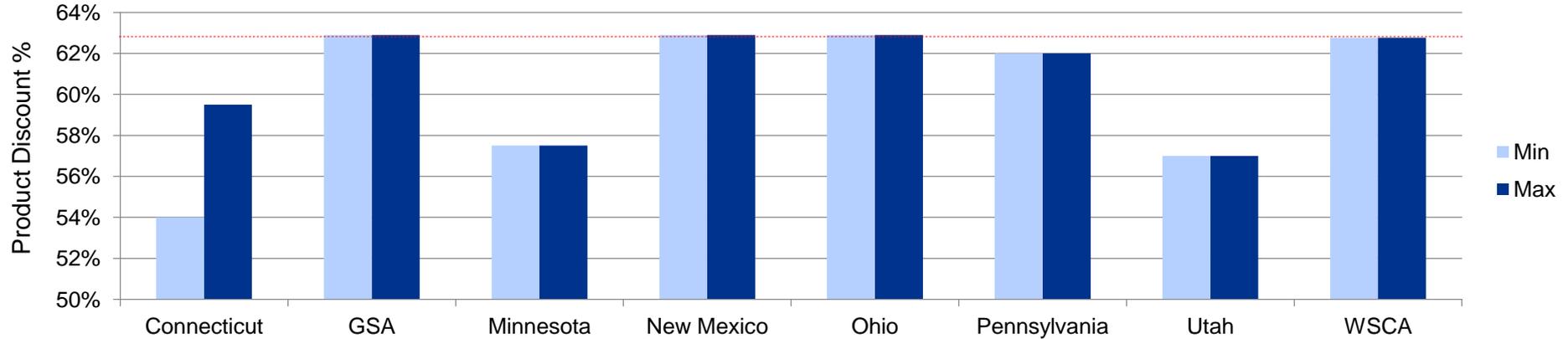
Subcategory Summary

For Manufacturer: Allsteel

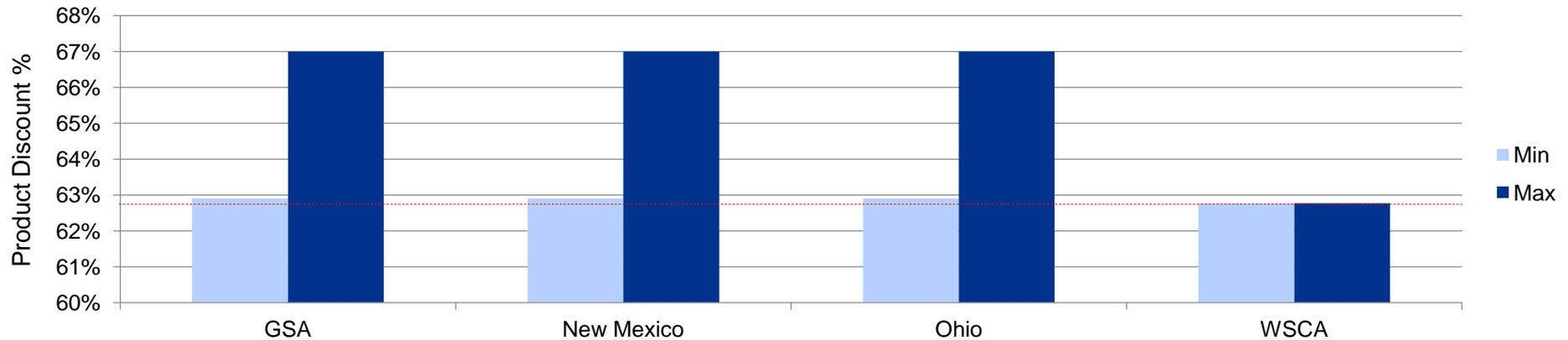
Product Category: Seating
Allsteel Seating

- Allsteel
- Herman Miller
- HON
- Steelcase

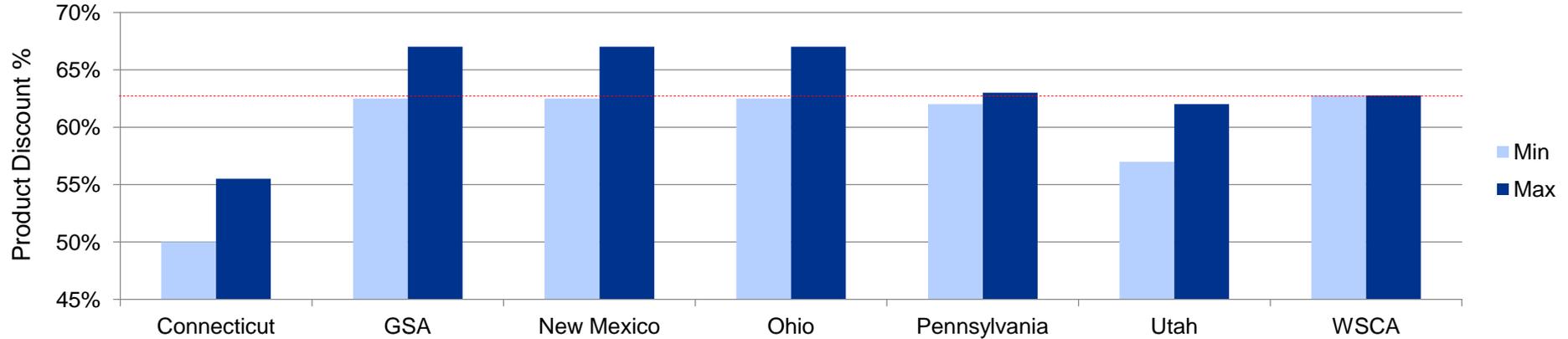
Subcategory: Conference



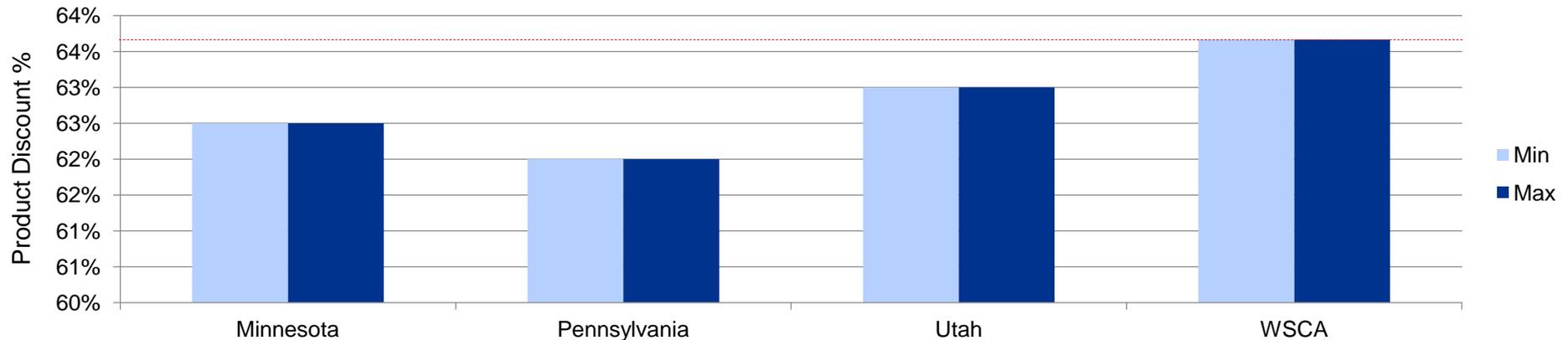
Subcategory: Side/Guest



Subcategory: Stackable



Subcategory: Work/Task

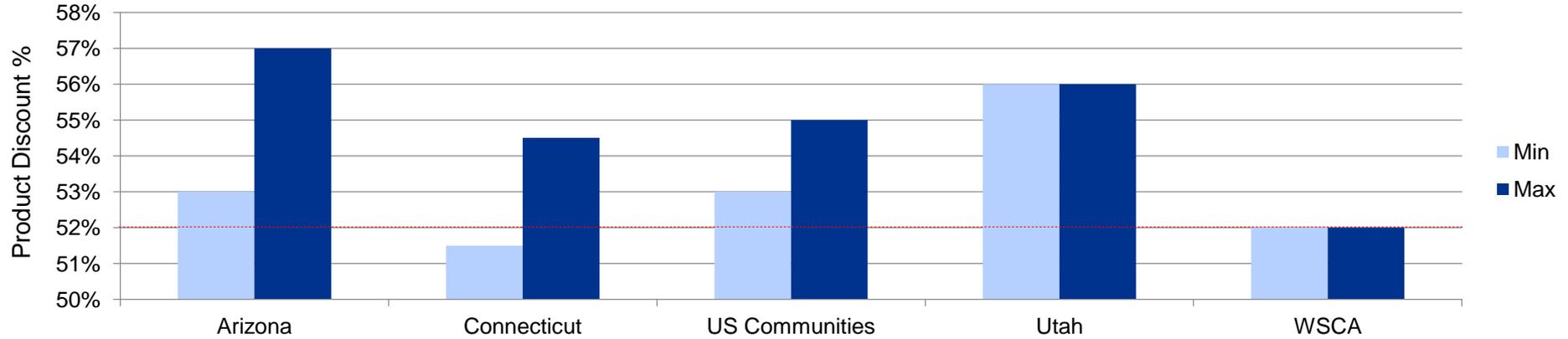


Seating Category

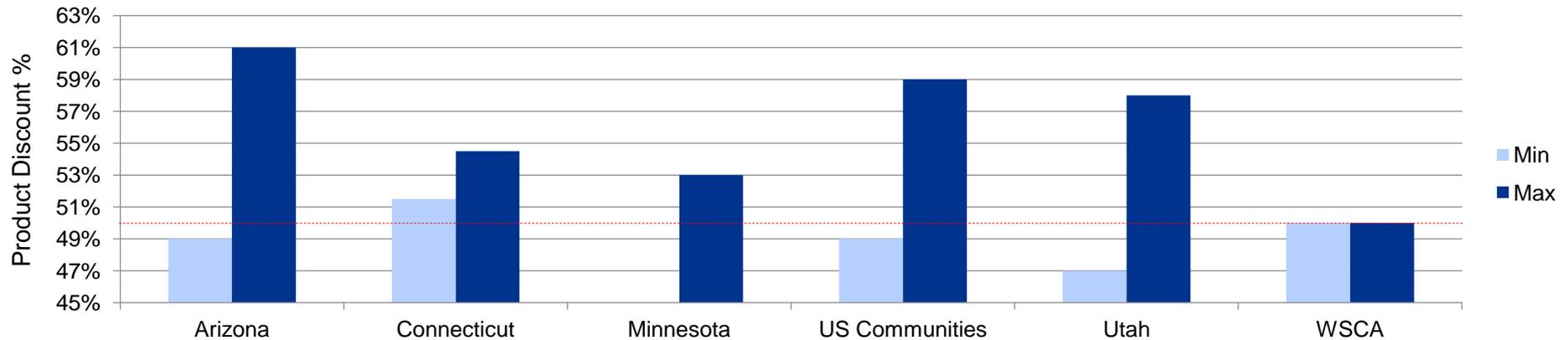
Subcategory Summary

For Manufacturer: Herman Miller

Subcategory: Side/Guest



Subcategory: Work/Task

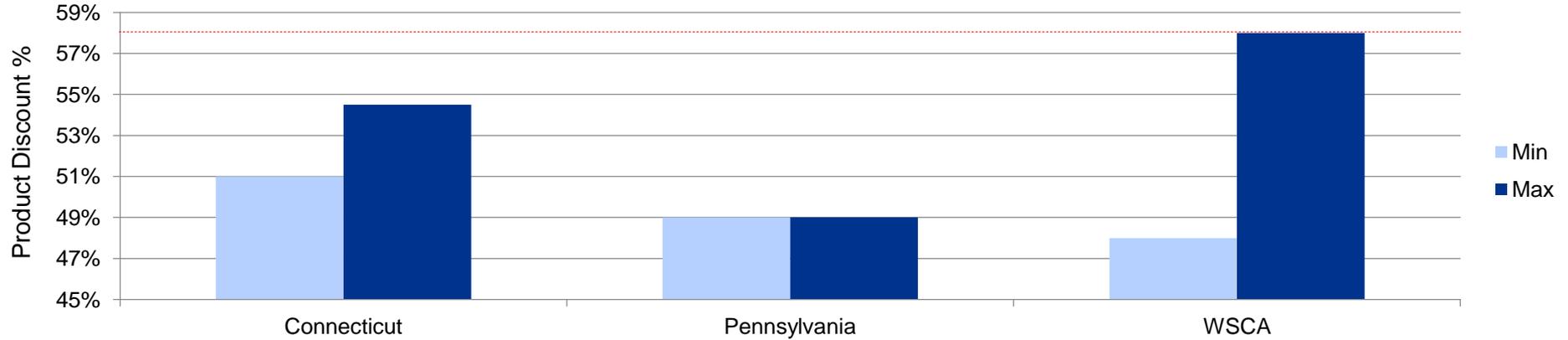


Seating Category Steelcase

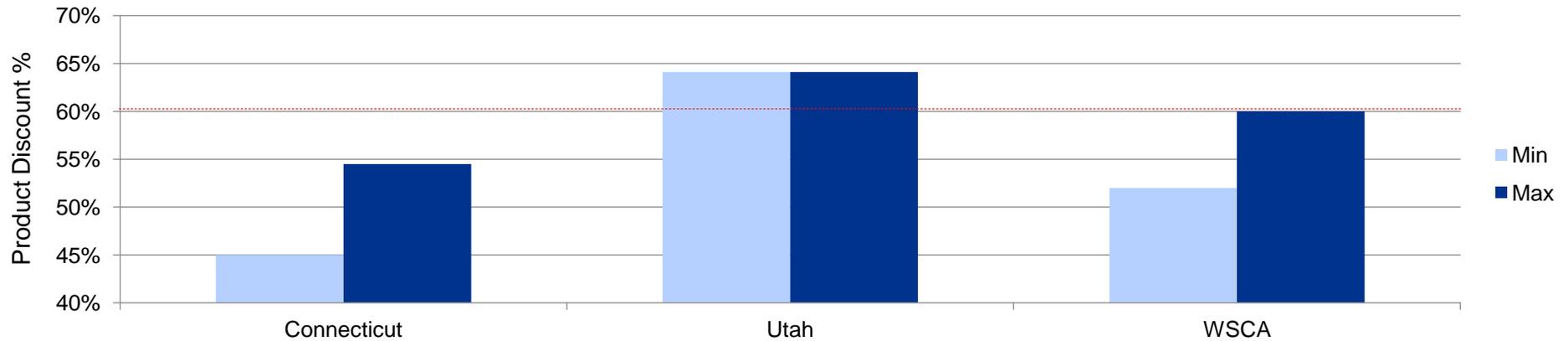
Subcategory Summary

For Manufacturer: Steelcase

Subcategory: Reception/Lounge



Subcategory: Stackable



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Desks and Tables Category

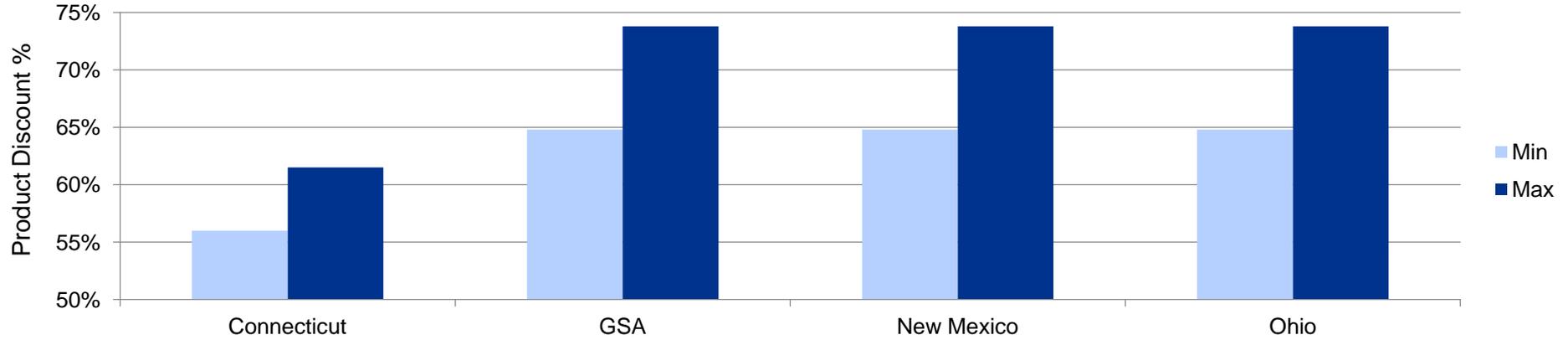
Subcategory Summary

For Manufacturer: Allsteel

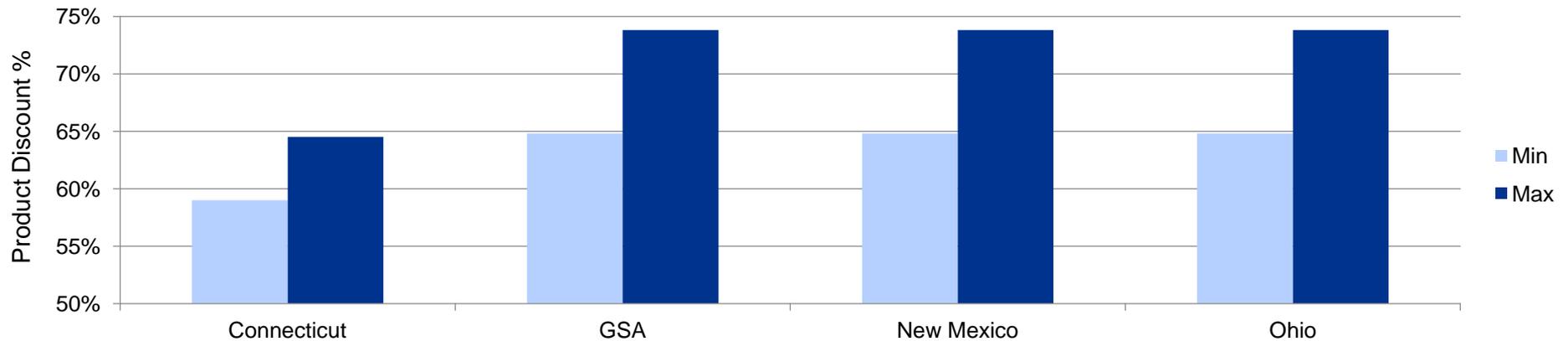
Product Category: Filing, Storage, Case Goods
Allsteel Filing, Storage, Case Goods

- Allsteel
- Herman Miller
- HON
- Steelcase

Subcategory: Lateral Filing



Subcategory: Vertical Filing



Desks and Tables Category

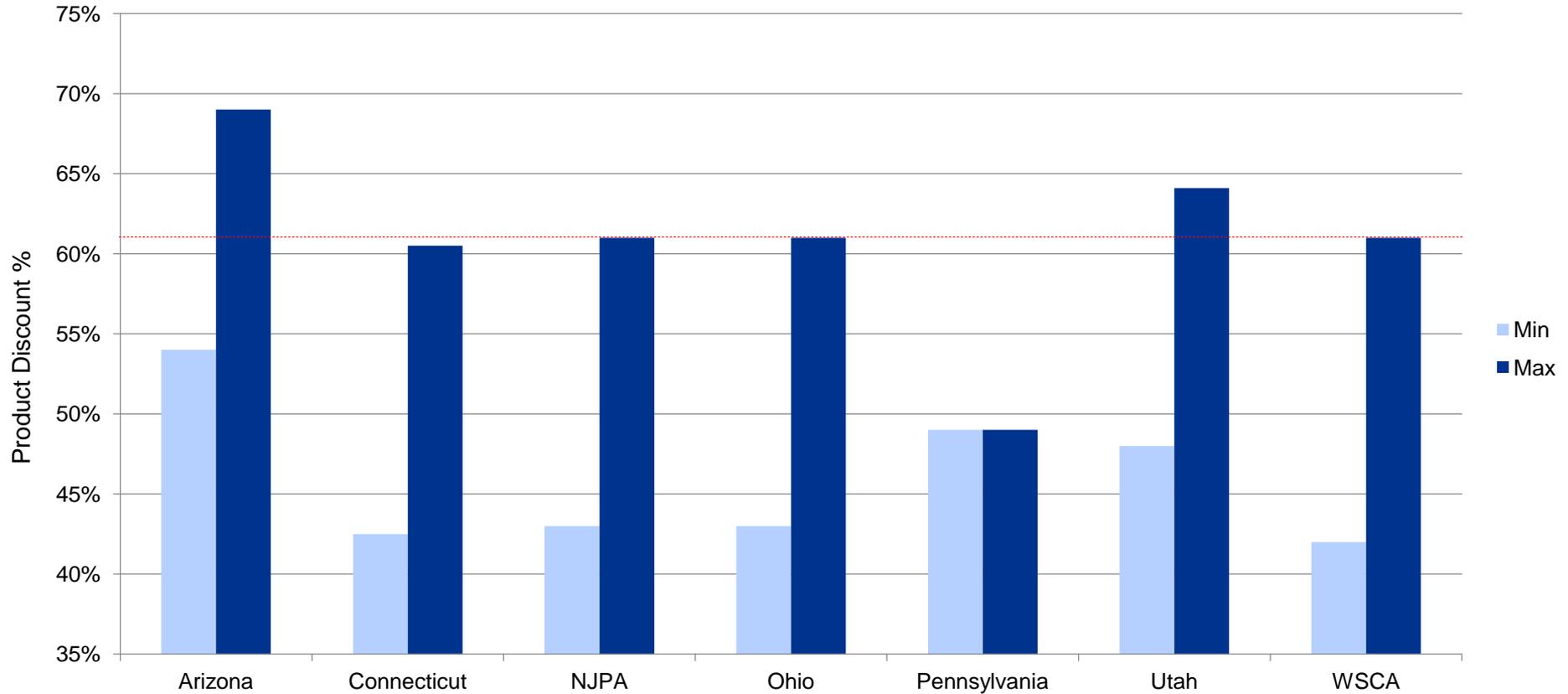
Subcategory Summary

For Manufacturer: Steelcase

Product Category: Desks and Tables

Steelcase Desks and Tables

- Allsteel
- Herman Miller
- HON
- Steelcase



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Filing, Storage, Case Goods Category

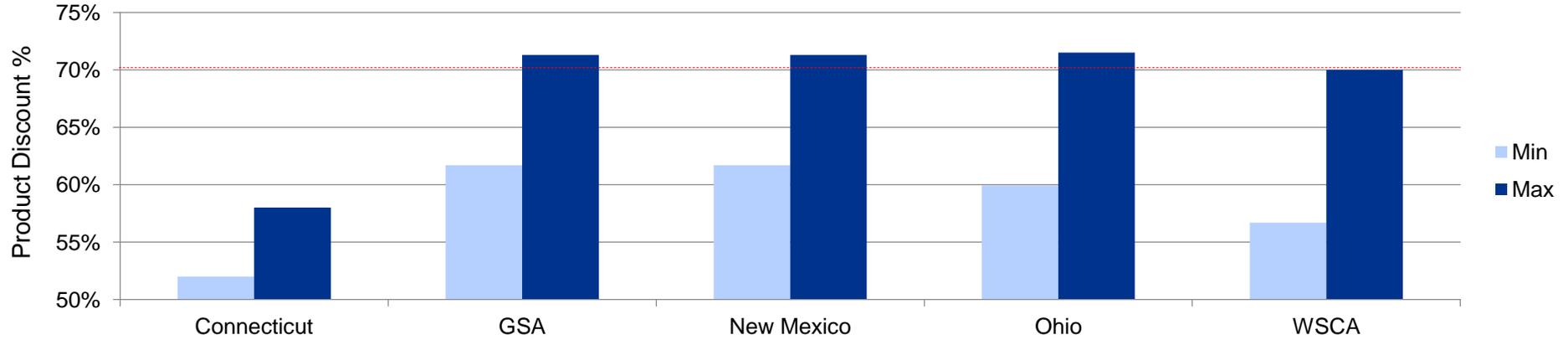
Subcategory Summary

For Manufacturer: HON

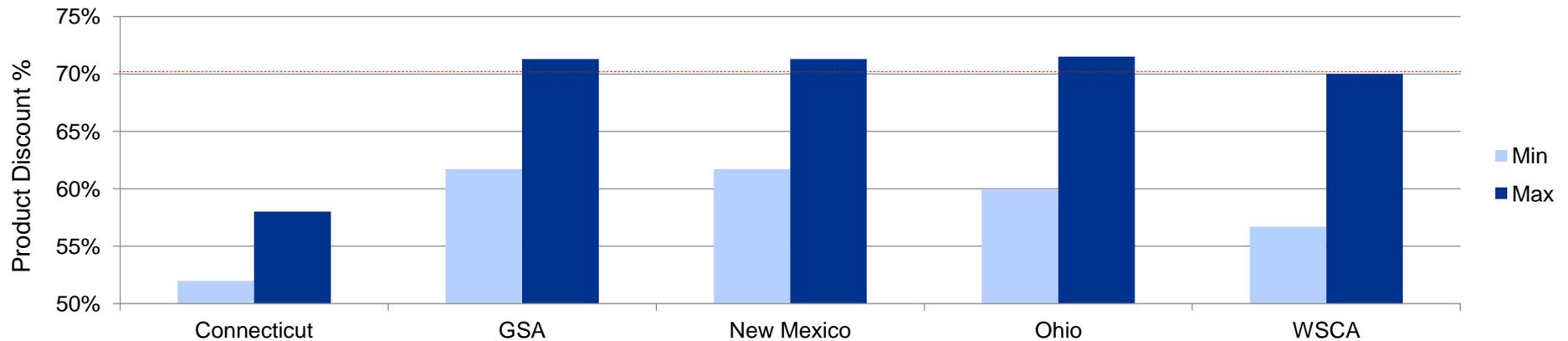
Product Category: Filing, Storage, Case Goods
HON Filing, Storage, Case Goods

- Allsteel
- Herman Miller
- HON
- Steelcase

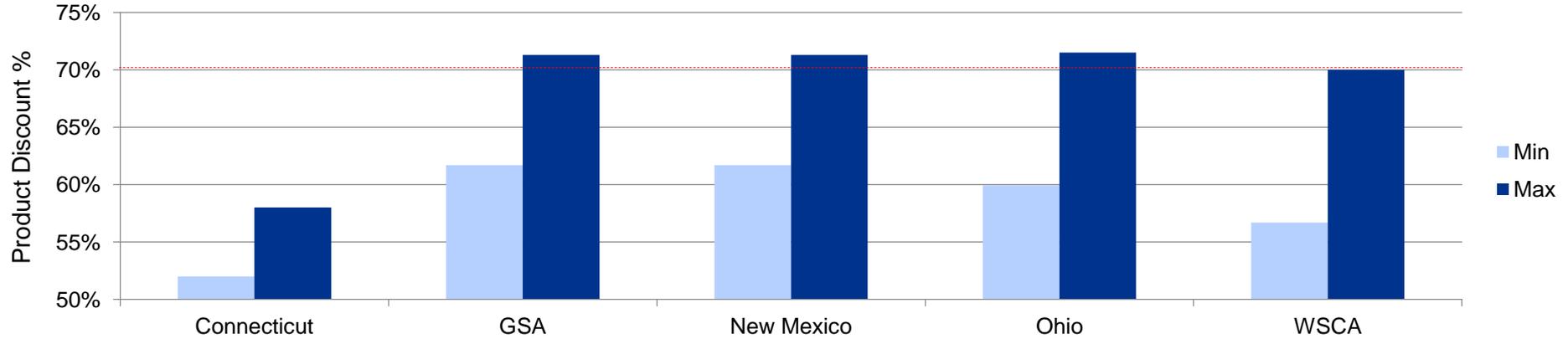
Subcategory: Lateral Filing



Subcategory: Vertical Filing



Subcategory: Storage





cutting through complexity



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