

News from the Field

2024 Market & Industry Forum—27 March 2024



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News from the Field
PLM Market & Industry Forum
A CIMdata Leadership Event

27 March 2024—Ann Arbor, MI USA

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#PLM4um

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CIMdata Defining What Comes Next in Digital Transformation

Strategic management consulting for competitive advantage in global markets

The leading independent authority on PLM and its digital transformation. We provide research, education, and strategic consulting to clients around the world.

OUR MISSION:
Maximizing clients' ability to design, acquire, deliver, and support innovative products and services.

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Key Takeaways



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- Organizations who have well-defined evaluation support processes & teams perform better than average
- Sales engagements vary widely throughout the industry
- PLM expansion projects commonplace in mature regions & industries
- Emerging economies getting into PLM as their markets mature
- Opportunities exist beyond data mgt. in traditional discrete industries
- M&A driving major CAx & PDM harmonization programs
- Product complexity & compliance driving many PLM initiatives

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Discussion Topics

- CIMdata's Field Involvement Defined
- Current Economic Outlook
- Field Insight by Region
- Key Drivers by Industry
- Key Overall Drivers & Challenges
- Concluding Remarks

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Our Contribution

We facilitate and energize the global digital ecosystem

CIMdata sits at the critical intersection of the digital ecosystem, helping define & implement what's next

Solution Providers
Executive Mgmt.
Program Mgmt.
Sales/Mktg.

CIMdata Experts

Industrial Clients
Executive Mgmt.
Program Mgmt.
Users

We address challenges & identify opportunities for both solution providers and industrial organizations

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Our Services

Strategic advice & counsel through a comprehensive & integrated set of services

RESEARCH
Foresight

EDUCATION
Leadership

CONSULTING
Success • Invest • Transformation

- Research & analysis
- Technology evaluations
- Market-specific insights
- Industry news & trends
- Industry conferences
- Seminars & webinars
- Certificate programs
- Best practices
- Strategic guidance
- Aligning solutions with needs
- Program management advisement
- Market positioning

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Transformation Methodology

Services for industrial organizations to enable digitalization of their product lifecycles

Supporting growth & evolution of enterprises across a wide range of industries in their pursuit of digitalization

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Select Transformation Clients

Aero & Defense	Auto/Transportation	Fab & Assembly	High-Tech
ALLEN VANGUARD, Litton TASC, AIRBUS GROUP, BOEING, MOOG, NORTHROP GRUMMAN, Lockheed Martin, VAUGHT, THALES, Orbital ATK, United Defense, RAFAEL, EMBRAER, BENTIS, OSHKOSH, NASA, CAE, Rolls-Royce, BAE SYSTEMS, GENERAL DYNAMICS, Gulfstream, ZODIAC AEROSPACE, Sandia National Laboratories, GIAT industries, Los Alamos, Bell Helicopter	ALFA ROMEO, RENAULT, ASTON MARTIN, MANN FRIEDEMUELLER, DURA, gm, DELPHI, FAT-N, NISSAN, JAGUAR, TOYOTA, VOLVO, PAULSTRA, Johnson Controls, BOSCH, MAHLE, TIMKEN, TVS, faurecia, HONDA, FERRARI, LEAR, Ford, INTIER, BMW, Visteon, YAZAKI, CHRYSLER, FIAT, TENNECO, GRUPO BOCAR, FURUKAWA, Autoliv, MAN, RICARDO, Great Dane, AVL, nemak, RIETER, NEXTEV, COOPER STANDARD	JOHN DEERE, BISSELL, CATERPILLAR, WARTSILA, Swagelok, OTIS, McGuey, ROLEX, Steelcase, SLOAN, JLG, KONE, Husqvarna, Hypertherm, SIEMENS, Bosch, CASE, Schneider Electric, HUNTER Engineering Company, BOBST, STRATTEC, SIMPSON, ACCO BRANDS, FISHER, Strong-Tie, WinWind, Whirlpool, TRANE, ASHLEY, Sidel, meyn, DANAHER, BOMBARDIER, Hunter, GE, TORO, Pentair, StanleyBlack&Decker, ABB Group, LEXFAX Corporation, Aprilaire, JCB, GRUNDFOS	PHILIPS, Microsoft, SHURE, AMD, APPLIED MATERIALS, Seagate, GIGABYTE TECHNOLOGY, OKI, rakon, Apple, 3COM, IBM, ALCATEL, tellabs, STORAGETEK, ERICSSON, BENQ, Veeco, SANG & OLUFSEN, NOKIA, TE, Canon, LEXMARK, XEROX, Waters, MINOLTA, Sun Microsystems, opnext, HUAWEI, Raytheon, hp, DOLI, FLUOROWARE, SONY, NXP


















































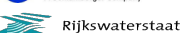










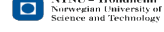


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Select Transformation Clients

CPG/F&B/Process	Medical/Pharma	Emerging Industries	Academic & Research
                  	                	                 	        

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What's Working


 Comments based on interactions with many of your field personnel

- Organizations that have well-defined RFP response processes and responsibilities are performing better than average
- Organizations who have already participated in a CIMdata-supported evaluation process generally perform better than average
- Professionalism has improved throughout the industry
- General presentations of solution offering & company are consistently done well
- Organizations that have training programs or have taken advantage of third-party programs (e.g., CIMdata's) perform better than average


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CIMdata Foresight Poll

 What do think are your company's biggest problems in the field?


What do you think are your company's biggest problems in the field?




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Problems in the Field


 *Comments based on interactions with many of your field personnel (1 of 3)*

- Listening and reading skills could use enhancements
 - E.g., ill-prepared RFP & Benchmark teams
- Assumptions are often taken too far
 - E.g., thinking that your client's problem is the same as one of their competitors
- Trying to sell too much or too little often results in failure
 - E.g., client asking for one solution, but being sold additional solutions
 - E.g., underselling can cause the client to think that you aren't listening
- Not adjusting demonstrations to fit the client's issues and/or industry
 - E.g., not enough time spent or not listening—hard to tell

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Problems in the Field

 *Comments based on interactions with many of your field personnel (2 of 3)*

- Not getting the right experts involved
 - E.g., you aren't going to show well if you don't have the right experts involved at the right time—mutual investment might be required
- Refusing to participate in a reasonable request
 - E.g., we tell our clients that this is best support you are going to get
- Trying to control the client's process (if CIMdata is involved)
 - E.g., we always stress fairness and thoroughness—it is an education process
- Selling the A team but giving them the B team isn't working
 - E.g., it doesn't take too long for a smart client to see through this

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Problems in the Field



Comments based on interactions with many of your field personnel (3 of 3)

- Still a disconnect between technical skills & business application knowledge
 - E.g., Solution can be demonstrated, but business value presentations are few and far between
- Partnerships appear to be forgotten—it appears that the wrong measurements are in place
 - E.g., When asked if a partnership would be better at x, answer is almost always...we can build that
- More leverage of previous evaluation responses required
 - E.g., In many cases it appears that past responses are not being built upon

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Field Insight By Region



Not all regions are the same—maturity level and needs vary (1 of 2)

- Asia & the Pacific
 - China head-wind for non-China based solution providers
 - Japan & Korea still offer significant opportunities well beyond PDM
 - India becoming the new China—growing in multiple dimensions
 - Southeast Asia production growth potentially leading to engineering growth (e.g., Vietnam)
- Europe
 - Central Europe, UK & Scandinavia still strong with additional opportunities
 - Eastern Europe emerging as engineering & production grow
 - Sustainability an important topic throughout

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Field Insight By Region


 *Not all regions are the same—maturity level and needs vary (2 of 2)*

- Middle East & Central Asia
 - Most economies singularly focused—obvious need to diversify
 - Many economies weak and not much engineering, let alone production
- Western Hemisphere
 - U.S. market continues to be a major growth driver
 - M&A driving major CAx & PDM harmonization programs
 - Most have PDM, and even CAx data management—PLM opportunities are significant
 - Smart & connected, and increased complexity driving new investments
 - Brazil's light has dimmed

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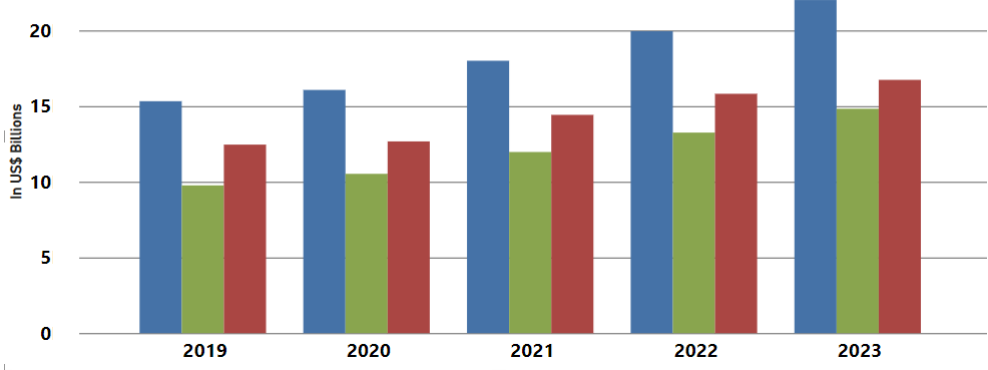
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PLM Geographic Distribution

 *History of investment by geography*

Revenues presented are CIMdata estimates

Geo ● Americas ● Asia-Pacific ● EMEA



Year	Americas	Asia-Pacific	EMEA
2019	15.5	10.0	12.5
2020	16.5	10.5	13.0
2021	18.5	12.0	14.5
2022	20.0	13.5	16.0
2023	22.5	15.0	17.0

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Key Driver By Industry—Discrete



Not all industries are the same—maturity level and needs vary (1 of 2)

- Aerospace & Defense
 - Defining & building digital threads/twins
- Transportation/Auto
 - True systems of systems design & optimization
- General Fabrication & Assembly
 - Increased complexity & configurability

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Key Driver By Industry—Discrete



Not all industries are the same—maturity level and needs vary (2 of 2)

- High-Tech Electronics
 - Speed to market with increased software content
- Medical Device
 - Increased cost & regulatory pressure
- Ship Building
 - Increased complexity & configurability

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Key Driver By Industry—Process

 *Not all industries are the same—maturity level and needs vary*

- Consumer Packaged Goods (including hybrid)
 - Speed to market with increase complexity & regulatory pressure
- Food & Beverage (including hybrid)
 - Increase complexity & regulatory pressure
- Pharmaceutical
 - Speed to market with increased regulatory & pricing pressure
- Oil & Gas
 - Need to be greener & diversify

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Key Driver By Industry—Other

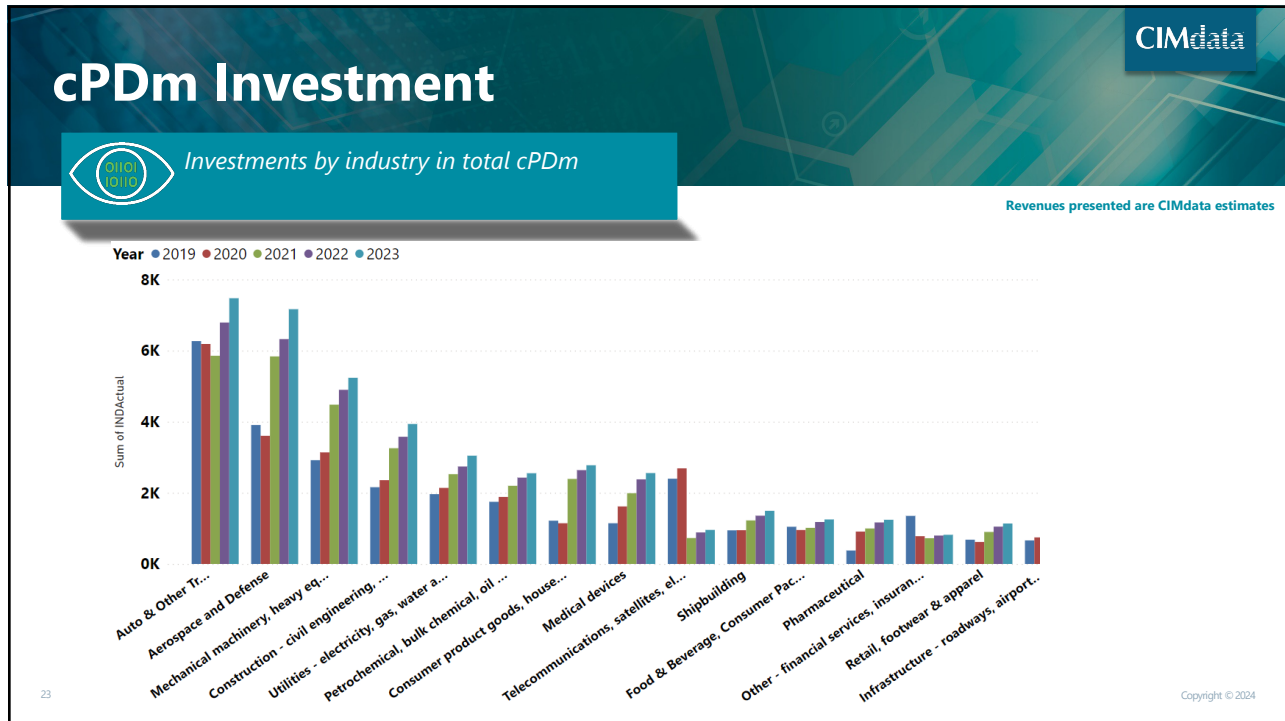
 *Not all industries are the same—maturity level and needs vary*

- Academia
 - Increased configurability & compliance
- Research Institutes
 - Increased complexity & data management needs
- Insurance
 - Increased product configurability & compliance
- Banking
 - Increased product configurability & compliance

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Concluding Remarks



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- Organizations who have well-defined evaluation support processes & teams perform better than average
- Sales engagements training & enablement requires focus
- PLM expansion projects commonplace in mature regions & industries
- Emerging economies getting into PLM as their markets mature
- Opportunities exist beyond data mgt. in traditional discrete industries
- M&A driving major CAx & PDM harmonization programs
- Product complexity & compliance driving many PLM initiatives

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Questions & Answers



What's on your mind?



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