

Windchill Upgrade Readiness Scorecard

A Windchill upgrade is a critical initiative, but success depends on how prepared your organization is before execution begins.

This scorecard is designed to help manufacturing and PLM teams quantify upgrade readiness, identify potential risks early, and determine the level of support needed to move forward with confidence.

How to Use This Scorecard

This scorecard is most effective when completed collaboratively by:

- ✓ PLM administrators
- ✓ IT and infrastructure teams
- ✓ Engineering leadership
- ✓ Program or operations stakeholders

Scoring Instructions

For each statement, assign a score from 1 to 5:

- 5 – Strongly Agree / Fully Prepared
- 4 – Mostly Prepared
- 3 – Partially Prepared

- 2 – Limited Preparation
- 1 – Not Prepared

Record your scores for each category and total them at the end.

Category 1: Current System Health

Purpose: Establish a baseline of system stability and supportability.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
Our current Windchill version is supported and well understood					
System performance meets user expectations					
Known issues are documented and manageable					
System architecture is documented					

Category Insight: Unstable or poorly documented systems increase upgrade risk and recovery time.

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3 – Partially Prepared

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1 – Not Prepared

Category 2: Customizations & Technical Debt

Purpose: Evaluate complexity and long-term impact.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
Customizations are well documented					
Custom code is necessary and actively used					
We understand customization upgrade impact					
We are open to retiring legacy customizations					

Category Insight: Upgrades are an opportunity to reduce (not carry forward) technical debt.

Category 3: CAD & Integration Alignment

Purpose: Assess downstream dependencies and compatibility.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
CAD versions align with target Windchill release					
CAD integrations are stable					
Third-party integrations are documented					
Integration testing is planned					

Category Insight: Integration issues are among the most common causes of upgrade delays.

Scoring Instructions

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3 – Partially Prepared

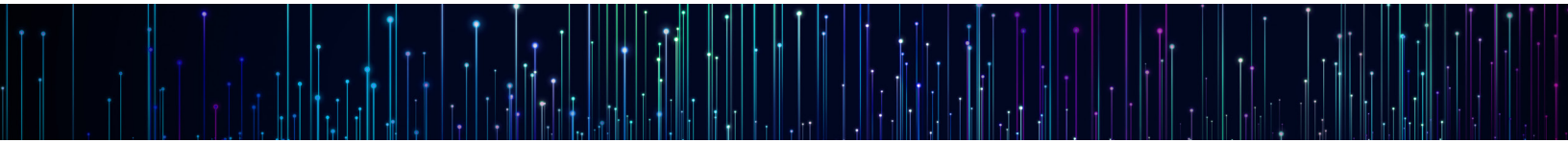
2 – Limited Preparation
1 – Not Prepared

Category 4: Data Quality & Governance

Purpose: Identify data-related risk.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
Identify data-related risk.					
Data volume and age are understood					
Known data issues are documented					
Data cleanup plans exist.					

Category Insight: Migrating poor-quality data forward compounds future challenges.



Category 5: Internal Resources & Expertise

Purpose: Measure execution capacity.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
Dedicated Windchill expertise is available					
Internal resources have upgrade experience					
Competing priorities are manageable					
Clear ownership is established					

Category Insight: Upgrades often fail due to bandwidth constraints, not technical skill.

Scoring Instructions

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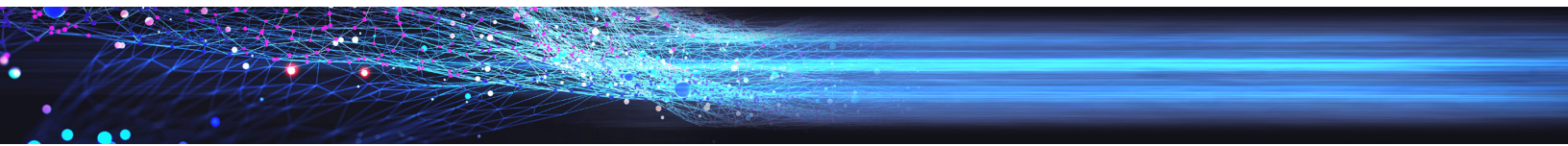
2 – Limited Preparation
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Category 6: Planning & Scope Definition

Purpose: Validate clarity of goals and approach.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
Upgrade goals are clearly defined					
Scope (upgrade vs modernization) is agreed upon					
Risks and assumptions are documented					
Success criteria are established					

Category Insight: Undefined scope leads to delays, rework, and frustration.



Category 7: User Impact & Change Readiness

Purpose: Protect productivity and adoption.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
Users are informed about the upgrade.					
Training needs are identified					
User acceptance testing is planned					
Post-go-live support is defined					

Category Insight: User readiness is often overlooked and always felt.

Scoring Instructions

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1 – Not Prepared

Category 8: Timeline & Risk Tolerance

Purpose: Test realism and flexibility.

Statement	Score (1)	Score (2)	Score (3)	Score (4)	Score (5)
Timeline reflects system complexity					
Downtime tolerance is understood					
Business constraints are accounted for					
Contingency plans exist					

Category Insight: Aggressive timelines increase business risk.

Scoring Your Results

Maximum Score: 160

Total Score	Readiness Level	What It Means
130-160	High Readiness	Strong internal capability and low upgrade risk
90-129	Moderate Readiness	Manageable risk with targeted preparation
Below 90	Low Readiness	High risk without additional planning or support

Recommended Next Steps

HIGH READINESS

- ✓ Validate assumptions
- ✓ Finalize timeline and execution plan

MODERATE READINESS

- ✓ Address identified gaps
- ✓ Consider targeted external support

LOW READINESS

- ✓ Perform a structured readiness assessment
- ✓ Engage experienced Windchill upgrade experts



How Partner-Led Support Improves Readiness

Experienced partners help:

- ✓ Identify hidden risks early
- ✓ Reduce internal workload
- ✓ Improve timeline predictability
- ✓ Minimize disruption during execution

The goal isn't to replace internal teams. It's to enable success.

Next Step

A Windchill upgrade is more than a version change. It's a moment to improve system health, reduce risk, and restore user confidence. Readiness determines outcomes.

If your score revealed gaps or uncertainty, the safest path forward is understanding your environment in detail.

Ready to move from assessment to action? Explore how EAC helps manufacturers execute Windchill upgrades with confidence.

Next Step: Talk with An Implementation Expert

