



# CIMdata®

## CIMdata Leadership

# Public PLM Certificate Program

### Knowledge to Improve PLM Projects in the age of Digital Transformation

For 40 years, CIMdata has been working in the Product Lifecycle Management (PLM) industry helping companies define and execute major components of their digital transformation. Our consulting services and research expertise are known around the world for best practice-based content and insight. CIMdata has leveraged its knowledge and experience to create the PLM Certificate Program as a central part of *CIMdata Leadership*—the PLM industry's most comprehensive non-biased education offering for today's PLM professionals who are at the center of their enterprise's digital transformation activities.

CIMdata Leadership is comprised of a set of well defined, assessment-based education certificate programs, short courses, and webinars. The certificate programs are delivered through a series of education sessions, and are intended to ensure that those who participate in a PLM project all have a strong understanding of key PLM concepts and industry leading best-practices, and how PLM is a critical component of an enterprise's digital transformation.

These certificate programs are available to industrial companies at any state in their digitalization journey, as well as to PLM software and service providers. These programs are also offered in a number of different configurations (see [www.CIMdata.com](http://www.CIMdata.com)<sup>1</sup>), including the configuration described herein.

## Public PLM Certificate Program

CIMdata's Public PLM Certificate Program delivers CIMdata's internationally recognized 5-day *PLM Certificate Program for Industrial Organizations and PLM Solution Providers*. This assessment-based certificate program satisfies the main PLM education requirements of small to large enterprises. The program also provides primary PLM education to PLM solution and service provider employees who are responsible for marketing, developing, selling, and delivering PLM solutions and associated implementation services. The *Private* version of the program provides organizations with an exclusively presented series of educational seminars that may be tailored to specific industry and/or topical needs.

*"Wish I had this BEFORE we implemented our PLM solution. It will be good for continuous improvement."*—Anonymous Attendee

The Public PLM Certificate Program is delivered through a series of education sessions. Sessions are 3.5- to 7-hours in duration. Furthermore, the program's content is tailored, within the given time restrictions, to address any industry-specific issues of interest to the participants.

The certificate program is delivered over three or five consecutive business days. Each day runs from approximately 8:30am to 4:30pm with one mid-morning break, a lunch break, and one mid-afternoon break. The students in the course are also

<sup>1</sup> [http://www.cimdata.com/services/education/plm\\_certificate.html](http://www.cimdata.com/services/education/plm_certificate.html)

expected to take part in team exercises that require additional time following each day's formal education sessions.

*"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

The certificate program includes a combination of lectures, industry case studies, group exercises, and tests.

Successful completion of a 5-day program leads to a *Standard Certificate of PLM Leadership* and 3.0 CEUs, and the successful completion of a 3-day program results in a *Core Certificate of PLM Leadership* and 1.8 CEUs.

## Target Audience

The target audience for the Public PLM Certificate Program includes, but is not limited to:

- Program champions and sponsors
- Mid-level business managers
- Digital transformation leaders
- Functional directors (i.e., IT, engineering, supply chain, NPD, etc.)
- Business subject matter experts
- Project leaders
- PLM project team members
- IT professionals
- IT managers

## Target Industries

The Public PLM Certificate Program has been designed to be industry independent. However, industry-specific content (e.g., process discussions, examples, and cases studies) can be easily added if the program is being delivered to a specific company or industry group.

## Certificate Program Outline

**Day 1:** Session 1a: PLM Basics

Session 1b: PLM Key Concepts & Learnings

**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

## Course Delivery

A team of internationally experienced, senior-level CIMdata consultants will deliver all course material in English. All presentation materials are provided to each participant in a fully searchable set of PDF files that may be downloaded.

*"Very worthwhile, will definitely help move our own PLM initiative forward."*—Allen Heindel, Crown Equipment Corporation

## 5-Day Pricing

The 5-day Public PLM Certificate Program cost is calculated per student per company represented. Pricing is as follows:

- First student sent by a company—US\$3,750
- Students #2 through #5—US\$3,450 each
- Students #6+—US\$2,950 each

*CIMdata Community Members* are eligible for a discount; please contact CIMdata for additional information.

## 3-Day Pricing

The 3-day (Days 1-3) Public PLM Certificate Program cost is calculated per student per company represented. Pricing is as follows:

- First student sent by a company—US\$2,750

- Students #2 through #5—US\$2,450 each
- Students #6+—US\$1,950 each

*CIMdata Community Members* are eligible for a discount; please contact CIMdata for additional information.

### **Notes**

- A maximum of 25 students can attend a Public Certificate Program session.
- Any travel expenses incurred by participants are the responsibility of the attendee and are not handled by CIMdata.
- Private certificate courses are available for companies that would like the courses to be tailored for their employees.

## **About CIMdata**

CIMdata, an independent worldwide firm, provides strategic management consulting to maximize an enterprise's ability to design, deliver, and support innovative products and services by identifying and implementing appropriate digital initiatives. For nearly forty years, CIMdata has provided industrial organizations and providers of technologies and services with world-class knowledge, expertise, and best-practice methods on a broad set of product lifecycle management (PLM) solutions and the digital transformation they enable. CIMdata also offers research, subscription services, publications, and education through certificate programs and international conferences. To learn more, visit [www.CIMdata.com](http://www.CIMdata.com) or email [info@CIMdata.com](mailto:info@CIMdata.com).

# Standard PLM Certificate Program

## Session Descriptions

Sessions 1 through 5 comprise the *Core Certificate of PLM Leadership*. Adding Sessions 6 through 9 to the curriculum completes the *Standard Certificate of PLM Leadership*.

### Session 1—PLM: Key Concepts & Learnings

**Duration:** 1 day

**Prerequisites:**

- None

**Intent:** The scope of this one-day session includes the presentation of today's view and vision of the global PLM market and technologies. The overall intent of the session is to provide a broad overview of the PLM market, including trends, system architectures, and critical elements of success. This session will include presentations, discussions, and a set of interactive exercises.

**Session Outline:**

- Introduction
- Elements of a PLM Enabling Platform
- The Expanding Reach of PLM
- Today's Trends & Challenges
- An Introduction to the PLM Commercial Landscape
- PLM Benefits
- PLM Best Practices

### Session 2—PLM Benefits & Potential Value

**Duration:** ½ day

**Prerequisites:**

- Session 1: PLM: Key Concepts & Learnings

**Intent:** This half-day session reviews industry metrics used to measure and monitor the benefits of PLM implementations and the costs associated with implementing a digitalization strategy. Areas of potential PLM benefits will be presented by reviewing case study results achieved by various companies that have implemented PLM. The focus of the session is to describe how metrics should be used to help define a company's PLM strategy, define the company's PLM roadmap, select the most appropriate PLM-enabling solutions, incorporate PLM into a company's operations, and much more.

## Session Outline

- Potential Benefits of PLM
- Defining & Measuring the Costs of PLM
- Measuring the Value of PLM
- Introduction to a Benefits Appraisal Methodology
- Using Metrics to Steer a PLM Program
- Selected PLM Benefits Case Studies

## Session 3—PLM Strategy & Solution Definition

**Duration:** ½ day

### Prerequisites:

- Session 1: PLM: Key Concepts & Learnings
- Session 2: PLM Benefits & Potential Value

**Intent:** This half-day session provides a set of detailed guidelines for developing a PLM vision, strategies, Main digitalization drivers, and solution definition. When properly followed, these guidelines will help an organization reduce the time it takes to define and create a PLM solution strategy and roadmap.

### Session Outline:

- Introduction to PLM Strategy Development
- High-Level Planning
- Defining a Strategy & Tactics
- Defining Business Requirements
- Implementation Strategies

## Session 4—PLM Solution Evaluation & Selection

**Duration:** ½ day

### Prerequisites:

- Session 1: PLM: Key Concepts & Learnings
- Session 3: PLM Strategy & Solution Definition

**Intent:** This session provides a set of detailed guidelines for evaluating available solutions and selecting appropriate solutions to support a company's digitalization strategy. When properly followed, these guidelines will help an organization reduce the time it takes to select the right solution suite for their organization.

### **Session Outline:**

- Evaluating & Selecting PLM Solutions
- Developing True Business Requirements
- Developing Technical Requirements
- Selecting the Most Appropriate Solutions

## **Session 5—PLM Implementation, Monitoring & Continuous Improvement**

**Duration:** ½ day

### **Prerequisites:**

- Session 1: PLM: Key Concepts & Learnings
- Session 2: PLM Benefits & Potential Value
- Session 3: Strategy & Solution Definition

**Intent:** This half-day session provides a set of detailed guidelines for implementing and evolving a PLM environment. When properly followed, these best practices will help an organization reduce the time it takes to identify and quantify associated risks and better manage and control PLM project costs from the project concept phase through implementation and organizational adoption.

### **Session Outline:**

- Why projects fail?
- Gaining Leadership Commitment
- Harnessing Project Management Skills
- Implementation Planning & Execution
- Communicate, Communicate, Communicate...
- Managing Expectations
- Assessing the Implementation
- Sustaining Your Program

## **Session 6—PLM Process Development & Testing**

**Duration:** ½ day

### **Prerequisites:**

- Session 1: PLM: Key Concepts & Learnings
- Session 2: PLM Benefits & Potential Value
- Session 3: Strategy & Solution Definition
- Session 4: PLM Solution Evaluation & Selection

- Session 5: Implementation, Monitoring & Continuous Improvement

**Intent:** This half-day session provides an understanding how to best define, implement, and continuously improve PLM-enabled processes. The session will also present best practices for testing the process-enabling PLM solutions.

### **Session Outline:**

- Developing Business Processes
- Documenting Business Processes
- Sample Business Process Definition
- System Testing & Validation
- Process Ownership & Continuous Improvement

## **Session 7—Integrating PLM within the Enterprise**

**Duration:** ½ day

### **Prerequisites:**

- Session 1: PLM: Key Concepts & Learnings
- Session 2: PLM Benefits & Potential Value
- Session 3: Strategy & Solution Definition
- Session 5: Implementation, Monitoring & Continuous Improvement

**Intent:** This half-day session focuses on PLM's role within an enterprise's overall information technology architecture (supporting both processes and data) and how to best approach the integration of various PLM solutions (e.g., via the implementation of a service oriented architecture), especially PDM technologies, with other enterprise IT systems, e.g., ERP, CRM, etc.

### **Session Outline:**

- Introduction
- The Typical Enterprise IT Landscape
- PLM's Role in an Enterprise IT Landscape
- Integration Approaches that Work
- Other Issues to Consider

## Session 8—Expanding PLM Across the Value Chain

**Duration:** ½ day

### **Prerequisites:**

- Session 1: PLM: Key Concepts & Learnings

**Intent:** This half-day session covers the next steps in implementing PLM inside and outside the company, to its supplier and partner community, providing access to its customers, to other functional areas outside of engineering and manufacturing operations, and distribute operations across the broader enterprise.

### **Session Outline:**

- Defining the Value Chain
- Current Areas of Expansion
- Essential Issues for Each Area
- New Technologies Impacting PLM's Expansion
- Priorities & Steps for Expansion

## Session 9—Configuration Management's Role in PLM

**Duration:** ½ day

### **Prerequisites:**

- Session 1: PLM: Key Concepts & Learnings

**Intent:** This half-day session defines configuration management and how PLM can be used to enable it. The session provides an understanding of the various PLM-related configuration management elements (e.g., configuration items, options & variants, change management, and effectivity) and how a PLM solution can be used to support them. The session also reviews of a set of configuration management best practices and industry examples.

### **Session Outline:**

- The History of Configuration Management
- Why Configuration Management Matters
- Configuration Management Defined
- Processes & Related Requirements
- Best Practices Guidelines
- Industry Example—CM2