

Selecting an Enterprise PLM Platform to Enable Product Lifecycle Transformation

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.

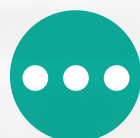
To address these challenges and unlock enterprise-wide value through data transparency, customer-centricity, and process resilience, the client partnered with Clarkston's PLM and supply chain experts to conduct a request for proposal (RFP) and vendor selection for an enterprise PLM system implementation.

Consumer Products 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

- Establish a structured and executable RFP strategy to support the selection of an enterprise-grade PLM platform
- Design and develop comprehensive RFP materials, including vendor briefing documentation, evaluation scorecards, response analysis workbooks, and scenario-based demonstration scripts
- Orchestrate vendor communications, engagement cadence, and end-to-end demonstration logistics
- Enable a disciplined and transparent vendor evaluation process, culminating in a data-driven recommendation for executive leadership
- Define and document forward-looking strategy proposals across PLM data governance, phased go-live scope (functional and product), and organizational change management
- Initiate a high-level implementation roadmap to support downstream system integrator (SI) planning and execution

RESOLUTION

- Developed and executed a comprehensive PLM RFP plan, leading the client through a structured 12-week vendor selection process
- Led the evaluation and selection of an enterprise PLM solution aligned to the client's long-term product management, data transparency, and scalability objectives
- Managed all aspects of the vendor engagement process, including communications, coordination, and facilitation of solution demonstrations
- Designed and facilitated a standardized vendor evaluation framework to ensure objective, requirements-driven assessment across all participants
- Consolidated evaluation results and delivered a comprehensive analysis and executive-ready recommendation report
- Produced a high-level implementation plan to support transition into implementation and alignment with the selected PLM vendor and system integrator

KPIs

- Successfully managed a competitive RFP process involving five PLM vendors, guiding the client through structured evaluations and shortlisting three finalists for in-depth demonstrations
- Developed five custom, scenario-based demonstration scripts tailored to the client's prioritized requirements and critical PLM pain points, enabling meaningful, like-for-like vendor comparisons
- Facilitated three full-day, end-to-end vendor demonstration sessions, ensuring consistent coverage of business, technical, and data-related requirements
- Aggregated and analyzed individual evaluator inputs to provide a clear, fact-based assessment and final vendor recommendation to senior leadership, supporting confident decision-making and implementation readiness

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