

Conducting a Product Lifecycle Management (PLM) Assessment

As a global leader in water management and treatment solutions, this client is recognized for their expertise in pool and spa equipment, residential water solutions, and commercial and industrial water systems.

Despite its industry leadership, the client's product lifecycle management (PLM) framework was anchored to an in-house SharePoint-based database and other offline systems that had become increasingly limiting. Challenges included inconsistent governance across lifecycle stages, deep-rooted workarounds, and limited end-to-end visibility into critical domains such as voice of the customer, product delivery and service execution, and end-of-life tracking. Compounding these issues were fragmented product data with poor traceability and a disjointed system architecture that constrained scalability and posed long-term risks to business continuity.

To address these challenges and unlock enterprise-wide value, the client partnered with Clarkston's PLM and supply chain experts to begin a PLM transformation. The effort included conducting a comprehensive current-state assessment, leading future-state visioning workshops, and charting a clear path forward for enterprise PLM system implementation - all driven by a commitment to data transparency, customer-centricity, and process resilience.

KPIs

- Conducted as-is discussions and future-state visioning workshops with 42 individuals across 16 stakeholder groups
- Identified 48 change impact areas across people, process, data & documentation, and technology
- Developed 450 solution requirements across 21 PLM sub-categories
- Identified 16 selection criteria across four executive themes to conduct vendor market scan and provided 5 vendors in a short list
- Created 7 SIPOC to-be flow diagrams across the product lifecycle (dream, discover, define, develop, deploy, deliver, decommission)

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Case Study

PROJECT OVERVIEW

INDUSTRY:



Other

PRODUCTS AND SERVICES :



Pool & spa equipment, water softening & filtration, and water supply & disposal for residential, commercial, industrial, and agriculture sectors

PRIMARY OBJECTIVES:

- Assess current state maturity of product lifecycle management (PLM) across global business units to identify gaps and opportunities for improvement
- Facilitate future-state visioning workshops to establish a cohesive enterprise PLM solution framework aligned with long-term strategic goals
- Conduct change readiness assessment across functional teams and develop a comprehensive change impact assessment and readiness action plan to ensure successful implementation and adoption across teams
- Define and document PLM solutions requirements, recommend a short-list of suitable providers, and outline a high-level request for proposal (RFP) strategy
- Design future-state SIPOC Level 2 process flows to guide operational alignment and ensure stakeholder clarity across key PLM functions

RESOLUTION:

- Facilitated cross-functional stakeholder discussions spanning all PLM workstreams and led future-state visioning workshops to capture stakeholder needs and align on enterprise PLM priorities
- Evaluated current state PLM processes, uncovering inefficiencies, functional misalignments, and areas for strategic optimization
- Assessed PLM maturity levels using Clarkston’s proprietary maturity matrix, benchmarked against industry best practices, and identified target improvement opportunities to shape a cohesive, future-state vision with a robust enterprise PLM implementation
- Developed a comprehensive change impact assessment and readiness action plan, laying the foundation for a successful transformation journey
- Defined client-specific evaluation criteria and conducted a market scan to short-list viable PLM solution providers
- Outlined a high-level RFP strategy and documented PLM solutions requirements to guide vendor engagement in the next phase

KEY BENEFITS:

- Developed strategic clarity and alignment for the client through deep enterprise-wide stakeholder engagement, ensuring the future PLM solution reflects genuine business needs while reducing misalignment and rework
- Identified operational efficiencies by evaluating current-state processes and creating SIPOC mappings to clarify roles and touchpoints across the lifecycle, improving coordination and reducing process friction
- Documented solution requirements to support scalability, adaptability to evolving demands, and improved data reliability and lifecycle traceability
- Equipped leaders with a robust change impact assessment and readiness action plan, providing actionable guidance to drive adoption, reduce resistance, and mitigate transformation risks