



 Frame & Flight[®]

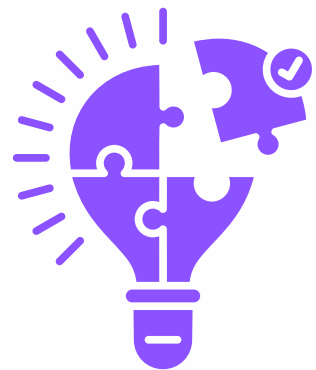
PLM READINESS

A Self Assessment Readiness Workbook



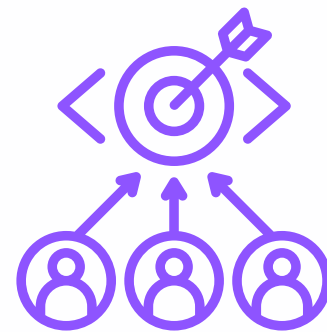
Why Readiness Matters

Laying the foundation for successful PLM starts with understanding where you are today before making high-stakes decisions that shape your future.



Solves the Right Problems

Ensures you're addressing the right bottlenecks—whether in process, data, or governance.



Aligns Stakeholders

Creates clarity across R&D, Regulatory, Packaging, Quality, and IT, aligning teams on goals, scope, and outcomes.



Defines Success Criteria

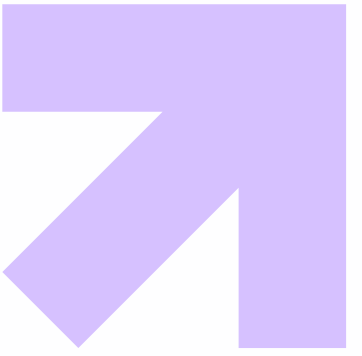
Clarifies success metrics, scope, and capabilities giving you a head start on your business case, RFP, and roadmap.



Reduces Business Risk

Reveals integration blockers, resourcing gaps, and change risks early—so you can appropriately plan for them

Common Pitfalls of Planning



Understanding where most PLM initiatives go off track helps you plan with greater clarity and confidence.

Unclear Business
Objectives

No Cross Functional
Alignment

Overlooking Process
Maturity

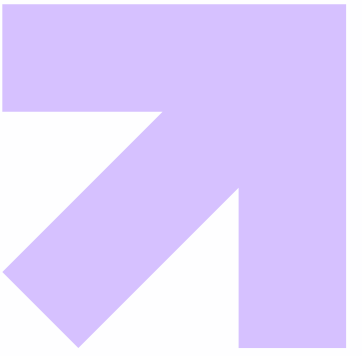
Inadequate Data Readiness

Rushed Vendor Selection

Too Much Scope, Too Soon

Underestimating Change
Management

Little/No Business
Ownership



How to Use This Guide

The guide is designed to help your team take a structured, self-paced look at your organization's readiness for PLM.



Start With Goals

Clarify what you want to achieve with PLM: faster innovation, better compliance, reduced rework, etc.



Score Yourself

Be honest and realistic; the goal is clarity, not perfection.

Use the scoring tables to mark readiness levels



Share and Discuss

Share the guide with cross-functional partners.

Consider holding a working session to align on scores and perspectives.



Interpret Results

Use the *Interpreting Your Score* section to understand where you are.

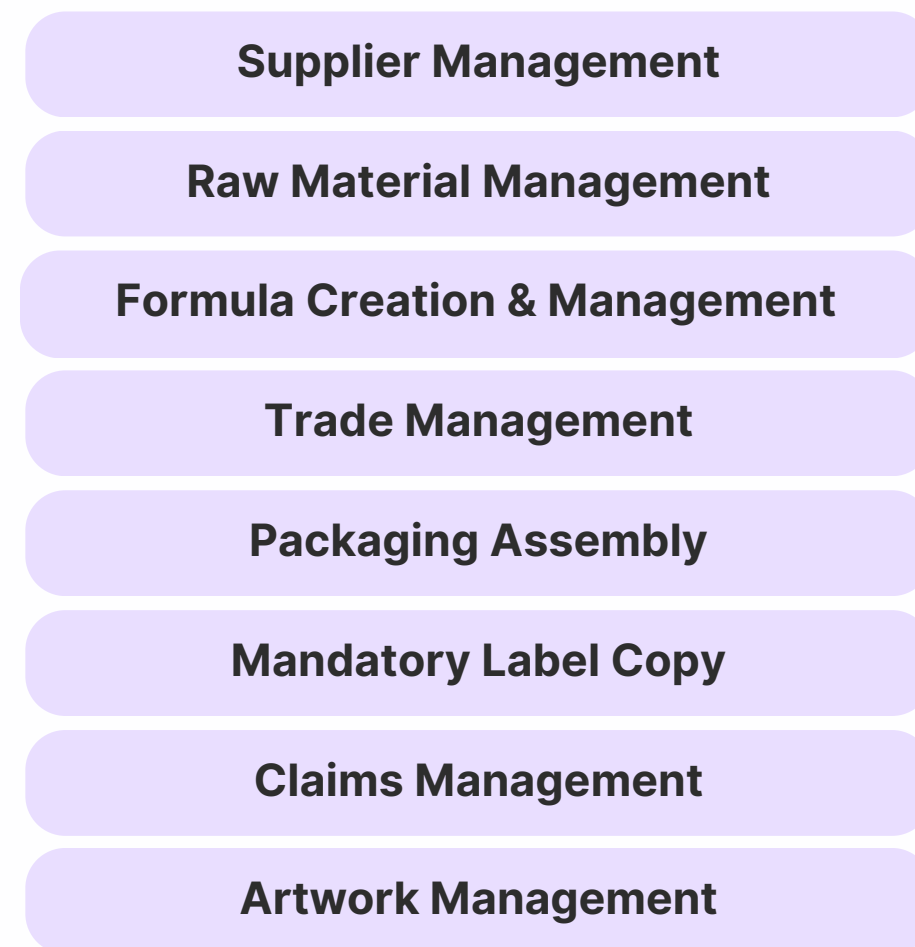
Identify quick wins, areas requiring deeper planning.

We Can Help - results validation, roadmap development, or access to our full maturity benchmarks and RFP tools

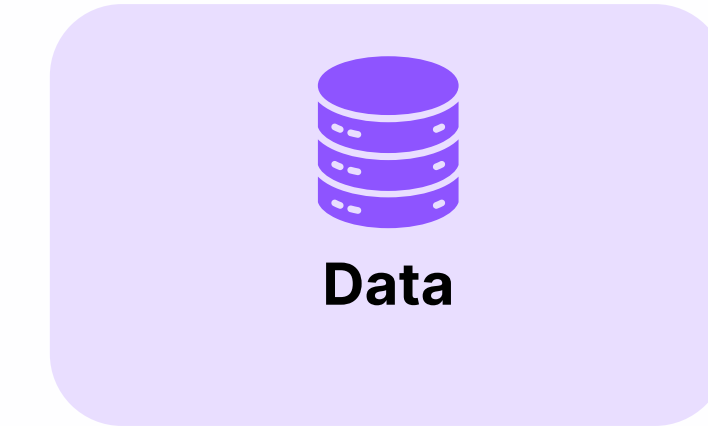
Assessment Framework

To assess PLM readiness we look across the management processes and readiness criteria.

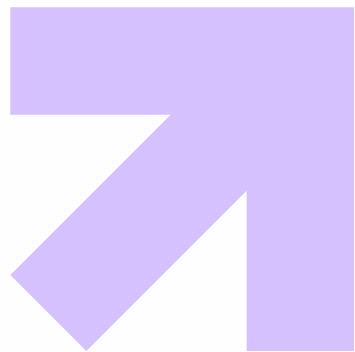
Management Processes



Readiness Criteria



Assessment - Scoring



Process

Score	Description
1	No Process in Place
2	Partially in place – ad hoc or manual methods
3	Basic system/process in place – limited scope
4	Consistently applied process/system – covers most needs
5	Fully standardized and integrated process

Enabling Technology

Score	Description
1	No Technology in Place
2	Manual or Ad Hoc Tools
3	Basic Technology Implementation
4	Established Technology Usage (broad adoption)
5	Fully Integrated and Scalable Technology

People & Skills

Score	Description
1	No Skill in Place
2	Informal Skills
3	Basic Training Available
4	Consistently Developed Skills Across Roles
5	Fully Embedded & Scaled Workforce Capability

Data

Score	Description
1	No Data Captured or Available
2	Unstructured or Inconsistent Data
3	Basic Data Availability
4	Reliable and Accessible Data Across Functions
5	Fully Governed, Integrated, and Actionable Data

Readiness Scoring

Average across Process, Tech, People/Skills, and Data



Low = Average <2



Intermediate = Average between 2 and 3



Advanced = Average >4

Getting to Work

Putting insights to work to move your innovation strategy ahead.

1 What We've Uncovered

- Key gaps across your PLM processes/capabilities
- Organizational friction points slowing innovation and scale
- High-impact areas that are under-leveraged or under-documented

2 What's at Stake

- Value leakage from delayed product launches, rework, or compliance risk
- Systems misalignment leading to poor user adoption and data silos
- Strategic disconnect between PLM investments and innovation goals

3 What We Recommend

- A PLM advisory engagement to:
 - Prioritize key initiatives based on risk and readiness
 - Support vendor alignment or reconfiguration
 - Facilitate cross-functional governance and momentum
- Ongoing support to operationalize improvements and measure ROI

Let's move from a static snapshot to a strategic roadmap, together.
We don't just assess, we guide.



Frame & Flight® - A Food & Beverage Technology Advisory Company

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