Training Best Practices for Solution Provider Education

CIMdata: PLM Webinar Series

2 December 2015

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CIMdata® | Global Leaders in PLM Consulting
www.CIMdata.com

Our Mission...

Strategic management consulting for competitive advantage in global markets

CIMdata is the leading independent global strategic management consulting and research authority focused exclusively on the PLM market.

We are dedicated to maximizing our clients' ability to design and deliver innovative products and services through the application of PLM.

- ## Chris Gregory, Practice Manager, PLM Success
  - Chris Gregory comes to CIMdata with over 30 years of experience with major PLM solution Providers, with broad experience and cross functional roles in services, product marketing, sales support, strategic alliances, business development and program management
    - Chris has led PLM implementations with F500 firms collectively representing over 100,000 users and $250 million in proven ROI

Learning Objectives

What you should understand at the end of this session

- Solution Provider make/buy decisions for training are overlooked, with hidden unseen costs

- Internally developed Solution Provider training programs are more expensive than you think

- Solution Provider training is often technology driven

- Most Solution Provider training is unmeasured, without a certification process

How *Effective* was Your Last Training?

Ask yourself "Did the course make a difference in how I perform?"

Let's take a poll and see how we view our past training experience

Training Best Practices for Solution Providers
Discussion topics

- Training – PLM's most Overlooked Need

- Training – The Significant difference

- Training – Solution Provider perspective

- Training – Best Practices

Training – PLM's Most Overlooked Need

What happens with the "Low Performers"?

- **Undersold for both** –
  - **Clients** - Training represents 5% of the client's <u>initial PLM investment</u>.
  - **PLM providers** - In 2013, organizations <u>averaged 1.5% of the time</u> in training.

- **Value not received** – Companies that emphasize training experience 5-10X greater results than those that don't
  - Ref: "<u>High Performance PLM, Key Success Factors for PLM Strategy and Adoption</u>" – PTC – Rob Levett

- At our clients, not *everyone* is trained – the power users become the focus, informally training others, ... or *not at all*.

- "**One and done**" – Usually done as part of the deployment ... and not again until next major upgrade

Ref: Stephen Porter – Aug 2015 http://zerowait-state.com/plm-state-training-day-plms-overlooked-need/

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The Most Significant Differences Relate to HOW Companies
Plan, Implement, and Adopt PLM

High Performers

Learning & Adoption

Software Implementation

Solution Design

Low Performers

Strategy and Planning

Source: Tech-Clarity and PTC Global Services, PLM Key Success Factors Survey, 2012

Training – Solution Provider's Perspective

- **"The shoemaker's children go barefoot"** – *Old English proverb*
  - We neglect those closest to ourselves –
    - As Solution Provider, **we don't train our own staff**

- **Software Provider**
  - Technology focused training, *of course*
  - Perspective of technology provider, not the PLM industry or client

- **Service Provider**
  - Staff best able to deliver training is the same staff often dedicated to revenue generation efforts
  - Perspective is **subset** of PLM industry, limited to subset of Service Provider's PLM partnerships

- ## Internal resourced and developed PLM training

  - ### Pro:

    - You get what you want, when and how…. (Assuming that the needed resources are on staff and available)

  - ### Con:

    - **Completeness**: Training doesn't leverage PLM knowledge outside your organization (competition, industry-proven deployment options, integration best practices…)

    - **Hidden costs:** Lost opportunity costs of dedicated staff for training development and deployment

      - In 2013, Organizations reported the cost for **one** hour of training development - $1800

- **External resourced and developed PLM training**
  - **Pro**:
    - **Completeness**: Known and proven
    - **Quality**: Known and proven
    - **Costs**: Known costs
  - **Con**:
    - **Costs**: May appear to be higher than direct internal labor costs

    - **BIG CAVEAT**: Knowing the completeness, quality, cost and, above all – Credentials of the PLM training organization

- ## Written set of training goals, objectives and outcome.
  - Definition of:
    - **Start state**: Pre-requisite background or knowledge
    - **End state**: Desired outcome and acquired knowledge / skills of participant
    - **Steps along the way**: Daily agenda, with industry lessons learned woven throughout

    - Applying the same rigor to training planning as a university level course or seminar on "PLM Process Development & Testing"

- **Experiences from the PLM industry are the best way to way to learn**

  - From veterans that have been there

  - We avoid mistakes by learning from others

    - "War stories" – real-world experiences that teach us to survive and thrive.

- **Measurement and Assessments ensure learning objectives are met**
  - Ensure cross cultural learning takes place
  - Provides opportunity to re-enforce gaps in PLM training

  - *"**Evaluated** experience is the best teacher"*

Experience is not
the best teacher;
Evaluated
experience is.

- John Maxwell

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Concluding Remarks

Ongoing PLM education moves your organization toward the High Performers

- Ongoing, evaluated education from PLM industry leaders is the best method to transform your organization into a high performer
  - For instantiating PLM implementation Best practices in your team
  - Level set the entire team to a higher level of knowledge
    - New hires, staff transitions as well as existing staff

- CIMdata is uniquely qualified to be this "change agent" for you

Our Services...

Creating, disseminating, and applying our intellectual capital

Research

- Market research & analysis
- Technology research & analysis
- Reports & publications
- Market news
- Member services...

Education

- Executive seminars
- PLM Certificate Programs
- Technology seminars
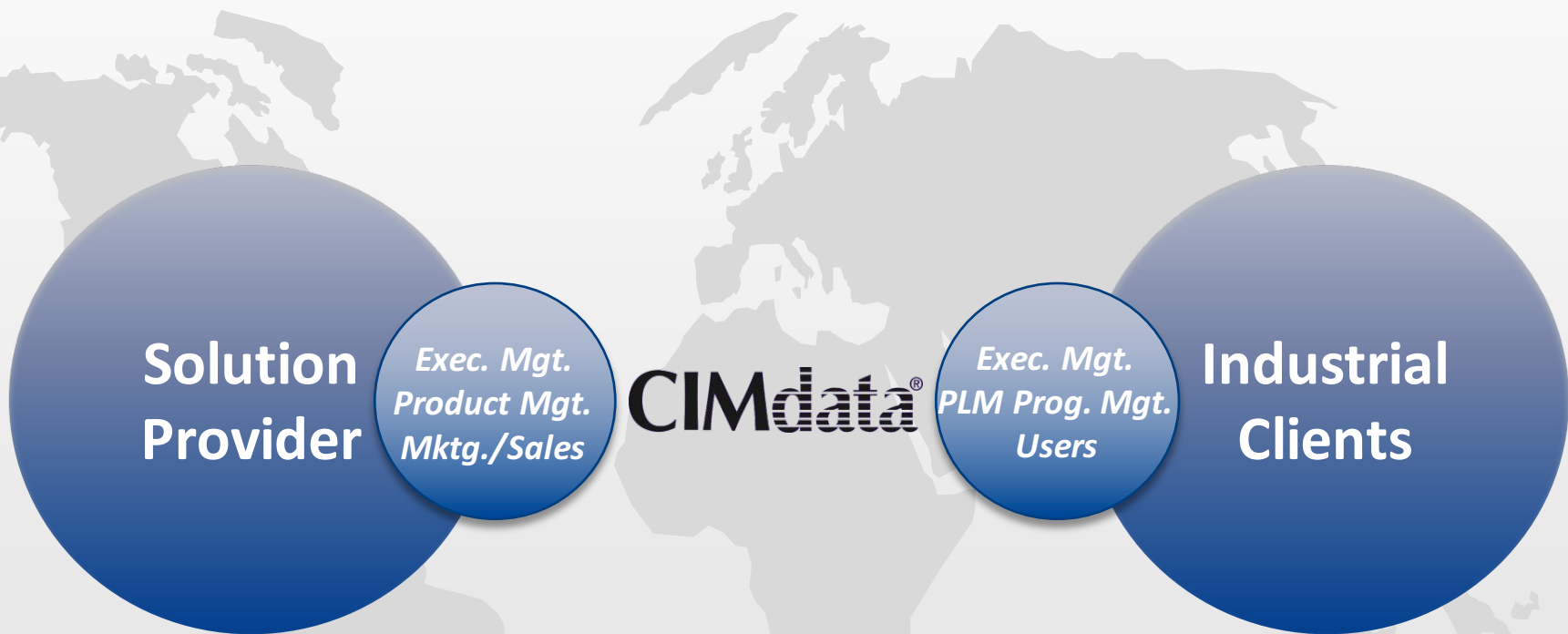- Int'l conferences & workshops
- Best practices training...

Consulting

- Strategy & vision
- Needs assessment
- Solution evaluation
- Best practices
- Quality assurance
- Program management
- Market planning...

Delivering strategic advice and counsel through a comprehensive, integrated set of research, education, and consulting services

Our Role...

Our role in the PLM ecosystem—facilitating and energizing the PLM economy

Solution Provider

Exec. Mgt. Product Mgt. Mktg./Sales

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Exec. Mgt. PLM Prog. Mgt. Users

Industrial Clients

CIMdata's certificate program is primarily comprised of a set of well defined, assessment-based PLM education and training classes.

These certificate programs are available to industrial companies who are considering and/or implementing PLM, and to PLM technology and service solution Provider.

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PLM Leadership

PLM Fundamentals for Solution Provider Short Course

2-day, 3-session outline for PLM Fundamentals for Solution Provider Course

- **Day 1:** Session 1: Introduction to PLM

- **Day 2:** Session 2: PLM Benefits & Potential Value
  Session 3: PLM Strategy & Solution Definition

- **Day 3:** Session 4: PLM Solution Evaluation & Selection
  Session 5: PLM Implementation, Monitoring & Continuous Improvement

- **Day 4:** Session 6: PLM Process Development & Testing
  Session 7: Integrating PLM within the Enterprise

- **Day 5:** Session 8: Expanding PLM Across the Value Chain
  Session 9: Configuration Management's Role in PLM

What Others Are Saying

"A must attend program for anyone that is planning to participate in PLM selection or implementation activities at their organization."
—*Shinod Kumar, Edwards Lifesciences, USA*

"The PLM course provides a great overall view of the business value of PLM. It will expand your knowledge so you can extend PLM benefits in your organization."
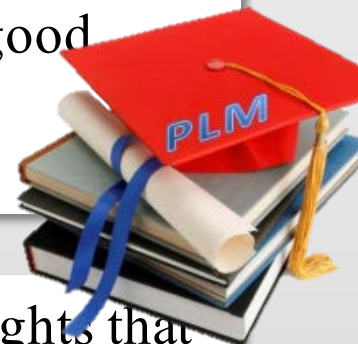—*Dan Miles, Tata Technologies, USA*

"Very valuable for business, not only functional and IT oriented; very good quality and professional."
—*Philippe Gautreau, Accenture, France*

"An excellent overview of all PLM and it's fit to companies. Good insights that can avoid many troubles in implementation."
— *Paulo C L Villaca, Embraer, Brazil*

A sampling of CIMdata PLM Leaders

2015/6 PLM Certificate Class Schedule*

Join us, to understand how PLM can help your organization

- September 21-22 – Boston, MA USA *(completed)*

- December 7-8 – Cypress, CA USA

- March 7-8, 2016 – Ann Arbor, MI USA

- June 6-7, 2016 – Amsterdam, the Netherlands

- October 3-4, 2016 – Boston, MA USA

- December 5-6, 2016 – Santa Clara, CA USA

SPECIAL OFFER

15% Discount for any scheduled class:
Sign up and pay by January 15, 2016

- *Custom & private, on-site programs by request*

* Dates are subject to change

Q&A

Let's hear what's on your mind?

For More Information, Contact…

We look forward to hearing from you

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