



Executive Business Case Summary

Windchill PLM for _____



Objective

Provide an executive-level justification to implement or upgrade **PTC Windchill PLM** as the enterprise system of record for product data, change, and configuration management.

Business Problem

Product development performance is constrained by fragmented product data and inconsistent processes. Today:

- ✓ Product information is spread across CAD systems, shared drives, ERP, and spreadsheets, driving rework and delays
- ✓ Change and release processes vary by team, resulting in late ECOs and downstream disruptions
- ✓ BOM and document revision errors create quality escapes, procurement issues, and manufacturing risk
- ✓ Traceability and audit readiness require manual effort and institutional knowledge

These issues increase cost, slow time-to-market, and limit the organization's ability to scale.

Proposed Solution

Implement or modernize **PTC Windchill PLM** as the enterprise system of record to:

- Centralize parts, documents, BOMs, and change data
- Standardize release and change governance
- Enable cross-functional collaboration across engineering, manufacturing, quality, supply chain, service, and IT

The solution will be deployed in **phases**, starting with foundational PLM capabilities and expanding based on value and adoption.

Expected Business Outcomes

Faster Change Execution	Reduce ECR/ECO cycle time by [X-Y%]
Higher Data Accuracy	Reduce BOM- and revision-related errors by [X-Y%]
Productivity Gains	Reduce time spent searching, validating, and re-entering product data by [X-Y%]
Improved Visibility	Decision-ready product status available across functions

Strategic Alignment

This initiative directly supports:

- ✓ Increasing product complexity and change volume
- ✓ Multi-site development and manufacturing coordination
- ✓ Faster time-to-market and reduced rework
- ✓ Digital transformation goals centered on a single source of product truth

Cost of doing nothing: continued rework, quality issues, expedite costs, audit risk, and tool sprawl.



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Recommendation

Approve a phased **Windchill PLM initiative**, beginning with:

- ✓ Phase 0: Readiness and governance
- ✓ Phase 1: Foundational PLM (parts, BOMs, documents, release, and change)
- ✓ Assigned executive sponsor and cross-functional steering team
- ✓ Budget authorization and internal resource commitment

High-Level Financial Summary

3-Year Total Investment (TCO):	\$ _____
3-Year Quantified Benefits:	\$ _____
Net Benefit (3 years):	\$ _____
Payback Period:	_____ months
3-Year ROI:	_____ %

3-Year ROI Worksheet

A. Assumptions

Assumptions	Value	Notes
Fully burdened labor rate	\$ / hr	Finance Standard
Engineers affected		
ECOs per year		
Current ECO cycle time	days	
% ECO cycle time reduction	%	Conservative
Annual scrap/rework from data errors	\$	
% reduction in data errors	%	



B. Annual Benefits Calculation

Labor Productivity Benefit Area	Hours Saved/Year	\$ Value
Reduced data searching/validation		\$
Reduced duplicate entry/manual handoffs		\$
Reduced ECO coordination overhead		\$
Total Annual Labor Benefit		\$

Hard-Dollar Cost Reduction Benefit Area	Annual \$
Scrap/rework reduction	\$
Expedite & premium freight reduction	\$
Procurement/quality issue reduction	\$
Total Annual Hard-Dollar Benefit	\$

C. 3-Year Benefit Summary

Year	Labor \$	Hard \$	Total Benefits
Year 1	\$	\$	\$
Year 2	\$	\$	\$
Year 3	\$	\$	\$
3-Year Total			\$

D. 3-Year Cost Summary

Cost Category	Year 1	Year 2	Year 3	Total
Windchill licenses/subscription	\$	\$	\$	\$
Implementation services	\$	\$	\$	\$
Internal labor	\$	\$	\$	\$
Infrastructure / hosting	\$	\$	\$	\$
Support / managed services	\$	\$	\$	\$
Total Costs				\$

E. ROI Calculation

Net Benefit (3 years): Total Benefits – Total Costs = \$[]

ROI: (Net Benefit ÷ Total Costs) × 100 = []%

Payback Period: [] months

Ready to explore next steps? See how Windchill’s modular capabilities and package options align to the value areas highlighted in this ROI worksheet.

Next Step: Explore Windchill Capabilities & Packages

