



## NS ProductPlan

**PRESENTED TO**

**ProductCenter Customers**

Summer, 2006

# Agenda

- Key Trends
- Business Challenges
- Unfulfilled Requirements
- Proposed Solution
- Key Product Features
- Product Roadmap

# Key Trends

- **“World is Flat”**
  - Highly distributed (internal and external) product teams
  - Tasks distributed to most cost effective (quality to cost ratio) source
  - All knowledge workers have high speed access to internet
- **Collaboration vs. Command & Control**
  - Immediate access to timely and relevant information is becoming more important than additional security mechanisms
  - Access to information allows distribution of responsibility
- **Operational Efficiency**
  - Need to remove all non-value-add activities
  - Time to market with quality at low cost is key for success

# Business Challenges in Managing Projects

- **How do you ...**
  - Track actual project deliverables through the execution phase
  - Identify risk in a project at any point in time
  - Allocate appropriate resources to key activities
  - Prioritize product launch schedules
  
- **Can you ...**
  - Distribute project update responsibility to each assignee
  - Distribute assignments within and between company boundaries
  - Present project information to individuals in the proper context
    - Executives
    - Department Managers
    - Project Managers
    - Task Assignees

# Unfulfilled PM Requirements

- **Document Centric Project Management**
  - Managed and maintained by Project Manager
  - Effective in planning, but not for execution or launch
  - No direct access to deliverables
  - Project plan often over-constrained – unpredictable behavior on change
  - Difficult to distribute real-time information
  - Cross-project reporting is difficult
- **Enterprise Project Management Applications**
  - Creates yet another IT support responsibility
  - Does not have direct access to deliverables
  - More expensive than the document centric approach

## Proposed Solution – NS ProductPlan

- Cost of a document centric tool with the functionality of an enterprise application
  - Built on ProductCenter PLM platform
- Project information managed in the context of product deliverables
  - Deliverables are version controlled and accessible
  - Team members can access deliverables for entire project
- Manage plan, execution and launch
- Distributed access
  - Project views based on user's role
- Change can be managed in the context of the project

# Simple Model for Project Management

- **PMI Reference model**
  - **Work Breakdown Structure**
  - **Activities and Milestones**
  - **Activity dependencies for forward scheduling**
- **Integration to ProductCenter Items**
  - **Deliverables – any ProductCenter item**
  - **Assignees – ProductCenter users**
- **ProductDashboard Client Interface**
  - **Personalized views**
  - **Consolidation of PLM and Project Management information**
  - **Template dashboards for PM, Assignees, Dept. Mgr & Executives**

# Project Manager ... "Plan"

Project is managed as any other ProductCenter item

Tracking of Target and Actual dates

Direct link and access to ProductCenter documents

Organize project by WBS

Project Plan - PRJ-01204

Save Check In Check In & Close

Project Number: PRJ-01204 Project Name: XM Radio Adapter  
 Target Start Date: 12-28-05 Target End Date: 01-05-06  
 Actual Start Date: Actual End Date:

Project Plan Project Team

New WBS New Activity New Milestone Open Delete

| #                | Activity                | Depend | Status    | Assign                     | Plan Start      | Plan End        | Duration  | Role       | Deliverables            |
|------------------|-------------------------|--------|-----------|----------------------------|-----------------|-----------------|-----------|------------|-------------------------|
| <b>Concept</b>   |                         |        | <b>93</b> |                            | <b>10-28-05</b> | <b>12-05-05</b> | <b>30</b> |            |                         |
| 1                | Market Requirements     |        | 100       | <a href="#">J. Smith</a>   | 10-28-05        | 11-23-05        | 20        | Prod Mgr   | <a href="#">MRD.doc</a> |
| 2                | Voice of the Customer   |        | 100       | <a href="#">J. Smith</a>   | 10-20-05        | 11-23-05        | 15        | Prod Mgr   |                         |
| 3                | Revenue Projection      | 1, 2   | 50        | <a href="#">T. Dunn</a>    | 11-23-05        | 12-05-05        | 10        | VP, Sales  |                         |
| <b>Design</b>    |                         |        | <b>28</b> |                            | <b>12-05-05</b> | <b>01-05-06</b> | <b>23</b> |            |                         |
| 4                | Update BOM              | 3      | 40        | <a href="#">S. Monroe</a>  | 12-05-05        | 12-19-05        | 10        | Engineer   | <a href="#">123.xls</a> |
| 5                | Create CAD Drawings     | 4      | 20        | <a href="#">L. McGuire</a> | 12-19-05        | 01-05-06        | 13        | Designer   | <a href="#">123.drw</a> |
| <b>Prototype</b> |                         |        | <b>0</b>  |                            | <b>01-02-06</b> | <b>01-14-06</b> | <b>9</b>  |            |                         |
| 6                | Approve Tooling         | 5      | 0         | <a href="#">L. Jones</a>   | 01-05-06        | 01-07-06        |           | Engineer   |                         |
| 7                | Define Quality Criteria | 1      | 0         | <a href="#">S. Stone</a>   | 01-02-06        | 01-14-06        |           | QA Manager |                         |

Assignment of Activities and Milestones

Role based assignments

# Project Manager ... "Template"

Activities and Deliverables can be made required

Templates provide standard from which specific plans can be created

**Project Template - PT-001**

Save Check In Check In & Close Close

Template Number: PT-001 Status: Released

Project Name: New Product Introduction

Project Plan Project Team

New WBS New Activity New Milestone Open Delete

| #                | Activity                | Depend | Duration | Required                            | Role       | Deliverable Class | Deliverable Required                |
|------------------|-------------------------|--------|----------|-------------------------------------|------------|-------------------|-------------------------------------|
| <b>Concept</b>   |                         |        |          |                                     |            |                   |                                     |
| 1                | Market Requirements     |        | 20       | <input checked="" type="checkbox"/> | Prod Mgr   | MRD               | <input checked="" type="checkbox"/> |
| 2                | Voice of the Customer   |        | 15       | <input type="checkbox"/>            | Prod Mgr   |                   | <input type="checkbox"/>            |
| 3                | Revenue Projection      | 1, 2   | 10       | <input checked="" type="checkbox"/> | VP, Sales  |                   | <input type="checkbox"/>            |
| <b>Design</b>    |                         |        |          |                                     |            |                   |                                     |
| 4                | Update BOM              | 3      | 10       | <input checked="" type="checkbox"/> | Engineer   | BOM               | <input type="checkbox"/>            |
| 5                | Drawings                | 4      | 13       | <input checked="" type="checkbox"/> | Designer   | Drawing, Model    | <input checked="" type="checkbox"/> |
| <b>Prototype</b> |                         |        |          |                                     |            |                   |                                     |
| 6                | Approve Tooling         | 5      | 2        | <input type="checkbox"/>            | Engineer   |                   | <input type="checkbox"/>            |
| 7                | Define Quality Criteria | 1      |          | <input checked="" type="checkbox"/> | QA Manager |                   | <input type="checkbox"/>            |

Default values for Duration and Dependents

Role definitions populate plan when team is assigned

# Assignees ... “In Basket”

Access to activity functions without full project plan

Configurable list of activity attributes

Project Activities - John Smith

Pending
  Active
  Complete

| Number    | Project Name            | Activity Name      | % Comp | Start Date | End Date | Status  |
|-----------|-------------------------|--------------------|--------|------------|----------|---------|
| PRJ-01204 | XM Radio Adapter        | Create CAD Drawing | 80     | 12-22-05   | 01-02-06 | Active  |
| PRJ-01211 | Wire Harness Redesign   | Update BOM         | 20     | 01-06-05   | 01-04-06 | Active  |
| PRJ-01334 | Sirius Radio Adapter    | Update BOM         | 50     | 11-22-05   | 11-28-05 | Active  |
| PRJ-00904 | Fiat Satellite Radio    | Restructure BOM    | 30     | 11-27-05   | 12-02-05 | Active  |
| PRJ-01345 | Peugeot Satellite Radio | Update CAD Drawing |        | 11-22-05   | 12-22-05 | Pending |
| PRJ-00966 | Chevy Standard Radio    | Update CAD Drawing | 0      | 11-27-05   | 12-29-05 | Active  |
| PRJ-01112 | Bose Radio              | Update BOM         |        | 11-22-05   | 12-11-05 | Pending |
| PRJ-01113 | Hummer Radio            | Update CAD Drawing | 0      | 11-22-05   | 12-13-05 | Active  |
| PRJ-01233 | Dashboard Redesign      | Create CAD Drawing | 0      | 11-22-05   | 12-08-05 | Active  |

Filter assignments by status

User's personal view for all project assignments

# Assignees ... “Activity Form”

Update activity information directly from In Basket

**Project Activity**

Save   Check In   Check In & Close   Close

**Project Number:** PRJ-01204      **Project Name:** XM Radio Adapter

**Activity Name:**

**Activity Status:** Active

**Target Start Date:** 12-28-05      **Target End Date:** 01-05-06

**Actual Start Date:**

**Actual End Date:**

**% Complete:**

Deliverables      Dependent Activities

Attach New   Attach Existing   Detach   Open Selected

| Number   | Description    | Type    | Status      |
|----------|----------------|---------|-------------|
| 1258.prt | Harness, Radio | Model   | In Progress |
| 1258.drw | Harness, Radio | Drawing | In Progress |

Attach deliverables through simple query

# Department Managers ... “Dept Activities”

Functions optimized for manager

Group display by Assignee or Project

Filter list by activity status

List of activities for a specified set of users

| Project Activities  |                         |                    |        |   |          |         |  |
|---|-------------------------|--------------------|--------|---|----------|---------|--|
| <input type="button" value="Open"/> <input type="button" value="Update"/> <input type="button" value="Reassign"/>                   |                         |                    |        |   |          |         |  |
| Filter by: <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Active <input type="checkbox"/> Complete |                         |                    |        | Group by: <input checked="" type="checkbox"/> Assignee <input type="checkbox"/> Project |          |         |  |
| Number  | Project Name            | Activity Name      | % Comp | Start Date  | End Date | Status  |  |
| <b>John Smith</b>   |                         |                    |        |   |          |         |  |
| PRJ-01204   | XM Radio Adapter        | Create CAD Drawing | 80     | 12-22-05  | 01-02-06 | Active  |  |
| PRJ-01211   | Wire Harness Redesign   | Update BOM         | 20     | 01-06-05  | 01-04-06 | Active  |  |
| PRJ-01334   | Sirius Radio Adapter    | Update BOM         | 50     | 11-22-05  | 11-28-05 | Active  |  |
| PRJ-00904   | Fiat Satellite Radio    | Restructure BOM    | 30     | 11-27-05  | 12-02-05 | Active  |  |
| <b>Peter Jones</b>  |                         |                    |        |   |          |         |  |
| PRJ-01345   | Peugeot Satellite Radio | Update CAD Drawing |        | 11-22-05  | 12-22-05 | Pending |  |
| PRJ-00966   | Chevy Standard Radio    | Update CAD Drawing | 0      | 11-27-05  | 12-29-05 | Active  |  |
| <b>Susan Monroe</b>   |                         |                    |        |   |          |         |  |
| PRJ-01112   | Bose Radio              | Update BOM         |        | 11-22-05  | 12-11-05 | Pending |  |
| PRJ-01113   | Hummer Radio            | Update CAD Drawing | 0      | 11-22-05  | 12-13-05 | Active  |  |
| PRJ-01233   | Dashboard Redesign      | Create CAD Drawing | 0      | 11-22-05  | 12-08-05 | Active  |  |

# Executive ... “Project Dashboard”

Simple functions available for drill-down and collaboration

Grouping function for personalized presentation

Project Dashboard - Active Projects

Open Email ...

Group by:  Project Manager  Customer  Status

| Number    | Project Name            | Status | % Comp | Target Date | Customer | Project Manager |
|-----------|-------------------------|--------|--------|-------------|----------|-----------------|
| PRJ-01204 | XM Radio Adapter        | Green  | 80     | 01-02-06    | Ford     | Jim Smith       |
| PRJ-01211 | Wire Harness Redesign   | Yellow | 20     | 01-04-06    | Ford     | Jim Smith       |
| PRJ-01334 | Sirius Radio Adapter    | Red    | 50     | 11-28-05    | Chrysler | Tracey McGuire  |
| PRJ-00904 | Fiat Satellite Radio    | Green  | 30     | 12-02-05    | Fiat     | Jim Smith       |
| PRJ-01345 | Peugeot Satellite Radio | Green  |        | 12-22-05    | Peugeot  | Michael Scott   |
| PRJ-00966 | Chevy Standard Radio    | Yellow | 0      | 12-29-05    | GM       | Tracey McGuire  |
| PRJ-01112 | Bose Radio              | Green  |        | 12-11-05    | GM       | Tracey McGuire  |
| PRJ-01113 | Hummer Radio            | Green  |        | 12-13-05    | Hummer   | Jim Smith       |
| PRJ-01233 | Dashboard Redesign      | Green  | 0      | 01-02-06    | Hyundai  | Jim Smith       |

User defined query to present projects of interest

Green, Yellow and Red status for immediate status

## Additional Features

- Export to MS Project
- Project and Activity permissions
- Accessible to standard ProductCenter reports
  - *Some pre-packaged project based reports*
- Simple 5 day work week scheduler

# NS ProductPlan 2.0

- **Objective**
  - The primary objective of the 2<sup>nd</sup> release is to address high priority customer requirements
- **Feature Candidates**
  - Multiple assignments per activity
  - Gantt Chart view of the project
  - Resource reports
  - Customer defined work calendar
  - Critical path calculation



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