

# Setting the Stage and First Release

## Achieving Long-Term Transformational Success with PLM in Life Sciences, Part 11: PLM Strategy

by Dave Hadfield

In the last entry, we gave [practical tips for developing a business transformation strategy](#) that prepares the business to transform results through PLM. In this entry we'll set the stage for a PLM strategy and look at what phase one should look like.

For [pioneers](#) that want to use PLM to transform the product lifecycle and not just automate traditional features, they need a vision that ties all elements of the product lifecycle together into a matrix of smart and integrated processes. If your business does not need that level of change, there are many, good, entry level PLM systems on the market that provide basic features with minimal fuss on a modest budget. Companies that want to make a transformational impact in product leadership ([examples were covered earlier in this series](#)) can use an extensible, scalable PLM platform to bring a whole new dimension of excellence with only a small to moderate increase in risk.

### Setting the Stage for PLM Strategy

With a solid [business transformation strategy](#) in hand, we know much more about what we must do to affect change. We understand our product development process and cultural readiness for change. We are finally qualified to start talking about how we can apply PLM most effectively to the organization.

To set the stage for a PLM strategy, first consider which implementation roadmap approach is best for your company. With a phased approach, one group of capabilities are implemented, followed by another. A slightly different incremental approach entails annual or even twice yearly releases. Think of this more like a train, which makes scheduled stops that deliver incremental capabilities. I favor this approach because it keeps the team accountable for delivering value on a schedule and ties better to annual budget and return calculations. I will cover more detail on how to develop this roadmap in the next entry of this series.

### Release One for PLM

Almost all companies need the same set of fundamental capabilities that are core to just about every PLM project. These include document management (product documentation and quality documentation), bill of material (BOM) management, and managing the broader Device Master Record (DMR), which integrates product and quality documents into the BOM. These fundamental capabilities create a comprehensive product recipe and work in concert with change management tools, typically broken into change request/assessment and change order workflows. Stack up the benefits of these fundamental automations against other possible starting points and they'll win every time. It's hard to derive much value from PLM without these elements, but they still must still be implemented with a strong link to the business transformation strategy and goals.

In the next entry we look at steps beyond phase one, which depend more on unique business challenges.

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The Missed Opportunity and How We Can Overcome It

- [PLM, the Great Missed Opportunity in Life Sciences](#)
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- [Adoption Obstacles](#)
- [It's Time to Get Excited About PLM in Life Sciences](#)

The Business Benefits

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- [Getting to a Business Transformation Strategy \(with an Emphasis on Product Innovation\)](#)

## PLM Strategy

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- Ten Traits any PLM Team Must Have
- Three Characteristics of a Successful Implementation Methodology

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## About the Author



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Dave brings over 17 years of experience in product lifecycle management (PLM) to Kalypso's clients, with deep expertise in the medical device industry.