PLM Interest Group

PLM Delivery Survey

Global Survey into the

Structure, Parameters and Measurement

of PLM Delivery

Version 1.0

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1.   THE QUESTION

The primary question at the heart of this Survey is:-

"Does the Customer Get What He Pays For when he buys PLM?"

A secondary question, arising from the first, is:-

"After PLM (or elements of PLM) have been implemented, is it clear that it was worth doing?"

These questions are important because, over the years, PLM has seen itself as some kind of "special case" that needs an exemption from normal business justification. This Survey will show what may need to be done to improve how PLM is applied and measured.

2.   BACKGROUND

All around the world, when you buy something you expect to get what you have paid for. With PLM, however, it can be quite difficult to establish that this is the case.

Because there is no common knowledge about how much companies should spend on PLM, many user companies may be spending a lot more than they need to. When PLM under-performs there are many additional costs and overheads, either in hard cash, wasted effort or lost productivity. Users start to believe that these are unavoidable.

The vendor needs to show how PLM will benefit the customer's business: but the user must provide all the baseline financial information. This requires a significant amount of collaborative work between user and vendor that can be difficult to set up and plan for. There may be "qualitative" benefits that are difficult to agree on. Perhaps most importantly, there is no neutral industry structure for users and vendors to follow that defines what "delivering PLM" actually means.

To rectify this, the PLMIG aims to establish an internationally-agreed **PLM Delivery** structure that will allow users and vendors to predict accurately at the justification stage that PLM will be worth doing - and to show clearly after implementation that everything that was promised has been achieved.

3.   PURPOSE OF THE SURVEY

Before attempting to devise a structure for PLM Delivery we need to know, from as many real implementations as possible, what are the most important metrics to consider.

The purpose of this Survey is therefore twofold.

1.   To enable as many PLM practitioners as possible to encapsulate their views on the issues, parameters and progress of PLM Delivery within their own implementations, or within their customers' implementations.

2.   To enable those who complete the Survey to send in a 'Comments and Feedback Form' to the PLMIG, so that we can capture the general thoughts of participants and incorporate them into the neutral PLM Delivery Structure.

4.   SURVEY SCOPE

For simplicity, the wording in this Survey has been phrased in terms of 'Users' and 'Providers', but there are many players and stakeholders who impact on PLM Delivery.

Participation in the Survey is open to PLM users, vendors, service providers, systems integrators and consultants – in fact everyone, from every organisation type in every country, who feels they have an input to make, or feels that completing the Survey will be of value to them.

5.   SURVEY METHODOLOGY

The main part of the Survey is for information and internal use by those who complete it. Answering the Survey questions and making a record in the Survey format will create a valuable picture of the status and shortcomings of PLM Delivery in the implementation under consideration.

We recognise that most of the information captured by this Survey will be too confidential for participants to release outside their own company. That is why there is a separate 'Comments and Feedback Form' that can be sent back to the PLMIG when the main Survey has been completed.

For those who would like to compare their detailed Survey Results with those of other companies, the PLMIG will run one or more face-to-face workshops in October.

Participants should therefore answer the Survey questions with regard to their own implementation (if a user); or one or more customer implementations (if a vendor); or one or more implementations on which the participant has worked (if a service provider, integrator or consultant).

Answering the Survey questions may require a certain amount of delving into documentation or calculating figures, but at this stage the answers are intended to be high-level. The quickest reasonably-accurate answer is the best.

Once the Survey is completed, participants are asked to enter their thoughts into the 'Comments and Feedback Form', while these thoughts are fresh, and to send *the Form only* to the PLM Interest Group at delivery@plmig.com. This step is not mandatory (you are welcome to complete the Survey without any contact with the PLMIG at all) but if you can do so it will be very helpful for the next stages.

The completed Survey is then ready for internal use as a discussion document, and can be retained for comparison with peers at the face-to-face event if required.

6.   CONFIDENTIALITY

For the main part of the Survey, it is the responsibility of the participant to maintain confidentiality of the results amongst those to whom they are circulated.

The PLMIG will keep confidential all conversations and written material relating to the content of the PLM Delivery Survey.

Returned 'Comments and Feedback' Forms will remain confidential to the respondents and the PLMIG. The names of participants will not be published. Returned Forms will be compiled into an 'anonymised', non-attributable format and will produce a picture of the issues and current status of PLM Delivery that will be of immense value to the industry.

7.   HOW TO COMPLETE THE SURVEY

The form overleaf is a Word table. As you write in your text it will expand, but do not worry about maintaining the format – just let the tables expand over the page if necessary. You can repaginate when all the answers have been captured.

To get the full value from the Survey, a certain amount of thought and internal research may be required. Encyclopaedic accuracy is not necessary, but some actual hard figures and ratios will be very informative.

The questions have been designed so that they can be answered as a User, or as a 'Provider' (using known examples from customer/client situations).

Remember that negative views are just as valuable as positive views if they are handled correctly.

Each question has a 'Notes' field that can be used to expand on the selected answers. These are particularly valuable because they allow capture of facts that support or expand upon the choices made; or findings that may fall between the fixed options offered in the Tables.

For the 'Comments and Feedback Form' the aim is simply to get initial reactions from the participants while the Survey preparation is still in their mind. It is best to use your own words, as you might explain the points in conversation with someone in person; and to write in general terms, rather than about the specifics of your own company or organisation.