

# Which?LM

PLM Customer Survey

*Report and Buyer's Guide*



WhichPLM®

Market Research

# Customer Survey Report and Buyer's Guide

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## Executive Summary

It is a rare opportunity to be able to present an industry first. The first customer survey of its kind to address the concerns and needs of the apparel industry. The first customer survey of its kind to ask consumers what they truly think of their Product Lifecycle Management (**PLM**) solutions. In March, April and May of this year the industry spoke, and we listened.

In undertaking the first ever truly independent apparel PLM customer survey we at WhichPLM solicited some 500-plus customers of PLM and Product Data Management (**PDM**) from around the world, comprising a cross-section of the industry and including multinational retailers, global brands, large-scale manufacturers and small businesses. We asked incisive and exhaustive questions not just because we were the people best poised to do so, but because we see ourselves as working not just for our clients, but for the industry as a whole; we care about PLM not just as a service but as a way of doing business, and we want to see it grow. We took this reductionist approach because we wanted to learn exactly what customers thought of the available PLM solutions and, more importantly, we hoped to learn how those customers wanted to see the industry mature.

We have taken the time to analyse and interpret the answers in a way that we hope does justice to how unique an information-gathering opportunity this, the first truly independent industry-wide customer survey, was. We present them here both as objective data and as interpreted by our team of experts with our observations accompanying key results.

Our aim is not to second-guess the results of customer surveys conducted by individual businesses but to look at broader trends and interesting anomalies in the light of what they can tell us about PLM's maturation into a fully-fledged industry within the fashion sector. We aim to set out suggested avenues of development not just for particular supplier or company types (although we do look at the results from these angles), but for PLM as a whole, which the results suggest is catering incredibly well to its growing client base. It is a message you might reasonably expect a group of PLM evangelists such as ourselves to put forward, but it is heartening to know that the results bear out what we already knew. In short: PLM works!

From a supplier's perspective it goes without saying that we cannot overstate the importance of customer satisfaction. A satisfied customer base can have a profound impact on every aspect of a business. On the whole we found that customers who entered into the process of selecting a PLM solution with a full understanding of their aims and an accurate blueprint of their existing processes were generally happy with the solution they picked, barring a few notable exceptions. Most customers considered the pre-sales stage to have catered well to their needs, but there were various concerns raised in individual cases of after-sales support differing from what they had been lead to expect. It is also worth noting that the vast majority of customers rated prior fashion industry experience as being crucial when it came to selecting a supplier, which given the range and diversity of respondents gives a strong impression of just how large this section of the market has become.

Acting on the information gleaned from an impartial survey is the perfect way to ensure that your business is growing in the ways that matter to your customers and that you are able to deliver the ultimate goals of exceptional customer satisfaction, loyalty and retention. Listening directly to your customers and making demonstrable improvements in the areas that count is the cornerstone of developing strong customer relationships, and is the one area of our survey in which suppliers came under relatively consistent criticism, but, encouragingly, also one of the main areas that customers would like to see their solution improve in the future.

From a customer's perspective we found that a worrying proportion of those who responded fell short of what we and other third-party experts consider to be the minimum amount of research and process analysis required before selecting a PLM solution. With the burgeoning marketplace becoming as crowded as it is, the results speak for themselves in reinforcing the need for careful consideration, expert consultation and meticulous forward planning when it comes to shortlisting suppliers and eventually picking a solution. As we are sure you have already guessed we know how it ought to be done, and it is with these results in mind that we present the Fashion PLM Buyer's Guide (section 4, page 47). Our hope is that better informed prospective customers and more receptive, adaptive suppliers will see the industry grow in ways that will benefit everybody.

It is important to note that while we at WhichPLM are unquestionably PLM evangelists, this survey was not designed as a competition. We did not set out with the aim of finding the 'best' solution, simply because we believe that the solutions available are as unique as the customers who are seeking them. Choosing a solution is not as simple as picking the most popular supplier, but rather picking the one that best fits your own business needs.

Let us know what you think. Plenty of people already have.

## 1. Introduction

### 1.1 Industry History

PLM as a concept has its origins in the aerospace and automotive industries of the early 1990s. The basic DNA of the systems and solutions that proliferate the current market is grounded in the work of those engineering-focused industries more than twenty years ago, and every current solution has traits that can be traced via heredity from the challenges that drove those pioneering businesses to establish PLM, right through to the factors driving its ever-increasing adoption in the fashion industry today.

The leap, however, was not instantaneous. The PLM 'label' found its way into wide circulation within the fashion industry relatively recently (roughly ten years ago), coinciding with the Internet boom and the attendant technological advances. The emerging opportunities for joint working and information-rich, instantaneous communication paved the way for the transformation of the then-current Product Data Management (**PDM**) systems (as widely used by apparel and textile development teams to build and re-use product specifications and to manage the associated data) into a truly collaborative, online, global solution.

Even then it took the work of the American company Freeborders to really galvanise the fashion industry into analysing their own existing processes and adopting the company's new web-based suite of products, which they termed Collaborative Product Management (**CPM**). Many Information Technology (**IT**) companies followed suit and began broadening the scope and capabilities of their existing PDM solutions to accommodate particular 'PLM traits' designed to facilitate online collaboration. Other technologically-inclined businesses opted to buy into the industry via mergers and acquisitions, driving the evolution of the nascent marketplace.

The fashion specific sub-sector of the PLM marketplace has changed dramatically since that time, both in terms of the key players and the types and sizes of customer who are now looking for a solution - it is no longer exclusively the large enterprises who are being turned on to the benefits of PLM. One of our overriding aims in conducting this survey was to gain an accurate picture of how many companies currently offer fashion PLM solutions, and of who the key market players are compared to how the industry was composed ten years ago, particularly in how it caters to smaller and more unique companies. We know that PLM works, but we wanted an outside perspective on whether PLM really lives up to the claims of suppliers and, more to the point, we wanted to compile, analyse and present all this information in a way that can be easily understood by businesses of any size who are in the market for a PLM solution. The aim of the PLM Buyer's Guide (section 4, page 47) is to use these findings to help more and more diverse businesses to achieve the maximum return on their investments and to move forward, taking advantage of all that PLM has to offer.



## 1.2 Our Survey – The Details

There has been no shortage of customer surveys conducted by individual suppliers, but these have by definition been partisan efforts designed to capture the opinion of that company's own pool of customers. White papers, market research reports, corporate events and seminars all claim to offer new and bewildered customers helpful insights into the industry. They proclaim an objective stance on which suppliers are the biggest and the best, but the truth is that these resources are often, despite claims to the contrary, biased and constrained in terms of the answers that they can provide. Having worked with businesses large and small over the past thirty years, we know firsthand that prospective customers come to these events armed with reams of questions ranging from the simple to the complex; only to discover that the answers they are given may be one-sided or compromised by corporate sponsorship.

To date there has not been a truly independent survey of fashion PLM customers conducted by a team of experts able to ask the right questions and provide what we considered to be a much-needed objective, unbiased analysis of the industry as it stands. We realised that we were in the unique position of being able to do something different and something important.

So, how are we at WhichPLM perfectly positioned to conduct an independent survey and to fulfil the lofty aim of giving customers the kind of truly impartial, completely honest advice that they need? Our team are industry experts in the most literal sense; our Managing Director alone boasts over 30 years' experience and our ever-growing family consists of designers, editors, executives, technology experts and more giving us a granular insight into every stage of the product lifecycle process. Between us we have done everything from cutting cloth to managing factories to writing code; together we have helped more than a hundred businesses analyse their processes, select, implement and take full advantage of PLM solutions.

Since the inception of our benchmarking programme two years ago, our experts have put many PLM solution providers through their paces and assigned each a series of scores based on a wide range of discrete indicators and assessment criteria. We aim to learn as much as possible about the suppliers and their solutions so that we can quickly and easily help our customers to select the right PLM solution fit for their business needs without the considerable investment of time and money required to individually assess every possibility on the market.

Like all our work these rigorous evaluations are fiercely independent. We own our own thoughts and answer to no single supplier. We are dedicated to providing advice, information and consultation with the aim of objectively evaluating PLM for the fashion and retail industries to help our clients find the right solution, first time.

Individual solution evaluations - even in as much detail as the WhichPLM benchmarking process entails - alone cannot replicate the wealth of hands-on information that a customer survey can provide, least of all in comparison with a detailed, industry-wide, global survey! We understood that beyond simply analysing the state of the marketplace, prospective customers stood to gain a great deal from a similar arrangement to our benchmarking programme but extrapolated across the entire industry. We knew that, real, honest data - from short-list to support - concerning existing customers' experiences of selecting, implementing and working with a PLM solution could be invaluable to businesses looking to follow suit.

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From all of this, the WhichPLM Customer Survey Report and Buyer's Guide was born. Our questions were based on decades' worth of meticulous, on-the-job research and were intended to drive honest answers from real customers. As an independent body we believe we are ideally positioned to ask the tough questions, find out what the top-performing solutions are, and discover whether or not they are satisfying customer expectations on-time and within budget. We aim to analyse and disseminate those findings in order to drive suppliers to develop their solutions in line with the improvements suggested by both their own customers and the industry as a whole.

**How is the survey structured?** The survey consisted of a series of questions with a wide remit; our aim was to discover in exhaustive detail which aspects of the available solutions customers particularly liked or disliked (and why). It may have taken our participants a while to complete, but we consider this level of detail to have been critical in obtaining data of the requisite quality and quantity. And we believe that more, farther-reaching and more incisive questions have prompted deeper and more considered responses, allowing us to better analyse the results and to fill this report with more insightful and considered findings appropriate to all our readers, suppliers and customers both.

**How is the report structured?** Since the questions themselves were structured in such a way as to trace the process of choosing a PLM solution from start to finish, this report will follow a similar structure. Our expert take is included alongside key items and each section of the report (as outlined in the Contents, page 5) includes a detailed introduction and, where appropriate, a deep analysis of the results.

### 1.3 Analysis - Who Took The Survey?

The individuals and companies who participated in the survey will remain anonymous. We were clear from the start that the information they provided was to be used solely to inform a holistic look at PLM across every sector of the industry. What we are prepared to say is that we received tremendous feedback from each of the 500-plus companies that we approached, including detailed information from some of the world leaders in a huge range of sectors, including:

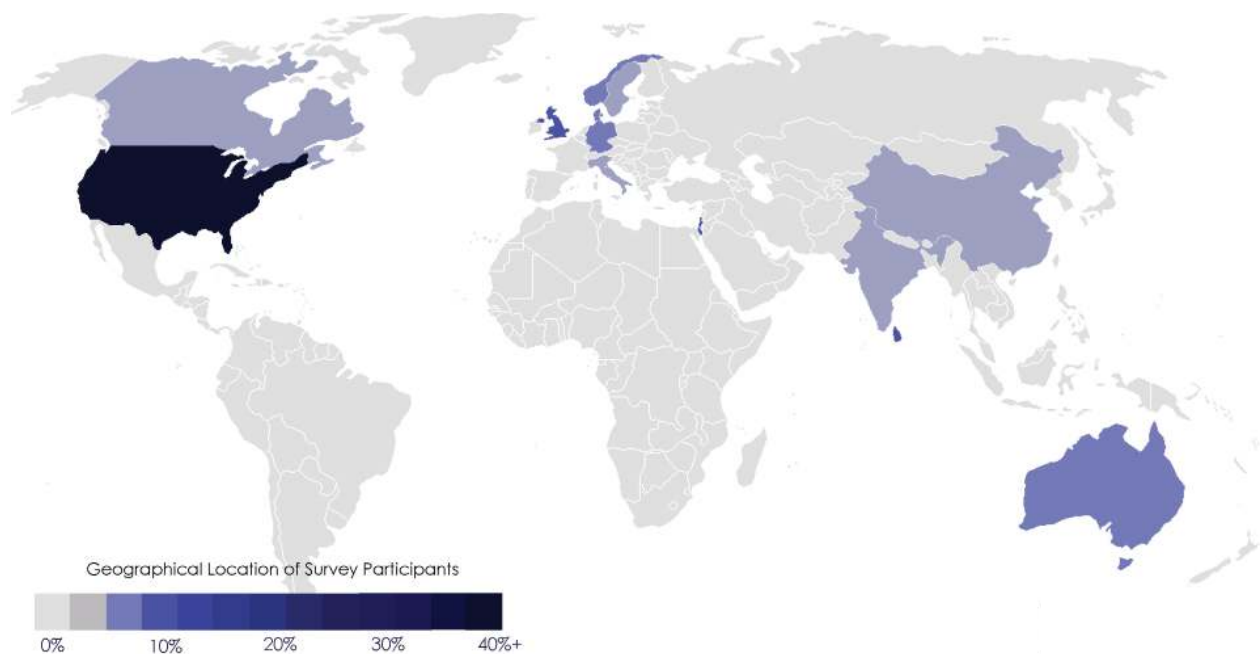
- Global apparel and accessory retailers;
- Luxury brands;
- Several of the world's leading apparel and footwear brands;
- Mail order companies;
- Internet-based retailers;
- Private label manufacturers; and
- Apparel and accessories product suppliers.

In terms of the roles of the individual respondents, we received comprehensive feedback from a broad cross section of the typical business management team, including:

- PLM project managers;
- PLM leads;
- Project managers;
- PLM analysis;
- IT engineering systems analysis;
- Sourcing managers/directors;
- Buying managers/directors;
- Garment technicians;
- Design directors;
- Business relationship director;
- Account managers;
- Chief Information Officers (**CIOs**);
- Business process managers;
- Implementation consultants; and
- Senior executives.

### Geographic location of survey participants

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Please note that the map does not indicate exact customer locations but rather is intended to give an impression of how far-reaching this survey has been; we asked participants to provide the location of their headquarters only as far as the country level.

As can be seen from the locations, the geographical distribution of the companies that participated in the survey has given it a truly global reach!

Interestingly, examining the regional coverage you can quickly see that those who responded tended mostly to be concentrated in the established traditional retail strongholds of Western countries, such as the USA and Europe. These are followed by a scattering from countries such as Israel, India, Sri-Lanka, China and Australasia. On deeper analysis we can see from the respondents that the spread of PDM and more recently PLM began in the USA in the mid-1990's, followed shortly after that time by Europe, and has since started to spread across countries on continents with growing retail power such as Asia, Australasia and the Pacific regions. We can expect to see this trend continue in line with the advancements in PLM processes, collaboration and increased adoption across the extended supply-chain. Most of the respondents are already maturing their use of PLM to include broader and deeper processes, including:

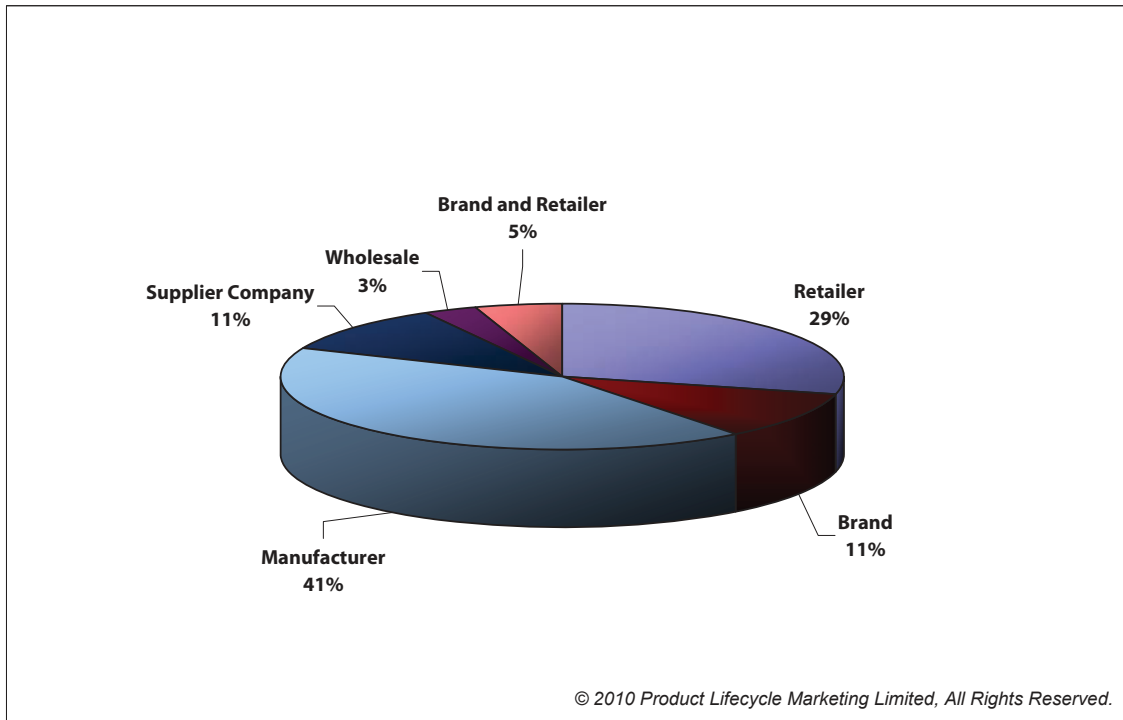
- Advanced planning systems;
- Three Dimensional (3D) virtual store designs;
- Virtual sample rooms;
- Visual planograms;
- Trend information plucked directly from the premier social networks; and
- Creative developments facilitated by advanced plug-ins to Adobe software.

These are counter-weighted by improvements to the other end of the spectrum, developments in advanced sourcing, tracking, certification and sustainability of business processing to mention but a few of the advanced features that are becoming integral parts of today's PLM solutions.

A considerable majority (41%) of participants classed themselves as manufacturers, with retailers being the second largest group, still representing around a third of the total. This goes to show that while today's PLM solutions are widely used in retail chains from the factory to the shop floor; the largest single consumer of PDM/PLM remains the manufacturing sector.

Taken in the context of today's market as a whole (something we will cover in more depth in the next section), the continued demand for greater efficiency across the extended supply-chain has begun to impact upon and expand the user base of PLM in its constituent sectors. We now see companies as diverse as manufacturers, textile mills, providers of components, trimmings, finishing services, testing laboratories, logistics and other associated supply-chain suppliers adopting solutions. Industry history tells us that the first major step in this direction flowed from the benefits of a shared collaborative environment, which provided manufacturers with the ability to work directly with a retailer's or brands' PLM solution.

### Company type of survey participants



If we extrapolate our industry history and these results we can confidently predict that this is only the beginning of things to come. We fully expect to see a spider's web of collaboration promoted by the need for companies to make greater efficiency savings based upon compounded benefits, linking those companies and processes that offer value to the core PLM solution, all facilitated by the proliferation of the solutions themselves.

## **2. The Market Today**



## 2. The Market Today

With a grounding in industry history and an understanding of which sectors, which countries and which kinds of employees are represented in the survey, we then wanted to see how our informed speculations (and the less informed guesses of others) stacked up against the reality of the marketplace today. We compiled a short list of typical assumptions an outsider or, indeed insider might have about the scope of the industry. Some were affirmed and others were challenged; you might be surprised to learn which!

- 1. The typical PLM customer is a large business.**
- 2. The majority of PLM solutions are bespoke, tailored to the companies that use them.**
- 3. Cost is the single biggest factor in customers' selecting a PLM solution.**
- 4. The recession has affected customers' IT spending habits.**
- 5. The largest companies offer the best solutions.**
- 6. Most PLM solutions have only been in place a short time – PLM is a 'new' thing.**
- 7. Customers care more about the software than they do a supplier's previous experience of the fashion industry.**

Throughout the report we will revisit these assumptions and compare them to the data gleaned from this pioneering, industry-wide survey.

Our educated examination of the market today is included below, and is intended to be read alongside the results themselves to provide a clearer understanding of how this survey can provide accurate trend analyses for the industry as a whole.

Judging from the results, many of the customers who responded were 'early adopters' of PLM solutions, with these traditionally representing the larger organisations i.e. companies with several thousand employees and a turnover exceeding \$1 billion. Companies of this size are required to manage large portfolios of brands (some taking charge of 80 or more names), all with unique and extremely complex processes and systems to support. The key drivers for these businesses, when adopting PLM in the past has been (and remains today) to streamline business processes and create a leaner process environment. By employing similar methods across their portfolio of brands, these aggregate businesses are able to achieve greater efficiency based on economies of scale.

From the results it is clear that many of these early adopters paid a high price owing to the comparative simplicity of the solutions available between 2003 and 2007. Those early solutions supported only basic processes and, in most cases, required a great deal of customisation to enable them to support the then-best-practice ways of working for each individual business. This is not to say that these pioneers made a mistake investing in PLM so early; quite the opposite is true when we consider that they have been able to benefit from the leaner processes and the refined and revolutionary ways of working that their PLM solutions have provided for many years.



Since then suppliers have worked tirelessly to develop their solutions, the majority of which growth has been funded and inspired by the investments and foresight of those early adopters, driving the ensuing market upsurge in PLM demand. The fruit of these developments, coupled with innumerable improvements in supporting technologies and the ever-decreasing cost of communication has subsequently fuelled an even greater demand for PLM today.

The market has grown at a phenomenal rate over the past few years, and is now also beginning to attract Small Medium Enterprises (**SMEs**) (defined in this report as those with a turnover of \$50 million or less).

In today's highly competitive market there are very few companies that do not take PLM seriously. Far from being considered as a useful 'extra' tool, PLM has very rapidly become a 'must have' part of the ways of working of many industry leaders, enabling them keep pace with the ever increasing demand for new and improved fashions.

As a corollary to this incredible growth, we have recently seen the introduction of what we term Out Of The Box (**OOTB**) solutions. These are designed to be one-size-fits-all and are marketed as being capable of supporting a business of virtually any shape or size. Generally speaking we expect an OOTB solution to support the following basic processes:

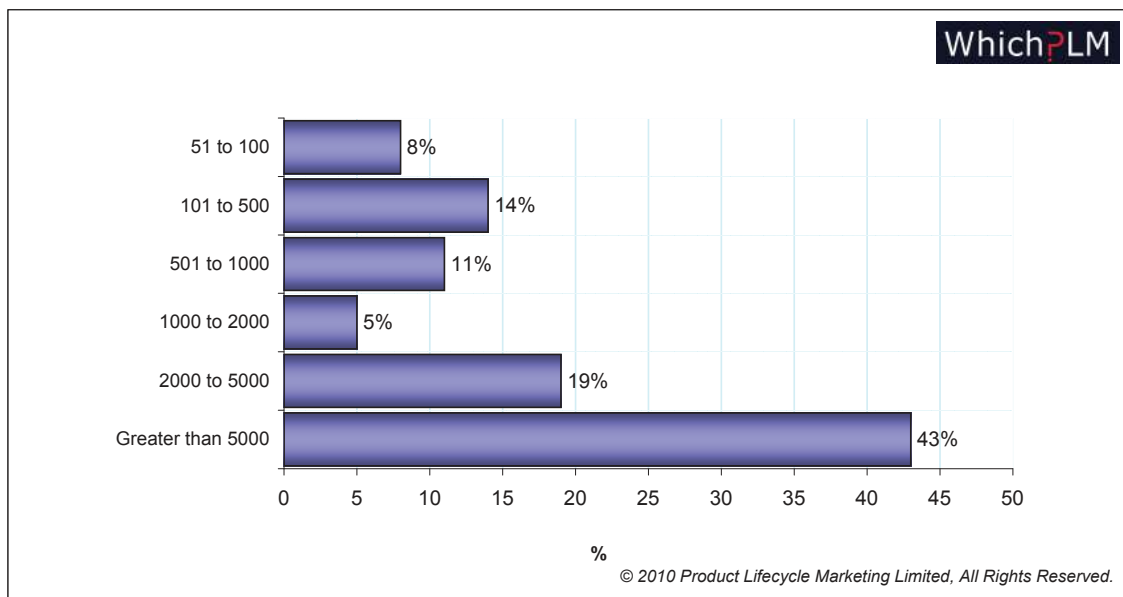
- Merchandising;
- Line planning;
- Creative design;
- Technical development;
- Vendor management;
- Sampling;
- Costing;
- Quality assurance;
- Certification;
- Sustainability; and
- Two Dimensional (**2D**) and 3D sampling.

Along with the explosion of development driven by the traditional high-end suppliers of PLM, this survey demonstrates a surprising and encouraging increase in the number of smaller technology companies entering the market to offer competitive solutions. These tend to offer a lower Total Cost Of Ownership (**TCOO**) and are intended to be affordable for businesses of a size that the bigger names have not previously catered to. These new suppliers are mirroring the development of broader and deeper processes of their larger counterparts, but in a way that has seen companies with as few as five users opting to buy into a PLM solution.

As for the concrete results themselves, our early questions were designed to elicit as much information as possible regarding company size, type, location and the provider and configuration of their PLM solution, with some interesting results.

First of all an overwhelming majority (over 40%) of the customers surveyed were representatives of organisations with more than 5,000 employees. This is not to say that SMEs did not figure in the results at all, but rather that businesses of all other sizes only constituted half of the overall total when taken together. At first blush it appears as though larger companies meet several criteria for having adopted a solution: they are able to afford the cost, they have the resources to implement a solution and, most importantly, these two factors mean that larger companies are generally the first targeted by suppliers in their marketing efforts.

### How many employees do you have?



As outlined above, one of the main considerations when it comes time for a business to choose a solution is cost, which goes some way to explaining why the early adopters tend to be the largest companies - companies that were able to allocate several-million-dollar budgets and who had the manpower and the tenacity to flourish despite undergoing implementations that tended to be measured in years as opposed to months or, today, weeks!

Despite the overwhelming majority of customers being representatives of larger businesses, we are still seeing an increase in SMEs joining the fray, largely due to the affordability and attraction of OOTB solutions.

The reduction in total cost of ownership is not, however, exclusive to the smaller companies. We have also seen average license prices fall from the heady days of early adopters paying \$6,000 per user to today's average price of \$3,000 per license, with modern solutions providing a far better process to dollar ratio. If this expansion and development continues then we can expect to see an even larger increase in the number of vendors entering the market, placing yet greater pressure on all suppliers to remain competitive. We fully expect the industry's overall business model to change in line with the increased adoption of cloud computing, taking into account the growth of Software as a Service (**SaaS**) hosted solution models.

While the names of the big players may not come as a surprise, we were struck by just how many suppliers in total claim to cater for the fashion industry. If we briefly revisit our industry history

and put these figures into perspective, in 2003 Freeborders was the sole CPM/PLM company for the apparel industry, whereas results and experience show that today we can see more than 40 companies offering expanded PLM.

### **'Tier 1' PLM Solution Suppliers**

• **Dassault Systemes • Infor • Lectra • PTC • SAP • Siemens**

The growth in supplier numbers and variety necessitates categorising them into two levels: Tier 1 and Tier 2 suppliers. Tier 1 is predominantly made up of large suppliers with sales turnovers in excess of \$1 billion and scalable technologies to match the needs of enterprise customers (for example, Dassault Systemes, Infor, Lectra, PTC, SAP and Siemens). Some of these diversified from supplying PLM solutions to other industries, others moved into a new solution sector (PLM from Computer Aided Design (**CAD**), PDM and Enterprise Resource Planning (**ERP**)). The size and scale of a Tier 1 supplier typically matches the size and scale of the customers they target. In order to keep pace with their multinational customers, these suppliers are able to quickly and confidently accommodate unique solution and tailored development requirements, and they will likely offer round the clock global support. A PLM solution from a Tier 2 supplier may be scalable to a degree that would suit an enterprise customer, but implementation and support resources may not be up to the standards expected of a Tier 1 supplier, meaning that third-party solution or consulting providers may be needed to fill those resource gaps.

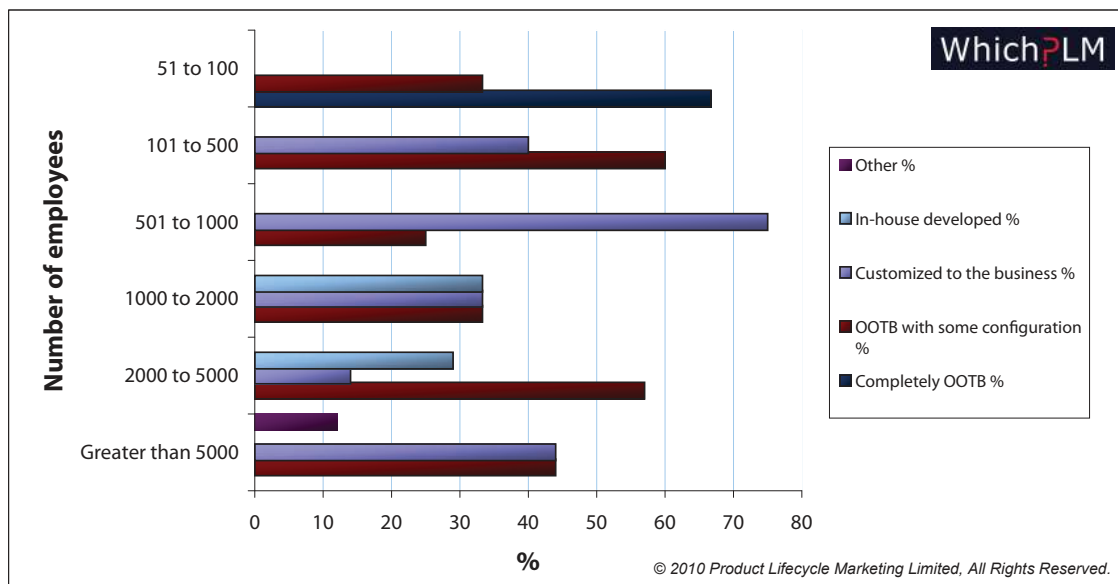
### **'Tier 2' PLM Solution Suppliers**

• **Aras Group • Arigo • Axind • BMS • Centric Software • CGS • Core Solutions • Decision Systems • DeSL • ecVision • Fashionware • Geometric • Gerber Technology • Just OnePlace • Lawson • Momentis • New Generation Computing (NGC) • Option Systems • Patternworks • Polytropon • Porini • TXT e-Solutions • TEXbase • TradeStone • Tukatech • Visual 2000 • WFX • Zweave**

Aside from the size of PLM solution suppliers, their historical backgrounds also play a key role in the selection process for customers. Tier 1 PLM providers like Dassault Systemes, Siemens, SAP, Infor, Lectra and PTC, entered the apparel market with solutions that had been tried and tested in the automotive, aerospace, engineering and electronics industries. Working on the basis that a PLM 'engine' can be adapted to fit any industry providing the user-interface is tailored to fit its unique processes, customer terminologies and ways of working, these companies offer robust and proven systems. From our own hands-on experience and from the results of this survey, some customers prefer a more personable supplier – one who can reassure them that a particular solution will accommodate their unique business needs.

There are several conclusions to be drawn from the type of PLM solutions in use at companies of different sizes. Most striking, however, is that only a small portion of completely OOTB solutions appear, despite being the solution of choice for small companies of 51 to 100 employees. It is also interesting to note that the alternative option – an OOTB solution but with some additional customisation – actually just outweighs the entries for truly bespoke solutions, designed from the ground up for the specific needs of a given business, suggesting that OOTB is initially offered as a starting point in negotiations as a cost effective alternative to a completely customised solution.

### Which of the following applies to your PLM solution?

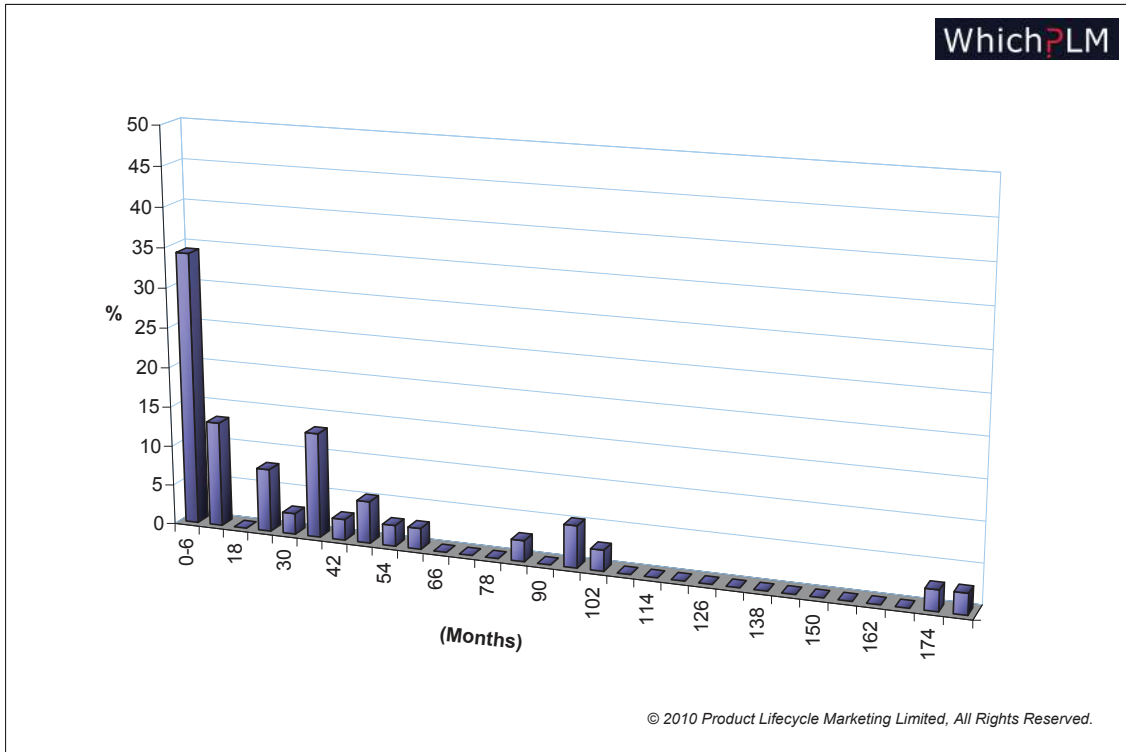


What this tells us is that a great many customers are looking for one-step solutions but, almost invariably, finding that those solutions then require some customisation before the purchaser can take full advantage of what they have to offer. In our experience one-size-fits-all solutions tend to be anything but, and that customers expecting a quick fix without undertaking the proper research and process analysis will likely find themselves beset by hidden costs and time-consuming adaptations before the implementation is over. The Buyer's Guide section of this report (section 4, page 47) covers this and other helpful advice in more detail.

Barring a few notable legacy systems that have been in place for longer than a decade, the majority of PLM solutions have been implemented for between one and five years. Taking into consideration the timing and global reach of the survey, this displays an upward trend over time in the adoption of PLM for business of all sizes the world over. The assumption that the recent recession has curbed business IT investment is a difficult one to properly analyse given that the financial slump is ongoing and that, outside of the financial sector, arrived with very little warning. From the results it does not appear that the economic downturn has done anything to stop the rise of PLM across the industry, but this is something that will be borne out (or otherwise) slightly better in a future survey.

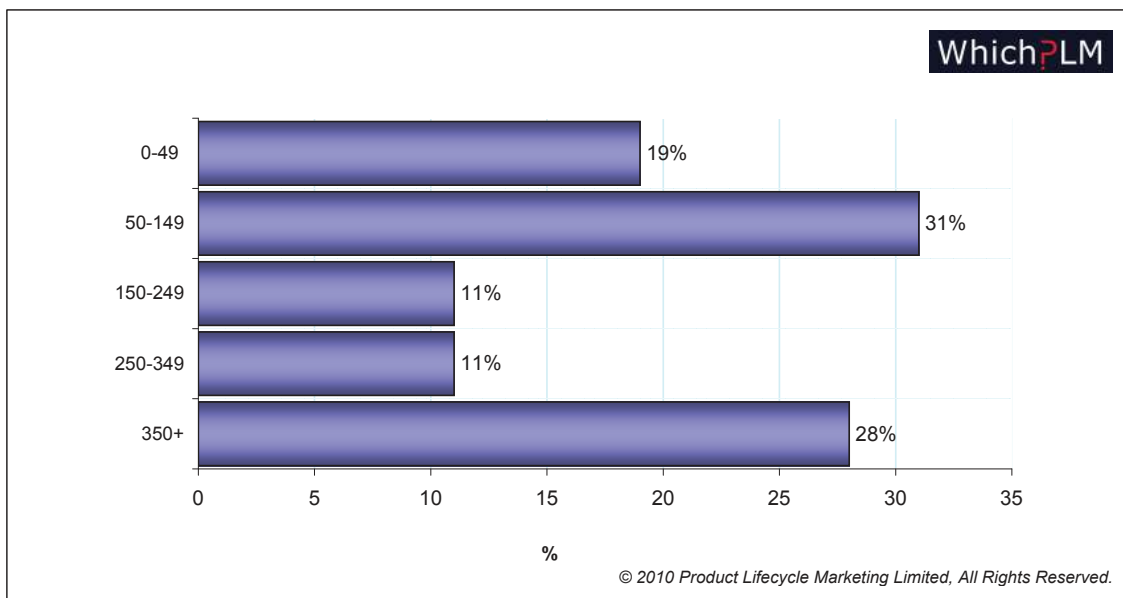
We are able to see some smaller companies investing in PLM recently, but the overall trend remains that large enterprises choose a PLM solution and, in most instances, they stick with it.

**How long (months) has this solution been implemented in your business?**



These results also suggest that we have seen three major spikes in demand. One, occurring almost 10 years ago was caused by the need to support growth, globalisation and visibility, linked to the massive increase in off-shore procurement. In more recent times the second and third spikes in demand, three years ago and more recently respectively, have been driven by the global recession; businesses the world over are struggling to improve processes in order to realise greater efficiency savings and to help drive 'fast to market' product development. These economic effects, whether based on prior growth or indeed the current financial climate affect all businesses, whether they be large, multibillion dollar organisations or members of the SME sector - businesses who are in some cases putting PLM in the corner to help them fight for their very survival.

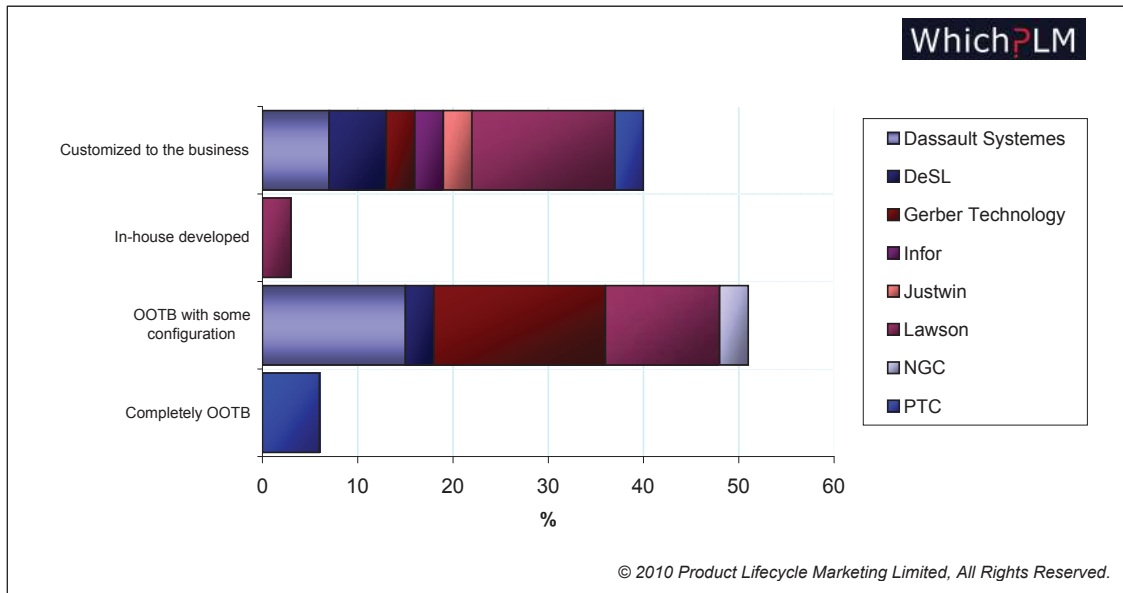
### How many licenses do you have installed?



What is unusual is that, given the previous data suggesting that larger companies represent by far the biggest sector of the market, we can see a relatively even split between three quite disparate internal PLM team sizes. A small majority of customers fall into the bracket of 50 to 149 users, with those owning more than 350+ separate licenses coming a close second. Strangely, a similar portion of customers reported themselves as having between 0 and 49 licenses, with comparatively few fitting into the brackets between 150 and 349 users.

This could suggest two possible things. Firstly, it seems likely that some of the larger companies who make up the bulk of the marketplace are using PLM only in small, select parts of their businesses - which would account for the spikes in license numbers at the bottom end of the spectrum in relation to the percentage of respondents who identified themselves as representing companies with over 5000 employees. Secondly it would appear that almost all of the smaller businesses have acquired licenses for a considerable portion of their workforce.

**Which of the following applies to your PLM solution?**



In our opinion, this goes at least some way to explaining the overwhelming domination of solutions that have been customised to some degree. Any small business looking to implement a solution across their entire (or the majority of their) staff and supply chain will find that an OOTB option will in most cases today fit the majority of value processes and ways of working of only a portion of their workforce, and not others. In order to gain the maximum return on their initial investment, these businesses will find themselves paying for additional customisation in order to allow their different departments to make full use of the solution they chose. Based on the feedback it appears that larger companies seem to be more likely to roll out a solution across only a small, specialised section of their business, meaning that they are likely to represent the majority of customers who sought out and bought a completely bespoke solution.





## **3. The Survey Questions**

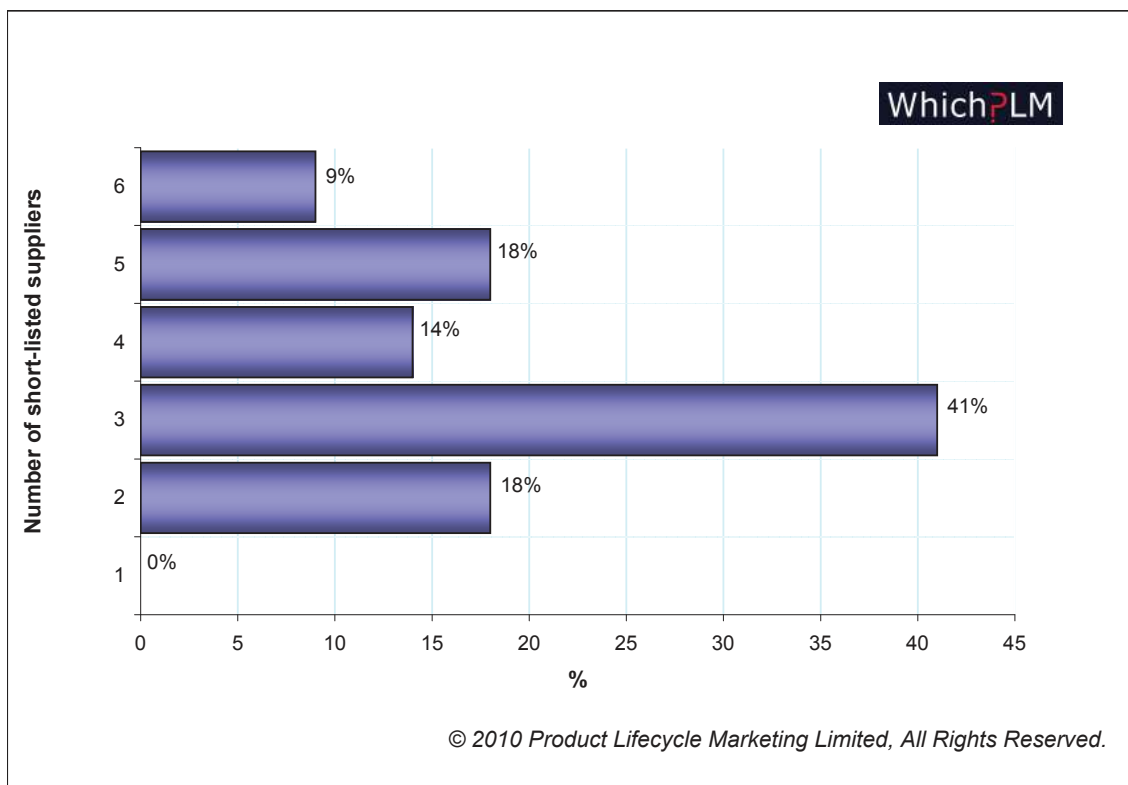
### 3. The Survey Questions

This section of the report will provide a useful reference to the questions we asked customers. The introductory questions were set up to gather information on the customer and the solution currently installed. Because of confidentiality agreements with the survey respondents, we are not publishing the answers to those questions, but will use them to steer analysis in other sections.

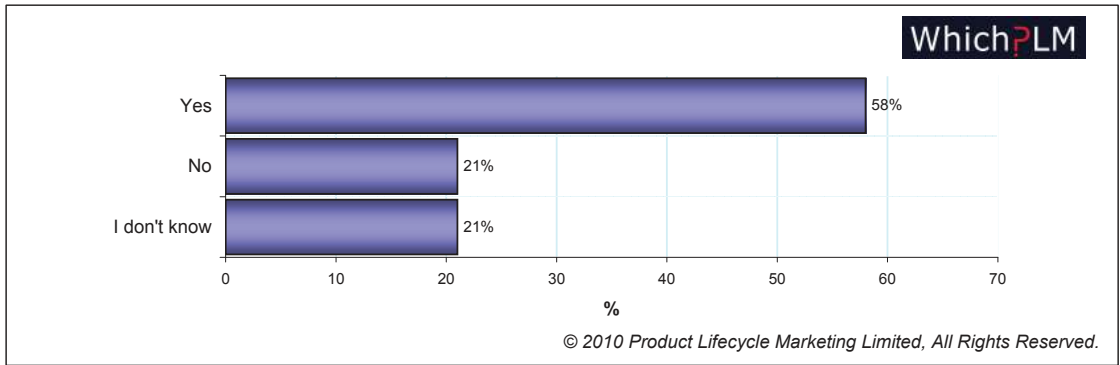
The remaining survey questions are divided into: **Pre-sales; Contract; Implementation; Post Implementation; and Customer Feedback.** This enabled us to capture the customer experience of the actual search, selection and implementation stages, as well as finding out what customers think of their chosen PLM solution today and what improvements they would like to see in the future to accommodate upcoming challenges.

#### Pre-Sales

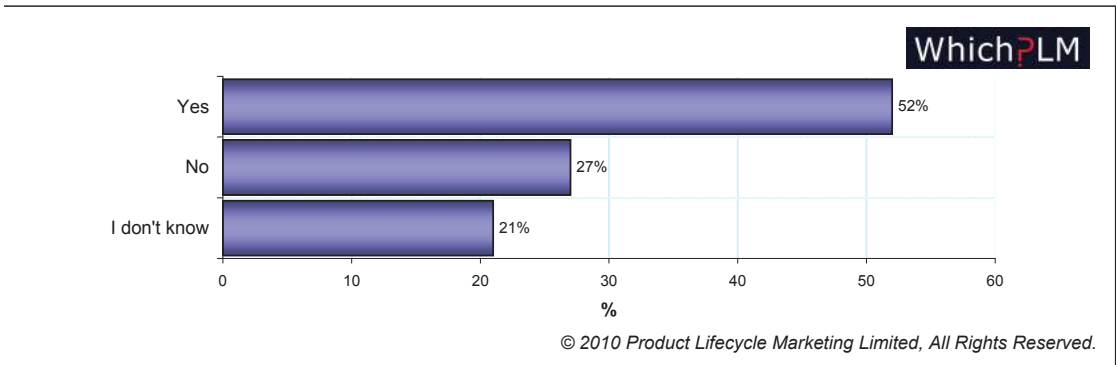
##### 1. How many PLM solution suppliers were initially short-listed to demonstrate their solution?



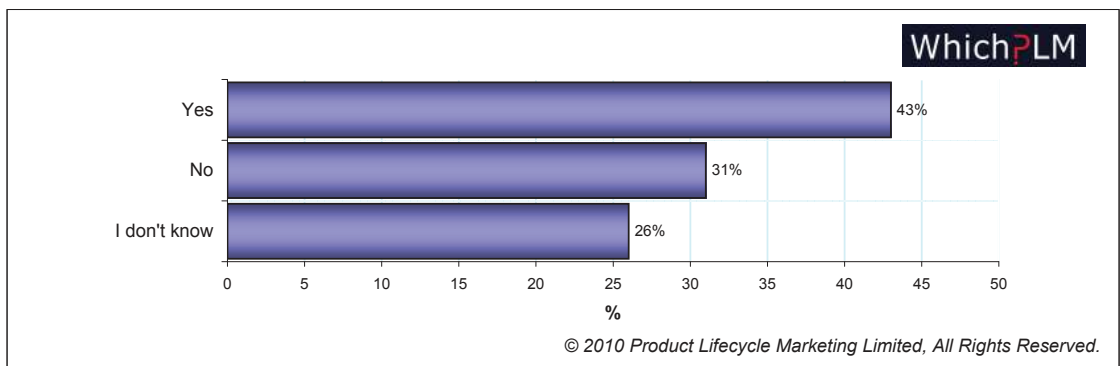
**2. Did you complete a pre-sales questionnaire document, sometimes referred to as a 'Request for Information' (RFI)?**



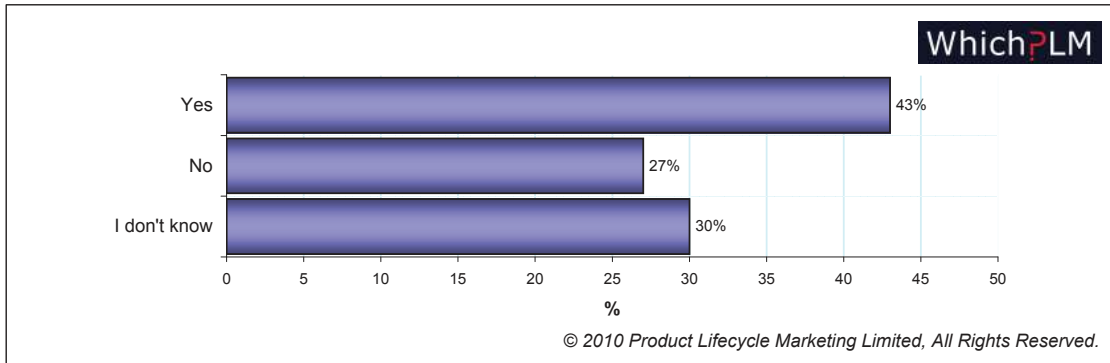
**3. Did your business complete an in-depth process examination based on 'As Is' and 'To Be' linked to process maturity?**



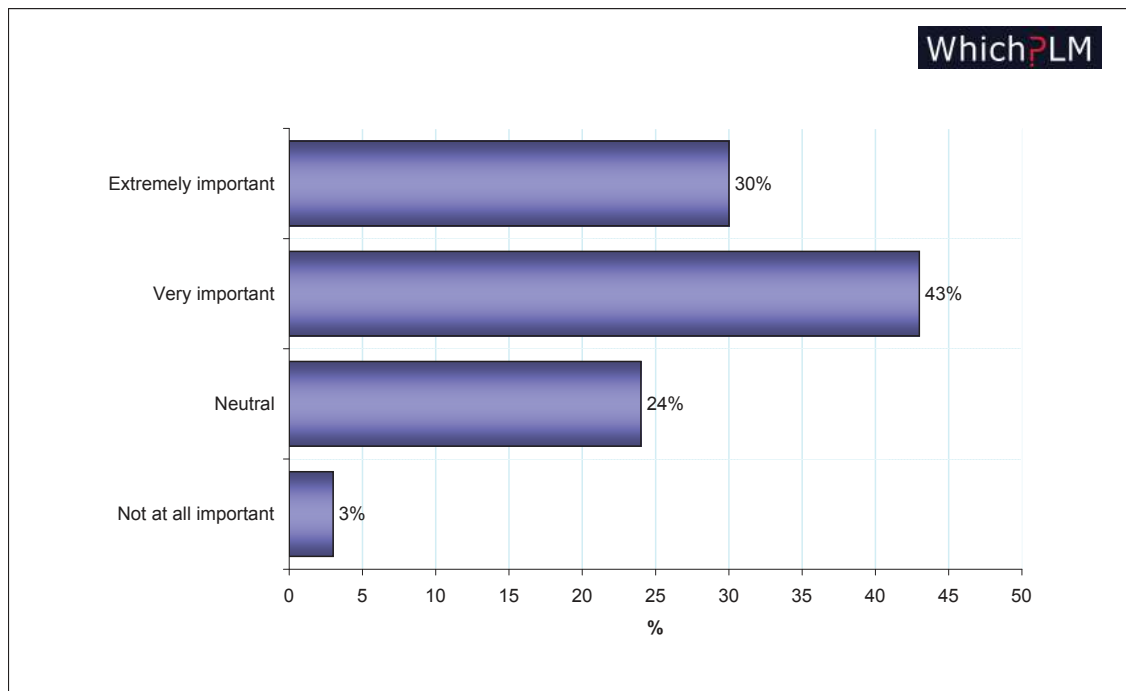
**4. Did you receive external help and advice on process improvements and process re-engineering?**



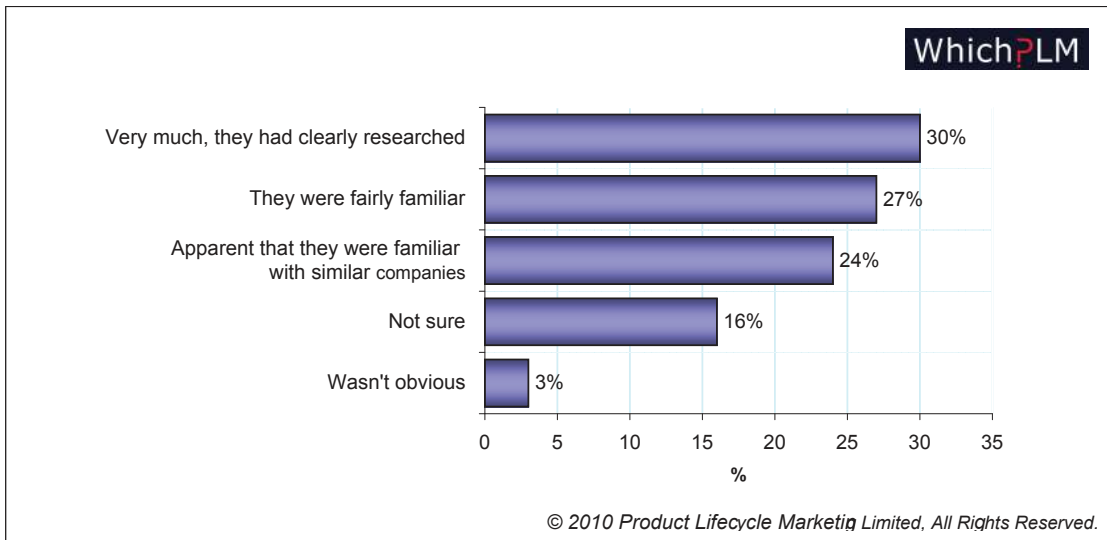
**5. Did the short-listed PLM solution suppliers obtain the new processes information ahead of presenting their solution?**



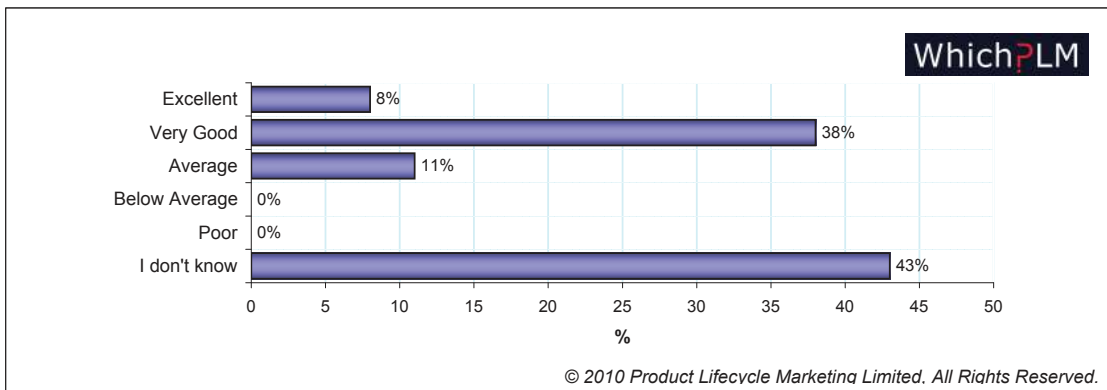
**6. How important for your business was it that the selected PLM solution supplier had extensive fashion/apparel PLM experience?**



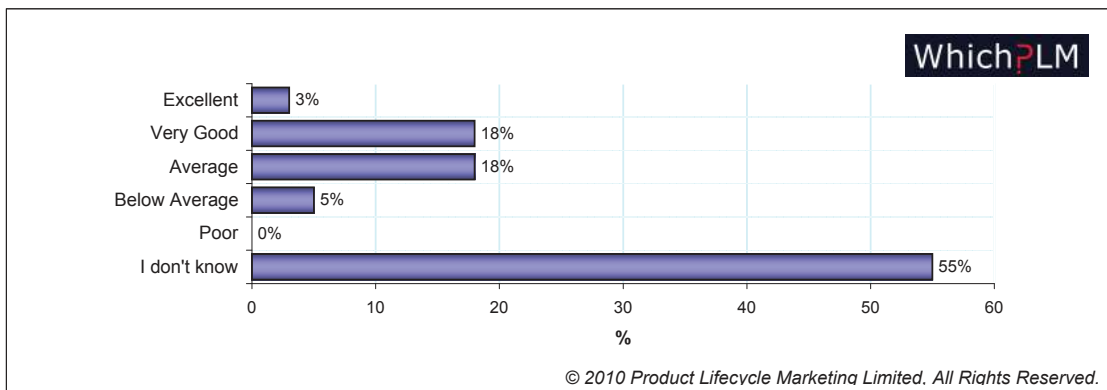
**7. How much did the selected PLM solution supplier understand your business at the pre-sales stage?**



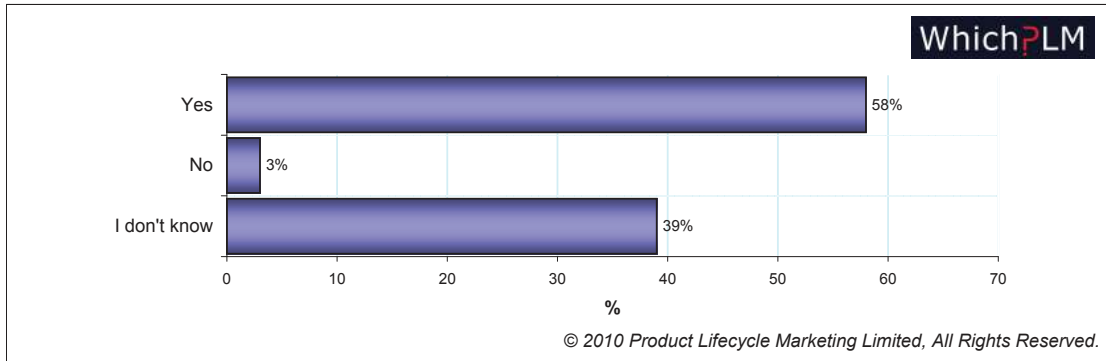
**8. How did the pre-sales presentations from the selected PLM solution supplier match your business objectives?**



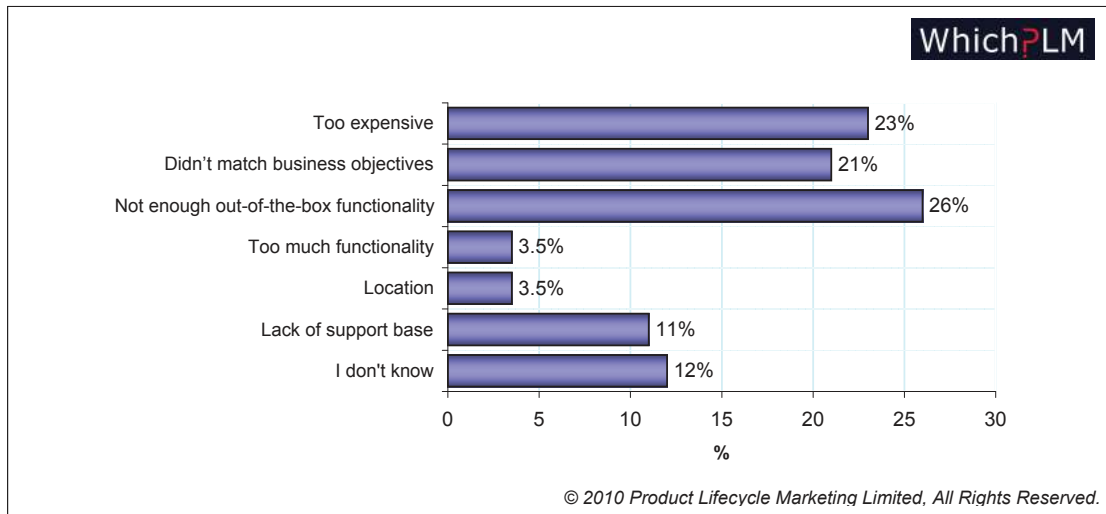
**9. How did the pre-sales presentations from the unselected PLM solution suppliers match your business objectives?**



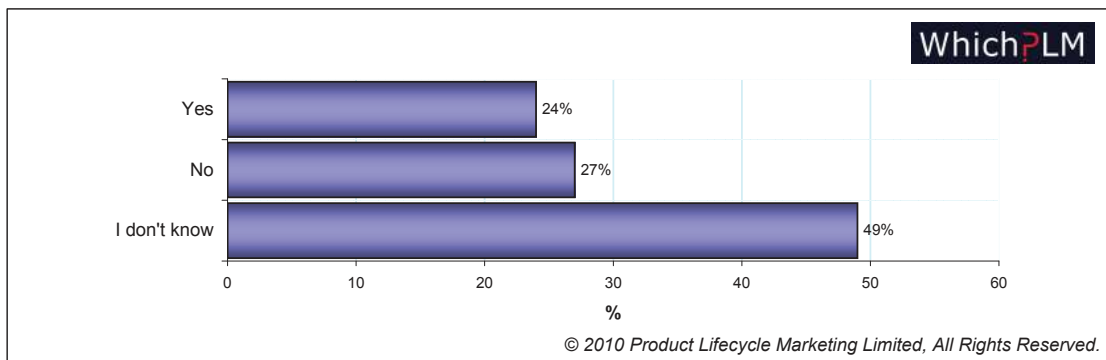
**10. Did the pre-sales presentation team for the selected PLM solution supplier demonstrate in-depth process knowledge in the apparel/retail sectors?**



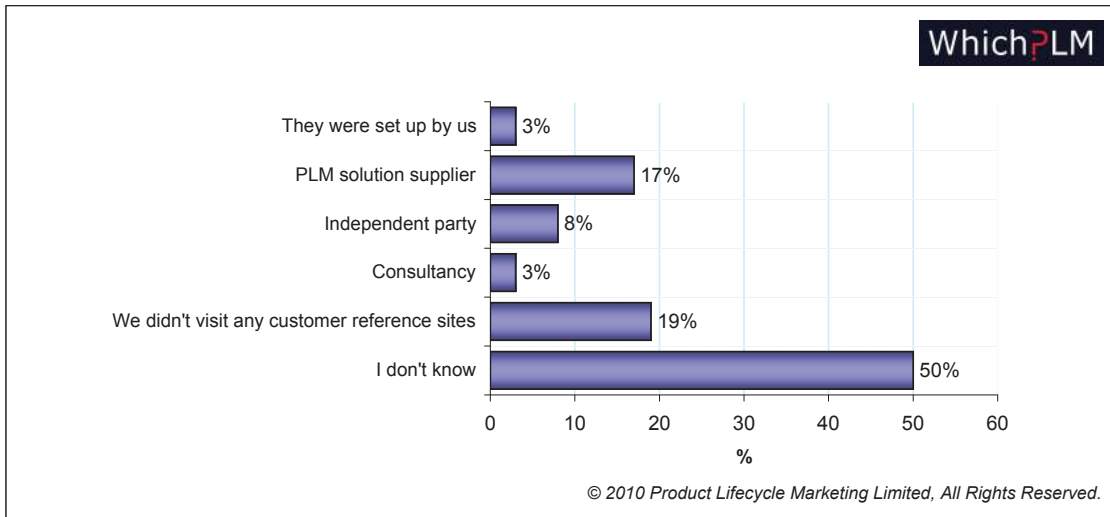
**11. What prompted you to not move forward with the other PLM solution suppliers?**



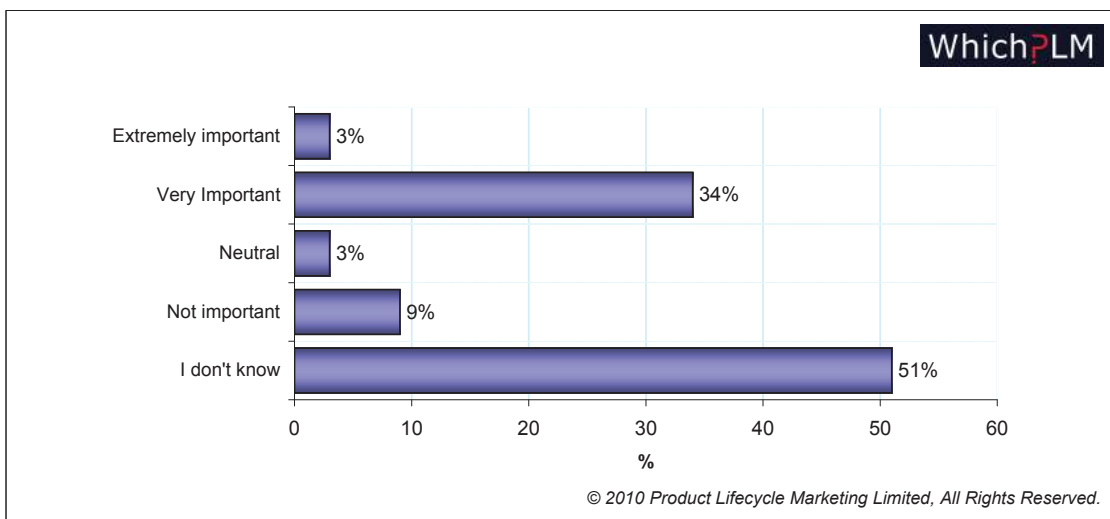
**12. Did you visit customer reference sites before making the final decision?**



### 13. Who set up the customer reference site visits?

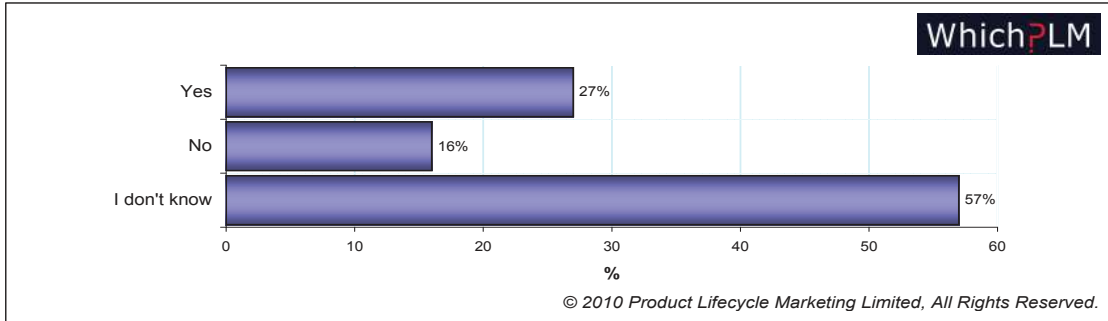


### 14. How important were customer reference site visits to your overall decision making?

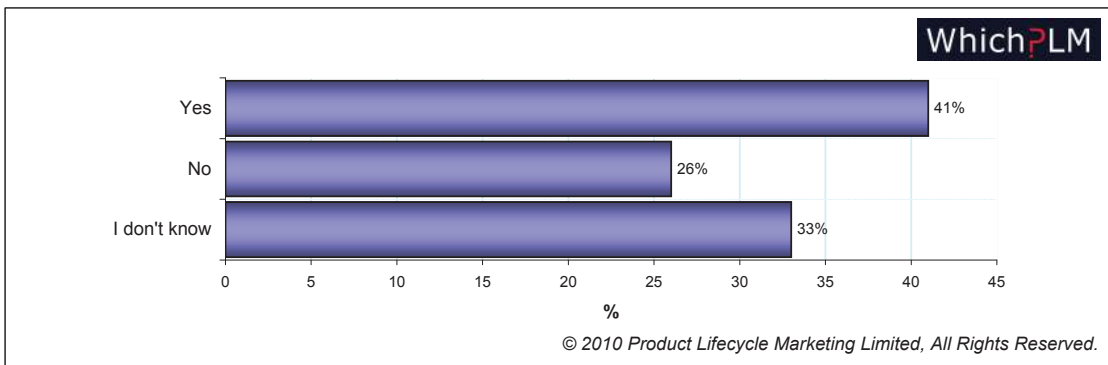


**Contract**

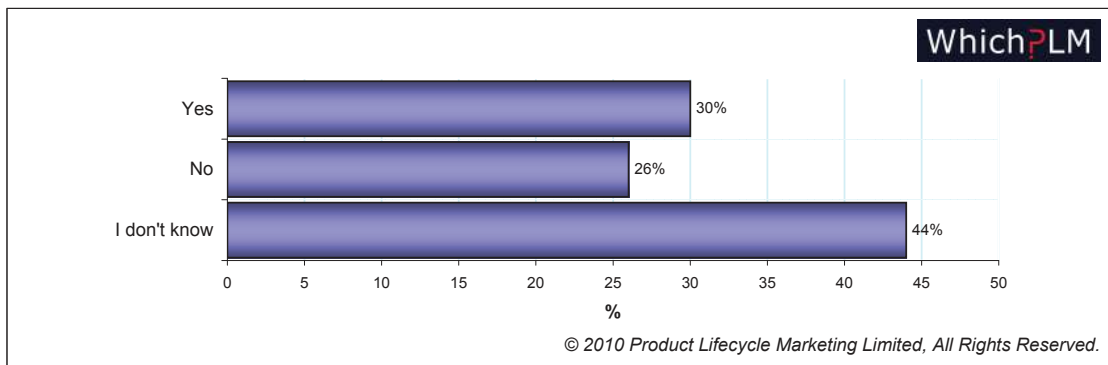
**15. Did your business complete a detailed ROI analysis ahead of the implementation?**



**16. Did you work with your chosen PLM solution supplier to complete a benefit analysis ahead of the implementation?**

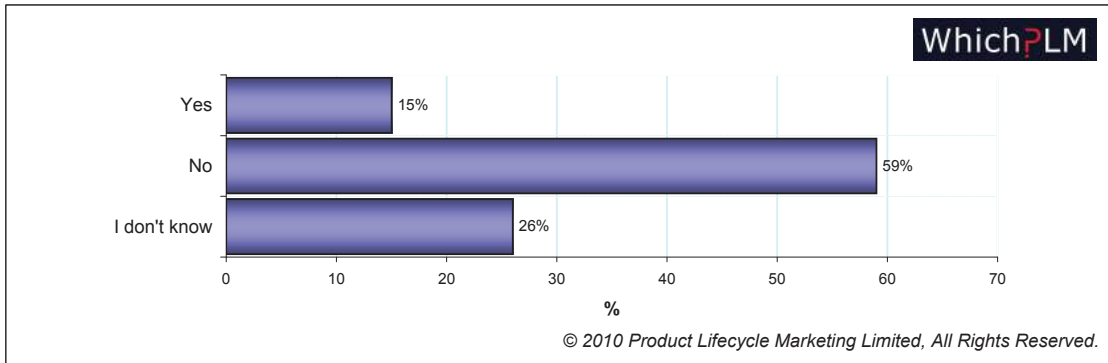


**17. Did you use your ROI/benefits analysis to help define your implementation strategy?**

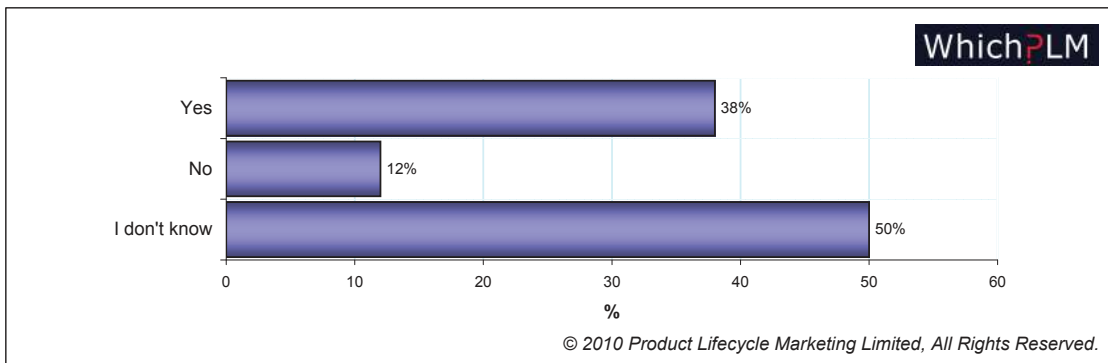




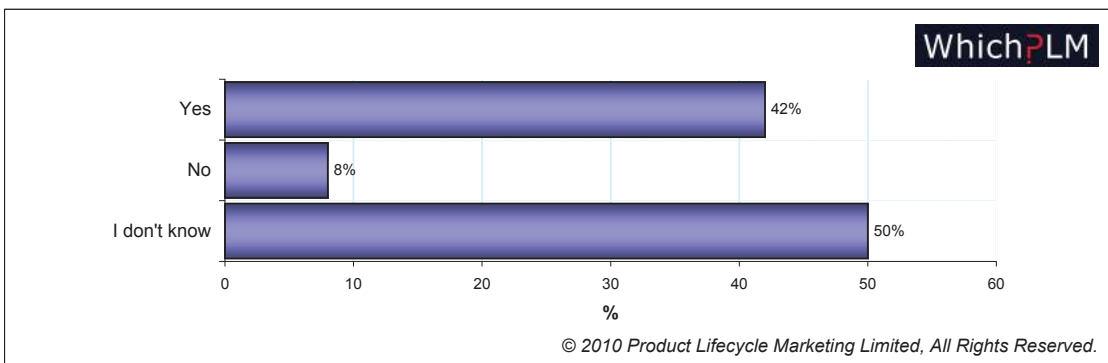
**18. Did you use third-party organisations to help you plan your implementation?**



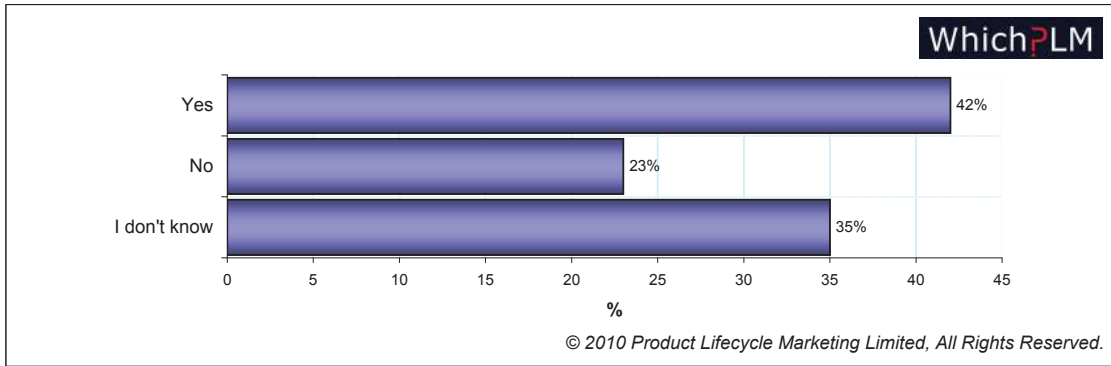
**19. Did the contractual offer match with your original objectives from the pre-sales stage?**



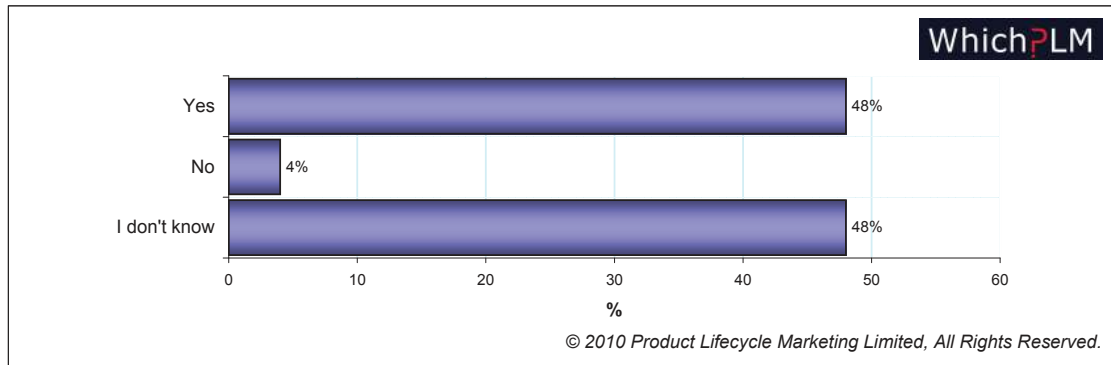
**20. Did the contractual negotiations run smoothly?**



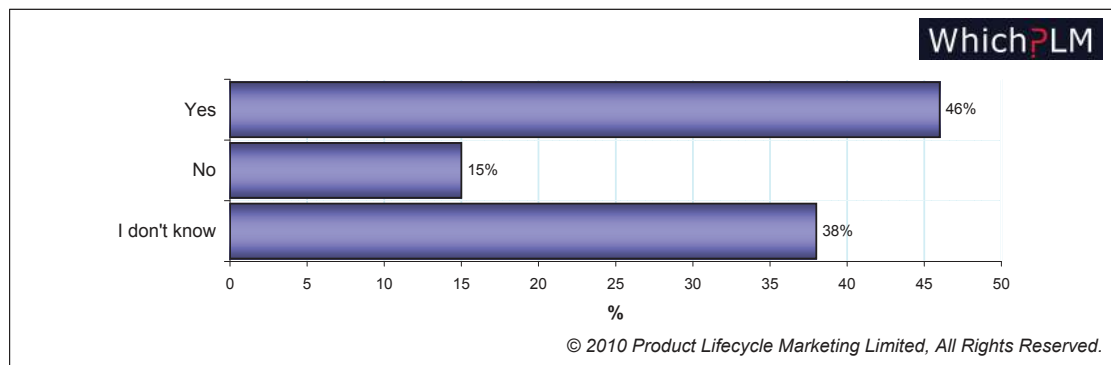
**21. Was the documentation simple and straightforward?**



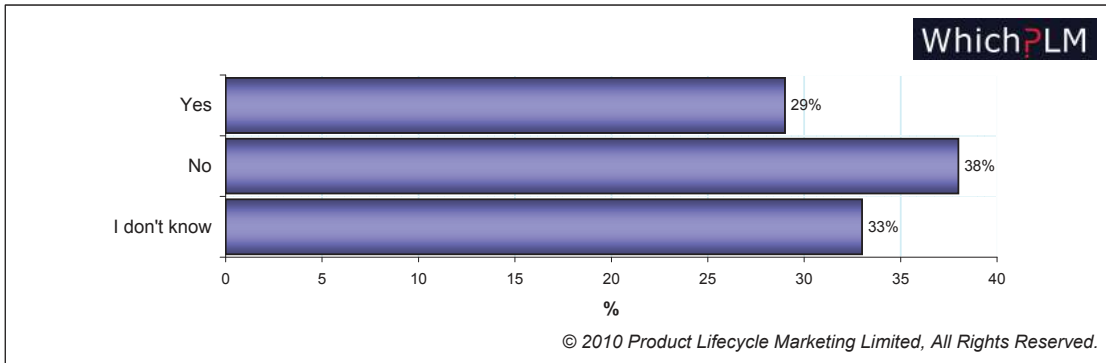
**22. Did you agree on a target price for the entire software solution in-line with your budget?**



**23. Did your contract cover your business for future up-grades (not support)?**

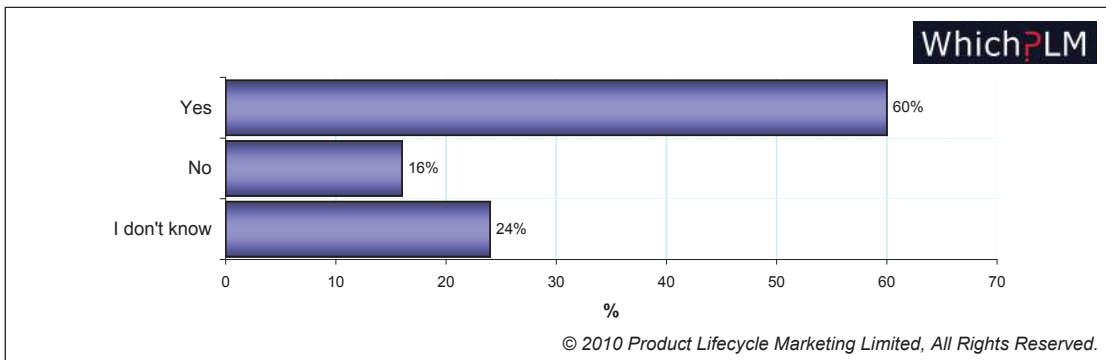


**24. Does your support contract provide cover across your extended supply-chain in multiple zones?**

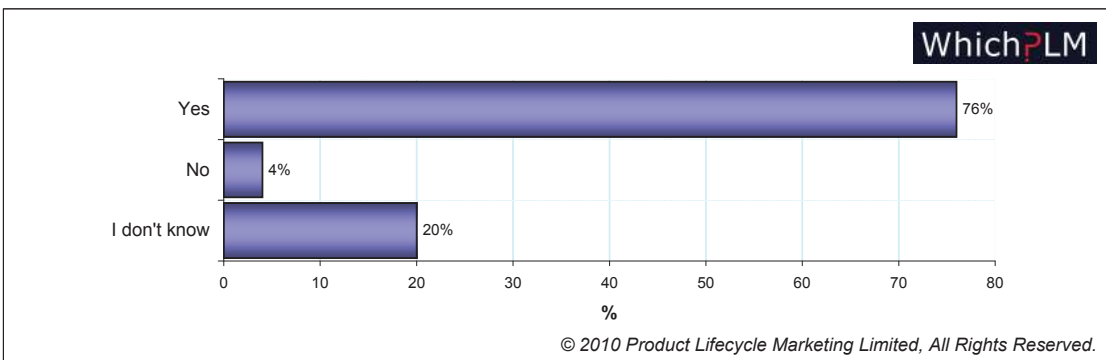


**Implementation**

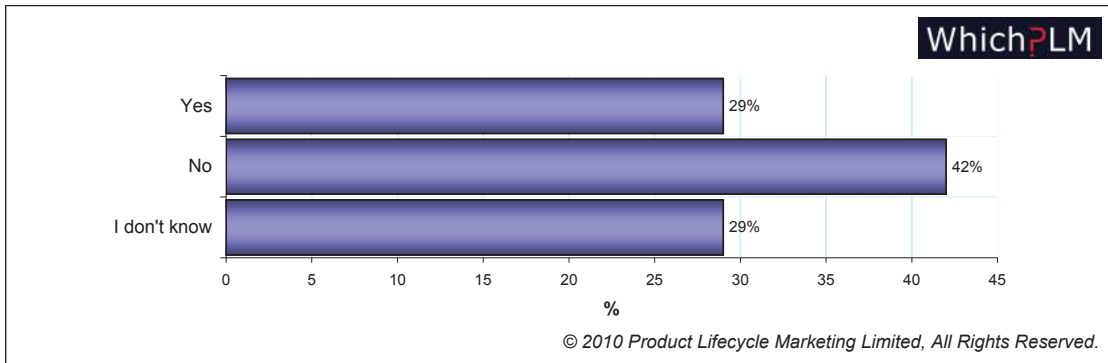
**25. Did you and your supplier define a steering committee to manage the project deliverables?**



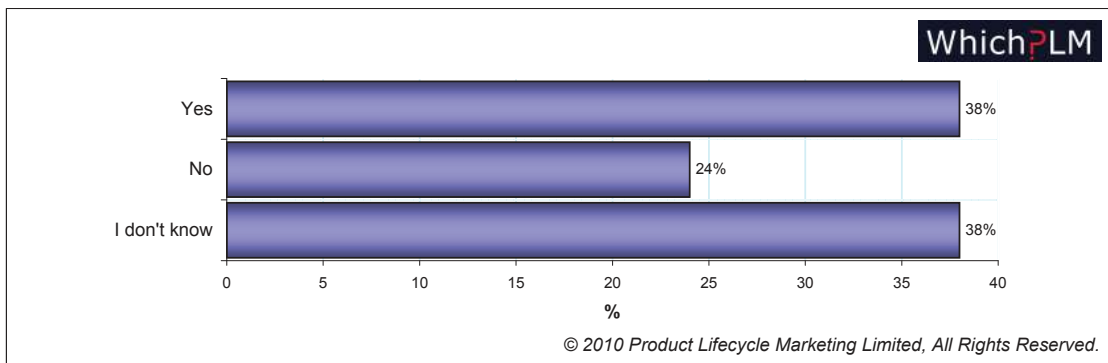
**26. Did your supplier complete pre-implementation visits and planning meetings?**



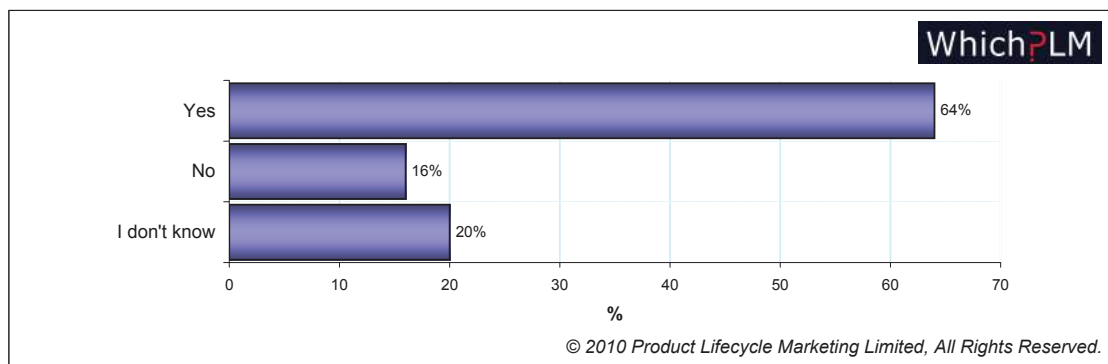
**27. Did your supplier assist you in shaping the internal PLM project team?**



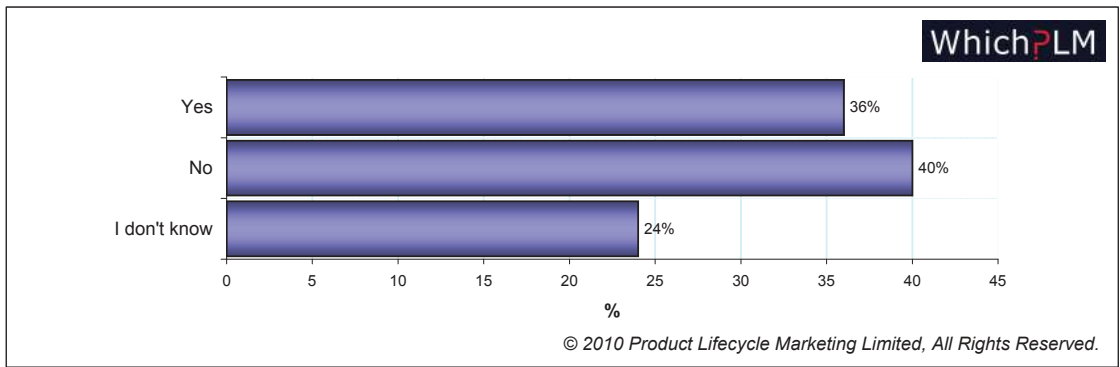
**28. Did your supplier provide you with detailed technical architecture documentation for sizing?**



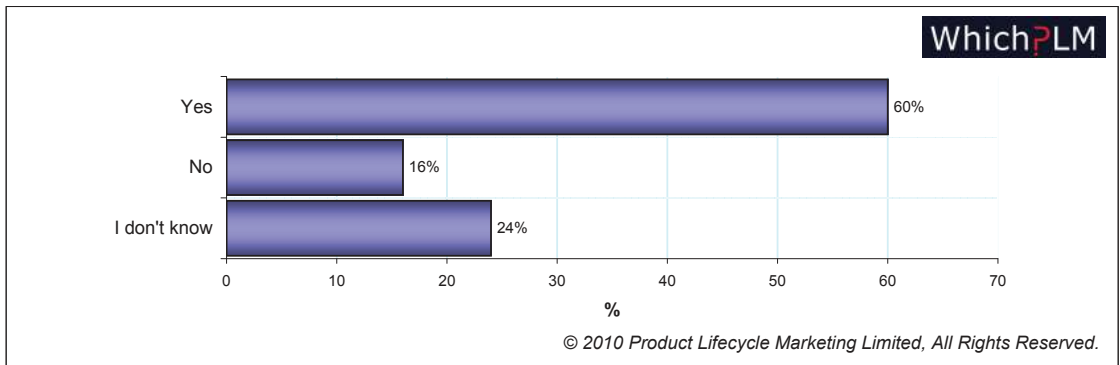
**29. Did your supplier complete a project kick-off meeting and high-level solution demonstration for all users?**



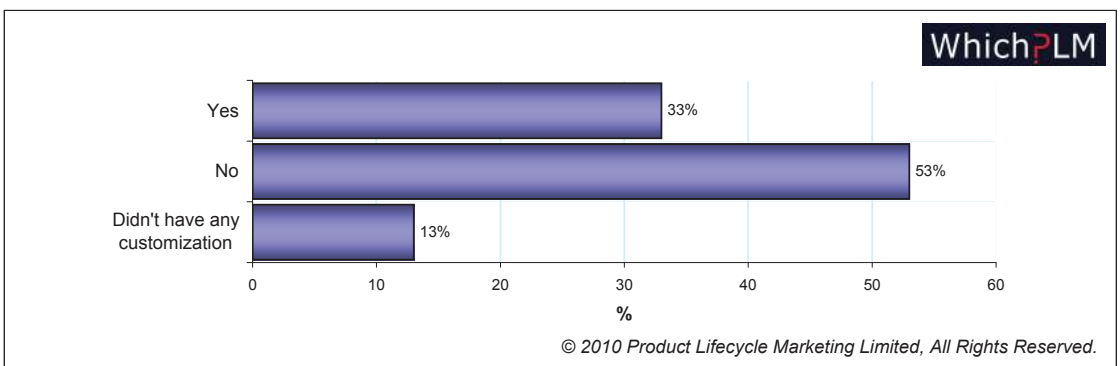
**30. Did your PLM solution supplier work with the internal project team to run process maturity workshops?**



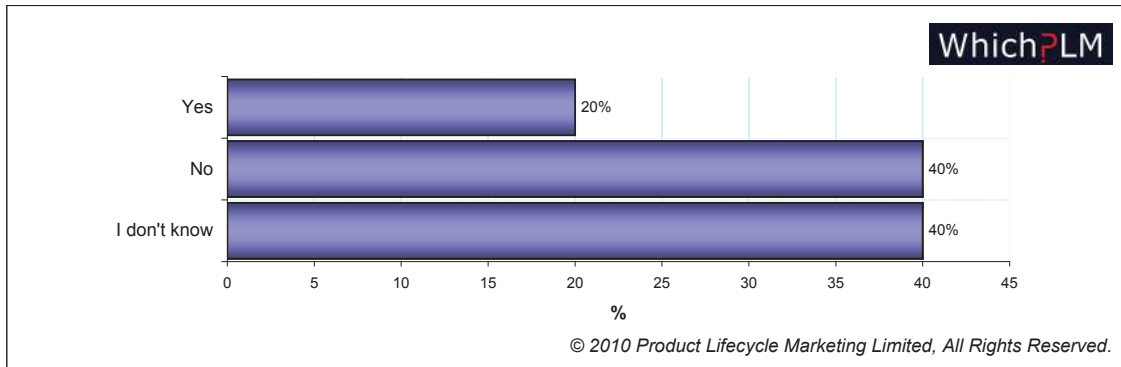
**31. Did you implement the solution in line with the business challenges?**



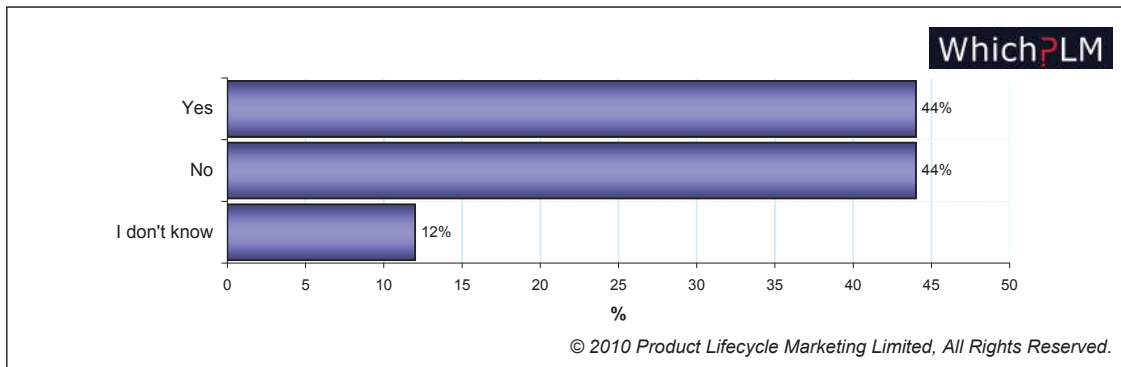
**32. Did your customisation (if any) match the contracted implementation objectives and timeline?**



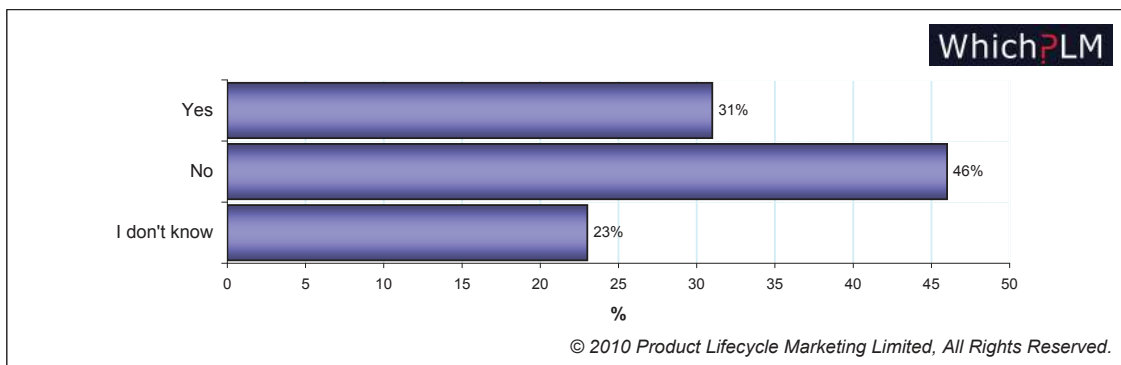
**33. Did your PLM implementation run to the contracted implementation plan and timeline?**



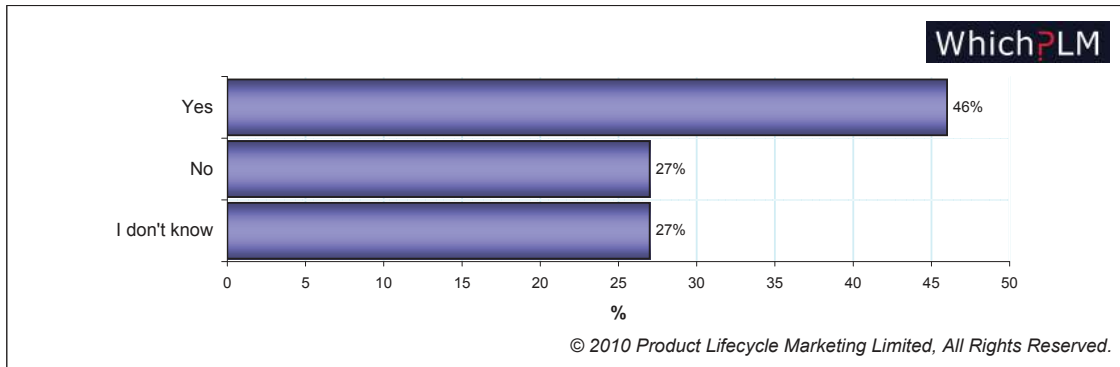
**34. Did the solution come with a set of reports and dashboards as standard?**



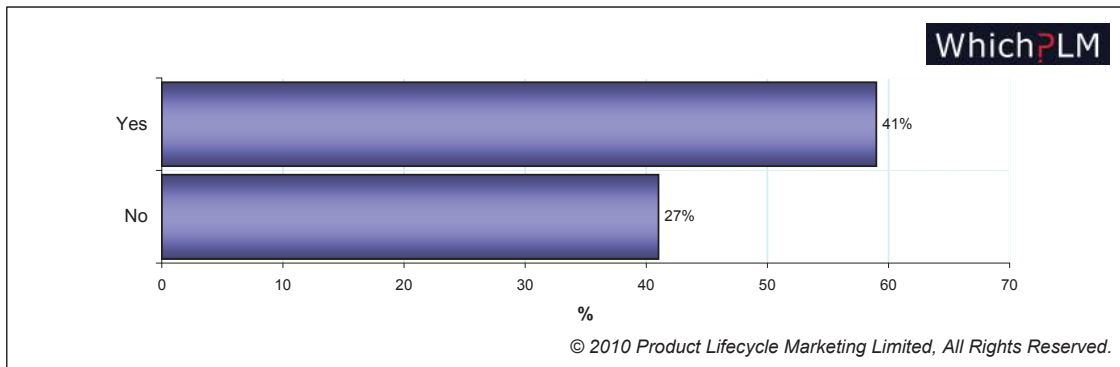
**35. Did the reports/dashboards deliver against your business needs or required modifications?**



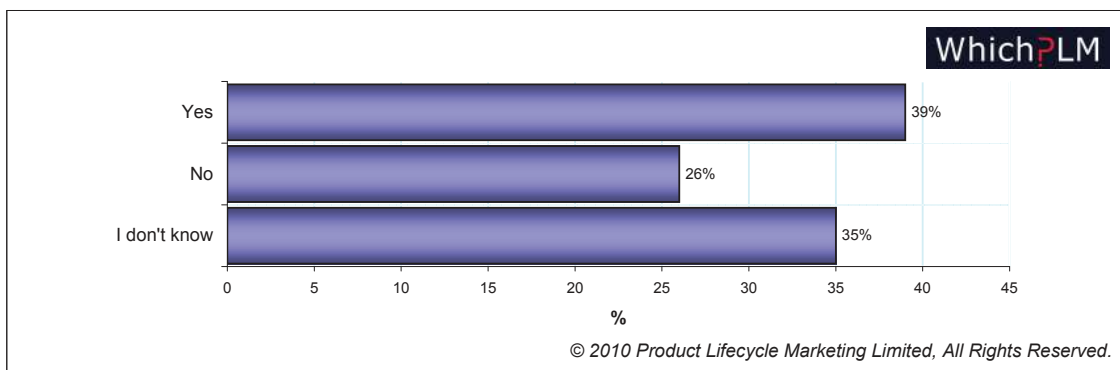
**36. Did your supplier keep the original implementation team throughout the PLM project?**



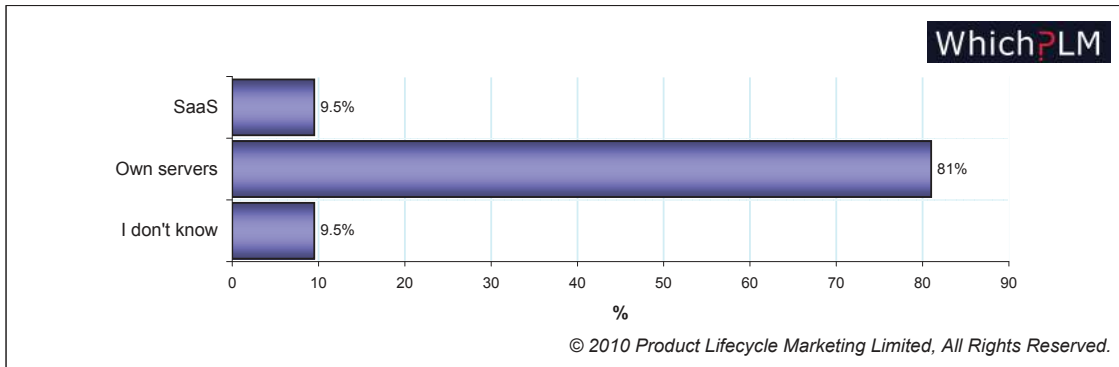
**37. Did the initial installation of the PLM software go to plan?**



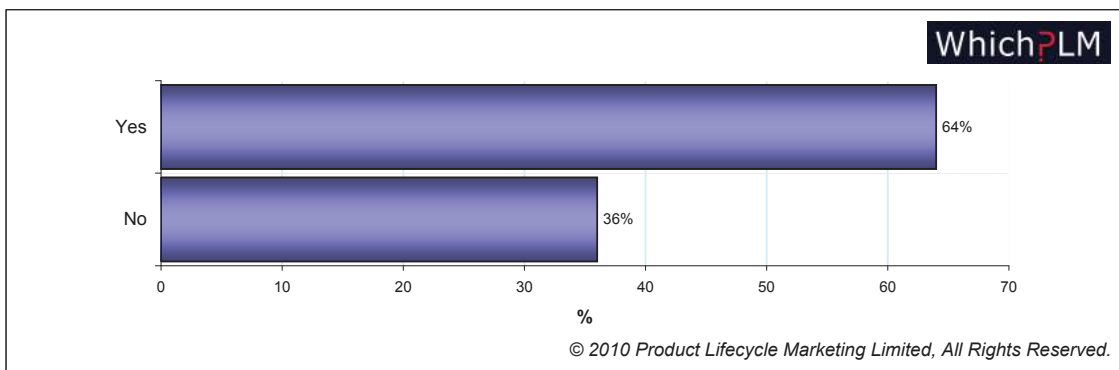
**38. Did you stay with the hardware/network sizing defined in the pre-sales stage?**



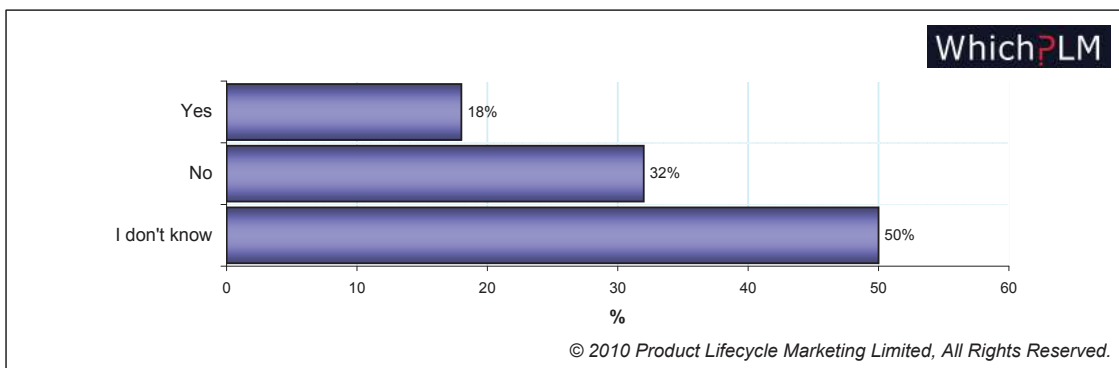
**39. Was your installation on your own servers or via a SaaS model?**



**40. Did the PLM solution supplier train your staff to complete the installation?**

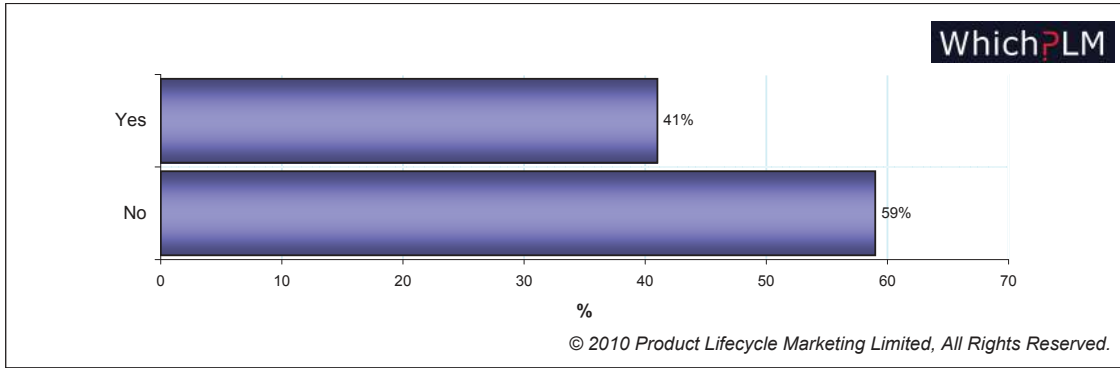


**41. Did the PLM solution supplier provide quality documentation for the installation?**

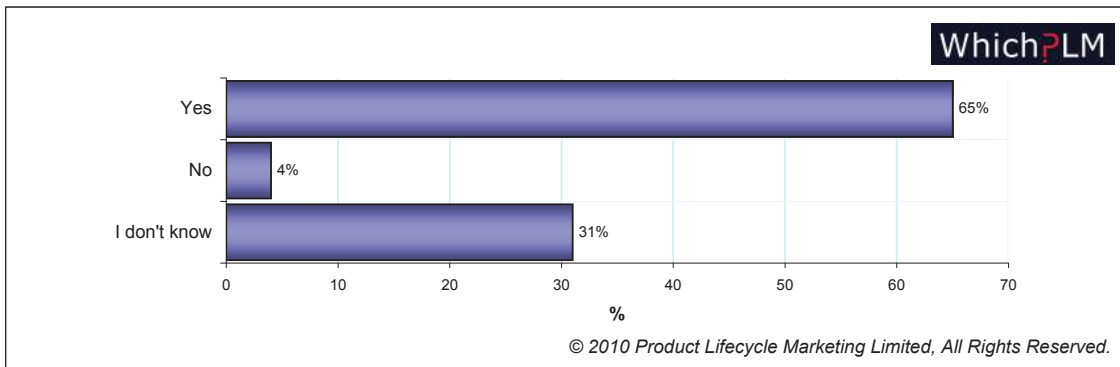




**42. Did your supplier complete the project to time and budget?**

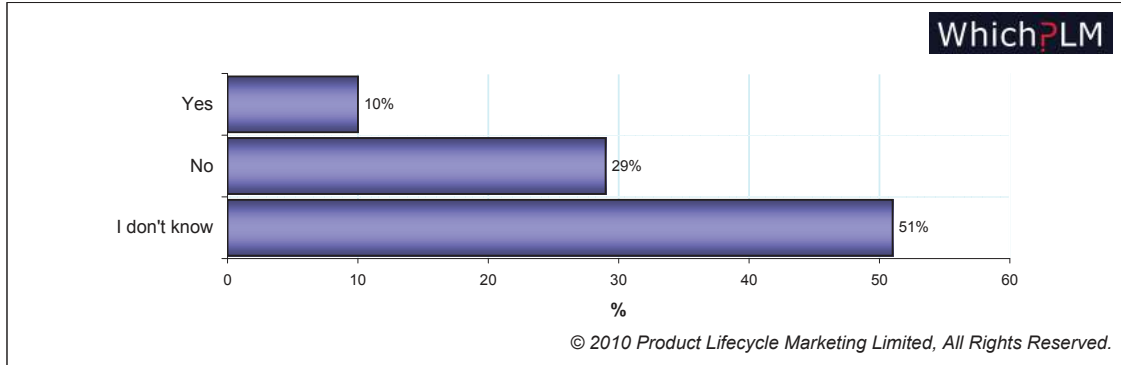


**43. Did your business need additional process enhancements?**

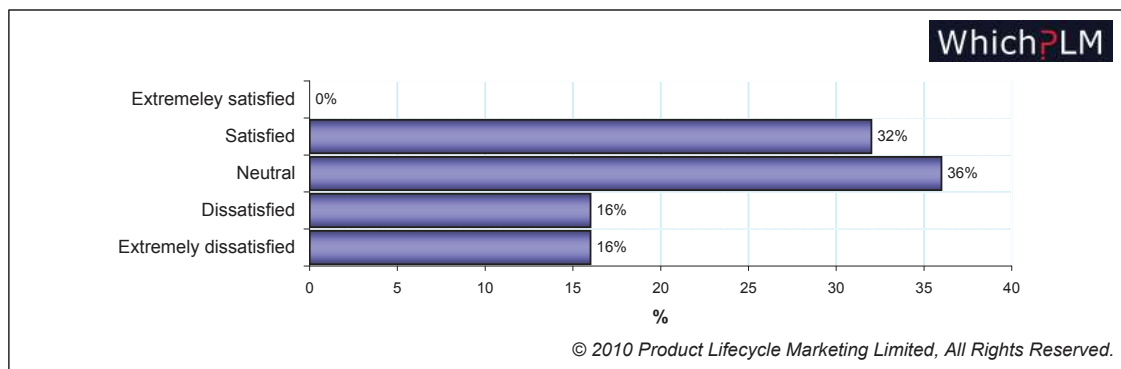


**Post Implementation**

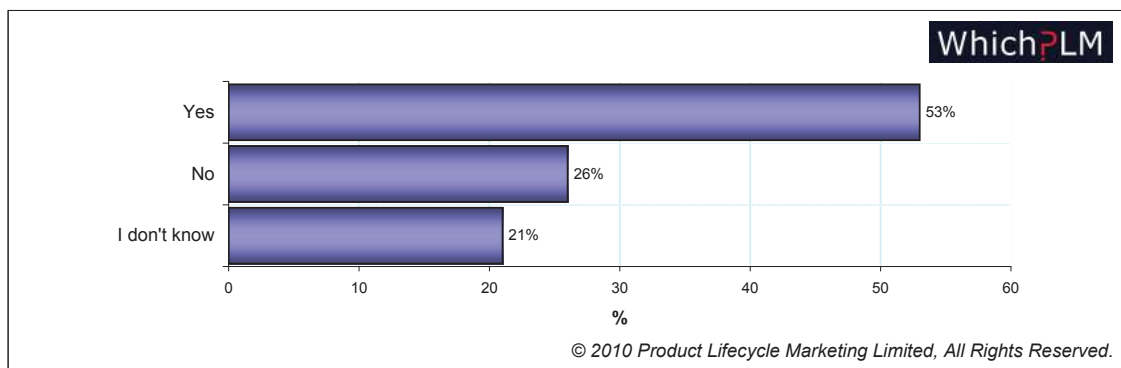
**44. Did the solution realise an ROI within the expected timelines?**



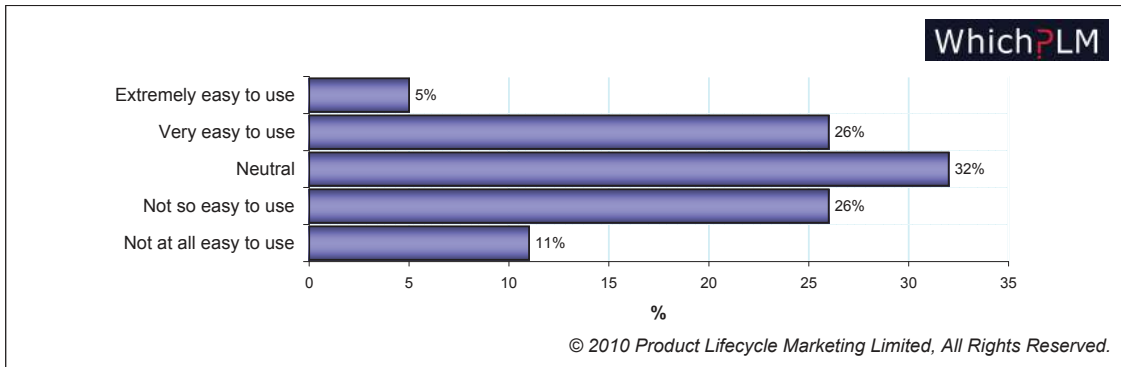
**45. How satisfied are you with the PLM solution you are using?**



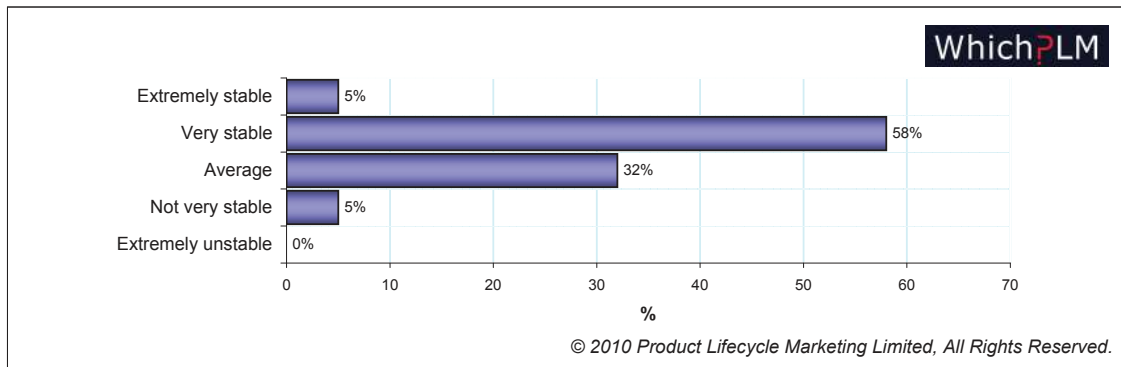
**46. Are teams using the solution as originally envisaged?**



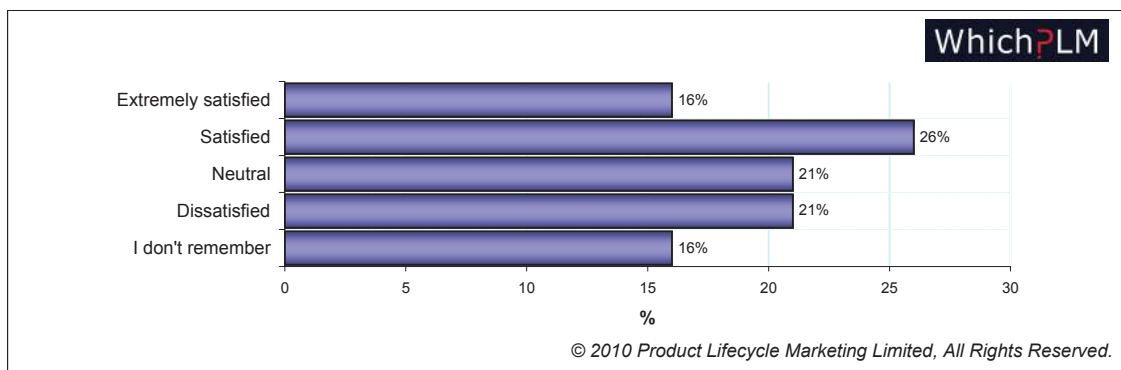
**47. Please rate the PLM solution on how easy it is to use?**



**48. Please rate the PLM solution on how stable it is (does not crash)?**

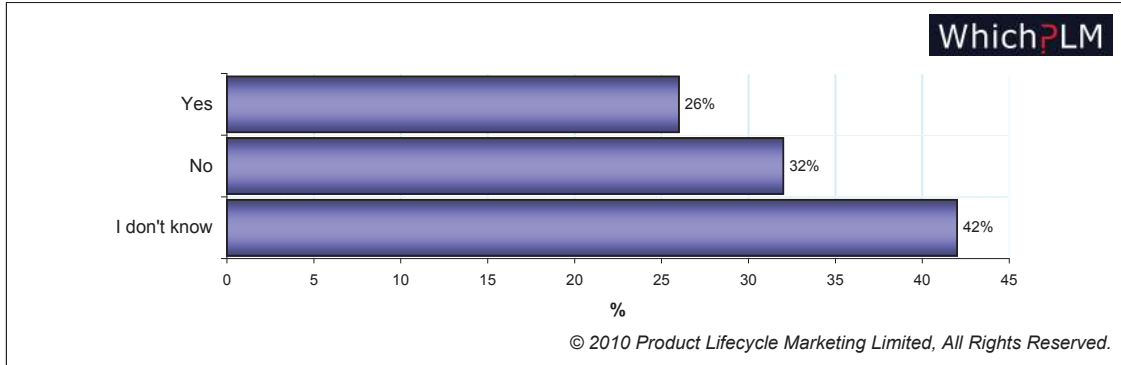


**49. How satisfied were you with the technical support team when you last called them?**

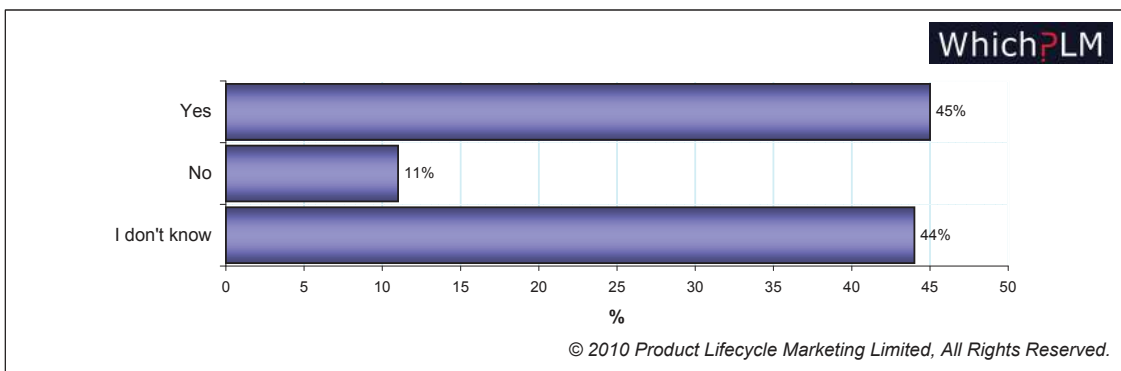


**Customer Feedback**

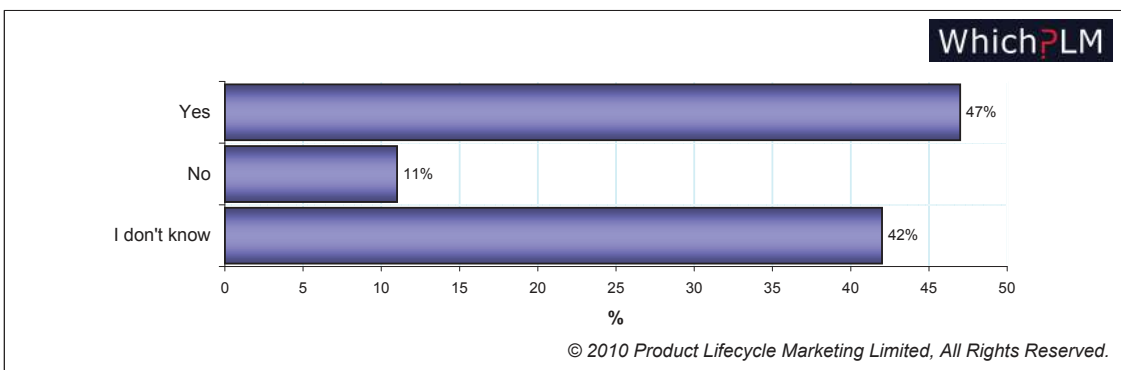
**50. Would you recommend your PLM solution?**



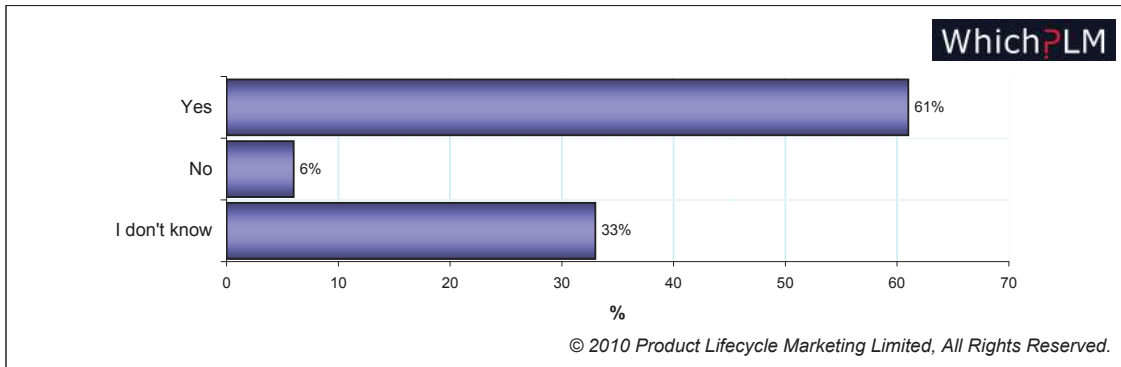
**51. Does your supplier have a Customer Advisory Board (CAB) or user group?**



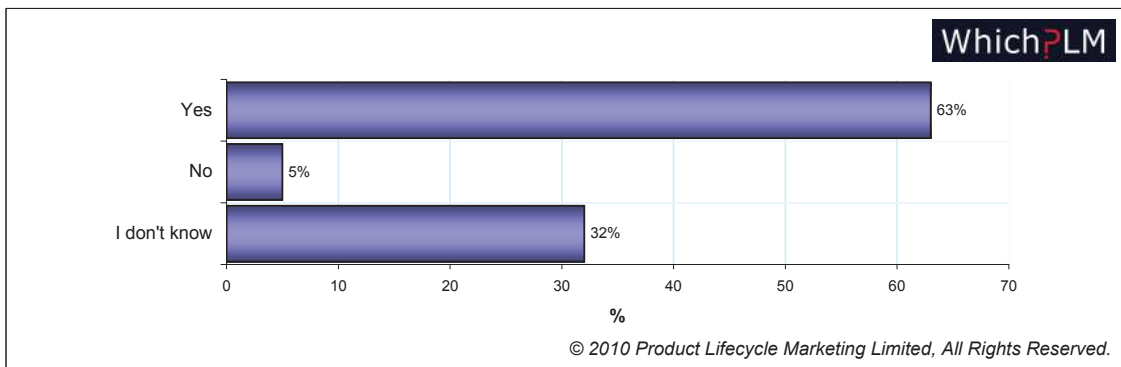
**52. Does the PLM supplier have a clear policy for enhancements?**



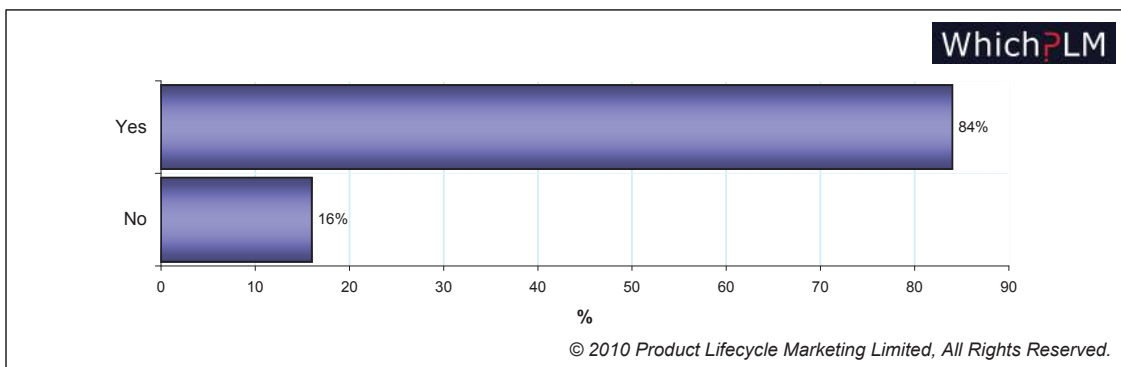
**53. Have any of your recommendations made it into the solution?**



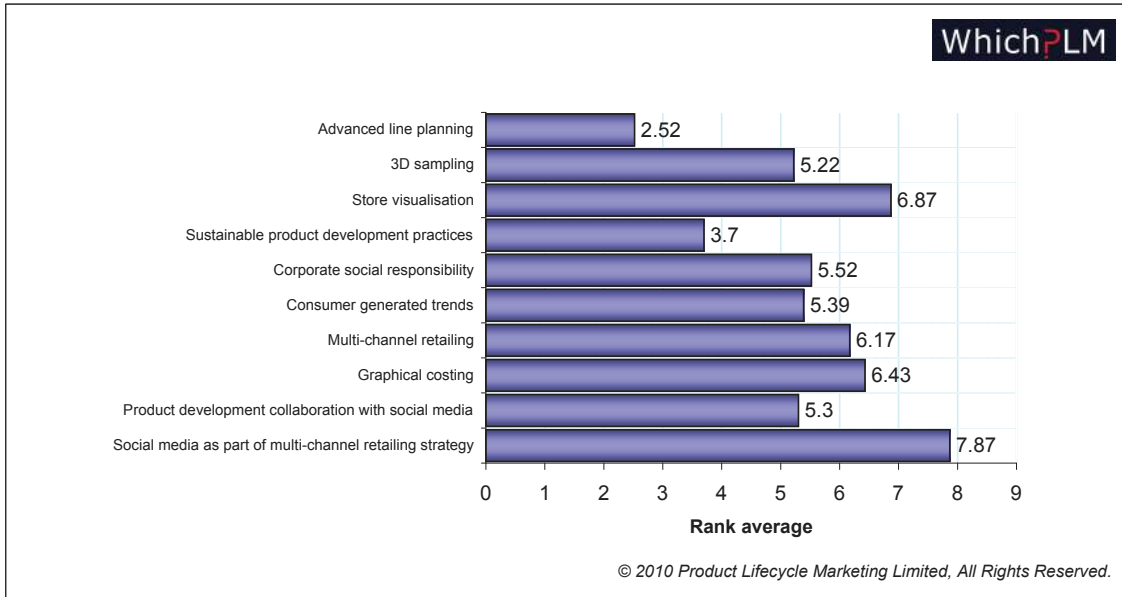
**54. Do you feel that your business would benefit from a truly independent CAB/user group?**



**55. Does your PLM solution supplier listen to your requests?**



56. How would you rate the following 10 processes in order of importance?



## **4. The Buyer's Guide**

## 4. The PLM Buyer's Guide

This section forms the bulk of the report and is intended to present the raw data and to analyse what the customers we polled thought about the PLM for the fashion industry as a whole. While no correlation is made here between the customers' responses and the specific supplier they opted to work with, we cannot stress enough to all suppliers that the data collected here outline industry-wide trends and that making demonstrable improvements in the areas that count to existing and potential customers is the cornerstone of developing strong and long-lasting customer relationships.

We hope this section will be especially useful for prospective customers in presenting not only advice on how to go about selecting a PLM solution but also a vital chance to learn from companies who have gone before them.

From our experience of more than 150 complete implementations, we have found the difficulties clients encounter most frequently to be in streamlining their processes and achieving their goals more quickly and efficiently. This is such a common desire that a huge range of solutions (each with its own benefits and drawbacks) have sprung up, offering to help create and manage these leaner processes. This is the very essence of PLM, and if one thing above all else has emerged from this survey it is that the industry as a whole caters extremely well to this need.

It is important to bear in mind, however, that PLM is about not just software, but also process efficiency. Software is a powerful tool that can enable you to experience considerable gains in efficiency from the most specialised to the farthest-reaching of your product development processes, but a solution is only as effective as the processes it facilitates. From mapping existing processes and defining new process models to the implementation itself, there are a huge range of tasks to consider once you have decided that a PLM or PDM solution is for you. This is why it is critical that an experienced team (either internal or external) with deep domain knowledge take the reins and ensure that you realise a full return on what in many cases represents a huge investment. Making the right choice here will be critical in ensuring that you achieve the best return on that outlay.

To a prospective customer the range of available solutions and the scope of information that they need to compile before examining, short-listing and selecting one out of so many can be daunting. It is not uncommon to be paralysed by doubts at this stage. A long period of hesitation or even a single incorrect decision can be incredibly costly, both monetarily speaking and in terms of squandering time and your own customers' faith in you. You need to know exactly what you want from a solution - whether a customised solution or an OOTB equivalent better suits your needs - and, critically, you need to analyse both your existing processes and the eventual benefits that you aim to achieve.



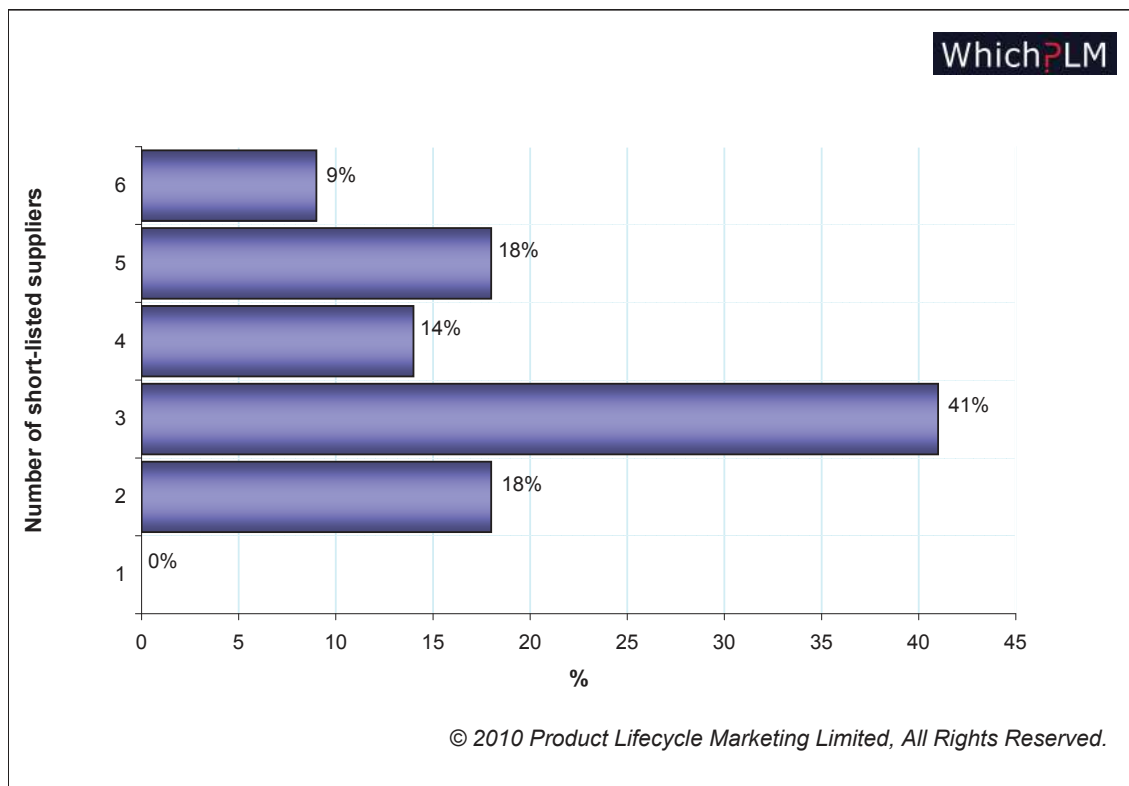
The following guidelines both informed the questions in this survey and form a crucial part of WhichPLM's own pre-implementation toolkit. We know from experience the many pitfalls of implementing a successful project and we consider these stages to be so fundamental that they are applicable to a business of any size or shape - so before we get on to the questions themselves, we thought it might be helpful to set out an 'ideal' process to give you an idea of how the results might be interpreted.

- **Examine the reasons that you believe a PLM solution is the right choice for your business.** What precisely are you looking to improve, remedy, or eradicate by adopting a PLM solution? Carry out a detailed ROI workshop and create a clear set of goals that will help your business to realise a return on its investment.
- **Produce a detailed analysis of your current processes,** prioritise them and, informed by best-practice, define realistic improvements to be made across the extended supply-chain, from concept to delivery to the consumer.
- **We would always suggest that you solicit best-practice advice from a third-party expert.** They can examine the capabilities of your business and produce a realistic set of expectations based on whether or not you are able to improve your processes in line with best-practice, and how realistic your hopes are in terms of how a PLM solution will assist you.
- **Having identified the key processes and capability gaps** that are essential to realising your PLM strategy, build these into your PLM implementation plan in order of importance and value to your business.
- **Compile detailed RFI documentation** focused directly on the immediate and specific needs of your business to ensure that the project is clearly aligned with your strategic and tactical objectives. It is important not to let the supplier take total control of the implementation strategy or you may find yourself struggling to realise an ROI in the order of importance that you had originally agreed.
- **Conduct a thorough evaluation of the range of PDM/PLM suppliers** that accommodate your immediate needs and cater for your future strategy. If you choose to work with a third party consultancy, use an independent one that understands the strengths and limitations of all the solutions on the market.
- **Identify your ultimate goals,** design milestones, perform a project scope analysis, define your processes (both critical and seemingly trivial) and consider them both as they are now and as they will be.

With the ideal in mind, let us see how the reality compares.

## 4.1 Selecting a Supplier

### How many PLM solution suppliers were initially short-listed to demonstrate their solution?



This question presented us with one of the most revealing sets of data of the entire survey. Given the breadth of the market scope as outlined in the Suppliers section (section 5, page 69) and irrespective of business size, degree of customisation desired in the final solution, or any other deciding factor, no company can afford to shortlist as few suppliers as the majority have. According to our data, of those customers who knew how many suppliers had been shortlisted, almost half asked only three suppliers to demonstrate their solutions, and those who tested more only brought between four and six into the final stages. Not one company shortlisted more than six suppliers.

With so many suppliers claiming to cater specifically for the fashion market, having such a tiny percentage tender for such a valuable investment is the equivalent of wanting to buy a new car, but only test-driving green, two-door hatchbacks produced by a couple of manufacturers... and this is before you have even made up your mind as to what kind of car you want!

After creating an accurate blueprint of your existing processes and a map of what your business aims to achieve with a PLM solution, shortlisting a wide range of suppliers is the most vital part of the early selection stage. There are many third party organisations that will be willing to outline the drawbacks and benefits of each solution, but any prospective customer should take care to ensure that their advisors are truly independent.

As outlined earlier we believe it is critical to complete a detailed, specific RFI during the pre-sales stage, and we are happy to see that the results bear this out. Almost 60% of all customers did, and of those that did not respond in the affirmative more than half reported that they did not know for sure, which leaves some scope for an even higher figure. We remain somewhat concerned that some PLM suppliers are attempting to persuade prospective customers to use their own off-the-shelf RFI, which has become known in the industry as a 'lockout document'. These work by loading the document with questions that will always show that particular supplier in a positive light; they are used by suppliers to influence and colour critical information with a view to accentuating their own strengths and downplaying those of their competitors. Independent RFI documents are readily available and can be tailored to fit the relevant requirements of your business.

Again, we suggest that all prospective customers complete a detailed examination of their existing processes, functionality and how they would like those to mature before selecting a solution. We are happy to report that twice as many customers did as did not, and that only a small portion did not know for sure. In the cases where this information had been produced it appears that the majority of suppliers took account of it and were able to tailor their presentations accordingly.

We mentioned that third party organisations exist that are willing to help with the pre-selection and selection stage. The results suggest almost 50% relied on this kind of external help in making their decision while 31% opted to choose alone. Taking the scope of the market into account, we would recommend expert consultation from an impartial body to any business that is at all unsure of either its needs or would simply like to know more about the various suppliers. The potential pitfalls are numerous and embarking on such a huge and costly process without informed advice can be extremely risky.

When it comes to shortlisting and eventually selecting a supplier, 71% of those surveyed indicated that prior experience in the fashion industry was either very or extremely important to them. This suggests that suppliers pitching a 'one size fits all' solution may find that they have their work cut out for them. Selected quotes include:

*"I think it is very important but not always the case."*

*"We felt that it would speed up the implementation process if the supplier understood the needs of the industry."*

This is reflected in the following question, which asked customers how well they thought their shortlisted suppliers understood their business. Surprisingly only 57% of customers reported that the suppliers were either very, or at least fairly familiar with their ways of working.

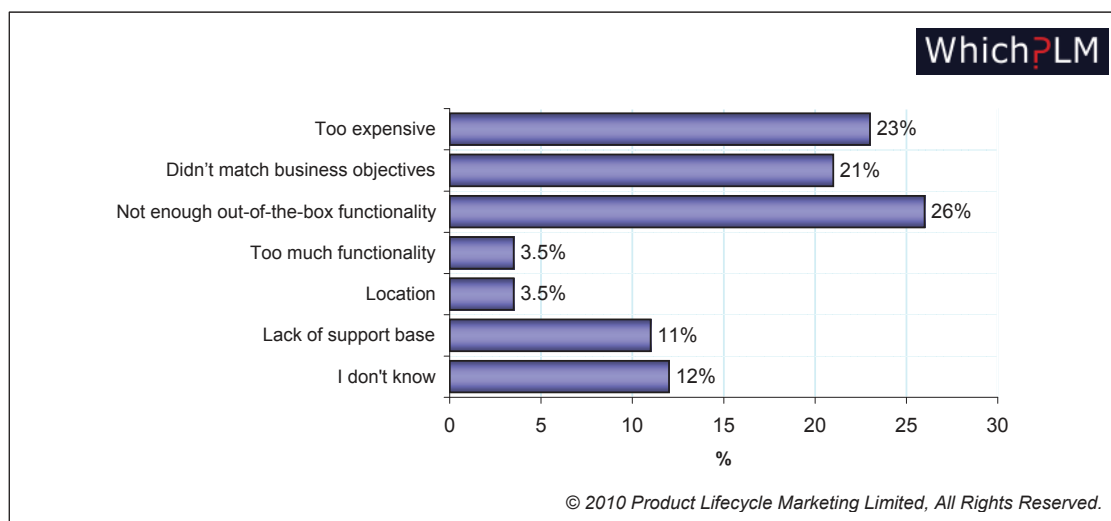
Following on from this, only 48% of customers felt that pre-sales presentations from the suppliers they eventually chose were either a very good or excellent fit for their business objectives. This is compared to only 21% who felt that the presentations from the suppliers they did not choose were a very good or excellent fit for the same objectives.

Of those who responded, more than 58% felt that it was important that the supplier they chose had in-depth knowledge of the processes and ways of working that are specific to the apparel and retail sectors.

This all goes to show that, from a supplier's point of view, fashion industry expertise is not only critical during the actual implementation but that it can also be a deciding factor in whether you are asked to present at all!

From a customer's perspective, it appears as though the majority of businesses are (wisely) looking for a supplier with prior experience and detailed knowledge of the industry, but that they are generally shortlisting far too few. This could be due to the suppliers' not emphasising their prior fashion industry experience or lacking it entirely; it could equally be that customers did not perform sufficient research before shortlisting suppliers and hence missed out on the many companies who offer precisely what they were looking for.

### What prompted you to not move forward with the other PLM solution suppliers?



Narrowing down their shortlist of suppliers, the three main criteria that customers used for rejecting a solution were that it was too expensive, it did not match their business objectives, or that it did not provide enough functionality out of the box, requiring further customisation.

Some other factors can be seen in the chart above, with a lack of support base coming in highest among them. Complexity and location are comparatively unimportant, illustrating the global reach and baseline technological knowledge of the market as a whole. Selected quotes from the 'other' category included:

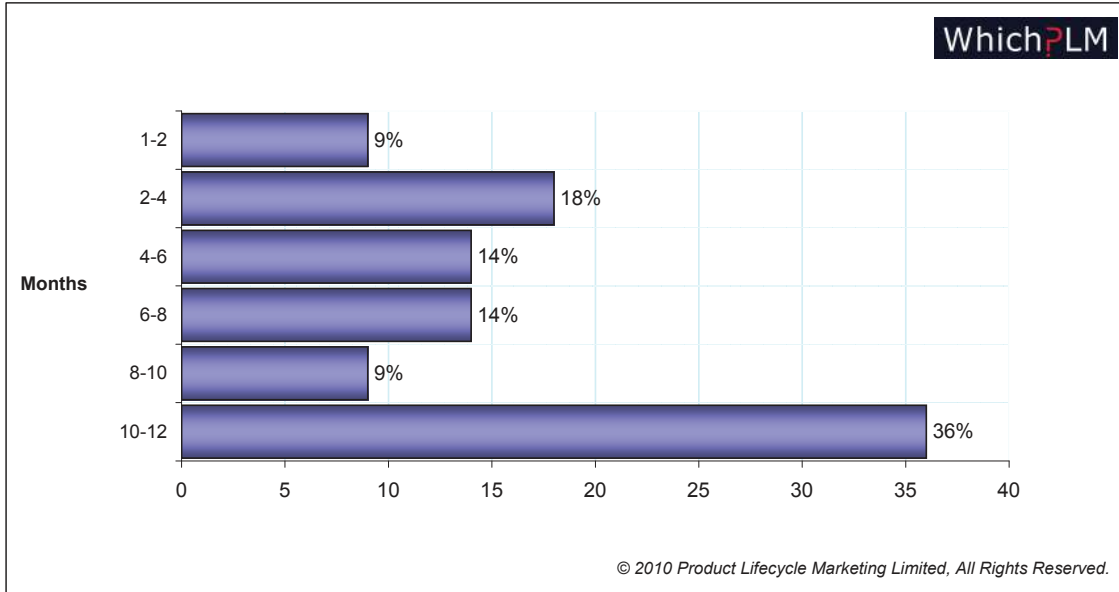
*"Budget changes."*

*"Few product installations."*

*"Same company as legacy system - assumed to be easy upgrade."*

All of which demonstrate the desire for a supplier with a proven track record in the fashion industry, the huge potential market for an efficient OOTB solution, but also that the decision not to move forward with one particular supplier may not be based on the supplier itself but rather a change of priorities within the customer's own business.

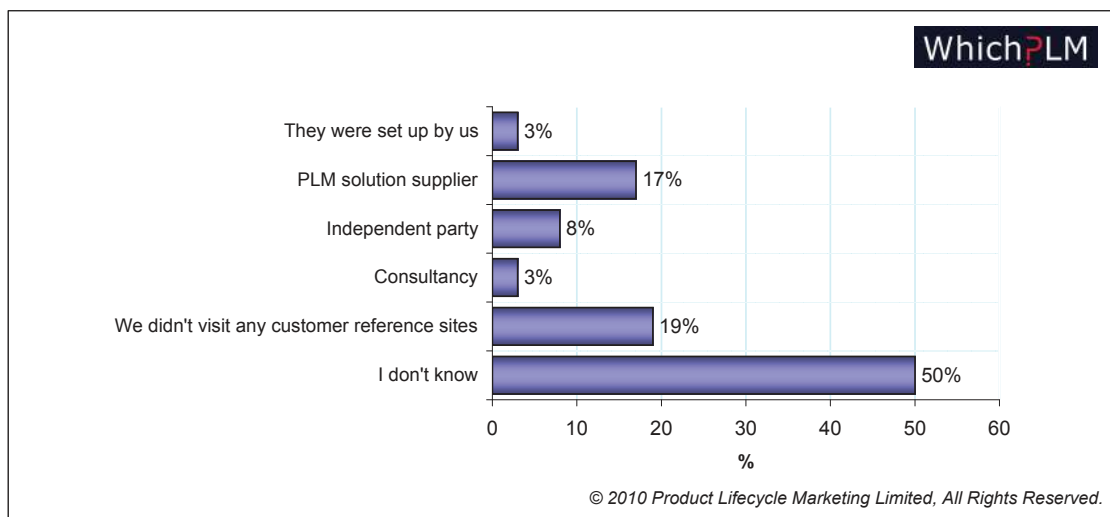
**How long did it take to decide (months) which PLM solution supplier was the best fit for your company?**



In the above results we can see that 36% of customers took a full 10 to 12 months to shortlist and choose a supplier. From considerable experience and based on recent improvements in OOTB solutions we expect to see the decision process taking less than six months to complete. In view of the importance of the project and due diligence required, we would recommend six months as being the bare minimum, although this is liable to change in light of the aforementioned improvements in OOTB functionality, which will help to expedite the selection process.

A key tool when it comes to shortlisting suppliers is the customer reference site visit. These can be organised either directly with past customers, arranged by the suppliers themselves or set up by an intermediary (usually a third party consultant). The results demonstrated that only 31% of the customers surveyed conducted site visits and of those a majority were arranged by either an unnamed party or by the suppliers themselves, as the chart below demonstrates:

**Who set up the customer reference site visits?**



Selected quotes from the 'additional comments' response included:

*"We had phone calls with other customers...provided by solution provider."*

*"One was set up by us, the other by the company."*

We cannot stress enough the inherent risks in allowing a supplier to arrange and, in many cases, conduct site visits. We would not recommend buying anything based solely on the testimonials that have been approved by the supplier, let alone entrusting what is likely to be your most significant IT investment to the say-so of hand-picked referees. Almost 40% of customers reported that site visits had been important in their making a final decision, but this is not reflected in the way that a good portion of customers did not conduct any such visits, and those that did in many cases allowed the suppliers to chaperone them. If you have heard that a certain customer has implemented a solution and that solution's supplier is reluctant to arrange a visit, there is probably a reason! To use another analogy, this is akin to buying a house based solely on a set of authorised photographs taken and provided to you by the vendor.

Most third party consultants remain close to their clients throughout the pre-sales, implementation and post-sales stage, but it is only those who can claim to be truly independent who can provide references for both those clients who had great experiences with a particular solution and those for whom the implementation went awry. While expert advice can be critical at all stages of the selection and implementation process, nowhere is it more useful than here in obtaining an impartial and objective view on the past successes and, if any, failures of a given supplier.

## 4.2 Implementation

Based on our experience of over 150 implementations and in line with our recommendations, we asked customers a series of questions designed to help us ascertain what proportion of them had key information in place before proceeding with their implementation, and consequently what effect this had on their satisfaction with the solution as a whole. Each of these is a critical part of the customer's toolkit when it comes to conducting a thorough, effective and above all profitable implementation of a PLM solution. Rather than accompany each with a paragraph explaining that those customers who did not carry out the steps were taking a considerable risk, we will say here that every one of them is absolutely crucial to have in place, and potentially expensive and time-consuming farther down the line to miss out! Preparation is without a doubt the most important stage of choosing a PLM solution, and it is one that can be undertaken before you even begin to look at supplier listings.

Firstly we asked whether or not customers had completed a detailed ROI analysis ahead of their implementation. Only 27% reported that they had. We asked whether customers had completed a full analysis of the benefits they hoped to achieve with the solution. Over 40% reported that they had, but the remainder either did not know or had not.

Of those that had conducted an ROI and benefits analysis, 30% reported that they had used this information to inform their implementation strategy, but with over a quarter of the respondents saying that they did not. We have said that this sort of preparatory information is absolutely vital when it comes to beginning an implementation, but this only applies if you choose to actually make full use of it in making sure that the solution will mature your existing processes in the right direction as opposed to forcing your unique business to fit into the supplier's way of working. We always recommend initially prioritising those benefits that will deliver the quickest return.

We asked whether customers had used a third party consultancy to help plan their implementation – an overwhelming majority (59%) said that they had not. We have already stressed the benefits of impartial advice and assistance in the planning stages; something that we believe is borne out by the degree of customisation that a good portion of solutions required. An objective view of your business's key processes can help to ensure that the solution meets your needs before the implementation begins, rather than waiting until it is in place.

Almost 40% of customers said that their contractual offer from the supplier matched their original objectives from the pre-sales stage, with 50% reporting that they did not know. This only reinforces the importance of having documented benefits and processes to compare against the offers made by prospective suppliers. From a supplier's perspective it appears as though most are constructing their offers well and pricing them realistically.

Similarly, more than 40% of customers reported that contractual negotiations between themselves and the supplier ran smoothly. Only a tiny portion (8%) reported being dissatisfied with the negotiations stage, with one customer citing incorrect invoicing as the reason. In terms of pricing 48% said that they were able to agree a target price for the entire solution that was accommodated within their budget, with 4% saying they were not.

Once the negotiations have been completed, customers find themselves at the exciting stage of actually putting their new solution into place. Our next set of questions was intended to cover the stages between the implementation team arriving in-house and the completion of the full installation.

We asked whether customers found the documentation accompanying their selected solution to have been simple and straightforward. Of those customers 42% reported that it had been, with 23% stating that they had found it difficult to understand. While the majority were satisfied with the written technical support at this stage, there is clearly room for improvement when almost a quarter of all customers reported being dissatisfied at the first hurdle! Having implemented a broad variety of PLM solutions, we can confirm first hand that the documentation provided by many suppliers falls way behind the actual functionality of their solution, leaving plenty of scope for suppliers to ensure that software capabilities, learning and support go hand-in-hand. We often advise our clients to identify the key processes that are supported by a solution and to ask where in the supporting documentation these are covered. In many cases they find that a given process does not appear at all in the documentation, highlighting a potentially immature function of the solution.

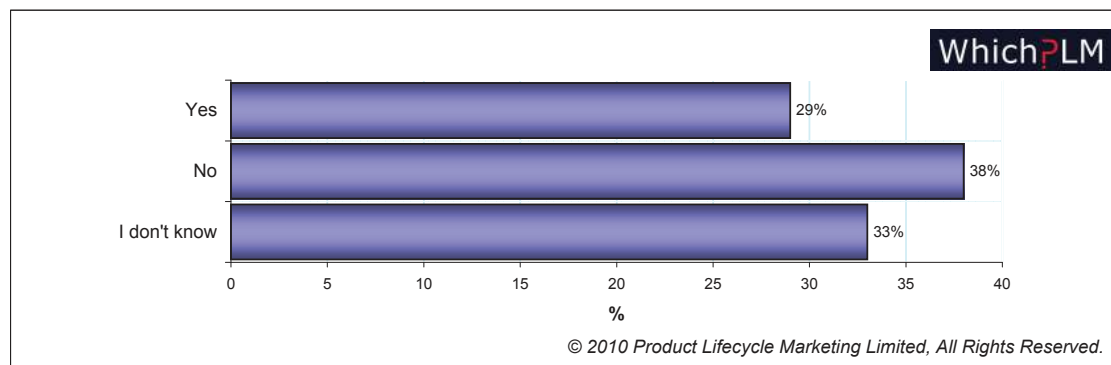


Every PLM implementation should be accompanied by an agreed support / future development contract alongside the agreements already made regarding cost and timeframe.

Almost half of the customers we surveyed reported that their contract covered them for future upgrades (with 15% having not arranged this provision). This division was less clear-cut when it came to agreeing a support contract that would provide cover across an extended supply-chain in multiple zones, with 29% saying that their contract supported their entire chain and 38% reporting that it did not.

There is significant scope here for better supplier and customer communication; from the customer's point of view it is naïve to assume that a support contract and the level of 'expert' support offered will be truly multi-national, and from the supplier's perspective it would be easy to avoid future disagreement by clearly stating whether a support contract caters only for single zones or across a full supply chain.

### Does your support contract provide cover across your extended supply-chain in multiple zones?



In addition to the documentation and contracts that accompany a solution, it is critical that a supplier makes the full range of their support and advice available to the customer during the implementation.

Our findings from the next set of questions revealed that suppliers are delivering the expected support and results in most areas, but with some notable exceptions that we hope will provide opportunities for improvement in the future.

Our experience shows that a good synergy between the supplier and the customer significantly improves the implementation. From our survey 60% of customers reported that their supplier had worked with them to set up a steering committee to help manage milestones and key deliverables throughout the implementation. This is a great result and a terrific example of how communication and cooperation between customer and supplier can help to shape the entire project.



Similarly all but one customer reported that their supplier had conducted pre-implementation visits and that they had held planning meetings. This kind of collaborative working is absolutely essential for a smooth and successful implementation.

One area where suppliers generally fell flat was in assisting their customers to manage the internal PLM implementation project team. For various reasons it can be difficult for business leaders to select the right people for the job from their existing staff, and this is where a supplier can assist by creating 'change managers' to help smooth the transition between old and new processes and use their influence to drive the internal uptake of the solution. Where possible, customers should work with their supplier to shape and encourage a qualified and eager internal team. If the supplier is seen to be struggling to assign process 'experts'. Then these resources should be sourced by a third party, one who is able to bring their experience and credibility to bear in encouraging full take-up of the solution across the user base.

Returning to documentation, most suppliers provided detailed technical architecture documentation to help their customers with sizing, although 24% of customers reported that they were not given that information.

As the true work began, the majority of participants reported that their supplier held both a project kick-off meeting and conducted a high-level demonstration of their solution to all users. Again, working together with your supplier and ensuring that all the relevant staff are fully briefed on what the implementation will entail and what the solution will achieve is a perfect way to avoid potential pitfalls in the future and help with the overall adoption of the solution internally. Speaking from experience, we would stress that the project committee should adopt a communications strategy to accompany the implementation project. Relative to the size of the project, many implementations can take anywhere from six months to several years to complete, so users from every part of the business ought to be informed of the implementation progress, ensuring that the project team can maintain a firm commitment and have the designated future users eager to adopt the new solution.

During the implementation 36% of participants reported that their supplier worked in conjunction with the previously-selected team to run process maturity workshops. These are intended to analyse the transition from the processes identified in the initial blueprint stages to the newer, leaner processes enabled by the new solution. The 40% of suppliers who did not conduct these missed a valuable opportunity to share information regarding the ongoing implementation and, in some cases, the chance to learn about possible difficulties before they arose.

That said, a huge portion of the customers we surveyed reported that they were able – with the help of their supplier – to implement their solution in a way that aligned with their unique business challenges, with very few (16%) suggesting that their implementation had not gone to plan. This is extremely encouraging for the industry as a whole, but customers should not be tempted to rely too heavily on their suppliers to manage this for them. The odds are that the most successfully implementations were either simple or came as the result of meticulous analysis, research and communication in the planning stages.

The kind of forward-planning that leads to a successful implementation also helps to avoid unforeseen changes and customisation requests later in the project. Many customers opt for a PLM solution without proper preparation and are surprised by the volume of customisation that can be required at a later date to make the solution fit their specific needs. This is reflected in the fact that less than 10% of customers reported that their solution required no customisation whatsoever. Of those that did, more than 50% reported that the customisation did not match the contracted implementation objectives and timelines. We cannot state enough that a clear understanding of your requirements and a detailed map of your existing and desired future processes will always lead to fewer and less-costly eventual changes.

On a related note, the same clear, developed starting point can help to mitigate delays in the project. 40% of participants admitted that their implementation overran the contracted plan and the agreed-upon timeline. In some respects this is unavoidable and it is rare for any project of the same size as a large-scale PLM implementation to run entirely to schedule, but there are many delays that we have seen crop up time and again. Each of these typical hurdles can be either surmounted or their impact minimised through methodical preparation.

The final piece of complimentary documentation (also representing the final stage of the main implementation process) that ought to accompany a PLM solution is a comprehensive set of reports and dashboards, something that only 44% of the customers we surveyed said they received. Of those who did report their solution as including these, 46% felt that they did not cater for their unique business needs and required further modification.

With the basic implementation complete, having a full suite of reports as standard goes a long way towards creating an impression of a full-featured and instantly-usable solution, which can have a major effect on overall customer satisfaction. However, unless you have chosen an OOTB solution, reporting and dashboards cannot be completed until the solution has gone live, otherwise you will end up completing and paying for this process several times over!

### 4.3 Feedback

In addition to the useful information that prospective customers and suppliers can pick up from the questions that covered the pre-sales and implementation stages, some of the most vocal and detailed responses came from the following questions. Each of these was designed to draw comprehensive, unbiased, retrospective feedback on the entire process from shortlisting to support. If our 150-plus implementations have told us anything, it is that the most profound insights into the ups and downs of implementing a PLM solution come from those who speak with the benefit of hindsight. Whether you are a customer or a supplier you can learn a great deal from other people's mistakes and experiences.

We opened this section with perhaps the most important question of the entire survey – namely what would your business have done differently to improve the implementation? The most informative responses are collected below:

*“We would have involved our IT department instead of managing this from the business side only.”*

*“We tried to do too much too fast.”*

*“Implement across all users and suppliers simultaneously.”*

*“We have not fully implemented yet - implementation is in process. A previous attempt (two years ago) to implement was aborted because of slow performance. [Supplier] was very slow to resolve a number of issues: slow performance, fatal errors, compatibility with MS service packs, miscalculation of fractions, reports crashing. In retrospect we should not have migrated more than three years of past data - we do not need anything older.”*

*“More planning - deeper look into methodology to account for software customizations as business dictates - and better understanding of total cost of ownership.”*

*“From a personal perspective, the common complaint from the users was the speed of the system. This is a difficult situation to resolve as users expect any IT system to be able to do more than it is [capable of] and there are so many factors that can affect the speed of the system.”*

*“More personnel in integration project.”*

*“Better specification of the user actual requirement. More defined workflow processes and less “flexibility” for nonessential user needs.”*

*“We would have tried to implement less functionalities at the same time.”*

*“One of the key issues was the speed of the system. We could have waited until the system was at full speed before implementing the system, but some of the speed issues did not arise until the system was implemented. The business also had a deadline to meet with moving to the new system.”*

*“Less customisation. More flexibility of processes across the different product groups.”*

*“Perhaps implemented end-to-end up front instead of modular approach.”*

*“More training for the internal team before beginning the implementation.”*

*"Upload customer information from their various formats and integrate PLM with other systems to eliminate data entry and duplication."*

*"Budgeted more money for further modules."*

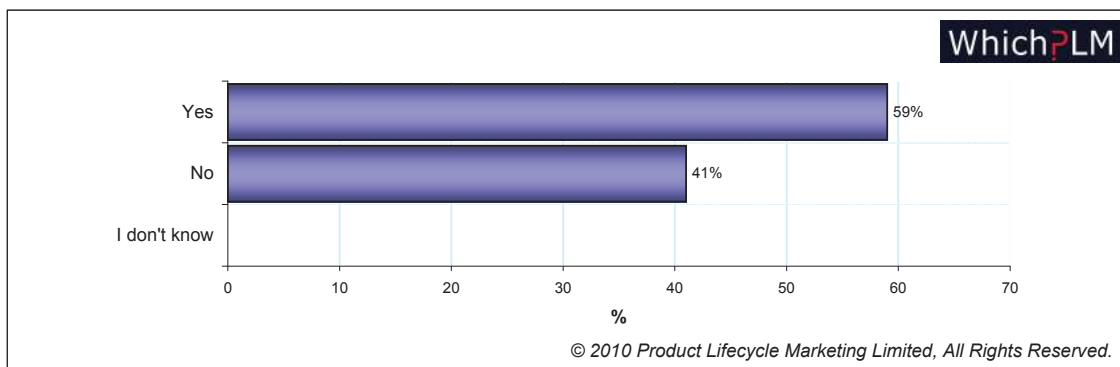
*"1. Have the people using PLM be the ones to select the PLM software.  
2. Have ALL staff and suppliers implement at the same time."*

*"Select the business users to the project team. Monitor the objectives and timelines closely."*

One issue that we have heard raised countless times has been that suppliers have changed their project team during the implementation period, having one team work with a customer during the pre-sales and early implementation stages but then assigning that team to a fresh client. We were pleased to see that 45% of customers who remembered the composition of their supplier's team reported that it had been consistent throughout the implementation. This is a positive result, but it is worth bearing in mind that still almost 20% of customers have suffered a change in team mid-way through their implementation, which can have an absolutely disastrous outcome for customer satisfaction, let alone the implementation process itself!

This and the many other factors mentioned elsewhere in this report must surely be reflected in the following chart displaying the results of a question asking whether or not customers' software implementations went according to plan.

### Did the initial installation of the PLM software go to plan?



While it is true that a majority did manage to implement their software solutions in line with their designs and expectations, there is certainly room for improvement in a situation where almost 40% of customers reported that their implementation went astray somewhere along the line. We have stressed throughout this report the importance of preparation and planning (whether internal or with the help of a third party) and nowhere does that ring truer than in the following quote taken from this question's 'additional information' section:

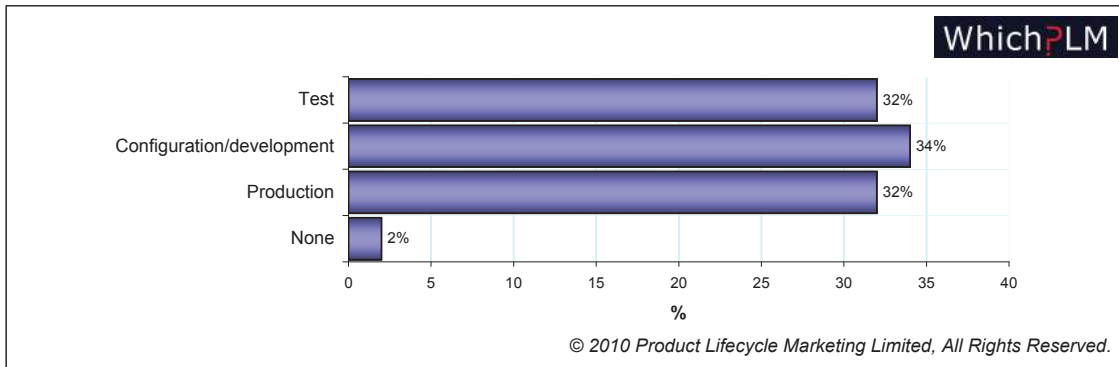
*"We had to change our implementation strategy a few times due to complexity and timing."*

No implementation is absolutely guaranteed to run smoothly, but proper analysis of your business's existing processes and a detailed blueprint of what you want from a PLM solution – both conducted with the help of an impartial consultancy - are vital in avoiding unforeseen changes and helping to mitigate the impact of unavoidable hurdles.

On a similar note, only a small majority of customers reported that they had stuck with the hardware/network sizing as defined in the pre-sales stage. This means that almost half of all customers had to make ad-hoc changes to their requirements during the implementation. Another complaint we have heard raised time and again runs along the lines of, "we did not know we would need this". This can be attributed to both a lack of preparation on the customer's part and the supplier's not doing a sufficiently thorough job in ensuring that the solution they are selling is appropriate to the underlying architecture. Employing the services of a third party with deep domain experience can ease initial communication and agreements between the customer and supplier, and can help avoid these unpleasant surprises further down the line.

Another tool that can help customers avoid nasty shocks is installing the solution in some sort of test environment to analyse any configuration, customisation or development in situ but without the added concern of making changes to your live production environment. As you can see from the results in the next chart, a very small majority opted to install in a test environment. A similar amount opted for a configuration/development equivalent, the same proportion chose to implement their solution in the production environment, and a further small percentage chose to do none of the above.

**Did you install the software on a test, configuration/development and production environment?**



Technology-wise, we asked a further series of questions, the first of which was whether customers had installed their solution in a single location or whether it was rolled out across distributed servers. These selected answers give some idea of the range of different configurations that a customer may need to fit a solution into. There is no 'typical' PLM customer!

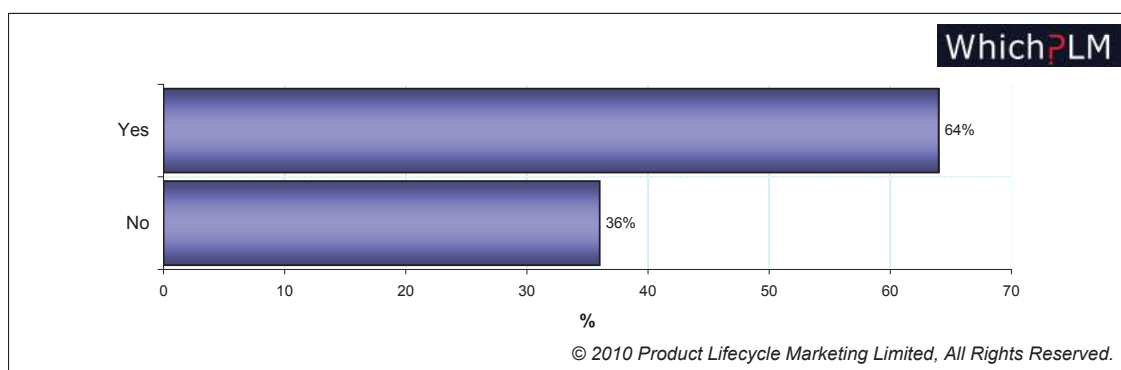
- *"Single location."*
- *"Across servers and countries."*
- *"Multiple servers with a load balancer."*
- *"Single to start... added additional site years later."*
- *"Several servers."*
- *"The system was installed across four servers."*
- *"Test server, accessible via remote from sites both in the UK and overseas."*
- *"Three servers: database, enterprise layer, vault."*
- *"Installed across four servers. "*
- *"The software is in a single location; however it requires an image server and a database server Distributed Servers in China, USA, UK, Germany, France and India."*

We then asked whether customers had performed the software installation on their own servers or had used the SaaS model. Very few reported to using the SAAS model, but this is an area in which we expect to see considerable growth in the near future.

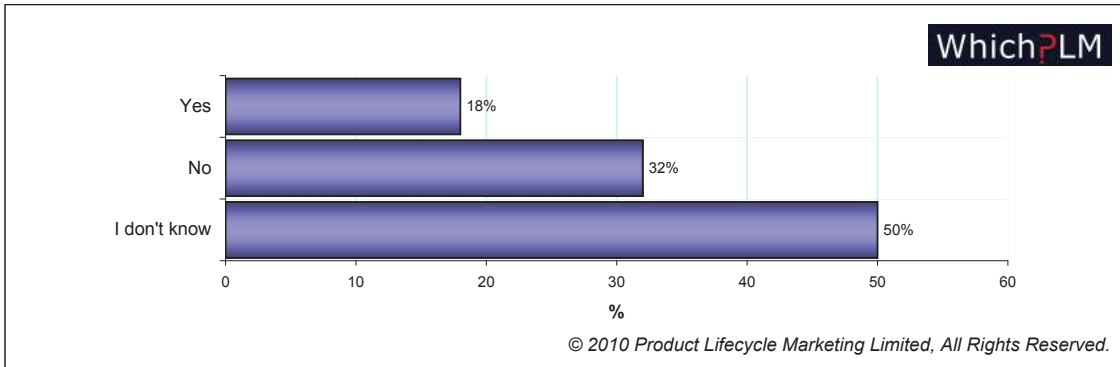
A key capability of most PLM solutions is the ability to share graphic design files across the extended supply chain in their native format, enabling multi-zone creative design processing. The responses suggest that almost all customers are focused on using the basic facilities provided by the leading design packages (Adobe Illustrator, Micrografx and Freeborders Designer) to share exported JPEG files between departments and zones. There is scope here for suppliers to better communicate the capabilities of their own solutions to make certain that suppliers are able to use them to their full capacity.

Outside of the software specifics, a key part of integrating a PLM solution into an existing way of working is training internal staff, not only in terms of the initial briefing and implementation outline that we have covered previously, but by coaching them in the use of the solution as a final step in the implementation process. As we can see below a reasonable majority of customers reported that their staff received at least some training in the use of their new solution, although there remains some scope for improvement in managing the handover from supplier to customer in the post-implementation stage.

### Did the PLM solution supplier train your staff to complete the installation?

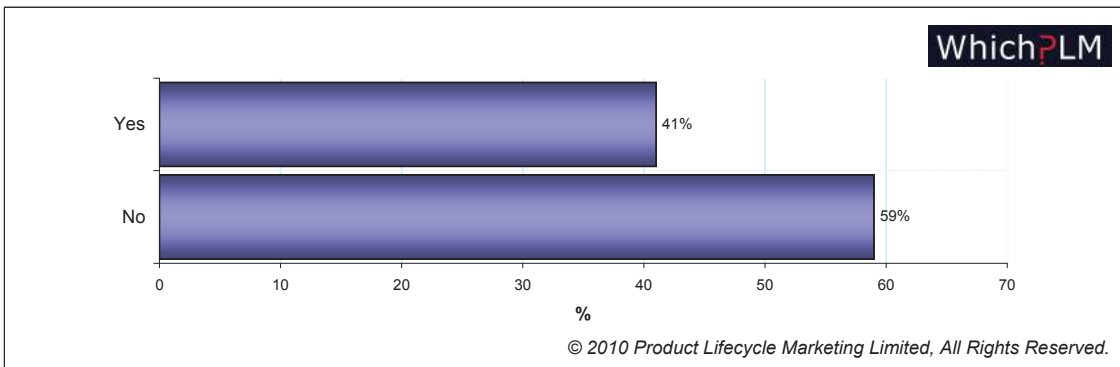


### Did the PLM solution supplier provide quality documentation for the installation?



Accompanying any training ought to be comprehensive and up-to-date documentation for the customer to refer to. The largest proportion of the customers we surveyed were not certain how well the documentation had met their needs, and of those who did specify one way or the other we see a completely even split. It is important not only that suppliers provide relevant and constantly updated documentation to accompany their solution, but also that customers take the time to read what is provided before starting to work with any new software, irrespective of how well their employees have been trained in its use. For suppliers, it is worth noting that documentation should also always accompany software patches and upgrades in order to avoid frustrations within the customer's IT team.

### Did your supplier complete the project to time and budget?



The most important metric when it comes to examining the success (or otherwise) of an implementation for any customer will always be the combined expenditure of time and money. We were surprised to see that a majority (almost 60%) of customers reported that their solution was not implemented in the contracted timescale and/or within the agreed budget.



The additional information we received included the following quotes, which give a flavour of just how costly an overrun in either time or money can be to both the customer **and** the supplier:

*"11 months, no extra cost."*

*"3 years + \$\$\$\$\$."*

*"30 months and over 10 million dollars."*

This is likely to be the result of the rapid rise in demand for PLM solutions – leading to a mixture of supplier inexperience, poor customer preparation and the hurdles that often present themselves during an implementation. Coupled with these is the increased uptake in OOTB solutions, which lack some of the breadth and depth of process management that their bespoke counterparts specialise in, leading to delays as the solution is tailored to fit processes that were not covered as standard.

Appointing a third party responsible for process and benefit analysis and for project management is an excellent way of making sure that the budget and timescales agreed to in contractual negotiations are as realistic as possible, as well as helping to set and manage milestones during the process.

As a coda to the question of time and money is the fact that a great many customers find themselves expending more of both on additional customisation that was not budgeted for in the planning stages. Again, some choice quotes reveal just how large an impact these unexpected alterations and additional process enhancements can have:

*"As the business evolved, different needs [were] identified and modifications needed."*

*"Roughly 40 to 50% of the final PLM version is customized for [customer]. All of the forms have been modified somewhat. Some forms were created specifically for [customer]. All of the reports were created for us."*

*"The system was developed further to include critical path and costings."*

*"We have not purchased any additional configuration but there was a lot of internal re-development."*

*"Additional modules to support company specific requirements that were 'in scope' of our PLM solution. Many user defined fields added to screens."*

*"Considerable but we knew this going into the project."*

Related to this, our next question revealed that a large majority of customers had needed further process enhancements once their implementation had been completed.



We consider it absolutely critical to quantify and then subsequently measure the benefits you aim to achieve with a PLM implementation. Having an accurate snapshot of your business as it exists before you choose and adopt a solution is vital since it enables you to perform a full assessment of the benefits of your solution and to extrapolate from those a detailed analysis of the return on your initial investment. We asked customers how they had quantified the benefits of their solution, and include a selection of the responses below:

*"Whether it gives the expected results on demand."*

*"Number of pages in the PDM spec; less data entry."*

*"We did not."*

*"Regardless of how many overall areas of the company will have better visibility, the PLM will be measured by ease of use and speed in making a spec package."*

*"Have not been able to do that."*

*"The main objective is to meet the requirements of the business today and the future."*

*"The measurement was not completed. However, the cost was greater than planned, the development time longer than forecast, and the implementation period was longer than we planned."*

*"Cycle times and data integrity."*

*"Still progressing through the first season and will review the measurables after completion."*

*"KPI [key performance indicators]."*

*"Did not measure."*

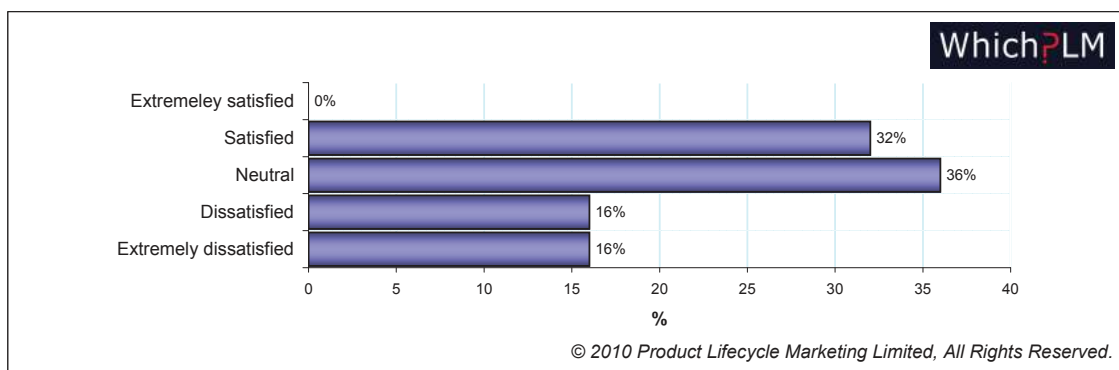
As we can see, many customers did not measure the eventual benefits of their solution at all. Among those who did we see a variety of different metrics used, which demonstrates that while there are benefits of PLM that are general to all businesses, any company conducting an implementation should keep track of the things that matter to them the most. This is why a detailed analysis of your processes and ways of working is so important – it not only helps the supplier to understand your business but also enables you to keep track of key deliverables as the implementation progresses and to analyse them afterwards.

Perhaps unsurprisingly, far more than half of all customers reported that they did not know whether or not their solution had delivered a return on investment within the expected time. As we covered in the introduction and industry history, every business seeking a PLM solution is looking to streamline their existing processes in order to deliver compound savings in efficiency and expenditure. With that in mind, not tracking the outcomes of such a substantial investment can in some cases be tantamount to throwing your money away!

#### 4.4 Overall Satisfaction

Paramount amongst all the other exhaustive information this survey was designed to collect was the sense of customers' satisfaction with their individual solution supplier. As we can see, the 'big' question saw a lukewarm response, with the ambiguous 'neutral' option proving the most popular. Despite the fact that a not insignificant proportion of customers reported being either satisfied or extremely satisfied, it is difficult to ignore the fact that some 32% of customers were dissatisfied or extremely dissatisfied and the vast majority would not be drawn one way or the other.

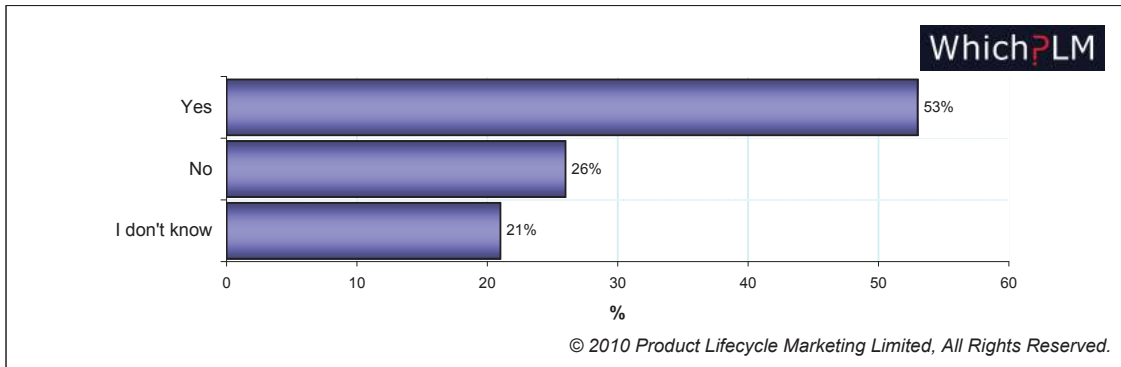
##### How satisfied are you with the PLM solution you are using?



It is important to note that while we at WhichPLM are unquestionably PLM evangelists, this survey was not designed as a competition. We did not set out with the aim of finding the 'best' solution, simply because we believe that the solutions available are as unique as the customers who are seeking them. Choosing a solution is not as simple as picking the most popular supplier, but rather picking the one that best fits your own business needs. This can only be confidently achieved through proper preparation and deep, unbiased knowledge of the specialisations and skills of each supplier. As the major independent body examining PLM solutions for the fashion industry, we understand the needs of our clients and we have personally benchmarked, or are in the process of evaluating, many of the suppliers who are mentioned in this report. Our overriding aim – with this report and in general – is to understand and shape the industry through detailed examination and open communication between customers and suppliers.

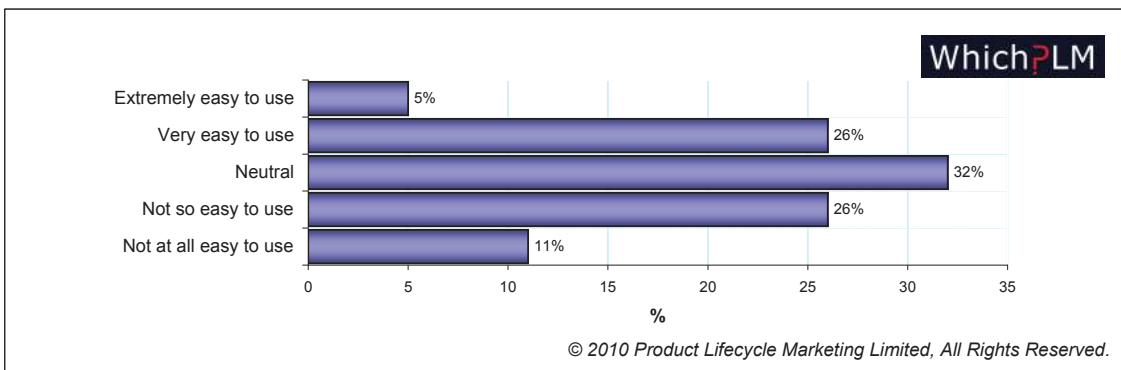
While we have talked in great detail about process, documentation and benefit analysis, it can be easy to lose sight of the fact that customers choose a PLM solution because they have identified a need within their business. It is testament to the work of talented developers that just over 50% of those who answered, reported that their employees were using the solution as they had envisaged.

### Are teams using the solution as originally envisaged?



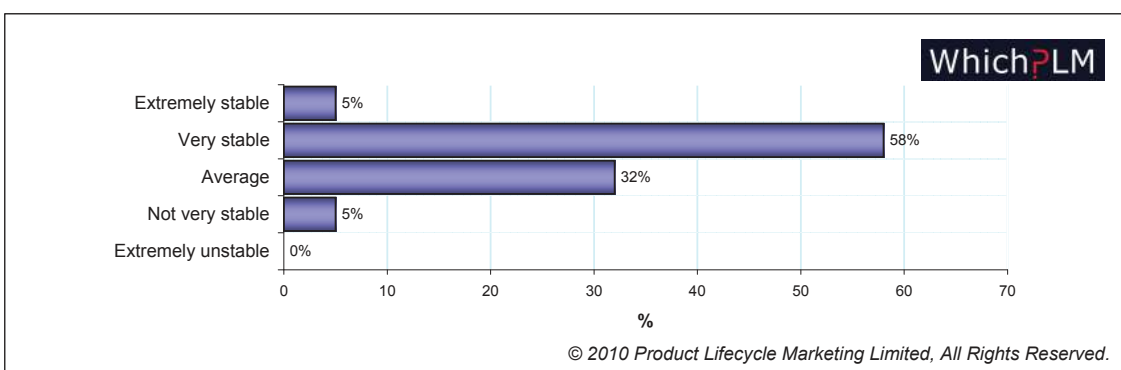
Similarly it seems that fewer customers struggled with their solution than said it was easy to use. While there is clearly scope for improvement in terms of usability, these results appear to indicate that most customers are both able to use their solution and able to use it for the purpose it was intended for.

### Please rate the PLM solution on how easy it is to use?

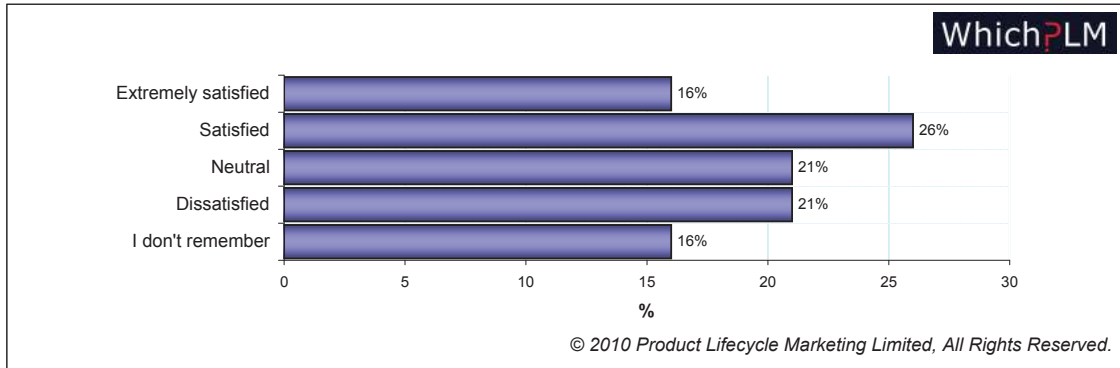


This, coupled with the next results suggesting that the vast majority of solutions are stable and robust, is an indicator of excellence for any piece of software.

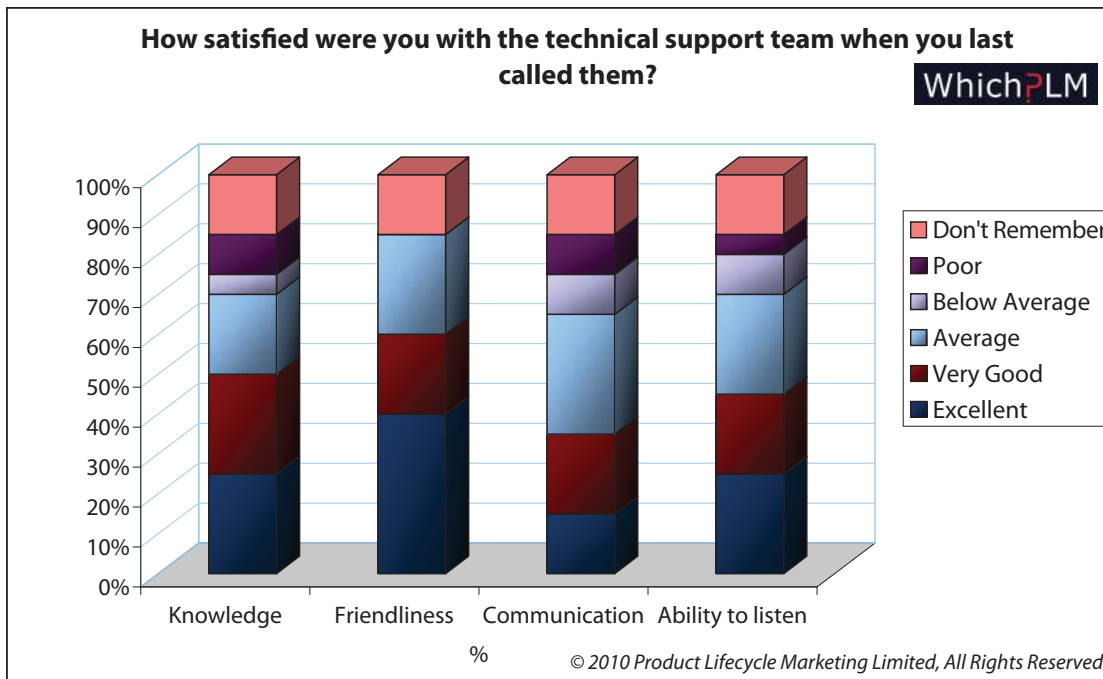
### Please rate the PLM solution on how stable it is (does not crash)?



**How satisfied were you with the technical support team when you last called them?**



We then asked for a detailed assessment of the most recent of those occasions that customers have had to contact the support team for their solution. A small majority of them reported being either satisfied or extremely satisfied with their experience as a whole, with more specific indicators outlined in the next graph.



# 5. The Suppliers

## 5. The Suppliers

It was encouraging to see that the survey attracted feedback from a broad range of PLM suppliers. We had responses from both the traditional suppliers – those coming from the apparel CAD/Computer Aided Manufacturing (**CAM**)/ERP sectors – as well as recent entrants to the apparel market, those suppliers who have their roots in the engineering, automotive, aerospace and defence industries. We have already delineated the suppliers into two tiers, but this section is intended to take a closer look at their individual performance and the trends emerging within the industry as a whole.

### The Supplier Landscape: The New Generation...

The explosion of PLM for the fashion industry in the last decade has driven an influx of new suppliers, each offering their own solution. In this, the first independent apparel industry customer satisfaction survey, eight suppliers were evaluated by their own customers, with more than eighty detailed questions designed to discover the hard facts about their chosen PLM solution as well as an impression of the overall 'customer experience', from pre-sales and selection to implementing and working with the solution. Several customers of other suppliers who were approached to participate declined since their implementation was currently only in the early stages. Some other responses have not been included in these results as the respondents were either representatives of consultancies or businesses from outside the retail, fashion and textiles industries. All the answers that have been taken into account for the purposes of this report are from companies that have been independently verified as customers of that particular solution and are proven to be representatives of companies from the relevant industries. We took this rigorous approach to analysis to ensure that we could provide relevant, high-quality insights into how suppliers of PLM for the fashion industry are performing and how satisfied customers are with solutions in this sector.

Tier 2 suppliers (including those with histories in PDM and more recently PLM), have begun developing new partnership strategies with the aim of strengthening their own global resources in the areas of business process consultancy and technical support, hoping to improve their market sales. From experience this is emerging as a critical competency, with customers seeking out Tier 1 and Tier 2 suppliers who can boast skilled staff and excellent resources anywhere in the world and while it appears that some suppliers claim to have a wealth of experienced employees and expert resources ready to deploy across the world, customers remain unconvinced of how far the suppliers expertise extends outside their regional strongholds.

Tier 2 suppliers (including those with histories in PDM and more recently PLM), have been undertaking new partnership strategies to establish additional global resources and help improve their offshore market sales. Generally speaking, they seek to gain traction in the areas of business process consulting and technical support. This has emerged as a critical competency that customers are seeking in not only Tier 2 but also Tier 1 suppliers; suppliers who can boast the resources listed in their marketing documentation, but customers are concerned they lack skilled resources outside of their regional strongholds.

The eight suppliers that have been 'evaluated' by their own customers for this survey are:

- Dassault Systemes;
- DeSL;
- Gerber (WebPDM customers, not the new Yunique PLM solution);
- Infor;
- Eclipse (Just OnePlace solution);
- Lawson;
- NGC (New Generation Computing); and
- PTC.

### **Why are some suppliers not included in the survey results?**

There are many excellent, established and upcoming, solutions to the fashion/apparel industries and of the 40 or so suppliers, we received customer feedback for 12. When contacting known fashion PLM customers to complete the survey, we received a variety of reasons as to why customers felt that they could not provide valued feedback this time around. Many customers who had recently selected PLM solutions were in the middle of the installation stage and so were not in a position to measure the success of the project and provide feedback on their solution supplier yet. Also, we need to remember that PLM is part of a customer's strategy to remain competitive and it is completely understandable if a customer wants to guard this information with legal policies to restrict employees disclosing information about any software that provides competitive advantage to that company.

After validating the results to make sure that participants were genuine customers, we had to eliminate the survey answers for four of those suppliers either because answers were provided by participants who were not employees of the customers (the survey was completed by third parties) or the participants were PLM customers, but for different industries. All the results used for this report were gathered from PLM customers in the apparel/retail/textiles sectors.

## Dassault Systemes

10 Rue Marcel Dassault  
78140 Velizy-Villacoublay  
France

Dassault Systemes SA, a public company listed on Euronext Paris, has worked in the apparel and textiles sectors for the last seven to eight years. Three and a half years ago, Dassault Systemes acquired the Enovia PLM solution from Matrix One, which is now branded as Enovia Apparel Accelerator for Design and Development. That solution is web-based and works primarily with the Oracle database, but it can also cater to companies requiring a DB2 and/or Structured Query Language (**SQL**) server.

The company has a growing customer base of some 40 companies, counting amongst them some of the world's largest retailers, brands and manufacturers. In the recent past Dassault Systemes has pursued an aggressive aim of becoming one of the leading suppliers of PLM solutions to the Retail, Footwear and Apparel (**RFA**) sector.

The company's solution supports a broad base of processes ranging from concept to tracking, supported by a range of additional functionality. The re-branded Enovia solution is able to integrate with many of the industry's leading ERP systems and back office solutions, including: SAP, AS400, CAD/CAM and Adobe Illustrator. The company also offers its own 3D apparel virtual sampling and 3D virtual in-store design solutions.

The company's solution has long been an example of what we term Tier 1 enterprise scalable solutions - these have the capacity to support thousands of users across many geographic regions. More recently, however, Dassault Systemes have also begun to focus on the SME market.

### **Dassault Systemes customers that took part in the survey.**

18% of customers that took part in the WhichPLM Customer Survey were customers of Dassault Systemes PLM solution for fashion.



## Strengths

<b>Area</b>	<b><i>High-level summary of respondents' feedback</i></b>
<b>Market Position</b>	The solution caters to the needs of large international customers with bases the world over. These can include business from industry sectors as diverse as: retail, fashion, sports, luxury brands, textile and footwear manufacturers.
<b>Vendor</b>	The company continues to invest heavily in research and development, enabling their solution to incorporate the latest and most advanced processes.
<b>Solutions</b>	The results show that customers of Dassault Systemes' Enovia solution are generally happy and feel that the solution meets their requirements by supporting each of the industry standard processes.
<b>Support</b>	The company is able to provide solutions and support to most areas of the world through both its own Global Services organisation and a partner network.
<b>Future</b>	The results suggest that the company takes account of customer development suggestions through various channels and responds quickly with improvements and upgrades.

## Challenges

<b>Area</b>	<b><i>High-level summary of respondents' feedback</i></b>
<b>Market Position</b>	The results show that the solution has been primarily adopted by Tier 1 and SME businesses.
<b>Vendor</b>	Feedback suggests that the company lacks expert resources in certain areas of the world, which can have a direct impact on the time taken and budget required to deliver a solution in those regions. Prospective customers are advised to conduct research to ensure that the company are able to reliably provide resources and support in their own area and across their own supply chain.
<b>Solutions</b>	Participants have expressed concerns that additional customisation is sometimes required beyond that agreed during the initial project planning stage, increasing the duration of the implementation. It should be noted here that many of the company's early implementations would have required additional customisation simply because the OOTB solution was not available. Customers are advised to agree their solutions requirements and budget for any expected customisation ahead of the implementation stage.
<b>Support</b>	The results show that some customers in the apparel sector are concerned about the time taken to address support queries and provide domain expertise specific to their area.
<b>Future</b>	The results revealed trends in the processes that customers would like to see integrated into the OOTB solution, for example: certification and sustainability processes, multidimensional Bill Of Materials ( <b>BOM</b> ) and costing.

## WhichPLM industry insight



Dassault Systems remains one of the world leaders in providing PLM solutions to the RFA market.

Their solution is geared primarily towards Tier 1 (large enterprise) businesses that operate across multiple regions and that have complex supply-chains. These businesses require support for a broad and robust set of processes supplemented by deep additional functionality and strong workflow atomisation, and the company's solution reflects this.

In terms of best fit, we would recommend the Enovia solution to either large organisations looking to have an OOTB solution customised to fit their needs, or a solution tailored from scratch, as well as for medium sized operations who anticipate that an OOTB solution will cater for their requirements with limited customisation.

Industry insight suggests that customers of Dassault Systemes would like to see an improvement in their solution's ability to manage multidimensional BOM, costing processes, and certification/sustainability requirements. These are alongside more fundamental improvements to the functionality of the solution, including an improved user interface and better and increased performance.

On the basis of the results and our own industry insight, we would strongly recommend that Dassault Systemes look at improving their consultation and customer support services, specifically as relates to the RFA sector, where expertise appears to be lacking in some cases.

## Discover e-Solutions Ltd (DeSL)

2 Alexandra Gate  
Ffordd Pengam  
Cardiff  
Wales  
CF24 2SB

DeSL was founded in 2002 by several employees of the UK-based JBA (Style 21), which operated as an ERP supplier before its eventual sale to Infor.

The company's PLM solution was designed specifically for the apparel industry, developed in 2004, and, in its current form, offers a broad set of product development processes. From a technical perspective the solution is built on Microsoft's technology stack, uses a SQL database, and features an internally developed 'Workflow' engine based on the .Net Framework.

The solution has been designed to meet the needs of retailers, brands, manufacturers and customers from across the consumer goods sector. It is geared toward Tier 1 businesses and the SME sector, but has the capacity and scalability to serve large, medium and small customers.

### **DesL customers that took part in the survey.**

18% of customers that took part in the WhichPLM Customer Survey were customers of DesL PLM solution for fashion.

## Strengths

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	The solution appears to be able to accommodate the needs of businesses from a variety of industry sectors, including: retail, fashion, brands, consumer goods products, accessories and textiles.
<b>Vendor</b>	The company's ongoing development is informed and driven by current industry trends.
<b>Solutions</b>	The software is adaptable and supports a broad range of processes from concept to delivery.
<b>Support</b>	The company's own support organisation works in concert with its partner network to provide support to most areas of the world.
<b>Future</b>	The company is reactive, responding quickly to tailor their developments in line with the emerging trends in PLM processes.

## Challenges

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	Results show that the solution has been primarily adopted by Tier 1 and SME businesses.
<b>Vendor</b>	Participants are concerned by the size of the company and how equipped it is to deliver on its promises outside of its local market.
<b>Solutions</b>	The results have identified a need for improved OOTB reporting, and suggest that users would like to see a CAB established to provide a direct line of interaction and to help focus future development in the desired direction.
<b>Support</b>	The results show participants expressing concerns about the timeliness of the company's support outside of the UK.
<b>Future</b>	Similarly, customers reported being worried about the company's ability to grow outside of the UK.

## WhichPLM industry insight



Generally speaking, DeSL received positive feedback from the customers who took part in the survey.

- Their solution is currently geared toward the Tier1 and SME sectors, being a configurable OOTB solution with the facility for additional customisation to be ordered as and when required.
- In terms of best fit, WhichPLM would recommend the solution to either Tier 1 or SME businesses that require a robust and adaptable PLM solution.
- Industry insight suggests that the company should continue to improve its solution's capabilities in the areas of reporting, Adobe Illustrator integration and costing support.

Further to the challenges mentioned above, we have also been made aware of concerns regarding the timescales for certain implementations. Rather than necessarily reflecting poorly on the supplier, these could be the result of many different factors, not least a customer's internal difficulties during the implementation period. We aim to investigate these concerns and work directly with the company to ensure that any such delays can be minimised and that DeSL are able to continue to develop and improve their current solution in line with their customers expectations.

## Gerber Technology

24 Industrial Park Road West  
Tolland  
CT 06084  
United States

Gerber Technology is a multinational organisation in every sense, with more than 120 offices around the globe and one of the largest PDM and PLM customer bases in the world.

Founded in 1968, over the last 40 years the company has developed a product list to match that size and diversity - providing everything from CAD and CAM, to automated cutting systems, pattern design and marker making systems, PDM and PLM solutions to the RFA industries.

The company has played a part in the industry ever since the inception of PDM. Their acquisition of Microdynamics in the early 1990s (approximately the same time as the unveiling of that company's next generation WebPDM system) meant that Gerber Technology inherited the first true PDM solution to reach market, not to mention also taking ownership of Microdynamics' cutting edge CAD/CAM systems.

Following on from this, in 2009, the company acquired Yunique Solutions, a small supplier whose PLM solution was developed using the Microsoft.NET framework and based on an SQL database.

The company currently offers both the WebPDM and Yunique PLM solutions, although we expect that Gerber plan for the latter to eventually replace the former once the new solution is upgraded to provide the industry standard processes, high performance and user experience for which the company's existing solution is known.

Both solutions are aimed at Tier 1 and SME businesses, and each has the capacity and the functionality to support users in the tens or the thousands.

### **Gerber Technology customers that took part in the survey.**

18% of customers that took part in the WhichPLM Customer Survey were customers of Gerber Technology PLM (WebPDM) solutions.

## Strengths

<b>Area</b>	<b><i>High-level summary of respondents' feedback</i></b>
<b>Market Position</b>	The two solutions cater for large multinational customers and other, smaller businesses in most areas of the world. These customers come from a variety of industry sectors, including: retail, fashion, sports, luxury brands, furniture, textiles, consumer products and footwear companies.
<b>Vendor</b>	The company's acquisition of Yunique PLM demonstrates their commitment to and ongoing investment in the PLM industry, which is supported by the recent announcement of a new internal software division intended to focus on the development of their PLM solution.
<b>Solutions</b>	<p>The results show that the company's Yunique PLM solution is highly rated, with specific praise being assigned to its OOTB processes, quality user interface and good performance.</p> <p>Due to limitations in the data gleaned from this survey, the WhichPLM team would rather reserve an in-depth analysis of the solution until it can be supported by concrete details. We have recently spoken to President of Software for the company, Mr Bill Brewster, and invited Gerber Technology to undergo the WhichPLM benchmarking process, the results of which we hope will provide an unbiased overview of the company's current solution to prospective customers.</p> <p>Following the company's acquisition of the Yunique PLM solution, its existing WedPDM customers are no doubt eager to learn how the company intends to manage seamless transitions and/or integration between that legacy solution and the new PLM equivalent.</p>
<b>Support</b>	The company is able to deliver solutions and support through its own Global Services network of 120 offices and agents, distributed throughout most of the world.
<b>Future</b>	The results reveal that customers are excited about the company's recent developments and eager to see how its next generation offering will combine the best aspects of both the WebPDM and Yunique PLM solutions.

**Challenges**

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	The results show that the two solutions have primarily been adopted by Tier 1 and SME businesses.
<b>Vendor</b>	Feedback suggests that customers are concerned by the limitations of the company's PLM expertise, and particularly the quantity and location of high quality resources and support. We would advise prospective customers to ensure that the supplier is able to deliver the proper support and provide the required expertise in their specific region as well as across their global supply chain.
<b>Solutions</b>	<p>Customers of the company's WebPDM solution reported concerns with the supported processes, certain architectures, a dated user interface, and overall performance. We would note that at least some of these solutions will have been implemented before the debut of Gerber Technology's OOTB solution, and as such will have required additional customisation and may be lacking support for some processes.</p> <p>Customers of the company's newly-acquired Yunique PLM solution reported concerns with the degree of customisation that has been required in some cases, especially where it exceeded agreed project timescales and budget allocations. The results suggest that customers would also like to see improvements in the solution's capacity for critical path and workflow automation.</p> <p>Existing customers will no doubt be reassured by the coming developments, but potentially concerned about how the company will manage a smooth transition from their legacy PDM solution to the new PLM equivalent, while ensuring that both sets of customers receive the full benefits of each.</p>
<b>Support</b>	The results show that some customers in the apparel sector are concerned about the lack of skilled supplier resources and timely support service specific to their area.
<b>Future</b>	Feedback suggests that customers would like to see certain processes become part of the current OOTB solution, including certification and sustainability, multidimensional BOM and costing modules.

**WhichPLM industry insight**



Gerber Technology remain one of the major suppliers of PDM and PLM solutions to the RFA industries, but has lost some ground to the proliferation of new suppliers since being the leading provider of PDM in the late 1990s.

The survey results suggested, and we believe, that limitations in RFA industry expertise are what will hold the company back from challenging the established Tier 1 market leaders, although this is something that can be remedied alongside the development of the new solution.



Both the WebPDM and Yunique PLM solutions are primarily designed for Tier 1 businesses, supporting a broad set of product development processes across multiple regions and complex supply chains. In terms of best fit, we would recommend the Yunique PLM solution to Tier 1 businesses who aim to use a combination of standard OOTB processes and a degree of customisation. The solution is also suitable for SME businesses that require a robust OOTB solution and whose customisation requirements are limited.

Industry insight suggests that, beyond the desired improvements to their critical path and workflow management capacities, the company's most pressing challenge is to combine the best of both its WebPDM and Yunique PLM and deliver a single, next-generation PLM solution that will meet the needs of its diverse customer base.

We have recently invited Gerber Technology to undergo the WhichPLM benchmarking process, with the aim of compiling an unbiased and informed assessment of the company's new Yunique PLM solution to benefit current and prospective customers alike.

## Infor

13560 Morris Road  
Alpharetta, Georgia 30004  
United States.

Infor is a competitive, truly global business, with 116 offices responsible for implementation and support in over 100 countries. The company has seen revenue increase from \$110 Million USD in the financial year 2003, to \$2 Billion USD in 2009.

Today, Infor offers a wide variety of solutions, ranging from Customer Relations Management (**CRM**), to Enterprise Asset Management (**EAM**), ERP and Financial Management (**FM**), although the company's flagship products are its PDM and PLM solutions.

Alongside its work in the apparel industry, the company continues to diversify into new markets. Using its global reach and its range of software, services, and support facilities, Infor aims to help its multinational client base realise significant efficiency savings and streamline their ways of working, whatever their solution. The company's aim is to become a market leader in a number of key industries, including fashion (which encompasses apparel, footwear, home textiles and accessories).

The company's PLM solution was originally designed by Runtime – a company whose work, through a series of acquisitions (by apparel and footwear specialists Geac in 2000, and Infor itself in 2006) has become the cornerstone of Infor's offering to the RFA market.

As of writing, Infor has over 500 clients in the RFA sector, although it is important to note that the majority of these are customers of the company's ERP software and/or other solutions. The number of PLM customers in the fashion industry is considerably smaller.

### **Infor customers that took part in the survey.**

3% of customers that took part in the WhichPLM Customer Survey were Infor customers.

## Strengths

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	The company is ideally positioned to cater for large multinational customers in most areas of the world. Those clients come from a variety of industry sectors, including retail, fashion, accessories and textiles.
<b>Vendor</b>	The company boasts a substantial client base of around 500 fashion industry customers, the majority of whom are using the ERP solution. That solution has been integrated with the company's own PLM software, providing an excellent environment for end-to-end product development.
<b>Solutions</b>	The combined solutions support a considerable breadth and depth of processes, and are underpinned by strong technical specifications.
<b>Support</b>	The company is able to deliver solutions and support in most areas of the world, both through its own 116-office-strong global services system and in conjunction with a network of partners.
<b>Future</b>	By furthering the existing integration between its PLM and ERP software, the company can expect to increase uptake of its PLM solution within its existing customer base as well as appealing to a new and more diverse range of prospective clients.

## Challenges

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	The results show that the PLM solution has primarily been adopted by SME businesses, which we believe is accounted for by the series of acquisitions leading from Runtime to Infor.
<b>Vendor</b>	According to customer feedback, some clients are concerned at the lack of a unified apparel PLM strategy.
<b>Solutions</b>	Survey feedback revealed that customers are generally happy with the solution's processes, but some participants voiced concerns relating to what they feel is out-of-date supporting architecture.
<b>Support</b>	The results confirmed that customers are generally happy with the support services provided.
<b>Future</b>	The survey collected customer comments, which suggest a sense of unease regarding the lack of a clear strategy for the ongoing development and future improvement of the company's PLM solution.

## WhichPLM industry insight



As one of the largest suppliers for the RFA and consumer goods markets (the company has some 500 fashion clients spread across its range of solutions), Infor is able to take advantage of the integration between its ERP and PLM solutions, using it drive uptake of the latter across its current customer base, as well as appealing to prospective clients looking to acquire a comprehensive and cross-compatible solution.

The solution is currently geared primarily towards the SME sector, providing a comprehensive OOTB solution suitable for businesses of that size. A solution that supports such a comprehensive range of processes as standard is ideal for customers with few or no customisation needs; while the company's solution does offer some configuration parameters, these are slightly limited, stopping short of meeting the requirements of customers seeking a truly bespoke solution.

Industry insight suggests that the company should now focus on making improvements to the technical architecture underpinning its PLM solution. As it stands, the Infor software is still based on a client server model, using a third party internet-based collaboration service.

What is also apparent from the survey results is that, since the acquisitions of Runtime and GEAC, Infor appears to have lost some of its PLM focus. We recently met with the company's European senior management to discuss their strategy for the future development and ongoing support of Infor's PLM solution, and we are pleased to say that they were able to allay many of the common fears that emerged from the results of this survey. Our hope is that, in the near future and with the company's approval, we will be able to shed further light on these promising developments.

It is clear from the results and our own relationship with the company that, with the right direction and a renewed momentum behind its solution, Infor have the potential to become a market leader.

## Justwin, Just OnePlace solution (now Eclipse)

Eclipse J1P  
Level 29  
580 George Street  
Sydney  
NSW 2000  
Australia

Although a fair percentage of participants reported themselves as being customers of Just OnePlace, the company itself went into administration in 2009. The solution software, all intellectual property and world-wide reseller and distribution rights were acquired in July 2010 by Eclipse Computing (Australia) Pty Ltd, a Sydney-based provider of ERP solutions. Eclipse's current ERP solutions are based on the Microsoft Dynamics suite, with the acquired Just OnePlace solution serving to expand their range into the provision of PLM for the apparel industry.

The Just OnePlace solution is built on the Microsoft .Net framework, runs on Windows-based servers (2003 and 2008) using the Microsoft SQL 2005 or 2008 database software, and boasts a web-based interface. Browser support for that interface is good, with multi-platform versions of Internet Explorer 6, 7 and 8, Safari 4 and Google Chrome all officially endorsed. Firefox is also functioning but has not been officially tested as of the most recent software revision (2.8.2).

The solution offers a reasonably broad set of processes and a modern user interface, with good indexing capabilities and the ability to view data using grids and built-in reports.

While the software incorporates good graphical workflow capabilities integrated into the critical path, it lacks the depth of functionality required to fully support the creative design process. Coupled with that, the survey results show that customers would like to see enhancements to both the vendor portal and the quantity and utility of user fields.

The Just OnePlace solution is geared primarily towards the SME market. Although it could conceivably cater for most of the needs of a larger, Tier 1 business, it lacks some of the line planning and multi-language capabilities required to support larger enterprises.

## Justwin customers that took part in the survey.

3% of customers that took part in the WhichPLM Customer Survey were Justwin customers.

## Strengths

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	The company is a regional supplier focused almost solely on SME businesses in the retail, fashion, sports, brands, textiles and footwear sectors.
<b>Vendor</b>	With the Just OnePlace acquisition being so recent, we are awaiting an indication as to the future direction and development of the solution following the Eclipse management team's own internal evaluation.
<b>Solutions</b>	The survey results suggest that existing customers have developed their own "bespoke" solutions based on earlier versions of the Just OnePlace software. In some cases these appear to incorporate elements of ERP. When it comes to the standard solution, customer feedback was neutral in the main. The solution is implemented with all functionality pre-configured and available from delivery, and although customisation options are limited at this stage, additional limited fields and drop down values can be added to the system via the administration interface.
<b>Support</b>	The company's support arrangements are currently confined to Australia.
<b>Future</b>	Eclipse's future plans are still in flux following the recent software acquisition. We are awaiting a detailed strategy for the company itself and for the ongoing development of their new solution.

## Challenges

<b>Area</b>	<b>High-level summary of respondents' feedback</b>
<b>Market Position</b>	The results show that the solution has been primarily adopted by customers in the SME sector of the market in Australia and New Zealand.
<b>Vendor</b>	In light of the changes caused by the Just OnePlace acquisition, we would advise any prospective customers to await a unified company strategy before choosing a new solution.
<b>Solutions</b>	Feedback has yielded several aspects of the current solution with which customers are dissatisfied, including: <ul style="list-style-type: none"> <li>• The lack of any line planning or business planning functionality;</li> <li>• The lack of control over form layouts and the inability to customise where and how items are displayed without resorting to code customisation;</li> <li>• Limitations in vendor portal functionality;</li> <li>• Measurements are currently handled relatively, with no support for absolute or incremental grading; and</li> <li>• Limitations in the solution's integration with creative design packages, e.g. the Adobe Creative Suite.</li> </ul>
<b>Support</b>	Amongst other things, the results suggest that customer support is reliant on the company's upcoming strategic direction and the recruitment of more and better skilled resources.
<b>Future</b>	The information gleaned from the survey shows the company's customer base eagerly awaiting a clear strategic outline for the future of its expanded apparel and consumer goods PLM business, without which we can unfortunately expect to see migrations to competing solutions.

## WhichPLM industry insight



The Just OnePlace solution underwent the WhichPLM benchmarking process in late 2009. The version assessed (2.8.2) was released in October of that year and remains the most up-to-date revision. The results demonstrated that the Just OnePlace solution is competitive and reasonably-featured, both of which aspects we expect will improve in the next iteration (currently estimated to ship in late 2010).

Following last year's administration proceedings and subsequent acquisition, all aspects of the business are being transferred from Just OnePlace to Eclipse; we would expect the new management team to make a detailed assessment of the solution and produce a comprehensive strategy for how it can best be integrated into their current ERP business. The customer feedback collected in the course of this survey suggests that this is something that needs to be accomplished sooner rather than later in order for the company to regain credibility and enhance the solution in line with the desires expressed by their customers.

We are currently in discussion with Eclipse and, like many existing Just OnePlace customers, are eager for the company to release a thorough future strategy and development roadmap.

In the meantime, customers should feel free to contact WhichPLM to discuss the impact of both the acquisition and the company's plans for the future.

## Lawson

380 St. Peter Street  
St. Paul  
MN 55102  
United States.

Lawson Software Inc. is a public company trading on the New York stock exchange. Since its foundation in 1975, the company has remained at the forefront of ERP technologies - offering packaged software solutions in the 1970s, embracing open systems technology in the 1980s, and introducing web-enabled business software in the 1990s. Today, Lawson continues to break new ground, with a wide variety of software, services, and support opportunities designed to help a range of clients realise significant efficiency savings and streamline their ways of working.

In 2006 Lawson merged with Intentia, the new company continuing under the renewed Lawson branding. The company's aim is to become a market leader in a number of key industries, not least of which is fashion (encompassing apparel, footwear, home textiles and accessories).

Their company's solution has its roots in Lawson's 2007 acquisition of software created by Freeborder's several years prior. The company's specific solution for the RFA industries is Lawson Fashion, which integrates with their M3 ERP solution. The company used their acquired solution (one of the first true PLM solutions) and fashion-specific software to establish a customer base of more than 30 clients, distributed as far apart as the USA, Asia, Europe, India and Australia.

### **Lawson customers that took part in the survey.**

26% of customers that took part in the WhichPLM Customer Survey were Lawson customers.



## Strengths

<b>Area</b>	<b><i>High-level summary of respondents' feedback</i></b>
<b>Market Position</b>	The solution and the company in general cater for large multinational customers in most areas of the world. These customers come from a variety of industry sectors, including: retail, fashion, accessories and textiles companies
<b>Vendor</b>	The company boasts a substantial fashion ERP client base of around 400 customers, with their M3 ERP solution being widely considered a market leader. The ERP and PLM solutions have been recently integrated, providing excellent opportunities for end-to-end working.
<b>Solutions</b>	The combined solution offers a fair breadth and depth of processes, and is supported by reasonably strong technical specifications.
<b>Support</b>	The company is able to deliver solutions and support in most areas of the world through both its own Global Services organisation and its partner network.
<b>Future</b>	By maximising the integration of its PLM and ERP solutions, the company will be able see an uptake of PLM amongst its existing customer base.

## Challenges

<b>Area</b>	<b><i>High-level summary of respondents' feedback</i></b>
<b>Market Position</b>	The results show that the solution has been primarily adopted by SME businesses.
<b>Vendor</b>	The results show that some customers in the apparel sector are concerned about the lack of skilled supplier resources specific to their area, with a marked rise in dissatisfaction over the past few years.
<b>Solutions</b>	Survey feedback revealed that customers are worried about the dating of the company's solution stack and the visibility and viability of their long-term PLM strategy.
<b>Support</b>	The results show that some customers are concerned about the time taken to address support queries outside the USA.
<b>Future</b>	Customer comments suggest a sense of unease over a lack of communication from company management regarding their future strategy and ongoing development.

## WhichPLM industry insight



As one of the leading ERP solution providers for the RFA and consumer goods market - boasting some 400 clients – the company is ideally positioned to use the integration between its existing ERP and PLM solutions to drive uptake of its PLM solution across its existing base of ERP customers.

The Lawson Fashion solution is currently geared primarily towards the SME sector, providing a comprehensive OOTB solution suitable for businesses of that size, with some configuration and customisation options. It is worth noting that while a strong OOTB solution that supports a good range of processes as standard is undoubtedly one of the company's key strengths, the limited potential for customisation represents a drawback for customers seeking a slightly more tailored solution.

In terms of best fit, we would recommend the Lawson Fashion solution to SME businesses seeking a simple, OOTB solution based on concrete technical specifications, provided they do not anticipate requiring anything beyond basic customisation.

Industry insight suggests that the company should focus on making demonstrable improvements to the core functionality of its solution, for example by refreshing its aging user interface and updating its processes and technical architecture. In addition to this, solution would benefit from specific improvements to both process integration and the development of broader workflow capabilities.

The company's second major release of the integration layers between its ERP and PLM solutions reveals considerable potential for future expansion.

## **New Generation Computing Inc. (NGC)**

New Generation  
Computing  
14900 NW 79th Court  
Miami Lakes, FL 33016

NGC provides PLM, global sourcing and ERP software solutions to a client base of brands, retailers and consumer product importers. The company was founded in 1982 and is a wholly owned subsidiary of American Software Inc. (NASDAQ: AMSWA).

The company has its headquarters in Miami, with major offices as far afield as New York, Los Angeles, China, India, Mexico and El Salvador.

The company's PLM software, e-PLM, is based on the Microsoft .Net framework and is uses an SQL server database.

That solution only forms a small part of the company's Global Enterprise System software suite. The fully integrated, end-to-end library of solutions includes not only e-PLM, but also e-SPS for global sourcing and visibility, and RedHorse, an apparel ERP solution. These are available to purchase as either a complete suite or as standalone products.

Outside of those grouped solutions, NGC also produces a range of other software, including:

- Analytics & Report Management Software (ARMS);
- Consumer Product Safety Improvement Act (CPSIA);
- The Production Manager) for shop floor control (TPM); and
- EZ-Ship, WebPlus and e-Pack (which together cover factory labelling, shipping and packing).

### **NGC customers that took part in the survey.**

3% of customers that took part in the WhichPLM Customer Survey were NGC customers.

## Strengths

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	The company caters to both the SME sector and large, multinational businesses in most areas of the world. Those clients come from a variety of industry sectors, including retail, fashion, sports, luxury brands, textiles and footwear.
<b>Vendor</b>	The company boasts a good customer base in both North and South America, but the results revealed little about its business outside of those markets. We would like the opportunity together further information and provide a more accurate picture of NGC's operations outside those regions.
<b>Solutions</b>	The results (from a small sample size) were mostly neutral with regard to the e-PLM solution. It is our intention to approach NGC to secure further information, after which all survey participants will be notified as soon as the clearer, more detailed picture is available.
<b>Support</b>	The survey did not return enough meaningful data to draw any conclusions on this point.
<b>Future</b>	The survey did not return enough meaningful data to draw any conclusions on this point.

## Challenges

<i>Area</i>	<i>High-level summary of respondents' feedback</i>
<b>Market Position</b>	The results show that the solution has been primarily adopted by customers in the SME and Tier 1 brackets.
<b>Vendor</b>	The company is currently focused almost exclusively on the North and South American markets but, given the quality and diversity of their product range, it could provide a serious alternative to the current, multinational market leaders. This could be achieved by an expansion of either their own service teams and offices, or by working in conjunction with third parties.
<b>Solutions</b>	The survey did not return a large or detailed enough sample to enable us to draw any conclusions as to the strengths of the e-PLM solution. Our aim is to contact NGC and invite them to undergo the WhichPLM benchmarking process, at which point we will be able to provide a fair and accurate assessment of the solution based on objective facts, not assumptions.
<b>Support</b>	The survey did not return enough meaningful data to draw any conclusions on this point.
<b>Future</b>	The survey did not return enough meaningful data to draw any conclusions on this point.

## WhichPLM industry insight



The company has a strong, growing customer base in the North and South American RFA markets, with its e-PLM solution seeing a recent surge in demand.

The solution appears to be geared towards both Tier 1 and SME businesses, and is used by both.

As we mentioned previously, we aim to invite NGC to undergo the WhichPLM benchmarking process. This is comprised of 760 comprehensive questions spread over a three-day, first hand assessment of the particulars of the software. It is designed to enable our team to provide an accurate and unbiased assessment of how the company's solution compares to its competitors.

Due to the extremely limited sample size and pending the completion of the benchmarking process, we would like to avoid drawing any further conclusions about NGC and its e-PLM solution.

## Parametric Technology Corporation (PTC)

Needham  
Massachusetts  
United States

PTC is a multinational company with over 110 offices worldwide, located in more than 25 countries. Since its foundation in 1985, the company has consistently spearheaded new technology - most notably in the development of its revolutionary MCAD application, and, in 1998, with the introduction of Windchill, its web-based product and process management system.

The company's current solution, FlexPLM, was first introduced in 2002 and is based on the architecture established for Windchill. The solution was specifically designed for customers from the RFA industries, and incorporates the basic framework and particular processes necessary to support them from conceptualisation through to retail delivery. FlexPLM proved extremely popular, rapidly building momentum to acquire a client base that, today, includes approximately 40 of the industry's leading businesses.

In terms of client relationships, the company is known for working closely with each of the diverse businesses that comprise its customer base. That global collaboration means that PTC constantly updates the capabilities of its solution, all the time refining and streamlining its core product development processes.

The company's solution is geared primarily towards Tier 1 businesses – those multinational organisations looking for strong, scalable solutions with the capacity to support thousands of users across many geographical regions. That scalability means that FlexPLM is also suited to SME businesses, companies who may have anywhere from 20 to 100 users.

### **PTC customers that took part in the survey.**

8% of customers that took part in the WhichPLM Customer Survey were PTC customers.

## Strengths

<b>Area</b>	<b>High-level summary of respondents' feedback</b>
<b>Market Position</b>	The solution and the company in general cater for large multinational customers in most areas of the world. These customers come from a variety of industry sectors, including: retail, fashion, sports, luxury brands, textiles, footwear companies and consumer products manufacturers.
<b>Vendor</b>	The company focuses its investments in research and development, leading to the creation of offshoot businesses (i.e. In-Sight) focused on specific areas such as testing/certification and sustainability processes.
<b>Solutions</b>	The results suggest that customers are generally happy with the solution and feel that it supports the breadth and depth of processes required.
<b>Support</b>	The company is able to deliver solutions and support in most areas of the world through both its own Global Services organisation and its partner network.
<b>Future</b>	Participants reported that the company operates its own CAB, providing a channel for direct interaction with customers and an opportunity for data gathering to help drive future developments.

## Challenges

<b>Area</b>	<b>High-level summary of respondents' feedback</b>
<b>Market Position</b>	The results show that the solution has been primarily adopted by Tier 1 and SME businesses.
<b>Vendor</b>	Customer feedback indicates a growing concern over the company's lack of RFA industry expertise. In addition to this, customers reported that unqualified staff have been deployed in certain cases, increasing the time taken and the budget allocated to those implementations.
<b>Solutions</b>	For those participants who using earlier versions the FlexPLM solution, a primary concern was the amount of customisation required and the cost associated with those alterations. The results suggest that the company's current OOTB solution still requires customisation in many cases.
<b>Support</b>	The results show that some customers in the apparel sector are concerned about the time taken to address support queries and provide domain expertise specific to their area.
<b>Future</b>	The survey collected a list of the improvements that customers would most like to see made to the solution, including: <ul style="list-style-type: none"> <li>• Simpler user interface;</li> <li>• Increased solution performance;</li> <li>• Easier third party integration to ERP and Business Intelligence (BI) solutions;</li> <li>• Simplified BOM development;</li> <li>• Improved supplier collaboration; and</li> <li>• Creative design process improvements.</li> </ul>

## WhichPLM industry insight



PTC remains one of the world's leading solution providers for the RFA and consumer goods market, with a diverse and expansive customer base.

Their solution is geared primarily towards Tier 1 (large enterprise) businesses that operate across multiple regions and that have complex supply-chains. These businesses require support for a broad and robust set of processes supplemented by deep additional functionality and strong workflow atomisation, and the company's solution reflects this.

In terms of best fit, we would recommend the FlexPLM solution to large organisations looking to adopt either an unadulterated OOTB solution or have one customised to fit their needs, as well as for medium sized operations who anticipate that an OOTB solution will cater for their requirements with very limited customisation.

Industry insight suggests that the company should focus its immediate development on streamlining the solution user interface and improving its overall performance. To help avoid the need for costly and unexpected customisation, the OOTB solution could be supplemented with additional and better processes as standard.

Our team will be working with PTC in September 2010 to complete a detailed and impartial benchmark analysis of their current solution. We will communicate the issues raised in these results to help ensure that the company develops and improves its solution in the ways suggested by its customers.



## **6. The Market Tomorrow**

## 6. The Market Tomorrow

Judging from these results and from our own experience, PLM for the fashion industry appears to have huge potential for the future. We are seeing many success stories published by such industry media companies as WhichPLM, Just-Style, Fibre to Fashion, Apparel Magazine and many more, each of which publication has begun tracking the emerging world of fashion PLM for the apparel industry. In terms of market growth we can expect to see even more fashion software companies and providers of PLM to other industries competing for a share of the growing fashion PLM market. The existing suppliers who adapt and grow in the ways that matter to their customers will continue to develop their solutions (or acquire new ones), and we will see many more large and small businesses adopting PLM as the market evolves to cater for a broader range of needs. It is clear from the survey feedback that no longer is it an option for a smart retailer, brand or manufacturer to choose not to adopt the concept of PLM to manage product information and facilitate collaboration. Today it is clear that without PLM, any business is going to find life in the fast lane very difficult and remaining competitive practically impossible!

We can be in no doubt that it is customer demand that drives the popularity of PLM as an industry and of particular suppliers in the fashion sector. With that in mind it is critical that suppliers listen to what their customers want in the next five years, and develop their solutions in ways that will allow them to achieve even greater savings in efficiency, allowing them to meet the demands of an increasingly competitive and constantly-shifting industry. The results of the final set of questions are included in this section, but we have also selected what we see as the most important trends to have emerged in what participants of the survey suggested:

- *"Improved critical path management and dashboards";*
- *"Simple and easy to use for the entire development team";*
- *"Improved user interface for designers with a more creative feel and flexibility";*
- *"Integration and feeds into, and from, social media websites to collect and gauge trend developments";*
- *"Deeper materials management with full collaboration to the mills and testing companies";*
- *"Simpler and more effective configuration with less limits that then require customisation";*
- *"Improved ability to design reports and dashboards";*
- *"Use of 3D in the earlier sample process with improved integration to PLM";*
- *"Virtual range planning";*
- *"Deeper and more dynamic links to CAD/CAM solutions";*
- *"Early and more accurate costing solutions linked to a sample Bill of Materials (BOM) and Clipart";*
- *"Ability to track samples linked to Google Maps or similar";*
- *"Product and material certification";*
- *"Planograms linked to stock planning";*
- *"3D store visualisation linked to PLM";*
- *"Use of improved visuals to help address the needs of the manufactures to assist Quality Assurance (QA)"; and*
- *"Greater ability to integrate to third party solutions".*

In addition to these results we also need to consider outside influences such as government-supported regulatory bodies who are likely to add additional requirements to future PLM developments in line with mandated sustainability targets, for example product and material certifications. We should also bear in mind the growing need to deepen integration with product development solutions designed to add value to the supply-chain. These can include cost data management systems, colour management solutions, tracking and logistic systems, and that is without considering the more obvious ERP and contract management systems.

We believe that in order for the industry to make full use of the efficiency savings enabled by PLM, suppliers must work together to agree a set of data standards that will enable retailers, brands, agents, sourcing partners, manufacturers, laboratories, mills, component and trim suppliers to share data between multiple PLM systems. The current business model effectively prevents manufacturers and other supply chain partners from entering the world of PLM and can be attributed directly to those suppliers who have their own unique data models that restrict the ability to easily share information between different solutions. Many manufacturers who supply multiple retailers or brands and are looking to initiate a PLM project of their own, find that their chosen PLM solution is not able to interact with any of the particular solutions their customers may have adopted without the use of costly customisation or plug-ins. When questioned individually, suppliers appear to be open to the idea, but the unfortunate truth is that it is not in their best interests to collaborate on an agreed set of standards. The sad fact is that this approach is holding back progress in the proliferation of PLM across the global supply-chain and we believe that the lack of basic standards is demonstrably restricting the demand for PLM solutions from a considerable sector of the market that would, in turn, provide improved revenue streams for all concerned.

The best way for suppliers to remain keyed in to what their customers want is to host a CAB. These provide direct interaction between the two parties and are a valuable tool for helping to shape the future growth of both solutions and client relationships. We asked customers whether their supplier currently hosts a CAB, and while very few reported in the negative, the remaining results were an equal split between 'yes' and 'I don't know'. While it is encouraging to see so many suppliers running these boards, a response of 'I don't know' in this situation is as good as a 'no'. There is clearly scope for suppliers who do run a CAB to better advertise its availability and which we feel will add significant benefits to their existing customer base.

We later asked whether or not customers felt that they would benefit from access to a truly independent CAB designed to supplement the one run by their supplier. A considerable majority said they would be interested in an impartial, supplier-agnostic board operated by a third party on behalf of the industry. This is something that we at WhichPLM have been considering for some time, and these results have helped to crystallise that design. If you would be interested in taking part in the first totally objective, industry-wide CAB then please contact us by any of the methods detailed at the end of this report.

Similarly, we asked whether or not customers were aware of their supplier's policy for enhancements and whether that policy was clear. Twenty four percent reported that they were aware of the policy and that it was transparent. Suppliers who have a policy in place that is designed to help manage customer requests, but who do not communicate it to the customer are not only sabotaging their own customer satisfaction, but also depriving themselves of a great opportunity to learn how their customers would like to see the solution improve.

Following on from that, we asked whether or not customers had seen any of their suggestions incorporated into the solution. While the majority did not know, almost a third reported that recommendations had made it into the solution, which demonstrates that, provided customers are aware of how to make improvement suggestions, suppliers are willing to listen. Another way of avoiding unnecessary and costly customisation towards the end of an implementation project is for suppliers to incorporate the most-requested enhancements into the core of their solution.

Related to that, we saw that almost half of customers felt that their supplier listened to their requests for developments, additions or new functionality in their solution. Of those that responded with a 'yes', there were a number of comments revealing that while suppliers listened, their developments were not completed for a number of years or until several customers requested the same enhancement.

With that in mind we present the final set of questions, all of which were designed to draw out exactly what customers want to see in the future development of PLM solutions across the industry. These detailed responses have been evaluated in compiling the trend analysis at the start of this section.

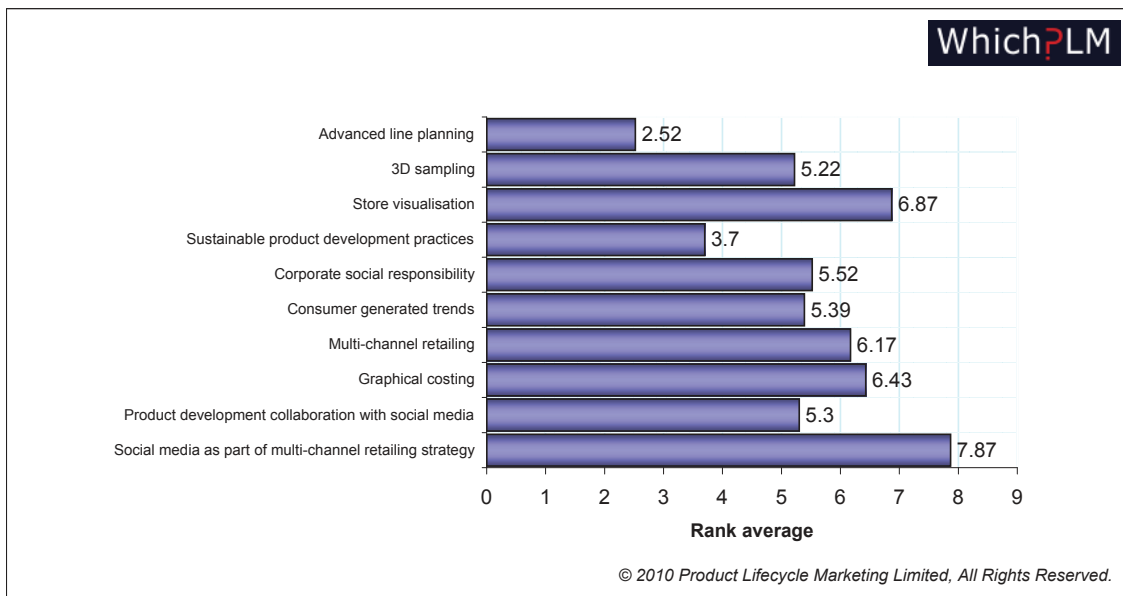
Firstly we gave the customers a list of 13 key trends and asked them to rate them in order of priority. Below are the blended results.

- 1. Trend analysis:** improve dashboards to incorporate influences like weather, customer trend, social media as attributes into analyses; enable individual channel analyses yet combine multi-channel information.
- 2. Creative design:** Intuitive User Interface (UI) and better output options, improved links to Adobe Illustrator and seamless links to selected CAD tools; support build of data starting in concept phase rather than technical design (greater integration to creative process).
- 3. Advanced line planning/merchandising:** (dynamic links to back end merchandising systems for real time capture); product costing (graphical and sample costing with improved integration to ERP/BOM); fast quotations; increase competitive costing ability (early visual costing solutions).
- 4. BOM:** smart BOM creation/implementation.
- 5. More flexible integration between multiple systems:** (develop standard interface exchange formats).
- 6. Product manufacture information support process.**
- 7. 3D Sample Review:** (3D virtual sampling built into PLM).
- 8. Extra modules for suppliers to fill in compliance information:** online (certification and sustainability); ethical sourcing (ethical and technical process module); improved access for off-shore vendors to contribute (not just view).

- 9. **Request for service:** (On-line support request - help line via e-mail).
- 10. **Raw Materials Management:** (purchase sample materials and trims with purchase order); capture accurate component costs (multidimensional costing).
- 11. **Content translation:** (multilingual PLM solution including apparel specific technical terms).
- 12. **Planogram module** to be linked to stock planning (3D store and planning tools); International planning module that can be used for overseas stores.
- 13. **Quality Assurance management:** (processing with international test standards and integration to labs).

Alongside the emerging trends that the survey has revealed, we then provided participants with a list of what we saw as the ten processes likely to drive and define the industry in the near future. We asked the customers to rate the processes in the order of their importance to them, and the results are set out below both in their raw form and as a graph.

**How would you rate the following ten processes in order of importance?**



We can see from these results that the use of social media (for example Facebook, Twitter, LinkedIn etc.) was by a small margin considered to be the most important process when it comes to the future of PLM for the fashion industry, with store visualisation (a way of working that goes beyond drop-down menus and the command line) and graphical costing/image libraries coming a close second.

The first factor is representative of the ever-increasing pace of change in the fashion industry, which is becoming further and further informed by market research and interaction facilitated by the most popular social media websites. Facebook overtook Google earlier this year, becoming the highest-ranked website in terms of raw traffic, with over 400 million members accessing the website directly or via mobile platforms on a regular basis. With this number of users sharing information, photos, links and making comments; effectively collaborating in this

way in their personal lives, there is every reason to expect that similar solutions will be created in order to encourage effective workplace collaboration. Future users of PLM solutions should expect to see 'Facebook-style' collaboration tools adopted to facilitate better collaboration with product development processes. This principle also applies to actual consumers. The same demographic who fastidiously follow and purchase the latest fashions are used to sharing and 'publishing' the things they like, which eventually generates trends that are observed and acted upon by the most savvy fashion companies. If companies can engage with consumers, using social media tools as well as other avenues of communication (e.g. interactive mobile applications) they can learn to effectively anticipate future demand earlier on and without costly, commissioned market research. These mammoth social hubs represent the best and most effective channel for identifying trends and using these to inform the future development of specific styles, lines and even entire brands. Once identified, trends should be fed through to PLM solutions at the conceptual stage, with a view to developing the product if and when the demand is established.

As a close second, the number of participants who chose store visualising demonstrated that the more streamlined and user-friendly ways of working that are emblematic of an effective PLM solutions are still in constant demand, and growing in line with the growth of the market itself.

Finally, we asked customers to list their top three 'wants' for future solutions and for the ongoing development of existing solutions. We did not request for these to be ranked in order of importance, but we present the results sorted into the tiers to which the customers assigned them to give an honest and accurate impression of the results.

We have no doubts that many suppliers have already or are in the process of implementing at least some of these improvements, but from both their perspective and that of the customers it should be useful to see not only how most of the solutions out there will grow in the future, but also how your ongoing needs compare to those of other businesses in the same or related sectors.

Priority	Customers' top features wants
1	<p>Easy to modify and add functionality;                      Advanced Line Planning that integrates to ERP systems;                      BOM tools;                      Flexible User Interfaces that can be easily configured for specific customers;                      Fast and easy to implement;                      PLM across brands inside our concern - joining databases;                      Configurable;                      Information available at point of use including manufacturing floor;                      The ability to share the same data with Factory and Retailer and present the data in the user's required format;                      Raw material aggregated planning;                      Suitability to the role;                      Many to one relationship of workflows;                      Complete functionality; and                      Links to Illustrator.</p>
2	<p>Easy to customise output graphics/export data;                      3D Virtual drawing tools;                      Enterprise graphical workflow;                      Easier to interface data with other best of breed ERP solutions like SAP and BI;                      Easy to use;                      Seamless interface to selected CAD tool;                      Full integration with ERP system;                      Integrates easily with other systems;                      Real time information updates to point of use;                      Concept to Production functionality;                      Scalability;                      Conversion of data into the local language;                      Merchandising scenarios;                      Multiple reminders and escalations;                      Improved pre costing; and                      Method to manage sample comments.</p>
3	<p>Easy to import data from manipulated output graphics;                      Workflow and dashboards;                      SolidWorks integration;                      Robust 3rd Party interfacing;                      Measurable data capture;                      OOTB reports that are easily customizable;                      Reduced storage;                      Vendor collaboration;                      Workflow for critical path that works for garment development;                      User defined reports / data dashboards;                      Planning scenarios;                      Full aftersales support; and                      Linkage to component libraries for Waste Electrical and Electronic Equipment (<b>WEEE</b>) support.</p>



## 7. Closing Summary

What has emerged, first and foremost, from this survey is the clearest picture to date that has been assembled of the state of the PLM marketplace in relation to the apparel industry - no other research body or consultancy has ever undertaken a survey as far-ranging or as detailed as this. WhichPLM are uniquely qualified and positioned (as informed, impartial and influential experts) to both solicit and present the accurate, unbiased truth from the people who hold the most sway in the industry, namely the businesses who look to PLM solutions to help them deliver the efficiency savings that they advertise.

If there is one thing above all else that this groundbreaking research has revealed it is that PLM as a whole delivers. Individual customers will always have complaints and/or praise for their specific suppliers, and this is something that can be addressed by direct avenues of communication between the two parties, but generally speaking customers have increasingly come to believe that a PLM solution is the most effective way of helping their business to adapt to the escalating demands of such a competitive industry. As the results have shown, this is not just marketing bluster. PLM has been road-tested and approved by some of the largest companies in the fashion industry and, as a consequence, more and more companies are providing solutions that cater not only to the needs of those multinational corporations, but to boutique designers and specialist retailers who are realising that the value of streamlined processes extends across businesses of all types, irrespective of size.

At the beginning of this survey we compiled a list of common assumptions both hypothetical and based on our own experience. Some of them have been borne out by the evidence, some contradicted, and we revisit them briefly here to show how common conceptions can sometimes be challenged by objective data.

### **Assumption One - the typical PLM customer is a large business**

This is essentially true. A considerable majority of the customers we surveyed represented businesses with more than five thousand employees. As explained in The Market Today (section 2, page 15), this can be attributed to the high total cost of ownership in the past. We fully expect the next major trend to be the development of more effective OOTB solutions that will extend the availability and drive the uptake of PLM solutions among smaller businesses.

### **Assumption Two - the majority of PLM solutions are bespoke, tailored to the companies that use them**

This is partly true. While most large businesses (defined as those having more than 5,000 employees) will opt for a completely customised solution, a significant sector of the market choose to buy an OOTB solution only to find that due to either inflexibility or their own lack of foresight it requires an unexpected degree of customisation. It is certainly true that most PLM solutions are customised to some extent, but with proper planning and the assistance of informed and independent consultant, this need not be the case. We must also keep in mind that most legacy solutions were almost 100% bespoke at their inception, whereas modern solutions are more capable as standard, based on maturing business processes that are able to effectively support the vast majority of fashion related businesses.



### **Assumption Three - cost is the single biggest factor in customers choosing to adopt a PLM solution**

This has almost certainly been the case in the past, when the TCOO was prohibitive for smaller companies. In the current economic climate, PLM is increasingly being heralded as a sound investment, with industry experts arguing that the cost of not adopting a solution is greater in the long term. What we are seeing now is the emergence of a range of solution options that can be accommodated by a range of budgets; PLM is no longer limited in its availability, with the main concern for customers now being the suitability of a solution to their unique business requirements.

### **Assumption Four - the recession has affected customers' IT spending habits**

This did not appear to be the case. In fact, we found that the second upsurge in demand for PLM coincided with the financial downturn. This can be attributed to the increased need for efficiency savings, fast turnaround times and streamlined processes across businesses of all sizes. In many cases customers are looking to PLM to help them mitigate the effects of the recession, looking at a short term investment to achieve viable long term business goals.

### **Assumption Five – the biggest suppliers offer the best solutions**

Our results have shown that some suppliers are certainly mentioned more than others, but it is important for customers to realise that there is no de facto solution. The tremendous growth of the market has led to the proliferation of a whole range of solutions, each with its own positives and negatives. From a customer's perspective this means that they are able to select a solution that fits their budgetary constraints and accommodates their particular ways of working rather than being forced to choose from a select few 'big name' solutions. A side effect to this is that the marketplace has become bewildering for first-time buyers, especially those smaller businesses for whom a PLM solution represents a substantial investment. Customers are essentially responsible for this investment decision and if things go wrong they can take a huge investment of time and money to set right. In such a complex and diverse market we would always recommend that before any large scale investment or radical change takes place, it is imperative to consult experts who are independent and can provide impartial advice informed by years of hands-on experience with a majority of the available solutions.

**Assumption Six - most PLM solutions have only been in place a short time – PLM is a 'new' thing**

As covered in The Market Today (section 2, page 15), the customer base is currently split between what are referred to as 'legacy' solutions (those huge systems that have been in place for some time) and the more recent, smaller-scale solutions that have appeared as a result of the market growth. Taking industry history and the rapid development of the fashion sector into account, PLM is by no means a 'new' thing. Its effectiveness has been proven across disciplines and almost all multinational retailers, brands and manufacturers employ it in one form or another. What is new, are the recent developments in more flexible OOTB solutions created for smaller companies and the growth of use by the extended supply-chain.

**Assumption Seven - Customers care more about the software than they do a supplier's previous experience of the fashion industry**

This is demonstrably not the case. PLM for the fashion industry has been in place for more than twenty years, and a growing crowd of suppliers now cater specifically for businesses that fall under that umbrella: retailers, brands, manufacturers and designers. A huge majority of customers consider previous fashion industry experience to be a fundamental requirement when it comes to selecting a PLM solution.

Now that we have defined the scope, the successes and the occasional areas for improvement of the industry today, it is on that background that we remind customers that they now have absolute buying power when it comes to choosing a PLM solution. With effective pre-sales planning and informed shortlisting, no prospective customer need audition or, worse yet, choose a supplier whose solution does not match the exact needs of their business. The problem arises when businesses with no experience of the marketplace beyond the knowledge that they need a PLM solution attempt to make sense of what has become an incredibly complex area rife with choice and misinformation.

For example, the survey revealed that customers typically shortlisted only three to four PLM solutions before making a final decision, even though the situation today is massively different from how it was ten years ago. There are now over 40 suppliers claiming to cater specifically for the fashion industry, so why are customers shortlisting so few? No doubt the search and selection process has become increasingly daunting and laborious simply because of the range of solutions that are available and the conflicting information that can accompany each. As we cited earlier in this report, most customers have their initial shortlisting and purchasing decisions influenced in one way or another in situations (i.e. sponsored trade shows) or by parties (consultancy firms who have close ties to one or more suppliers) that may not necessarily have their best interests at heart. In an increasingly competitive market it can be all too easy to be swayed by marketing, 'impartial' recommendations or hand-picked references. We at WhichPLM have dedicated ourselves to providing an independent point of contact for customers and suppliers who are looking to sidestep the vagaries and the hard-selling of the shortlisting process. Over the past two years WhichPLM (through its sister company PDP Limited) has deployed its team of experts to benchmark and objectively evaluate nearly half of

all the available solutions. Our aim is not to promote any solution beside the one that is most suitable for each individual client, and customers are now able to compare in-depth, side by side a wide range of suppliers against their own pre-defined requirements.

We want PLM to grow and mature, and we believe that this is best achieved when informed customers with detailed analyses of their existing processes and well-defined aims for their future are able to contact the suppliers of the solutions that can accommodate their needs with minimal customisation. We want to see our industry develop in line with what its customers want, and it is with that aim that we produced this report, and we hope to go on to commission further surveys and help to deliver further successful implementations for many years to come.

If you have any questions about the substance of this report, would like more information about an independent customer advisory board or are simply concerned about the range of choices out there, we would love to hear from you. We know that PLM works; it is only together that we can ensure that PLM works for everybody.

## Appendix 1: Abbreviations List

<b>Abbreviation</b>	<b>Definition</b>
<b>BI</b>	Business Intelligence
<b>BOM</b>	Bill Of Materials
<b>CIO</b>	Chief Information Officer
<b>CPM</b>	Collaborative Product Management
<b>CAD</b>	Computer Aided Design
<b>CAM</b>	Computer Aided Manufacturing
<b>CAB</b>	Customer Advisory Board
<b>CRM</b>	Customer Relations Management
<b>EAM</b>	Enterprise Asset Management
<b>ERP</b>	Enterprise Resource Planning
<b>FM</b>	Financial Management
<b>IT</b>	Information Technology
<b>OOTB</b>	Out Of The Box
<b>PDM</b>	Product Data Management
<b>PLM</b>	Product Lifecycle Management
<b>QA</b>	Quality Assurance
<b>RFI</b>	Request For Information
<b>RFA</b>	Retail, Footwear and Apparel
<b>ROI</b>	Return On Investment
<b>SME</b>	Small, Medium Enterprise
<b>SaaS</b>	Software as a Service
<b>SQL</b>	Structured Query Language
<b>TCOO</b>	Total Cost Of Ownership
<b>UI</b>	User Interface
<b>WEEE</b>	Waste Electric and Electronic Equipment

## Appendix 2: Contact Information

WhichPLM ([www.whichplm.com](http://www.whichplm.com)) is an affiliate of Product Lifecycle Marketing Limited and a registered trademark of Mark Harrop.

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