



PLM Readiness Scorecard



Introduction



This scorecard is designed to help engineering, manufacturing, quality, and IT teams quickly determine whether they're ready to move forward with a Windchill initiative **and what to fix first if they're not**. Windchill is a PLM platform that centralizes product data and supports collaboration across functions, which makes readiness across people, process, data, and technology critical.

How to Use This Scorecard

Score each item from 0–2:

0 = Not in place

1 = Partially in place

2 = Fully in place / consistently executed

Add up your totals to determine your readiness band at the end.

A) Strategy & Ownership

PLM succeeds when it has ownership, scope, and metrics (not just software).

- _____ Executive sponsor identified (accountable for business outcomes)
- _____ PLM product owner identified (day-to-day decisions and prioritization)
- _____ Cross-functional steering team established (Eng / Mfg Eng / Quality / Supply Chain / Service / IT)
- _____ Initial scope defined (what Windchill manages first: parts/BOM, docs, change, etc.)
- _____ Success metrics defined (e.g., ECO cycle time, BOM accuracy, time-to-find info, rework reduction)
- _____ Budget, timeline, and phase gates agreed to

Score (0-12): _____

B) Process Readiness

Windchill won't fix unclear processes. It will expose them.

- _____ Release process documented (WIP to review to released)
- _____ Change process documented (ECR/ECO) including functional approvers
- _____ Part numbering and naming standards defined
- _____ Document control standards defined (types, metadata, lifecycle states)
- _____ Configuration/variant approach defined (options, effectivity, as-designed vs as-built)
- _____ Handoffs documented across Engineering, Manufacturing, Supply Chain, and Service

Score (0-12): _____

C) Data Readiness (Quality, Structure, Migration)

Most PLM pain comes from messy data. Cleaning it up is a readiness milestone.

- _____ Inventory completed of current data sources (PDM, shared drives, ERP, spreadsheets, email archives)
- _____ Data cleanup plan exists (duplicates, obsolete items, naming normalization, metadata rules)
- _____ BOM baseline established ("what is the truth today?")
- _____ CAD data strategy defined (naming, revisions, check-in/out discipline, multi-CAD considerations)
- _____ Migration approach chosen (active programs first vs full migration) and archive strategy defined
- _____ Ownership defined for ongoing master data quality (not just pre-migration cleanup)

Score (0-12): _____

D) People & Adoption (Make It Stick)

Adoption is the multiplier. If users don't adopt, ROI never shows up.

- _____ Roles defined (PLM admin, data librarian, change analyst, CAD leads, super users)
- _____ Training plan defined by role (engineers vs reviewers vs casual users)
- _____ Change management plan documented (communications, champions, reinforcement)
- _____ Support model defined (internal support, outsourced admin, managed services)
- _____ Plan for casual-user access defined (e.g., leveraging role-based access tools like Navigate apps)
- _____ Post-go-live adoption follow-through planned (office hours, refresh training, onboarding new users)

Score (0-12): _____

E) Technology & Integration (IT Readiness)

PLM is an enterprise system. Stability, security, and integration planning matter.

- _____ Deployment approach selected (on-prem, rehost, upgrade timing, or modernization path)
- _____ Environment strategy defined (dev/test/prod + promotion process)
- _____ Performance and uptime requirements documented
- _____ Security requirements documented (SSO, access controls, audit needs)
- _____ Integration needs mapped (ERP, CAD tools, reporting/BI, identity management, QA systems)
- _____ Upgrade and maintenance approach defined (avoid "set and forget")

Score (0-12): _____

F) Implementation Approach (Reduce Risk, Accelerate Value)

PLM succeeds faster when implementation is phased, tested, and optimized.

- _____ Phased rollout plan defined (modules + functional groups by wave)
- _____ Pilot group selected (representative users + real workflows + real data)
- _____ Testing plan defined (migration validation, workflow testing, user acceptance criteria)
- _____ Cutover plan defined (freeze windows, parallel run plan if needed, rollback criteria)
- _____ Reporting plan defined (dashboards, standard queries, KPIs)
- _____ Post-go-live optimization plan defined (process tuning + adoption improvements)

Score (0-12): _____

Scoring Summary: Your Readiness Band

Add the six section scores: **Total (0-72):** _____

0-24: Not Ready

You're likely to encounter slow adoption, messy migration, and scope creep.

Focus next:

governance + process definition + data cleanup plan.

25-50: Developing

You're ready for targeted pilots, but gaps may create delays or rework.

Focus next:

tighten change/release processes, define migration scope, and lock support/adoption plans.

51-72: Ready

You're positioned for a phased implementation with a strong chance of value realization.

Focus next:

execute the rollout plan and keep optimization/adoption active post-launch.

What Comes Next (Based on Your Score)

If you're planning a Windchill implementation or upgrade soon, prioritize planning around the categories with the lowest scores (these are the most common failure points). Windchill upgrades and modernization approaches are often used to improve performance and reduce ongoing overhead.

If adoption across non-engineering roles is a priority, consider a role-based access approach (such as Windchill Navigate apps) to expand visibility without training everyone as a power user.

If you want a fast path to clarity, use this scorecard as the agenda for a readiness workshop. Align your stakeholders, confirm scope, and turn gaps into an actionable roadmap.

Next Step: Explore the Latest in Windchill

