

PLM, ARE YOU ACTUALLY READY?

Our PLM Gap Analysis


by Christopher Brandsey

BEFORE YOU LAUNCH THAT PLM RFP... ARE YOU ACTUALLY READY?

Rolling out a PLM system is one of the biggest moves a manufacturer or food service provider can make when it comes to digital transformation. IT and Innovation teams tend to dive into the RFP process without aligning on the basics—why they’re doing it, what they need, and whether they’re set up to make it stick.

I’m writing this to help you avoid wasted time, prepare your organization, and show up with a plan to get the most out of your technology investment. In this short article, I’m sharing our framework, which has been leveraged by the worlds largest Food & Beverage companies with distribution to over 180 countries.

I hope you find the content useful.



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Frame & Flight®

KNOW YOUR WHY

Start with the real business drivers. What's forcing the conversation now?

- Are you up against compliance risks due to messy documentation?
- Is innovation slowing down because of poor handoffs between R&D, Regulatory, and Packaging?
- Are you trying to scale and getting stuck in disconnected tools and spreadsheets?

Your RFP should be grounded in the business problems you're actually trying to solve, not simply a feature checklist.

Here are a few real world drivers that helped frame successful PLM business cases:

1. Our technology is antiquated and won't allow us to scale.
2. Our competition are making significant investments to speed up and enhance their innovation process.
3. Our primary growth driver for the business is innovation, we need to enable our growth thru innovation.
4. Our current processes and technology are not supporting our need for compliance.

In our experience, the drivers for change are different from company to company. Understanding your overarching business goals will help you cement your narrative.

WHAT WILL BE YOUR WHY?

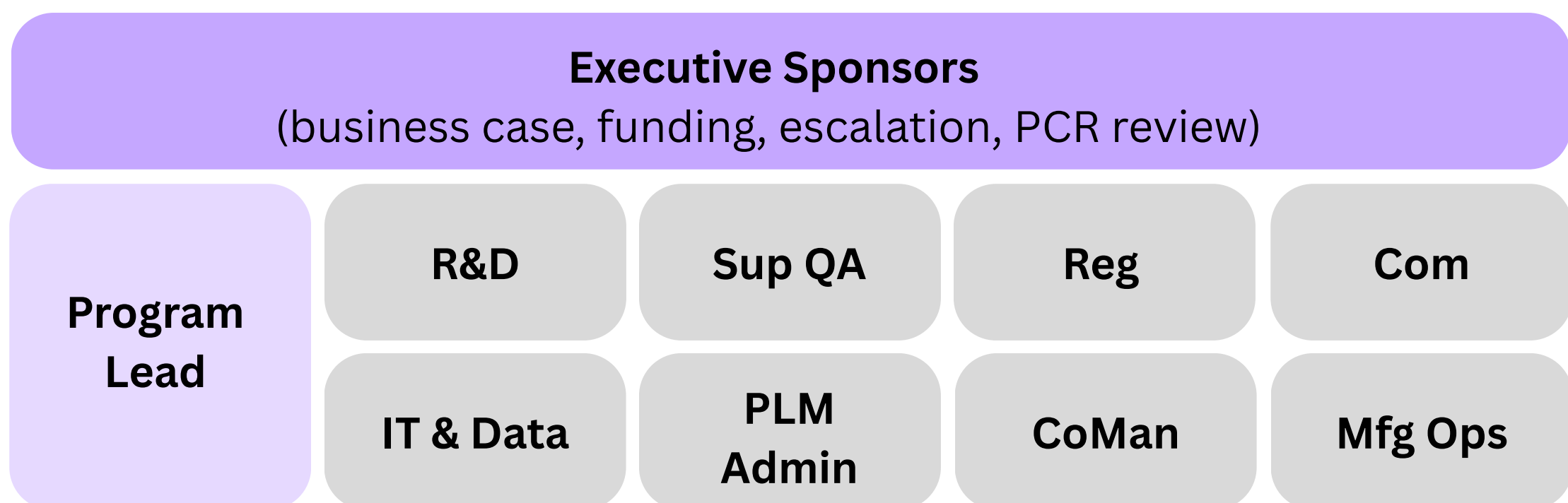
GET CLEAR ON OWNERSHIP

PLM isn't just a system, it's a shift in how cross-functional teams work together.

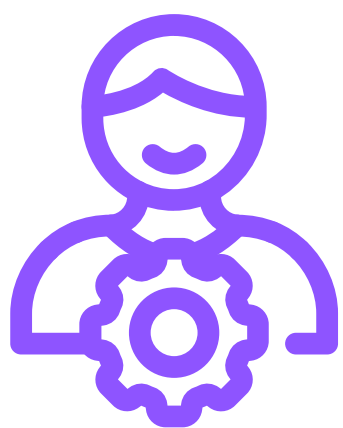
- Who owns this initiative from the business side?
- Are all the key functions (R&D, Packaging, Regulatory, QA, IT) aligned?
- Do you have a way to resolve conflicts and drive decisions across functions?

If no one owns the process end-to-end, you'll feel it in the implementation.

In short, how you leverage your governance model matters.



Build the Ways of Working Before the System



Technology won't resolve turf wars, governance will.

- Before selecting a vendor, define how decisions will be made across teams.
- Agree on how to handle conflicts, trade-offs, and priority calls during implementation.

MAP WHAT YOU ACTUALLY DO

Don't ask vendors what their platform does. Show them your real-world workflows.

- Have you documented your current-state processes (formula creation, spec approvals, label reviews)?
- Do you have actual use cases that reflect how your teams work across geographies and product types?
- Where are your biggest pain points?

Bringing use cases to the table makes demos meaningful—and reveals whether a vendor can really handle your complexity.

Here's an example use case to get you started. Mapping ALL of your use cases will give you a basis for your requirements.

Example Use Case: Generate Ingredient Statement

Persona: Regulatory Specialist

Goal: Create and export an ingredient statement for a new formula.

Trigger: New formula is finalized

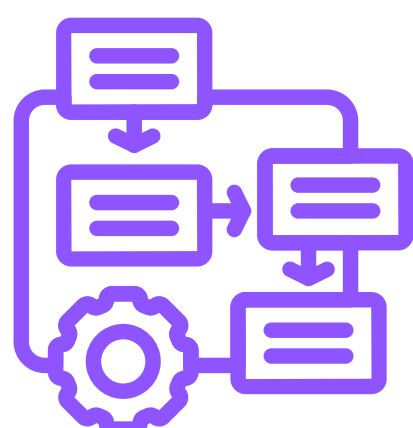
Preconditions: Formula is approved and all ingredients are classified

Postcondition: An approved stored record of the ingredient statement, versioned, controlled, exportable.

Business Rule: Order of predominance, formatted allergen call outs, sub-ingredient declaration, thresholds, processing aids, common/usual names, sub-ingredient breakdowns

Dependencies: Ingredient database must be validated and complete

Map the Process - Interview Tips



Use your use cases as a framework for interviewing stakeholders.

Ask, “Walk me through how you currently generate a label. Who’s involved, what systems are touched, what goes wrong?”

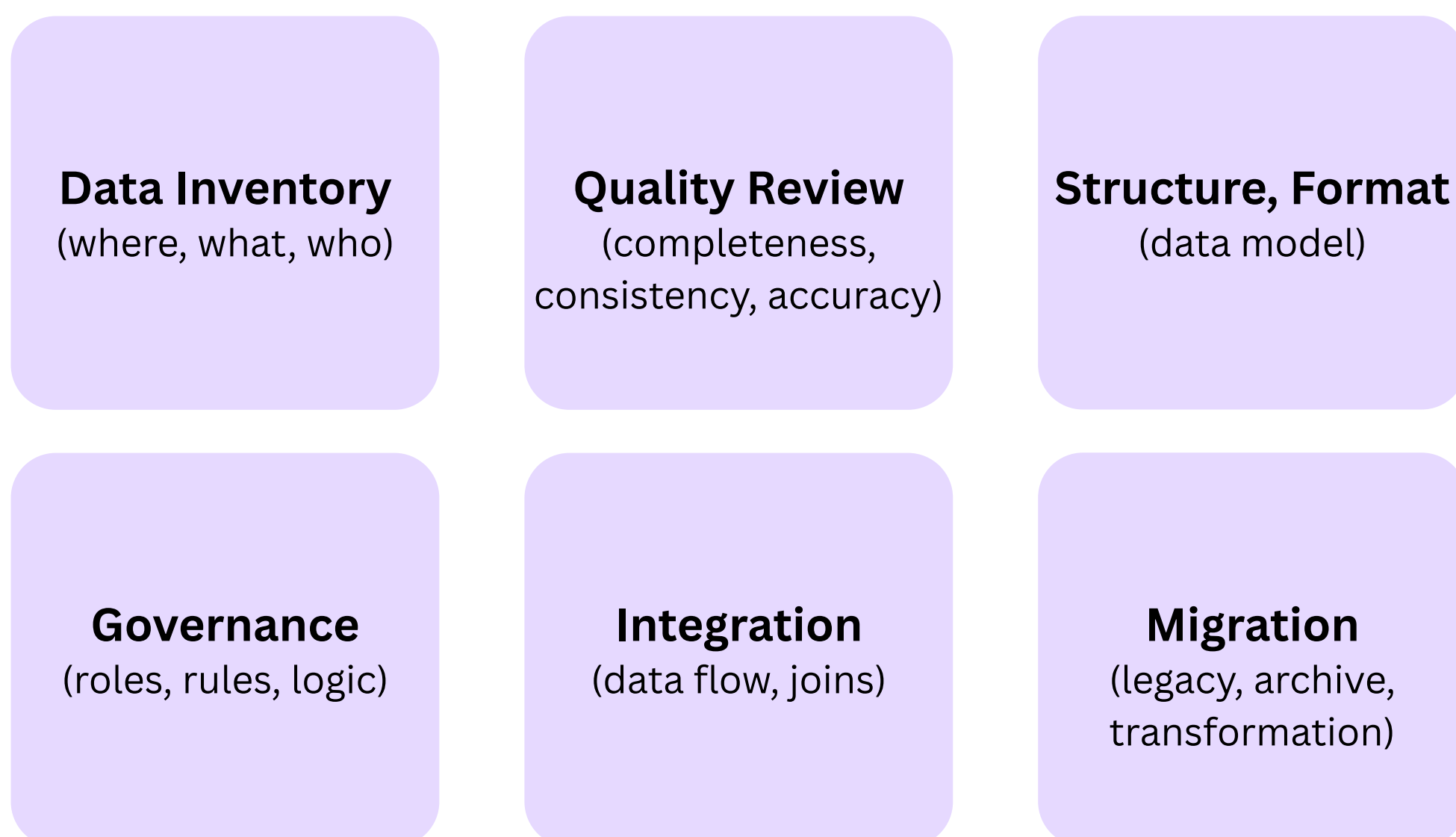
UNDERSTAND YOUR DATA REALITY

PLM won't fix broken data, it's likely to expose it.

- Where is your data today? How much of it is reliable?
- Do you have duplicates, versioning issues, ownership gaps?
- Will you be migrating old data or starting fresh?

You don't need perfect data to start but you do need to know what you're walking into

Core Components of a PLM Data Assessment



The intention here is a structured deep dive into your current product data landscape to evaluate quality, completeness, structure, and governance.

This is about understanding how fit your data is for PLM enablement.

Don't Skip the Politics



Data issues are rarely just technical, they're often ownership issues in disguise.

Before diving into cleanup:

- Ask: Who owns this data? Who approves it? Who maintains it?
- Build alignment on who will govern what in the future-state PLM.

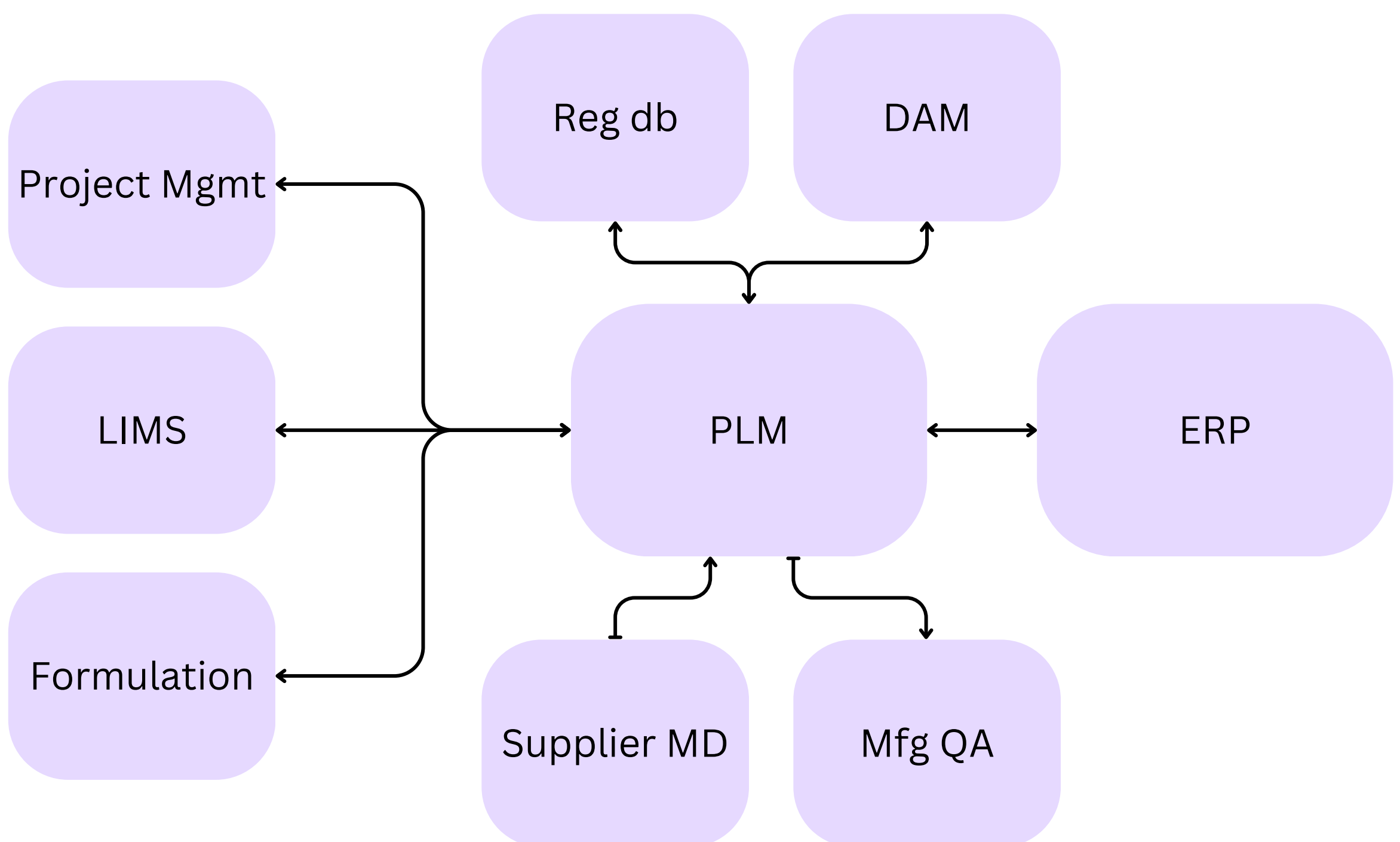
LAY OUT THE IT LANDSCAPE

You'll need to help vendors understand where PLM fits in your tech stack.

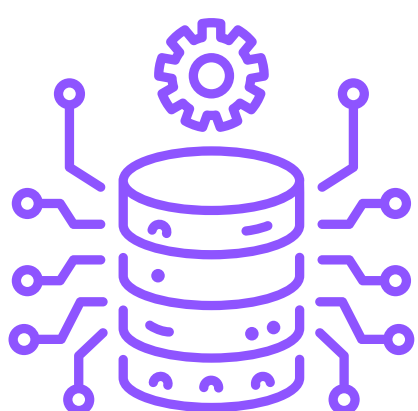
- What systems does it need to integrate with—ERP, LIMS, DAM, etc.?
- Are you leaning toward cloud or on-prem?
- Will integrations be real-time or batch?

Clarity up front saves a ton of rework and misalignment later.

Clarify your innovation ecosystem, establish data ownership, and define which data PLM will govern as the source of truth.



Don't Just List Systems, Show Dependencies



When mapping your tech stack:

- Highlight data producers vs. data consumers
- Call out critical timings
- Flag any manual bridges, they often reveal hidden risks or opportunities for automation.

ALIGN EXPECTATIONS WITH REALITY

PLM doesn't deliver results overnight and that's okay.

- Do your stakeholders understand what change management really looks like?
- Have you budgeted time and effort for more than just software (e.g., data cleanup, training, process rework)?
- Have you defined what success looks like 6 months, 12 months, and 3 years from now?

You're not just buying software, you're evolving how your teams operate.

It's Normal to Need Support Through All or Part of This Process. Reach out if you would like to talk through your Innovation and technology strategies.

Where You Can Find Us

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