whichPLM

BEST PRACTICES TO GET PLM-READY

PLM PROJECT PACK 2021

There is one critical area so often overlooked on a PLM journey, and it comes between selecting your system and beginning implementation. You might think selection and implementation sit side-by-side on your PLM roadmap - and you wouldn't be alone - but in fact what sits between is crucial to your system's survival.

After the preliminary research and investigation stage, and a (possibly lengthy) selection process, you are hopefully feeling confident in your chosen PLM partner. You're no doubt excited and anxious to get started using your new system. But before implementation can even begin, it's critical that you take some steps to get your business PLM-ready.

Cross-departmental buy-in

Whether you're embarking on your PLM project for the first time, updating an already-existing system, or switching from one system to another, you need to ensure your business, your soon-to-be-PLM-users and your systems are ready.

You're about to embark on a fairly substantial business transformation, and the first step is to get everyone involved; it's about more than simply getting everyone on the same page - it's about making sure that page is a positive one. People by their very nature are reluctant to change, so this is no easy task.

By now the project team who has been responsible for investigating, shortlisting and selection will have successfully on-boarded the senior management. But the process won't be the same with other members of your business. Management were likely won over by the promises of business-wide benefits, increased revenues, improved performance, and reduced markdowns. But these benefits don't necessarily resonate the same with designers, buyers, or the marketing team. They want to know, as future PLM users, how this system will change their day-to-day lives ...for the better.

Rollout of the system will likely be phased, so not everyone will be using it from the get-go. But that doesn't mean it's not important to get everyone on board at the beginning. By obtaining cross-departmental buy-in as early as possible, an implementation is much less likely to run out of steam before the later stages of the project. It's beneficial for every department to have an agent for change, who is passionate about what's coming. These change agents are integral cogs in making sure every person in the business understands the overall project, and how it will affect them.

Incorporating departmental feedback is also vital to a successful PLM rollout. If each department's queries have been addressed prior to implementation commencing, there should be far fewer roadblocks as things progress. For many businesses, this is also where 'outside help' comes into play. PLM advisors can be advantageous to an implementation. However, before enlisting outside help, it's crucial to ensure they are: familiar with the industry, familiar with your business type, and extremely familiar with the specific PLM system you have chosen, as well as having proven expertise in each of the best-of-breed solutions that are currently used or will be implemented as part of the overall solution stack. An independent advisor who knows the capabilities and restrictions of your chosen system should have the foresight for any potential pitfalls or issues down the line, and pre-emptively avoiding them along way.

Process mapping

So we've discussed best-practices when it comes to people - but what about processes?

Before implementing a new system, it makes sense to review any and all current systems in place. Virtually every one of these systems will either be replaced by PLM, or will have to co-exist with it. Some of these systems may be new and easier to integrate with PLM, but others may not. Older bespoke systems are likely out-dated and may need to be replaced by PLM or other best-of-breed solutions but, depending on the architecture of each system, as well as how ingrained it is in everyday working, this isn't always as simple as it first seems.

The best approach to organising the structure of your future business is to go down the most obvious route: investigate each of the systems you currently have in place. Understanding exactly what each system is and does is vital to knowing where (if anywhere) it sits in the future model. Dissecting each solution can be a very lengthy process, but it's far better done pre-implementation than during.

In order to review the relevance of each business system in place currently, process mapping can be a very helpful exercise. [Included in this pack is an example of this, for reference.] Process mapping is exactly how it sounds: a map or flow diagram of how every system and application works within your extended organisation. This needs to include every system currently in use - whether that's on-site applications you use every day, or systems your extended team(s) use away from HQ. Not only will this help depict which systems are redundant, but it will also help pinpoint where your critical data sits and how it is used within the extended value-chain.

Every system will be different in its architecture - with some far more complex than others. Systems will also differ in functionality and you may find duplication when it comes to the actual processes each system supports. You may also find data duplication and inconsistencies if the same data is being stored in multiple systems. Cleaning your data prior to implementation is paramount. The important of this honestly cannot be stressed enough.

A master-data project

Without a dedicated master data project, information will, in the majority of cases, be duplicated, product development will be complicated unnecessarily and entire implementations will be put at risk.

Managing the data used by any given business has always been a major challenge for any PLM implementation – ever since organisations have tried to share or integrate that data across systems and between departments and divisions.

The data itself can take a huge range of forms, too:

- **EPOS**
- **Merchandising**
- **Agents**
- **Vendors**
- **Factories**
- **Colourways**
- **Materials**
- **Trims**
- **Labels & Packaging**
- **Product Types**
- **Measurements**
- **Employee & Partner contact details**
- **Compliance data**
- **And much, much more…**

Much of the data your business holds, whether you realise it or not, falls within the scope of 'Master Data'. Some or all of the following will be applicable to your business:

- **Product data (item number, bill of materials, product codes)**
- **Labour Operations (Standard minute values)**
- **POM (Point Of Measures)**
- **HTM (How To Measure Data & Images)**
- **Size Ranges**
- **Size Categories**
- **Grading Increments**
- **Image Types (Trend, Designs, Sketches, Colourways, Knits, Weaves, Prints, Embroideries, Graphics, Logos, Labels, Hang Tags, Constructions, Folding, Packaging etc.)**
- **Costing Data (Currency tables and exchange rates)**
- **Country Codes**
- **Duty Rates**
- **Roles & Employee data (employee role, names, email address, contact numbers, placement in organisational structure)**
- **Partner data (Supplier name, address, contact details, classification)**

Whether you are a retailer, brand, manufacturer, agent, vendor or supplier, it's likely that you currently develop your products using traditional, paper-based methods or electronic proxies for those methods.

Without a PLM system already in place, you're probably using what we like to call “Microsoft PDM” – i.e. a combination of PowerPoint, CAD and Word files - during the design phase, supplemented by hundreds of Excel spreadsheets that support the technical specification process. In these situations, Excel serves as a bridge between purchasing solutions, ERP and testing; e-mail is heavily relied upon for collaboration, and costing and critical path mapping tend to, again, be done on paper, in Excel, and with hundreds of phone calls!

These legacy systems, emails and notebooks, not to mention the potentially-thousands of Excel files are where the data that can (and should) become Master Data reside. Companies working in this way often have poorly implemented Data Governance processes to handle changes in this data over time, leading to inefficiencies, inaccuracies, duplications, redundancies, losses and many, many, many mistakes.

While these traditional processes have been in place for many decades, that lack of data governance has probably seen little or no focus given to the way the data they rely on is handled. The foundations are far from ideal. These traditional development methods have evolved over time to a state where each process owner makes his or her own decision on how they would like to enter data, based on their own experience and personal preferences. And every company is different.

For example: *some of those process owners will have used capital letters for style or supplier names, while others will have used the typical capital first letter, followed by lower case, to enter their style names and therefore giving two records for the same information.*

Another example might be colour naming: *some people will abbreviate the colour* **black** *with* **BLK**, *at the same time another person will enter* **Black** *in lower case, whilst another will enter* **BLACK** *in capitals. Or, a designer may use a Pantone reference and refer to Black as* **midnight black**.

That's 5 different versions of the colour Black.

If you assume, for the purposes of a Master Data project, that you have several versions of the same record as a result, your database is potentially five or more times more complex than it needs to be, the speed of the solution is five times slower, and the team(s) are working five times harder trying to maintain the most up to date versions of the data.

Master Data, which in its purest form is the establishment of one centralised, unified set of data from which all enterprises systems can draw, is something absolutely critical to any enterprise project. And it should be treated with the same level of importance that your team would give to the functional scope, training, change management or detailed design.

A comprehensive Master Data project is the solution to the data problem.

In most circumstances, though, it's not as simple as a quick data-cleansing and gathering exercise. Master Data should be considered to be a standalone project that should take place preferably before, or at least in parallel with, the PLM process design & scoping.

If we use the analogy that PLM is the vehicle that enables organisations to reach a state of streamlined, modern product development, then Master Data should be viewed as the high-octane fuel for that vehicle.

Unless your business treats Master Data as carefully as it did selecting PLM or ERP, then unfortunately the results will be affected by that lack of care. Without careful organisation and cleansing, you're unlikely to achieve the kind of benefits and returns on investment that you would like to see from PLM.

It is vital that data governance rules and a business-wide culture change driven by Master Data are considered as early as possible in any implementation process, to ensure that, where PLM or other enterprise-level systems are adopted across a business, the data they rely on is accurate and consistent and can deliver results.

The adoption of PLM can be complex, but if you undergo some pre-implementation best-practices (and not necessarily only those listed above) you will be putting the right foundations in place for a smooth journey.

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