



Webinar 4: Realize Your Competitive Advantage



Agenda

1. Introduction
2. Quick Review of Previous Webinars
3. 10 Steps to Realizing Your Competitive Advantage
4. Summary
5. Questions

Our Advisors

Andreas Lindenthal - Managing Partner

- Over 25 years of practical, international experience in innovation, product development, PLM, business management and consulting
- Former partner at Kalypso, leading the PLM, A&D and Automotive practices
- Co-founder and president of Metafore, an independent PLM solution provider
- Former executive at Siemens PLM/UGS in Switzerland and the US
- Former head of new product development at Sulzer AG in Switzerland
- MBA in Entrepreneurship from Pepperdine University in Malibu, CA
- BSME degree with emphasis in CIM from the Zurich University of Applied Sciences in Switzerland
- Author of numerous articles, publications and blogs in the area of innovation, NPD and PLM
- Select clients and projects:
 - Apple (HT&E): Supply chain integration and PLM implementation
 - Applied Materials (HT&E): PLM selection
 - American Medical Systems (MD): Process optimization, PLM selection and implementation
 - Edwards Lifesciences (MD): Process optimization and PLM implementation
 - HGST (HT&E): PLM strategy, selection and business case
 - Hunter Industries (I&PE): PLM C&M assessment, NPD assessment and process transformation
 - Nexteer (Auto): PLM C&M assessment and recommendation
 - Thales (A&D): Process optimization, PLM selection and implementation
 - Topcon (Mfg): PLM implementation



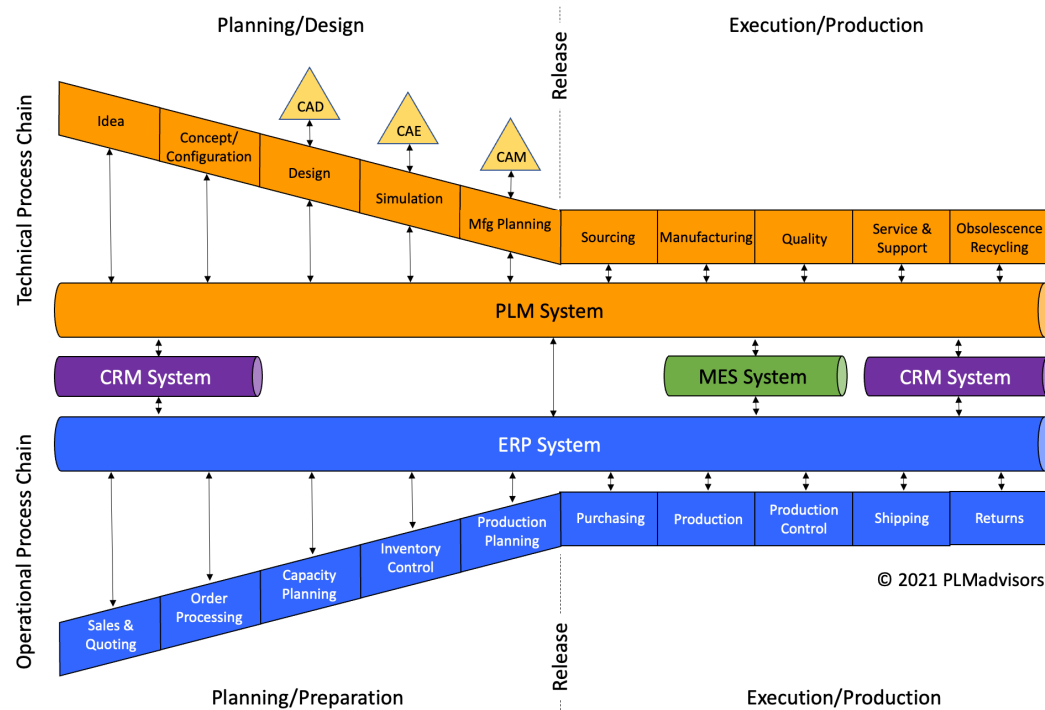
PLM advisors



- We provide unbiased consulting and advisory services in
 - **Product lifecycle management (PLM).**
 - **New product development (NPD)**
 - **Innovation**
- We help clients to define and optimize their strategies, practices, processes and technologies
- We are strictly vendor independent and technology neutral
- We do not sell software and do not have strategic partnerships with software vendors
- We implement and support all major and many smaller PLM systems
- Services we offer include
 - Education & awareness
 - Assessments & diagnostics
 - Strategy & roadmap development
 - Business case development
 - Software evaluations & selection
 - Process design & optimization
 - Project management and recovery
 - Organizational change management & leadership

Webinar 1: Creating Competitive Advantage with PLM

Integrating value activities

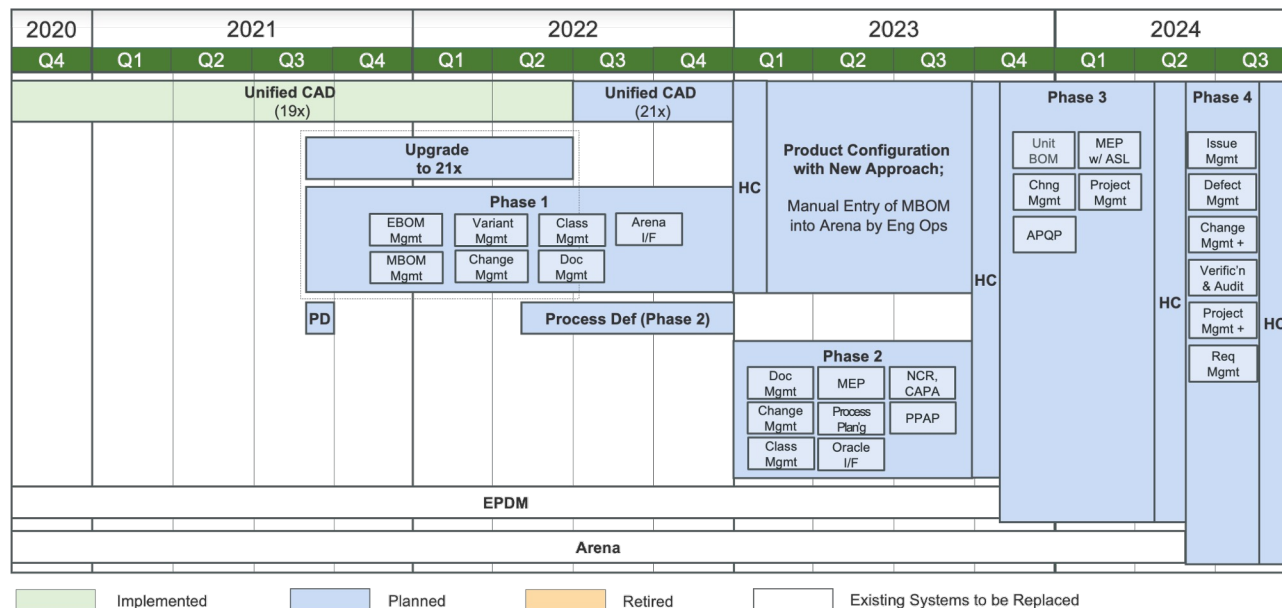


PLM can make every value activity in itself and the entire technical value chain more efficient and hence improve a company's competitive advantage

The full value of PLM comes from integrating the entire value chain

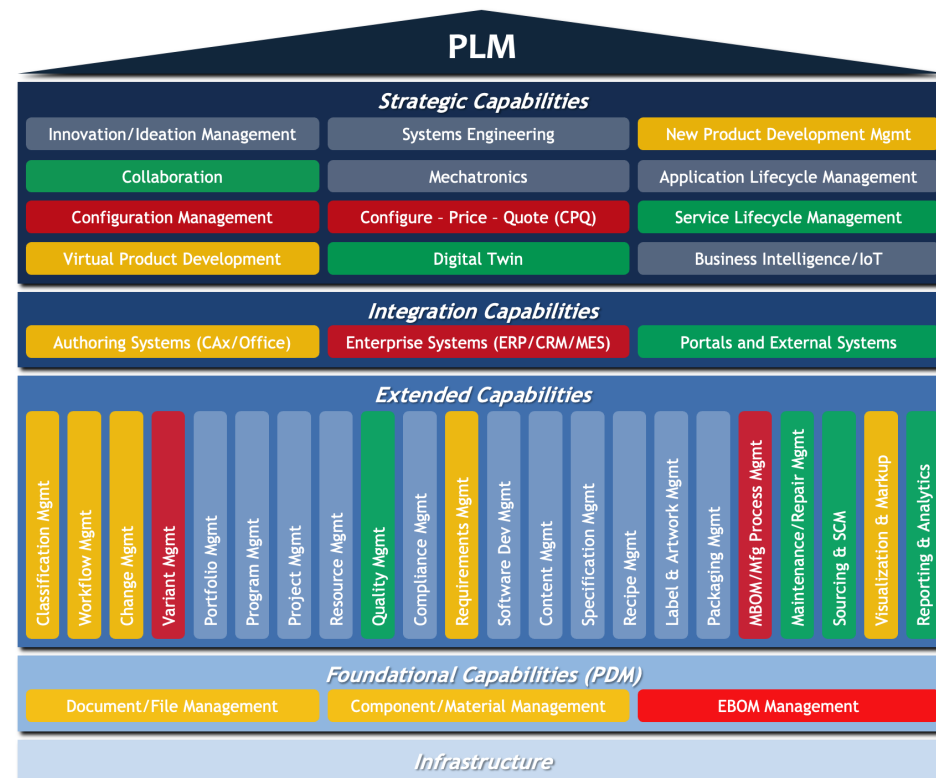
Webinar 2: Create PLM Roadmap

1. Determine highest business priorities and the required PLM capabilities (related and prerequisites)
2. Define the scope of the initial phase based on business capacity → maximum 4 to 6 months
3. Plan to define and optimize processes in those areas → Before technology implementation (!)
4. Identify tools that can be replaced and plan for data migration and tool retirement
5. Repeat for additional phases → Each additional phase should not be more than 3 to 4 months



Webinar 3: Finding the Right Technology for Your Business Needs

- Determine the overall, long-term needs of the business
- Define high-level processes and detailed use cases and requirements for all PLM capability areas you need
- Find a PLM system that can meet all your needs using a methodical evaluation approach



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Steps to Realizing Your Competitive Advantage

1. Secure executive support, sponsorship and commitment
2. Engage and get help from a PLM expert for the duration of the project
3. Define detailed scope for the current phase based on overall roadmap
4. Define detailed practices and processes
5. Identify, commit and assemble your project core team
6. Use a proven project management and implementation methodology
7. Participate in the solution design and testing
8. Start data migration preparation early
9. Don't forget the people: Make OCM and integral part of the project
10. Carefully plan cut-over and post-go-live operation and support

Step 1: Secure Executive Support, Sponsorship and Commitment

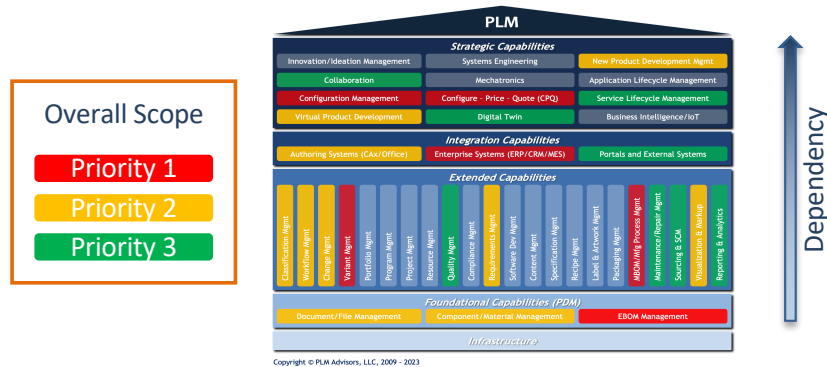
- Executives have to sign the checks for external resources (advisors, consultants, SI, etc)
- Have to make people available for the project (PM, business SMEs, etc)
- The PLM project is usually not the only responsibility for internal resources
- **Executives have to make and keep people available for the PLM project when there are conflicts**
- Educate executives early about the PLM project, the value of PLM for the business, etc
- Keep executives informed consistently throughout the project about status, progress, risks, successes, requests

Step 2: Engage and Get Help from a PLM Expert

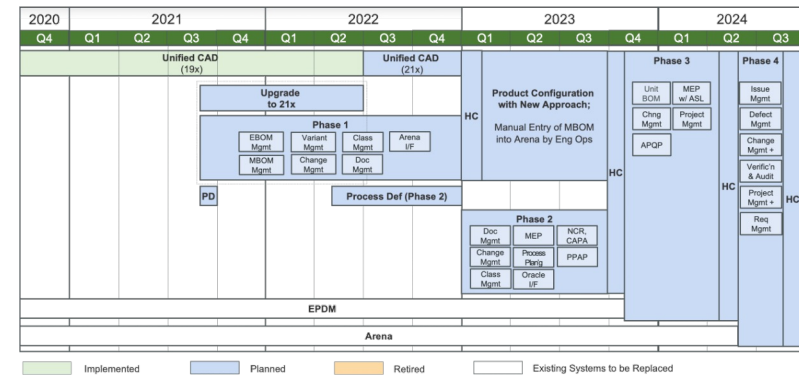
- Implementing PLM is not a core competency for most businesses
- An experienced PLM advisor can make the project easier, better, faster, less costly and ultimately **make the difference between success and failure**
- Can support the internal project manager or manage the project
- Has done it before and knows the pitfalls and potential challenges
- Can anticipate problems before they arise
- Can guide the business in making decisions regarding processes, practices, system design and architecture, functionality, etc
- Can supervise and guide the implementation partner/SI and check their plan and recommendations for feasibility and soundness
- Coordinate and manage tasks that the PLM software company/SI typically would not do, such as integration with 3rd party systems (CAD, ERP, MES, etc), data migration, OCM, etc

Step 3: Define Detailed Scope for First Phase Based on Roadmap

1) Overall scope

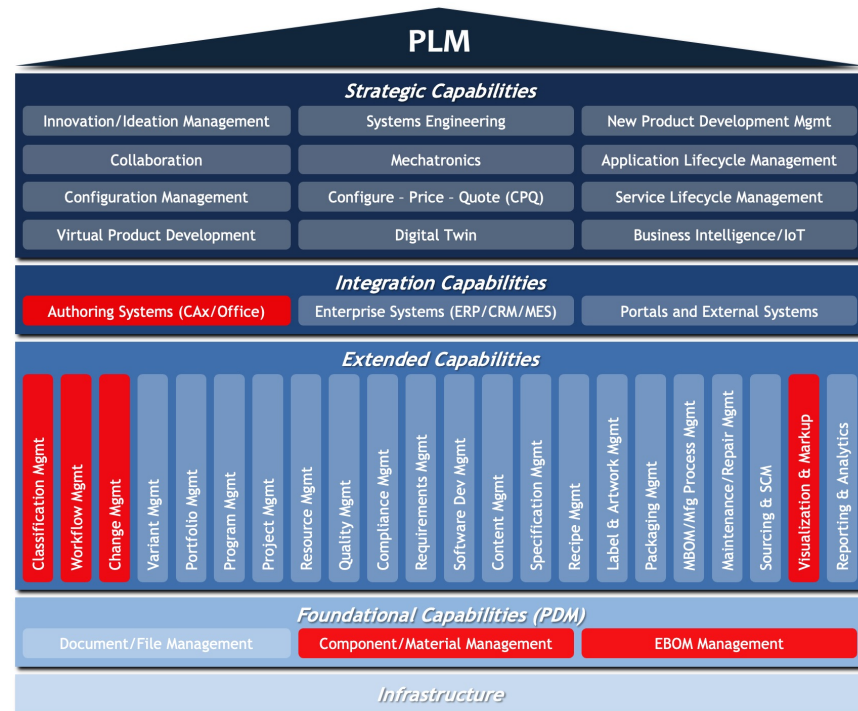


2) Roadmap



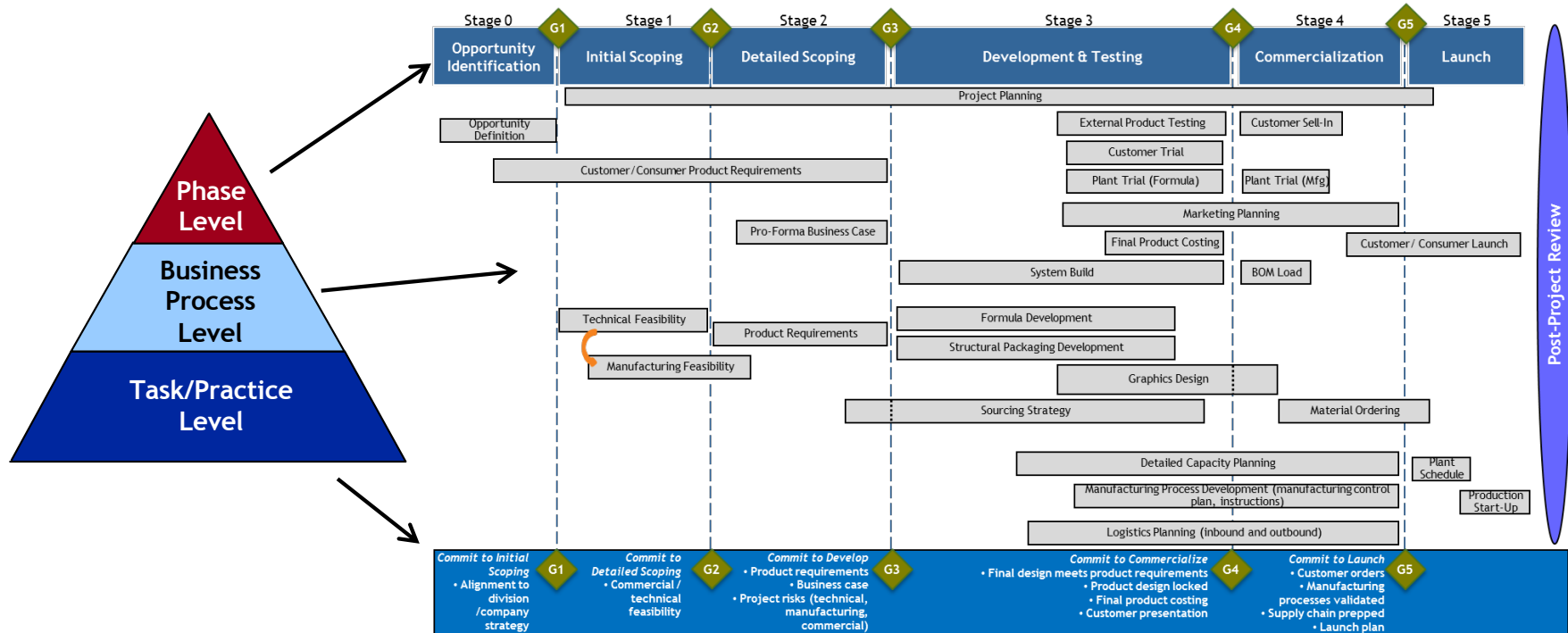
3) Scope of First Phase

- Limited scope, can be implemented in 4 to 6 months
- Based on business priorities and dependencies



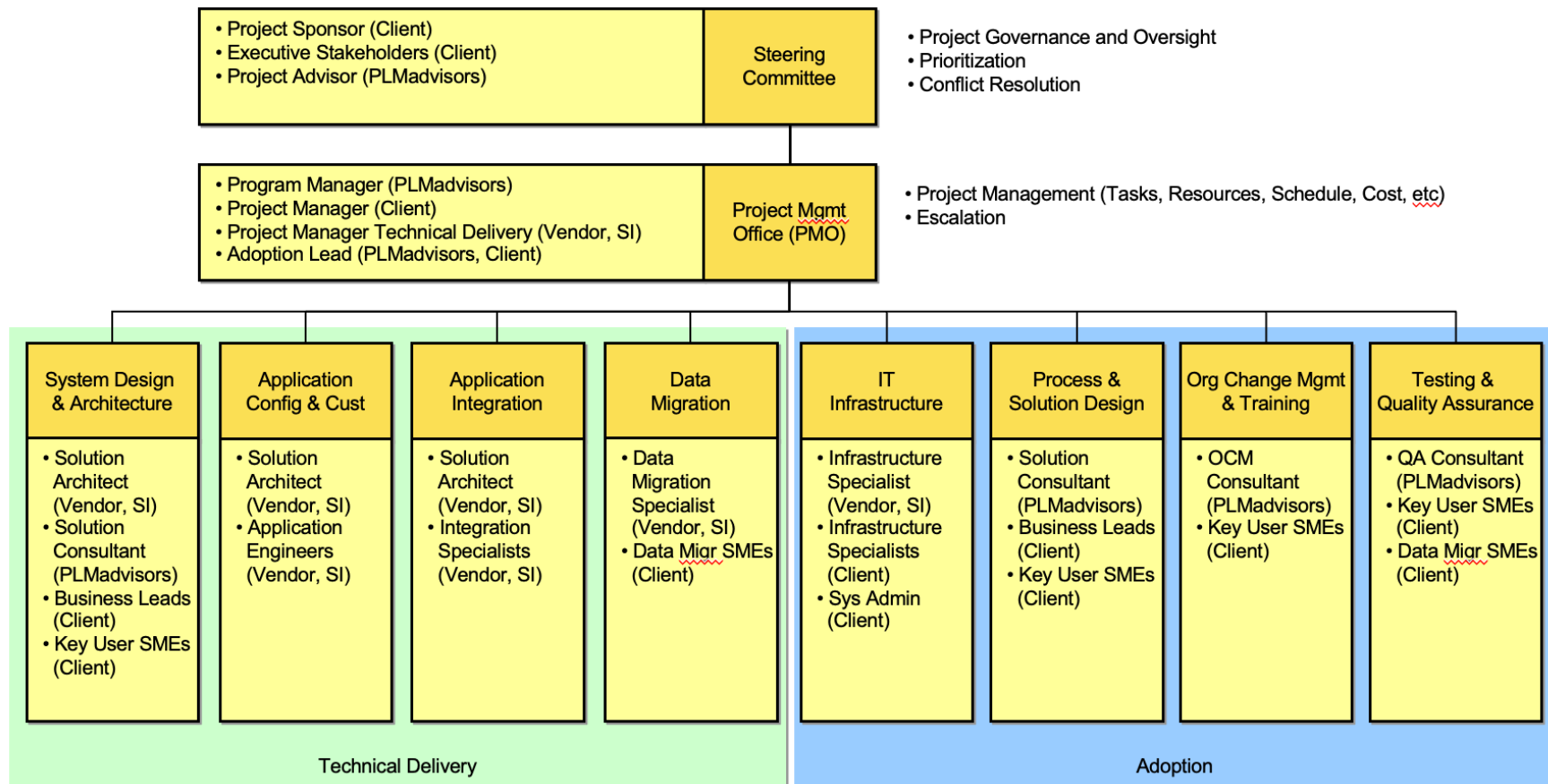
Step 4: Define Detailed Practices and Processes

- Define all phases, processes, practices and tasks for the current phase based on the functionality of the selected system
- **Needs to be defined before starting the design and configuration of the system**
- Involve the PLM expert and ideally also the implementation partner



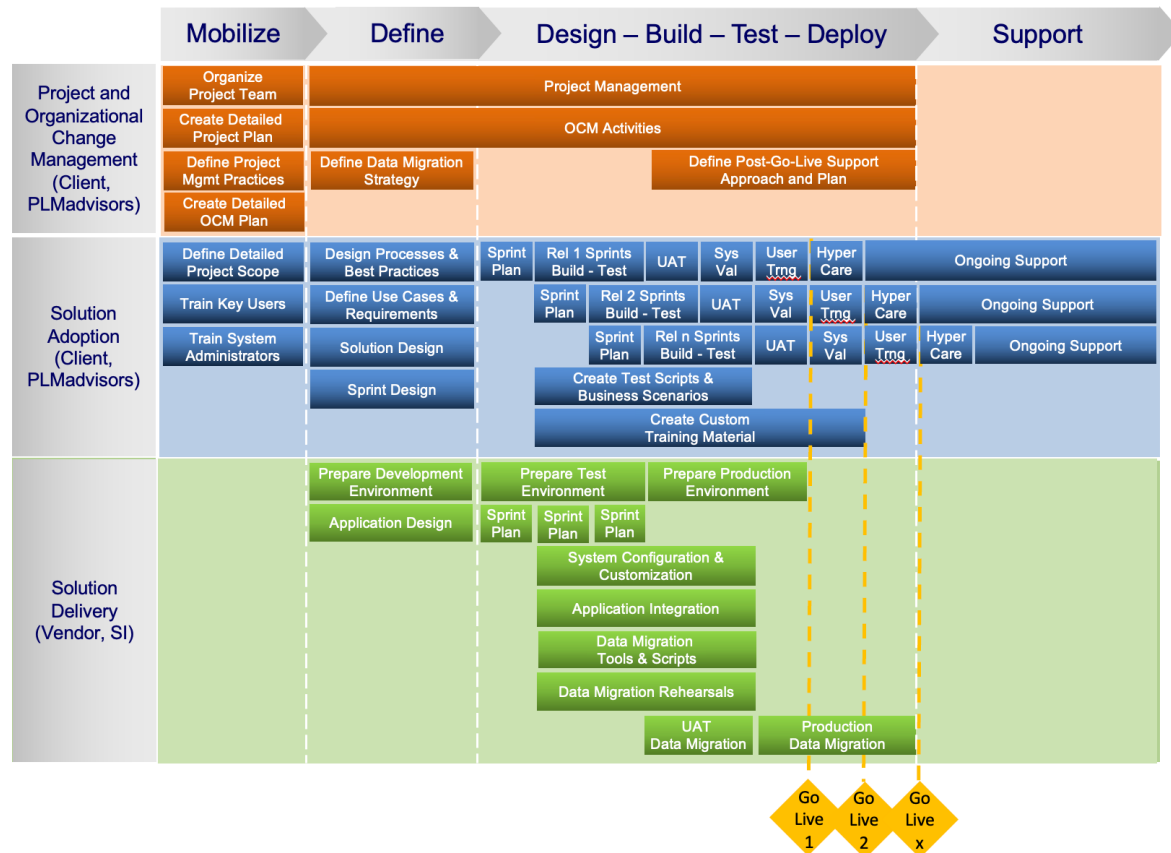
Step 5: Identify, Commit and Assemble Your Project Core Team

- Internal: Subject matter experts (SMEs)
- External: Technical implementation (software vendor, implementation partner, SI)
- External: Project management/guidance and expert advice (PLM expert/consultant)



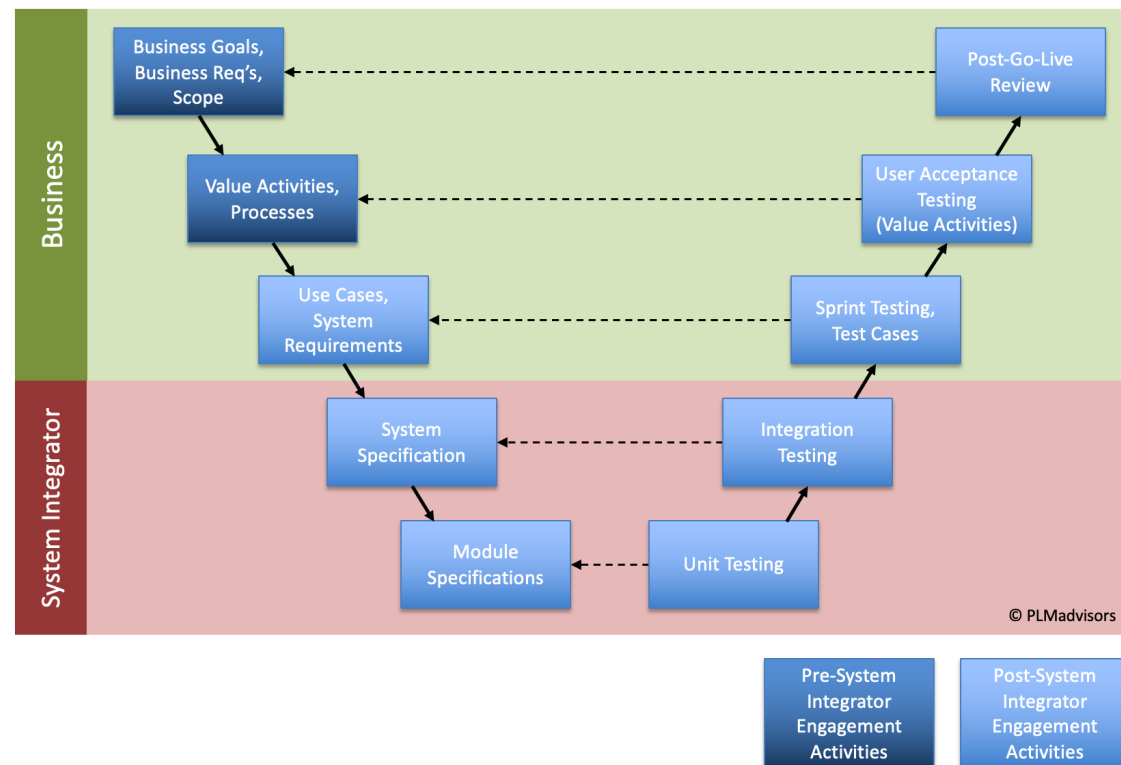
Step 6: Use a Proven Implementation Methodology

- There are hundreds of activities that need to be started and executed in a timely fashion and dozens of resources that need to be managed during a PLM implementation project
- Just forgetting one important thing usually leads to significant delays and cost overruns
- A proven implementation methodology ensures that the project can be executed efficiently and completed on schedule and budget.



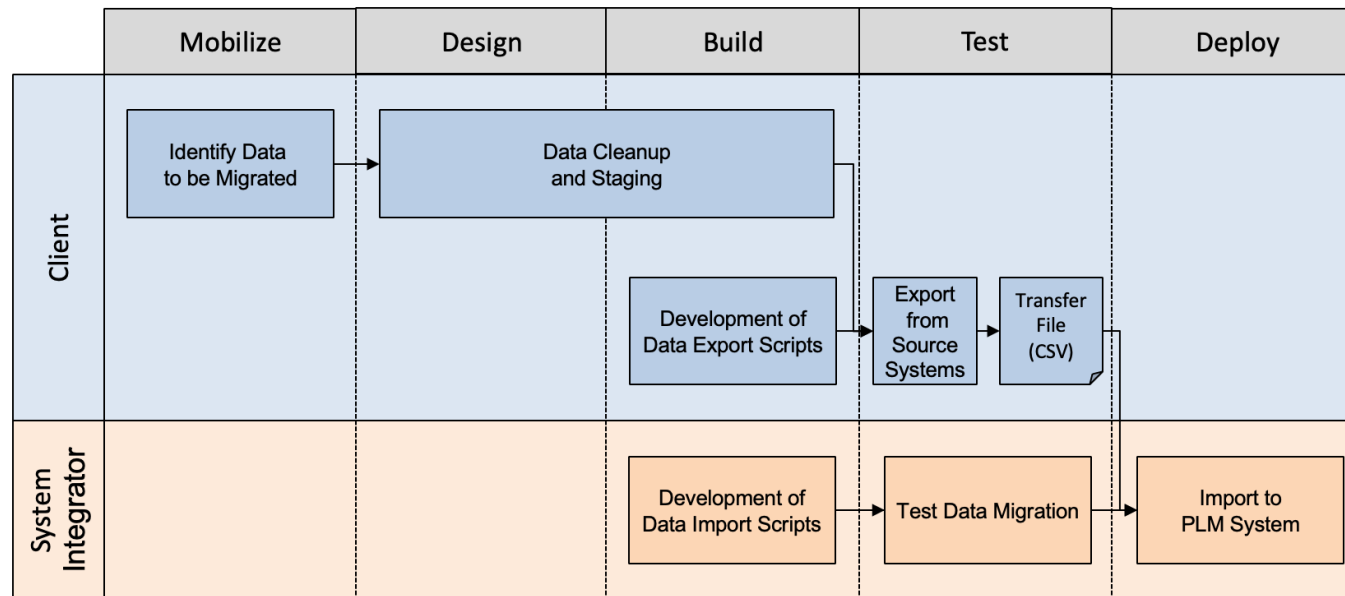
Step 7: Participate in the Solution Design and Testing

- Every functional area of the business affected by PLM in the current phase should participate.
- The system design activity is the business' opportunity to influence how the system will work. If you don't participate, you don't have a voice.
- The business (key user SMEs) writes test cases and does Sprint and UAT testing. Do not delegate this; it's your system, you have to ensure it works the way you need.



Step 8: Start Data Migration Preparation Early

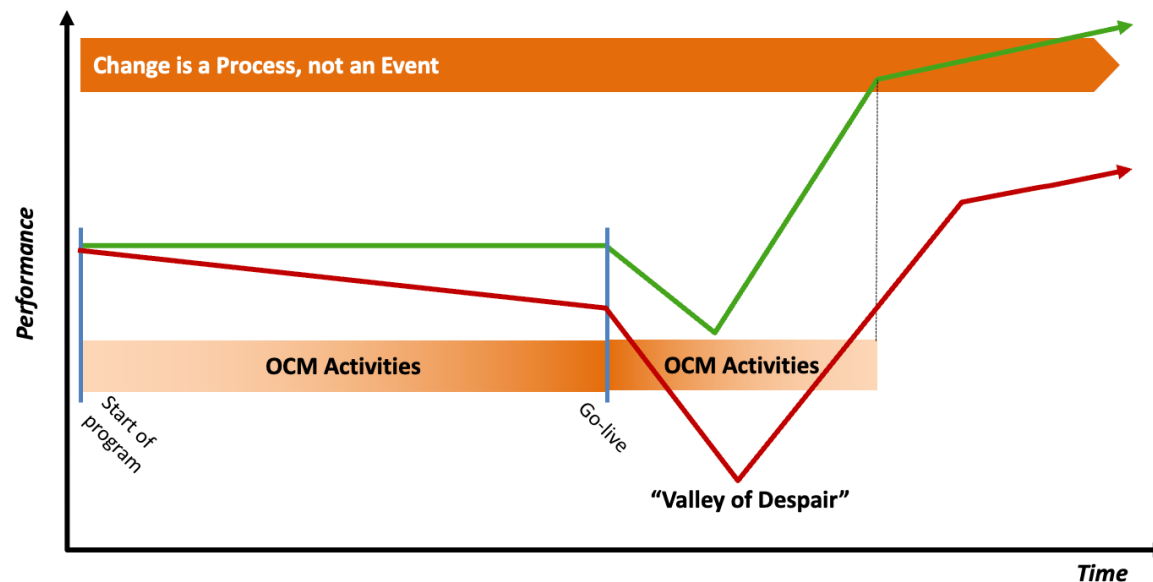
- Data migration is usually the activity with the longest lead time
- Data cleanup and staging can take a long time and require significant resources
- If not started early, it is often the reason for delays
- Secure resources early in the project (usually when getting project approval)



Step 9: Make OCM an Integral Part of the Project

Change is scary if there is uncertainty

- Organizational change management is the structured approach to planning, implementing and guiding transitions within a company to achieve desired outcomes and mitigate negative impacts. It involves strategies, communication and support systems to help affected stakeholders adapt to new processes, technologies and/or organizational structures.
- OCM activities can significantly **improve the acceptance** of a new PLM system, new practices and processes and new organizational structures and **shorten the transition period**.



Step 10: Carefully Plan Cut-Over and Post-go-Live Operation

- Plan enough time for production data migration. Is a weekend enough?
- What happens with systems that are being replaced with PLM? Turn off, keep running in the background, etc?
- What happens with change orders that are in the middle of a change process?
- What happens with customer projects that are in the middle of delivery?
- What happens with new product development projects?
- Set up a hypercare organization and procedures
- Ongoing onboarding and training of new users → who, how, where?
- Ongoing system maintenance and improvements → procedures, infrastructure (development/test/staging environments)

Steps to Achieving a Competitive Advantage with PLM

Summary

1. Identify the value activities and processes that can be improved with PLM
2. Optimize high-level processes within each value activity for PLM
3. Map PLM Capabilities against value activities and processes
4. Define priorities and dependencies
5. Create a PLM roadmap reflecting your priorities and dependencies
6. Evaluate and select the best PLM system for your business needs
7. Implement the selected system
8. Operate, maintain and improve the PLM system

Download PLM Implementation White Paper at

<https://plmadvisors.com/competencies/plm-implementation-white-paper/>

Creating Competitive Advantage with PLM

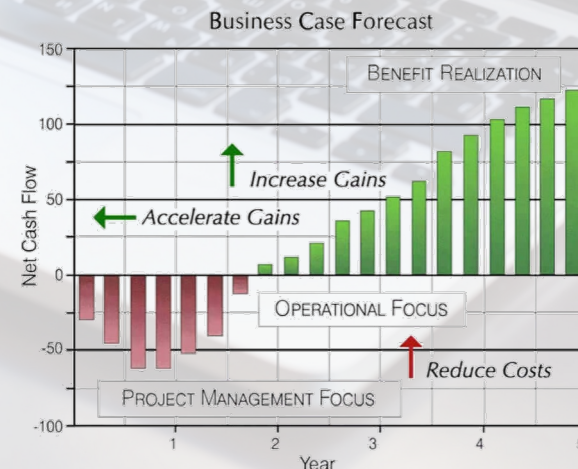
Questions?

Upcoming Webinar: How to Justify an Investment in PLM (so that even your CFO will sign off)

Join us for our webinar where we will explore how you can make a solid business case for an investment in PLM

- Do you need to justify an initial investment in PLM, or an upgrade or expansion of your current deployment?
- Are you looking for proven, real world quantitative and qualitative benefits of PLM?
- Do you want to calculate the return of investment (ROI) or the net present value (NPV) of an investment in PLM based on actual and tangible savings?
- We work with you to develop a realistic business case for your PLM project that meets the financial justification requirements of your CFO and accountants.

Friday, October 13, 2023; 8 AM Pacific time.





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