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# FAX TRANSMITTAL FORM

COVER SHEET - Page 1

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DESTINATION: FAX NUMBER: ATTENTION:	Orderen Consulting 312-507-0976 Fon Godwin
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DATE:	9/3/90
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# MATERIALS MANAGEMENT PRODUCT ASSESSMENT

The objective of this interview is to obtain the opinions of key IS (Information Systems) executives and functional managers on a potential materials management offering currently in the planning stages by a major supplier of software and services. The interview explores: market potential for several major vertical industries; information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities; and buyer values.

Respondent names will remain confidential; i.e. will not be disclosed to INPUTs client.

For purposes of the interview, we will define a materials management system as one which minimally supports purchasing, material requisitioning, and inventory management.

We'll start out by getting a little information about the size of your firm and the level of IS expenditures, etc.

#### DEMOGRAPHICS

1.1	Industry	By US Industrial major SIC Classification
1.2	Annual Revenues	In Millions of Dollars
1.3	IT Budget	Corporate (Estimated/Millions)
		Is S/W included ? Y/N
1.4	IT Budget	Divisional (Estimated/Millions)
		Is S/W included ? Y/N
1.5	Title	Of Respondent

Now we'll move on to a few questions regarding how automation is presently handled for materials management within your firm.

#### PRESENT STATUS

Do you currently have an installed system to support the materials management function?
 N
 (fro, skip to section FUTURE PLANS.)

We would like to know more about what materials management functions the system handles, how tightly integrated these functions are from a systems viewpoint; and whether the software utilized was a purchased package or custom built to meet your specific needs. For each of the following functional capabilities, please indicate whether:

- The system has the capability, (Y/N)
- You consider it tightly integrated with other capabilities. (Y/N)
- The functional capability under discussion was purchased or custom developed. (P/C)



## PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	EXISTS Y/N	INTEGRATED Y/N	PUR/CUS P/C
2.2	Purchasing (Vendor Management)			
2.3	Material Requisitioning			
2.4	Inventory Control (Inventory Accounting)			
2.5	Cataloging (Of Item Characteristics & Compatible Units)			
2.6	Forecasting & Inventory Plng.			
2.7	Warehouse Management (Distributed and/or Sophisticated Capabilities)			
2.7a	Accounts Payable			
2.7b	General Ledger			

2.8 | Iff the respondent did not indicate that outside software was used, skip this questions.] Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

PACKAGE	VENDOR	FUNCTION

2.9	When was the last time you considered making a major upgrade to the systems used to support the
	materials management function? [Year is adequate]

3.0 When will you be re-examining this question? [Year/No Plan]



#### FUTURE PLANS

During this section of the interview, I'd like to discuss your future requirements for systems to support the materials management function, as well as those aspects of your computer environment which would make the selection of outside packages more or less attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the Interview we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level and 5 being the highest.

[Interviewers Note: In some instances we have also asked the respondent to respond to specific capabilities within a major function. In these instances you might want to prompt the interviewee by saying indicating that your dealing with a sub-function.]

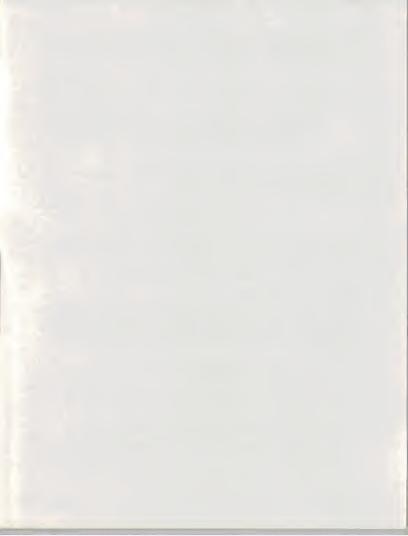
ID	FUNCTIONAL CAPABILITY/MODULE	IMPORTANCE 1 - 5	IMPORTANCE 1 - 5
4.0	Purchasing, Vendor Management		
4.1	Vendor Analysis		
4.2	3 Way Match (Invoice, Receipt, PO)		
4.3	Word Processing for Extended Text		
4.4	EDI		
4.5	Material Requisitioning		
4.6	Allocations/Reservations		
4.7	Work Orders		
4.8	Inter-store Transfer Orders		
4.8a	Other order types (patient orders,etc.)		
4.9	Inventory Control		
5.0	Time-phased Replenishment Policies		
5.1	Cataloging		
5.2	Bill of Material (equipment/spare parts,kiting, compatible units)		
5.3	Forecasting & Inventory Planning		
5.4	Distribution Requirements Planning (DRP)		
5.5	Warehouse Management		



To what degree would you consider looking to an outside packaged solution to meet the kinds of requirements you've specified above. Please indicate your degree of interest in an outside packagusing the 1 - 5 rating, with one being the lowest and 5 the highest.
(For 1-3 above only) Describe the characteristics of a custom solution that would make it more attractive than a package solution in you environment.

Applications systems such as the one under discussion can be implemented across a wide variety of hardware and software platforms. As the final portion of this interview we would like to get your views on the prefered architecture for the materials management system under discussion. For each of the alternatives listed below please indicate your preference by rating the alternative on a scale of 1 to 5, with 1 being the lowest rating and 5 being the highest.

ID	ARCHITECTURAL CHARACTERISTIC	1-5
6.0	Mainframe Processing for Primary Systems	
6.1	Cooperative Processing Interface for User Workstations Using Windows Technology	
6.2	Complementary Capability to Run Applications in Dumb Terminal Mode	
6.3	Distributed Capability for Functions Such As Warehouse Management & Purchasing	



0.4	in there are preferred alternatives for one or more of these architectural characteristics, please indicate the characteristic and the preferred alternative.
	nds our interview, we want to thank you for the time and consideration that you have given us. If there ner people you think that we should talk to in your company, please let us know who they are, and we'll up:



# MATERIALS MANAGEMENT PRODUCT ASSESSMENT QUESTIONNAIRE

The objective of this Interview is to obtain the opinions of key IS (Information Systems) executives and functional managers on a potential materials management offering currently in the planning stages by a major supplier of software and services. The Interview explores: market potential for several major vertical industries; information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities; and buyer values. Respondent names will remain confidential; i.e. will not be disclosed to INPUT's client.

We'll start out by getting a little information about the size of your firm and the level of IS expenditures, etc.

### DEMOGRAPHICS

1.1	Industry	By US Industrial major SIC Classification
1.2	Annual Revenues	In Millions of Dollars
1.3	IT Budget	Corporate (Estimated/Millions)
1.4	IT Budget	Divisional (Estimated/Millions)
1.5	Title	Of Respondent

Now we'll move on to a few questions regarding the how automation is presently handled for materials management within your firm.

### PRESENT STATUS

2.1 Do you currently have an installed system to support the materials management function?

Y

If no. skip to section FUTURE PLANS.)

We would like to know more about what materials management functions the system handles, how tightly integrated these functions are from a systems viewpoint; and whether the software utilized was a purchased package or custom built to meet your specific needs. For each of the following functional capabilities, please indicate whether:

- The system has the capability. (Y/N)
- You consider it tightly Integrated with other capabilities. (Y/N)
- The functional capability under discussion was purchased or custom developed. (P/C)

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# PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	EXISTS Y/N	INTEGRATED Y/N	PUR/CUS P/C
2.2	Purchasing (Vendor Management)			
2.3	Material Requisitioning			
2.4	Inventory Control (Inventory Accounting)			
2.5	Cataloging (Of Item Characteristics & Compatible Units)			
2.6	Forecasting & Inventory Ping.			
2.7	Warehouse Management (Distributed and/or Sophisticated Capabilities)			

2.8 [If the respondent did not indicate that outside software was used, skip this questions.] Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

PACKAGE	VENDOR	FUNCTION	

2.9	When was the last time you considered making a major upgrade to the systems used to support
	the materials management function? [Year is adequate]

	14/1	0/ 01- 011
3.0	When will you be re-examining this question?	[Tear/NO Plan]



#### **FUTURE PLANS**

During this section of the interview, I'd like to discuss your future requirements for systems to support the materials management function, as well as those aspects of your computer environment which would make the selection of outside packages more or less attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the Interview we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level and 5 being the highest.

[Interviewers Note: In some instances we have also asked the respondent to respond to specific capabilities within a major function. In these instances you might want to prompt the interviewee by saying indicating that your dealing with a sub-function.]

ID	FUNCTIONAL CAPABILITY/MODULE	IMPORTANCE 1 - 5	IMPORTANCE 1 - 5
4.0	Purchasing, Vendor Management		
4.1	Vendor Analysis		
4.2	3 Way Match (Invoice, Receipt, PO)		
4.3	Word Processing for Extended Text		
4.4	EDI		
4.5	Material Requisitioning		
4.6	Allocations/Reservations		
4.7	Work Orders/Customer Orders		
4.8	Inter-store Transfer Orders		
4.9	Inventory Control		
5.0	Time-phased Replenishment Policles		
5.1	Cataloging		
5.2	Bill of Material		
5.3	Forecasting & Inventory Planning		
5.4	Distribution Replacements Planning (DRP)		
5.5	Warehouse Management		

5.6	Are there any significant or unique requirements that would need to be included for your industry which have not been mentioned above; e.g. encumbrance processing or micro-based functions for small stores inventory management? If so, please indicate below:			



8		be any characteristics of a packaged solution that would increase the attractive ge over a custom solution.	ness of th
	_		
9		would you anticipate spending for a system which meets the kinds of requireme pecified above? Please identify the expected range.	nts that
	U	nder \$250K, \$250-500K, \$500-1000K, Over One Million	
RC	HITECT	URAL CONSIDERATIONS	
th	e prefer	d software platforms. As the final portion of this interview we would like to get y red architecture for the materials management system under discussion. For e	
err	natives li		ach of the
eri	natives li	red architecture for the materials management system under discussion. For e sted below please indicate your preference by rating the alternative on a scale the lowest rating and 5 being the highest.	ach of the of 1 to 5,
eri	natives li 1 being	red architecture for the materials management system under discussion. For e sted below please indicate your preference by rating the alternative on a scale the lowest rating and 5 being the highest.  ARCHITECTURAL CHARACTERISTIC	ach of the of 1 to 5,
eri	natives li 1 being ID 6.0	red architecture for the materials management system under discussion. For e sted below please indicate your preference by rating the alternative on a scale the lowest rating and 5 being the highest.  ARCHITECTURAL CHARACTERISTIC  Mainframe Processing for Primary Systems  Cooperative Processing Interface for User Workstations Using Windows	ach of the of 1 to 5,
eri	ID 6.0	red architecture for the materials management system under discussion. For ested below please inclicate your preference by rating the alternative on a scale the lowest rating and 5 being the highest.  ARCHITECTURAL CHARACTERISTIC  Mainframe Processing for Primary Systems  Cooperative Processing Interface for User Workstations Using Windows Technology	ach of the of 1 to 5,
eri	ID 6.0 6.1 6.2 6.3	red architecture for the materials management system under discussion. For ested below please inclicate your preference by rating the alternative on a scale the lowest rating and 5 being the highest.  ARCHITECTURAL CHARACTERISTIC  Mainframe Processing for Primary Systems  Cooperative Processing Interface for User Workstations Using Windows Technology  Complementary Capability to Run Applications in Dumb Terminal Mode  Distributed Capability for Functions Such As Warehouse Management &	ach of the of 1 to 5,
err	ID 6.0 6.1 6.2 6.3	red architecture for the materials management system under discussion. For ested below please inclicate your preference by rating the alternative on a scale the lowest rating and 5 being the highest.  ARCHITECTURAL CHARACTERISTIC  Mainframe Processing for Primary Systems  Cooperative Processing Interface for User Workstations Using Windows Technology  Complementary Capability to Run Applications In Dumb Terminal Mode  Distributed Capability for Functions Such As Warehouse Management & Purchasing  are preferred alternatives for one or more of these architectural characteristics	ach of the of 1 to 5,

5.7 To what degree would you consider looking to an outside packaged solution to meet the kinds of requirements you've specified above. Please indicate your degree of interest in an outside



That ends our interview, we want to thank you for the time and consideration that you there are other people you think that we should talk to in your company, please let us are, and we'll follow up:	

Page 5



# MATERIALS MANAGEMENT PRODUCT ASSESSMENT QUESTIONNAIRE

The objective of this interview is to obtain the opinions of key IS (information Systems) executives and functional managers on a potential materials management offering currently in the planning stages by a major supplier of software and services. The interview explores: market potential for several major vertical industries; information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities; and buyer values. Respondent names will remain confidential; i.e. will not be disclosed to INPUT's client. For parpsets of

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#### DEMOGRAPHICS

1.1	Industry	By US Industrial major SIC Classification
1.2	Annual Revenues	In Millions of Dollars
1.3	IT Budget	Corporate (Estimated/Millions)
1.4	IT Budget	Divisional (Estimated/Millions)
1.5	Title	Of Respondent

Now we'll move on to a few questions regarding the how automation is presently handled for materials management within your firm.

### PRESENT STATUS

2.1 Do you currently have an installed system to support the materials management function?

Y
N
(If no. skip to section FUTURE PLANS.)

We would like to know more about what materials management functions the system handles, how tightly integrated these functions are from a systems viewpoint; and whether the software utilized was a purchased package or custom built to meet your specific needs. For each of the following functional capabilities, please indicate whether:

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- You consider it tightly Integrated with other capabilities. (Y/N)
- The functional capability under discussion was purchased or custom developed. (P/C)



# PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	EXISTS Y/N	INTEGRATED Y/N	PUR/CUS
2.2	Purchasing (Vendor Management)			
2.3	Material Requisitioning			
2.4	Inventory Control (Inventory Accounting)			
2.5	Cataloging (Of Item Characteristics & Compatible Units)			
2.6	Forecasting & Inventory Ping.			
2.7	Warehouse Management (Distributed and/or Sophisticated Capabilities)			

2.8 [If the respondent did not indicate that outside software was used, skip this questions.] Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

PACKAGE	VENDOR	FUNCTION

2.9	When was the last time you considered making a major upgrade to the systems used to support the materials management function? [Year is adequate]	
	_	
3.0	When will you be re-examining this question? [Year/No Plan]	



#### **FUTURE PLANS**

During this section of the interview, I'd like to discuss your future requirements for systems to support the materials management function, as well as those aspects of your computer environment which would make the selection of outside packages more or less attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the interview we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level and 5 being the highest.

[interviewers Note: In some instances we have also asked the respondent to respond to specific capabilities within a major function. In these instances you might want to prompt the interviewee by saying indicating that your dealing with a sub-function.]

ID	FUNCTIONAL CAPABILITY/MODULE	IMPORTANCE 1 - 5	IMPORTANCE 1 - 5
4.0	Purchasing, Vendor Management		
4.1	Vendor Analysis		
4.2	3 Way Match (Invoice, Receipt, PO)		
4.3	Word Processing for Extended Text		
4.4	EDI		
4.5	Material Requisitioning		
4.6	Allocations/Reservations		
4.7	Work Orders/Customer Orders		
4.8	Inter-store Transfer Orders		
4.9	Inventory Control		
5.0	Time-phased Replenishment Policies		
5.1	Cataloging		
5.2	Bill of Material ( I grupe 4/ spore ports, kething,		
5.3	Forecasting & Inventory Planning		
5.4	Distribution Replacements Planning (DRP)		
5.5	Warehouse Management		

5.6	Are there any significant or unique requirements that would need to be included for your industry which have not been mentioned above; e.g. encumbrance processing or micro-based functions for small stores inventory management? If so, please indicate below:				



	packa	age using the 1 - 5 rating, with one being the lowest and 5 the highest.	
5.8	Descr	ibe any characteristics of a packaged solution that would increase the attractive age over a custom solution.	lleature eness of the
5.9		would you anticipate spending for a system which meets the kinds of requireme specified above? Please identify the expected range.	ents that
	_	nder \$250K, \$250-500K, \$500-1000K, Over One Million	
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hardy on the altern	vare an e prefei atives l	systems such as the one under discussion can be implemented across a wide d software platforms. As the final portion of this interview we would like to get y rod architecture for the materials management system under discussion. For e isted below please Indicate your preference by rating the alternative on a scale the lowest rating and 5 being the highest.	our views ach of the
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	6.1	Cooperative Processing Interface for User Workstations Using Windows Technology	
	6.2	Complementary Capability to Run Applications in Dumb Terminal Mode	
	6.3	Distributed Capability for Functions Such As Warehouse Management &	

6.4 If there are preferred alternatives for one or more of these architectural characteristics, please

indicate the characteristic and the preferred alternative.

5.7 To what degree would you consider looking to an outside packaged solution to meet the kinds of requirements you've specified above. Please indicate your degree of interest in an outside



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FAX NUMBER: ATTENTION:

Urgent DESCRIPTION:

1280 Villa Street, Mountain View, CA 94041 (415) 961-3300 Telex 171407 Fax (415) 961-3966

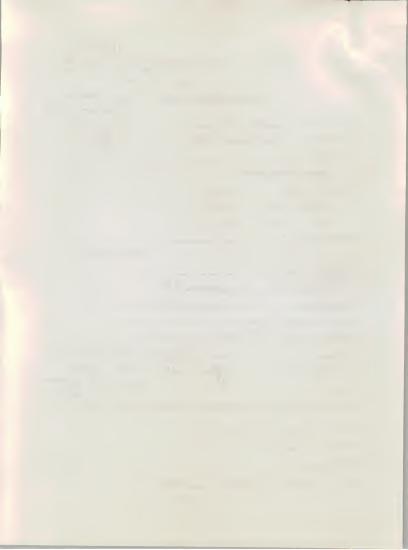
312-587-8673 FAX TRANSMITTAL FORM DESTINATION: Twan Telephone Number/Location \_ NUMBER OF PAGES: \_\_1\_ OF \_\_6 Confidential Yes No L Yes V 1 code? need by 10/3 & Concreuse usu DB. yes. 6. Hack you don't promoce 25.30 4.5/day Is exec or Museual ngut person savent Thom. telecon.

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# MEMORANDUM

DATE September 21, 1990

TD: Joanne

FROM: Denny Wayson

SUBJECT: ATTACHED QUESTIONNAIRE

Here is the preliminary questionnaire for the interviews for next week. I'm reviewing the questionnaire with Andersen Consulting here at the office this morning. Will give you sample information and any revisions this afternoon. I 11 call after the meeting with Andersen.



# MATERIALS MANAGEMENT PRODUCT ASSESSMENT QUESTIONNAIRE - ANDERSEN CONSULTING

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The objective of this interview is to obtain the opinions of key IS (information Systems) executives and functional managers on a potential materials management offering current in the planning stages by a major supplier of software and services. The interview explores: market potential for several major vertical industries, information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities, and buyer values. For purposes of the interview we will define a once materials management system as one whice minimally supports, the estaloging, purchasing, material requisitioning and inventory control and provides direct interfaces to such other systems as vendor management, forecasting & planning, inter-actor transfer control and management reporting.

We'll start out by getting a little information about the size of your firm and the level of IS expenditures, etc.

# DEMOGRAPHICS

1.1	Industry	By US Industrial major SIC Class	saification	
1.2	Annual Revenues	In Millions of Dollars		
1.3	// Budget	Corporate (Estimated/Millons)	Is software reladed	4/1
1.4	IT Budget	Divisional (Estimated/Millions)	Is software included	4/10
1.5	Title	Of Respondent		

Now we'll move on to a few questions regarding the how automation is presently handled for materials management within your firm.

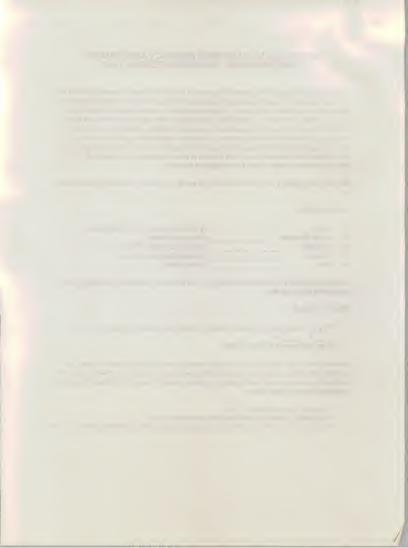
#### PRESENT STATUS

Do you currently have and installed system to support the materials management function?
 N
 (If no, skip to sector FUTURE PLANS.)

We would like to know more about what materials management functions the system handles, how tightly integrated these functions are from a systems viewpoint; and whether the software utilized was purchased (tailored) or custom built to meet your specific needs. For each of the following functional capabilities, please indicate whether:

1.7

- The system has the capability. (Y/N)
- You consider the dightly integrated with other capabilities. (Y/N)
- The functions sability under discussion was purchased or custom developed. (P/C) by when?



# PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	ECSTS Y/N	INTEGRATED Y/N	PUR/CUS P/C
2.2	CORE - Cataloging			
2.3	CORE - Purchasing			
2.4	CORE - Material Requisitioning			
2.5	CORE - Inventory Control			
2.6	SECONDARY - Forecasting & Inventory Ping.			
2.7	SECONDARY - Inter-Store Transfer Control			
2.8	SECONDARY - Vendor Management			
2.9	SECONDARY - Management Reporting			
3.0	SECONDARY - Inventory Accounting			
3 1	RELATED - Stores Inventory			
3.2	RELATED - Warehouse Management			

- 90 to =

3.3 [If the respondent did not indicate that outside software was used, skip this questions.] Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

- 3.4 When was the last time you considered making a major upgrade to the systems used to support the materials management function? [Year is adequate]
- When will you be re-examining this question? [Year/No Pian]

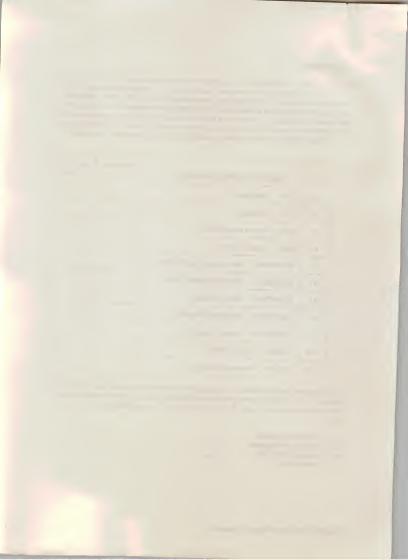


During this section of the interview. I'd like to discuss your future requirements for systems to support the materials management function, as well as, those aspects of your computer environment which would make the selection of outside packages, more or less, attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the intensiew we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level, and [5] being the highest and asking you to indicate whether you would consider an outside software package to perform the function.

10	FUNCTIONAL CAPABILITY/MODULE	IMPORTANCE 1 -5	BUY OUTSIDE?
4.0	CORE - Cataloging		
4.1	CORE - Purchasing		
4.2	CORE - Material Requisitioning		
4.3	CORE - Inventory Control		
4.4	SECONDARY - Forecasting & inventory Ping.		
4.5	SECONDARY - Inter-Store Transfer Control		
4.8	SECONDARY - Vendor Management		
4.7	SECONDARY - Management Reporting		
4.8	SECONDARY - Inventory Accounting		
4.9	RELATED - Stores Inventory		
5.0	RELATED - Warehouse Management		

If your comapany were to consider a new systems for the materials management area, to what degree would each of the following functions/managers participate. Please indicate their degree of influence on the decision by rating on a scale of 1 to 5, with one being the lowest influence and 5 being the highest

- 5.1 Materials Management
- 5.2 Purchasing Management
- 5.3 Financial Management
- 5.4 IS Management



5.5.	Functional Capabilities	
5.6	Cost	
5.7	Ease of Fit With Existing Systems	-
5.8	EDI and Messaging Capabilities	
5.8	Compliance With Corporate Standards	
- 0		

# ARCHITECTURAL CONSIDERATIONS

the

Applications systems such as the one under discussion can be implemented across a wide variety of hardware and software platforms. As the final portion of this interview we would like to get your views on the preferred architecture for the materials management system under discussion. For each of the atternatives listed below please indicate your preference by rating the alternative on a scale of 1 to 5, with 1 being the lowest rating and 5 being the highest.

ID	ARCHITECTURAL CHARACTERISTIC	1 - 5
6.0	Mainframe Processing for Primary Systems	
6.1	Cooperative Processing Interface for User Workstations Using Windows Technology	
6.2	Complementary Capability to Run Applications in Dumb Terminal Mode	
6.3	Distributed Cepability for Functions Such As Stores Inventory and Warehouse Management	

	d alternatives for one or mor nd the preferred alternative.	e of these architectura	characteristics, please indicat	e
				_
ast ends our interest are other peo	ple you think that we should	for the time and considerable talk to in your compen	eration that you have given us. ly, please let us know who the	- H

