



PLM Interest Group

PLM Self-Assessment Toolkit

A practical Toolkit that enables the PLM Team to perform an in-house assessment of their own implementation, without the need for external advisers or consultants.

This is a hands-on instruction manual for everyone who needs a clear written overview of their PLM environment.

Version 3.0E

0 Executive Summary

This is a simple, standard *PLM Self-Assessment Toolkit* that enables any current or would-be PLM user organisation to generate an overview of their PLM situation.

Its primary purpose is to enable any organisation to carry out its own Assessment of its PLM environment in a way that provides structured and actionable findings.

It guides you through the steps that a management consultancy would use if they were skilled in PLM - but rather than using external advisors, the *Toolkit* enables you to generate an internal overview that you can use to review your PLM needs and progress.

It works equally well for SMEs and for multinationals - the answers may be at a different level of complexity, but the thought process and logic are the same.

The *PLM Self-Assessment Toolkit* does not give a numerical score, but generates a set of discussion material that can be used to take management decisions on the next steps for PLM.

Carrying out the Self-Assessment requires no special skills – you simply follow the instructions. The questions are straightforward, and those that you cannot answer are as instructive as those that you can.

If all of the PASS/END gates are passed, the Assessment moves naturally to a Review and Planning Stage that provides a sound base for further action. It can also be used to give a clearer picture of where external advice would be valuable, or as an internal cross-check of how the work of your consultants or integrators is progressing.

The aim of the Self-Assessment is to produce a picture of your current and prospective PLM that can be used as the basis for the widest possible discussion and planning. The final Step gives guidance on extracting the results and deciding on the next actions, and there is a new Section on using the *Toolkit* as part of a drive towards Class A PLM.

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