



Business Process
& Technology
Optimization



PROCESS THEN PLATFORM: BUILDING A SCALABLE PLM

Growth through acquisition can expand a manufacturer's capabilities quickly. It can also introduce complexity that is hard to manage. Each site brings its own processes, systems, and ways of working. Those differences make it difficult to share best practices, coordinate across teams, and apply consistent discipline to core activities like product introductions.

For an industrial products company with a high mix of custom offerings, that complexity was becoming harder to ignore. Some of its sites relied on paper-based processes for new products and engineering changes. Others had developed their own approaches. One facility, however, stood apart by using a product lifecycle management (PLM) system to manage changes with far more structure and consistency than the rest of the organization.

AN ATTEMPT AT STANDARDIZATION

 Leadership believed that standardizing around a single PLM platform could help bring that same level of discipline across the business. The company tried to roll out the existing PLM to another site and replicate what had worked before. It didn't go well.

The issue wasn't the software. It was the difference in how the business operated. The original site produced a relatively small number of products at high volume. Workflows were simpler and manual data entry between systems was manageable. The new site was entirely

different, with highly customized products, more engineering activity, and greater variation in how work moved through the organization.

Processes that worked in one context quickly broke down in the other. Manual entry became a bottleneck. Was the PLM platform the problem, or was the business trying to apply it in a way that didn't fit?

IPM was engaged to answer that question before the company committed to a broader path forward.

PROCESS-FIRST ALIGNMENT

 Rather than starting with features or vendors, the work began with how the business actually operated. IPM partnered with cross-functional teams across sites to map processes for new product introductions and engineering change orders. The differences were clear: variations in workflow, gaps in coordination, and points where manual tracking slowed progress or introduced risk.

From that understanding, the team defined a new approach that could work across both high-volume and highly customized sites.

What would it take to manage product changes consistently? Where did workflows need to differ, and where should they be standardized? What information needed to move between systems, and how quickly?

These answers were translated into a detailed set of business and system requirements. Only then did the technology question come back into focus.



OPTIMIZING EXISTING TECHNOLOGY



The assessment showed that the existing PLM platform could support the company's needs, but not without changes. The earlier rollout attempt had relied too heavily on manual processes and didn't account for differences in how sites operated. To scale successfully, the system would need to be integrated with other core systems and supported by workflows designed for more complex environments.

Instead of replacing the platform, the company could build on what was already working. IPM recommended extending the existing PLM system across sites, introducing key integrations, and tailoring workflows to reflect the realities of different operating models.

The decision avoided a costly and time-consuming reset. Based on comparable enterprise system efforts, adopting an entirely new

platform could have extended the timeline by six to nine months or more. In contrast, leveraging the existing system allowed the company to accelerate implementation while preserving prior investments, including existing licenses and internal familiarity.

With a clearer path forward, the company moved from assessment into implementation. IPM is now leading the team to translate process maps into system workflows, prepare data for migration, and progress the first site toward end-to-end testing.

Execution has required flexibility. Competing priorities, shifting resources, and ongoing organizational change have made alignment an ongoing effort. But with a defined approach grounded in how the business needs to operate, the program has maintained momentum while adapting to changing conditions.

THE BENEFITS TO COME



As the rollout continues, the expected benefits extend beyond system alignment. More consistent processes will improve how product introductions and engineering changes are managed across sites. Better integration will reduce reliance on manual workarounds that previously constrained throughput. And a shared platform will make it easier to reinforce best practices as the organization continues to grow.

What began as a question about technology ultimately led to a more fundamental shift. By starting with process and aligning the platform to support it, the company avoided an unnecessary reinvention and established a more practical foundation for scaling product lifecycle management across the enterprise.

