PLM

Achieving Value Chain Orchestration

3rd Annual *Apparel* Research Study & Analysis

This special report represents our third annual state of PLM technology adoption in the apparel industry. One of the overarching themes to be gleaned from the results is that apparel retailers and footwear and soft goods firms have a continued desire to integrate PLM processes and functionality with direct materials sourcing activities.

Apparel magazine and AMR Research Inc. conducted the survey from January to March 2008, seeking input from executives involved in the design, manufacturing and selling of apparel and footwear merchandise. We would like to thank the 128 companies that participated and shared their latest PLM progress.

Half of the respondents were brands and manufacturers; 26 percent were vertically integrated retailers producing and selling their own apparel brand; and 20 percent were retailers offering branded apparel merchandise, or some combination of the two. Companies of all sizes expressed their interest in PLM technology by participating in the study. Forty percent of survey respondents had annual sales of over $1 billion; 30 percent had sales of $101 million to $1 billion; 11 percent had sales of $50 million to $100 million and 18 percent had less than $50 million.

It is our goal that this report will be a beneficial benchmarking tool to you and your company, whether you're only just beginning to explore PLM or are already far down the path. As always, we welcome any comments or suggestions for next year's survey.

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Survey respondents indentified faster time to market, lower product costs and improved design as the top three benefits of product lifecycle management (PLM). And as for the biggest opportunity, functions from post-design forward need the most help from today's PLM technology.

by Jeffrey Hojlo and Janet Suleski, AMR Research Inc.

The apparel, footwear and soft goods (AFS) market is an evolving industry for product lifecycle management (PLM) when compared to the aerospace and defense or automotive industries, for example, but it is hardly immature when it comes to thinking about PLM as a value chain enabler.

This year's study of PLM technology spending by AFS companies includes results from 128 apparel brand manufacturers and vertical retailers and reveals the continued desire to integrate PLM processes and functionality with direct materials sourcing activities. By creating this integrated platform, and layering on integrated global calendar management and intelligent dashboards for exception identification and performance management, companies plan to create a comprehensive architecture for new product development and launch (NPDL) — one that will become the means for orchestrating an ever-more-complex set of business processes rapidly and efficiently across a global network.

Apparel brand manufacturers and vertical retailers realize that getting their data under control using product data management (PDM) is simply the first step in a journey. This provides a critical foundation where other critical processes will be connected to enable effective management of fast fashion's multiple seasons and trends. Unlocking and sharing product designs and specifications among designers, executive management, brand management, merchants, corporate operations and the supply chain will lead to the desired goals of PLM.

The three primary benefits to using PLM, according to companies participating in this year's study, are faster time to market, lower product costs and improved design. Companies have overall satisfaction with the up-front part (design) of the NPDL process, but events after the product design need the most help from today's PLM technology.

Defining the PLM Footprint in Apparel

It is useful to re-visit the common description of the components included in PLM applications to consolidate the many descriptions of what is included in the functional scope. AMR Research does not view PLM as a new business model or process, but rather as a set of enabling functionality to support an organization's NPDL process. Based on this approach, AMR Research defines the scope of PLM applications for the apparel industry as including the following:

PDM and specification management — These data-centric processes revolve around the management of all the critical product, material and component data needed to build a bill of materials (BOM) and ultimately create a complete specification package for the manufacturing vendor. Specification management includes major components such as measurements and grading, construction details, CAD, or sketch files, and may include costing details.

Line planning — Line plans define the templates for how many items or styles will be created (including color and size definitions) for each product category. Line plans also form the basis for: (1) organizing products across the functional teams that must interact with the process, (2) providing a view of the critical financial elements for products and (3) linking to the assortment planning process.

Collaborative product design — Many design departments begin seasonal activities by creating themed storyboards depicting the trends that will influence the line and individual styles. Creating an electronic version of these typically offline creations, typically in a CAD or illustration application, allows designers, technical designers and trading partners to review, place markups on and comment on images

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in a collaborative manner without jeopardizing the integrity of the native file.

Trading partner collaboration — This functionality enables secured access to data by outside trading partners that participate in the development process. This could include the shared entry of material or product data, the review and receipt of product specifications, collaboration on requests for quotation and the ability to support joint development activities.

Development process management — This encompasses the many critical development activities and approvals that must occur before the completion of a specification. Raw material development and approval, lab dips, sample approval and performance testing are just some of the elements many companies currently track and control manually or in Excel spreadsheets. PLM applications provide version control and reduce risks associated with e-mailing Excel files.

Workflow, calendar and event management — Calendars provide the major milestones and timelines associated with the seasonal development cycle for each product category. As companies create timelines, calendar and event management functionality use milestones and dates to track the status of each individual product or development activity against the deadline, and display the status at any point in time. Workflow functionality overlays the individual or role ownership for each task or event and provides a vehicle for routing alerts and notifications that a particular event is complete or needs oversight and action.

Direct materials sourcing — Direct materials sourcing is the sourcing of products and services that are either components of a product being assembled, or the product itself that is sold to the end customer. In parallel with product development, the sourcing team must become involved in planning based on existing and new supplier contracts and relationships, and materials, capacity and product availability. This includes the strategic sourcing of products and materials, hedging and postponement, RFQs (request for quote, etc.), negotiation management, change management and supplier performance management.
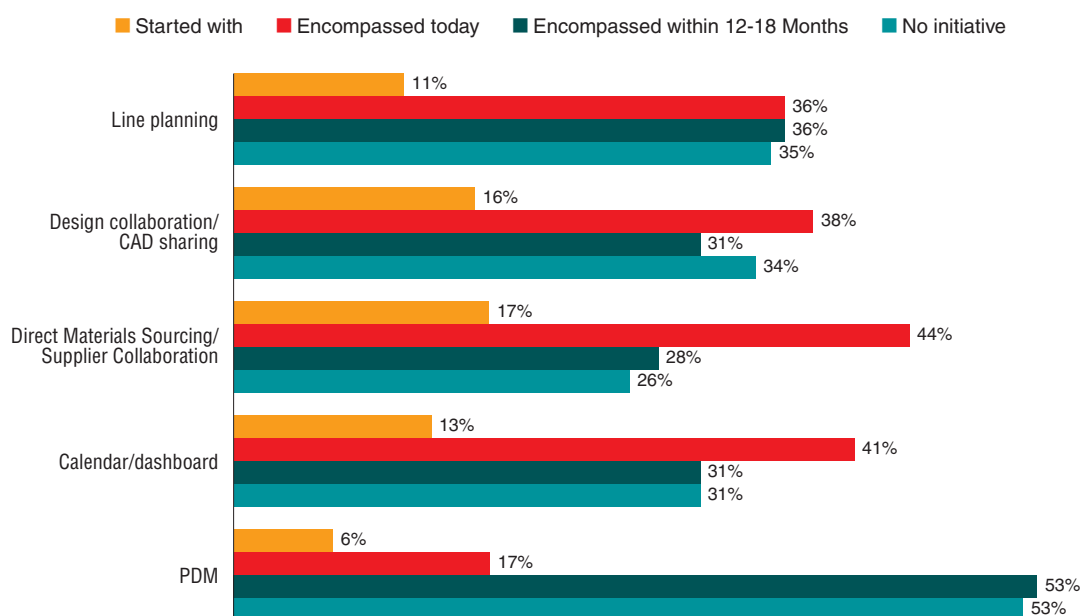
2008 Snapshot and Evolution

Product data management continues to be en vogue; line planning and calendar management emerge as new focal points.

Getting control of data through product data management continues to be the first order of business for most companies when launching PLM initiatives. Over half of survey respondents began here, with 53 percent of companies indicating that PDM is in the current scope of their PLM initiatives **(see Figure 1)**. PDM's role as the standard library of materials and components shared across planning and development teams continues to play a substantial role in improving the quality of the product created. It accomplishes this by providing up-to-date and accurate specifications while also lowering costs by increasing component re-use, allowing companies to negotiate better rates by driving up volume purchases.

Last year, only nine percent of companies indicated that line planning was within the current project scope; this year fully 35 percent of companies identified line planning as one of the early functions adopted. Line planning's many functions within PLM make it a cornerstone of increasingly sophis-

Figure 1 – PLM Starting Points & Plans

■ Started with   ■ Encompassed today   ■ Encompassed within 12-18 Months   ■ No initiative

Line planning
- 11%
- 36%
- 36%
- 35%

Design collaboration/ CAD sharing
- 16%
- 38%
- 31%
- 34%

Direct Materials Sourcing/ Supplier Collaboration
- 17%
- 44%
- 28%
- 26%

Calendar/dashboard
- 13%
- 41%
- 31%
- 31%

PDM
- 6%
- 17%
- 53%
- 53%

Figure 2 – Where will Direct Materials Sourcing/Supplier Collaboration Functionality Come From?

Separate Sourcing Application	17%
Assortment Management Application	2%
ERP (includes merchandise and PO management)	27%
PLM	54%
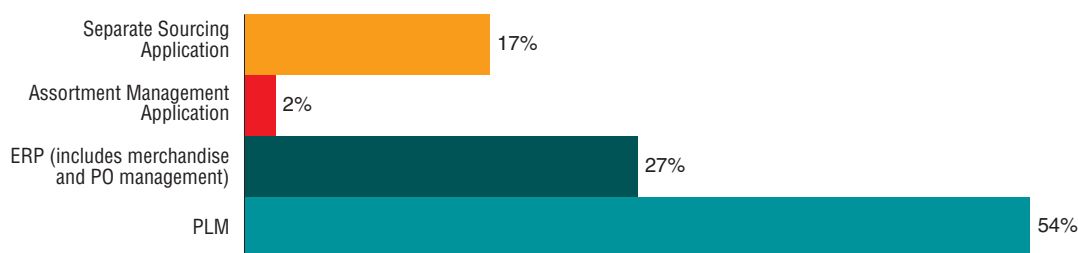
ticated PLM business practices, acting as a process and cost visibility tool. It is also the touch point between PLM and assortment management processes within vertically integrated companies. As retailers continue to expand their private label development businesses and brand companies add retailing arms, robust technology support for line planning processes linked to assortment functions will become increasingly important. Design collaboration and CAD sharing for virtually as well as vertically integrated AFS companies came in third as an area included in initial PLM technology rollouts.

Direct materials sourcing and calendar management are the linchpins for value chain orchestration.

Once companies have done their internal housekeeping to organize their data via PDM and link product development activities to assortment management, supply chain data sharing becomes the next frontier in the push for orchestration processes and data across the extended value network.

Direct materials sourcing and supplier collaboration functionality are in the cross-hairs for PLM initiatives over the next 12 to 18 months, with 44 percent of companies planning to tackle these areas. The multiple seasons and rapid churn of styles in apparel and footwear, as well as the growing consumer interest in "green" products that are produced in a sustainable way, make it an imperative to tightly tie PLM and sourcing. Without connecting PLM to sourcing, apparel manufacturers will not be able to quickly find the materials they need and suppliers they want to do business with during the initial design phase — costing valuable time to market.

As companies orchestrate global and cross-enterprise activities, calendar management and dashboard capabilities also become increasingly important. In fact, 41 percent of AFS companies plan to roll out functionality to synchronize activities and monitor and manage plan exceptions.

AFS companies have high expectations of their PLM vendors to fulfill their functional requirements for direct materials sourcing, supplier collaboration, calendar management and dashboards. More than other manufacturing industries, AFS companies regard product development and sourcing as a single business process that can, and should, be supported with technology from the same software provider, and 46 percent of surveyed companies currently integrate PLM

with sourcing. In 2008, 54 percent of AFS companies will look to their PLM vendor partners first for these functions, while 27 percent expect to get these capabilities from their ERP providers **(see Figure 2)**.

Global calendar management a necessity for universal visibility.

Achieving a unified view of activities, projects, due dates and performance is an enormous challenge for companies with increasingly dispersed groups of employees, contractors, partners and suppliers that make up their NPDL teams. Dashboards offer a means to manage these processes and teams well, and achieve open and collaborative innovation and orchestration through an effective management layer to keep everyone on the same page and driving toward the same performance goals.

However, just 31 percent of PLM initiatives currently encompass dashboard and calendar management technology, but, as stated earlier, 41 percent of companies plan to add capabilities here over the next 12 to 18 months. One reason for the emphasis companies place here is the reality that 60 percent of AFS companies manage between three and 10 product lifecycle calendars simultaneously today. And calendars — many handled manually through spreadsheets today — are frequently unsynchronized and lack mechanisms for exception identification and management.

Global product development drives corporate IT influence; business remains closely involved.

Participants in this year's study indicated that corporate IT has regained leadership momentum of PLM projects, with 37 percent naming this group as leading initiatives versus 25 percent last year **(see Figure 3)**. Product development and design organizations continue to lead approximately 20 percent of projects, although AFS companies stated that better design is not a primary driver behind implementing PLM software.

Notably, companies pulled back on assigning business unit and production managers to lead PLM projects. Why? As the complexity of global product development grows, the matrix of processes, people and technology required to manage PLM initiatives has become correspondingly complex, making it difficult for any single business unit executive to

Figure 3 – Who is in Charge of PLM Effort?

■ 2008　■ 2007　■ 2006

	Corporate IT	Business Unit General Management	Sourcing/ Supply Chain	Product Development/ Design	Merchandising	Production/ Manufacturing	Other
2008	37%	18%	14%	19%	3%	3%	6%
2007	25%	22%	14%	20%	2%	8%	10%
2006	37%	24%	9%	9%	15%	0%	6%

manage the scope. A centralized IT group responsible for IT governance and experienced in the oversight of enterprise projects is viewed as better suited to overseeing implementation of global NPDL technology. They are also the logical group to coordinate business process change with line-of-business managers across functional silos.

Spending plans indicative of a rapidly maturing market.

Companies positioning for growth have clearly identified PLM as a key business platform for long-term success to speed time-to-market while supporting cost visibility and management. Many of these companies are brand companies with small but growing retail divisions, or mid-sized retailers that have embraced private label activities. Among the largest companies, spending on PLM has become essential to creating and maintaining business flexibility and responsiveness — particularly as globalization of brand manufacturing continues, more retailers look abroad for growth opportunities and nimble mid-sized companies make their name in the AFS market.

Investment in PLM technologies continues to grow among AFS companies as early forays are expanded and additional functions such as sourcing, collaboration and calendar management are added to the product development architecture. Across all survey participants, the most common investment level is less than $100,000, but this was largely driven by the reported investment levels to date among companies with $100 million or less in annual revenue **(see Figure 4)**.

The level of technology investment reflects the size of organization. Among companies with $100 million to $1 billion in annual revenue, most have invested $100,000 to $500,000, and fully one-third have invested more than $1 million. Among companies with greater than $1 billion in annual revenues, the number investing greater than $1 million in PLM technology is growing rapidly.

Planned investment is also aggressive, with 61 percent of respondents planning to spend $100,000 or more on top of the capital already invested **(see Figure 5)**. Mid-sized AFS companies with annual revenues of $101 million to $500 million are among the most aggressive, with 33 percent planning to invest more than $1 million more to build out a complete PLM platform.

Small- and medium-sized businesses (SMBs) also plan to increase their spending on PLM technology this year. SMBs, just like large companies, see product development as a critical business initiative — a value chain enabler — to support the future growth and resiliency of their companies.

In fact, in AMR Research's recently published cross-industry PLM spending report, over 60 percent of SMB respondents ($50 million to $250 million in revenues) said that they will increase spending on PLM solutions in 2008 by approximately 12 percent. So it is consistent with the overall market trend to see a planned spend increase among SMB respondents to the *Apparel* magazine survey. That said, logic says smaller companies will tighten their budgets and reduce spending in this uncertain economy. While that may be the case, the

Figure 4 – PLM Investment to Date

■ More than $1 million ■ $501,000 - $1 million ■ $101,000 - $500,000 ■ $10,000 - $100,000 ■ Less than $10,000

	Total	Less than $50 million	$50-$100 million	$101-$500 million	$501-$999 million	$1-$5 billion	Over $5 billion
More than $1 million	25%	5%		4%	33%	32%	76%
$501,000 - $1 million	15%	5%	7%	12%	8%	32%	14%
$101,000 - $500,000	19%	9%	14%	44%	33%	14%	
$10,000 - $100,000	29%	27%	79%	36%	17%	18%	10%
Less than $10,000	12%	55%		4%	8%	4%	

Company Size
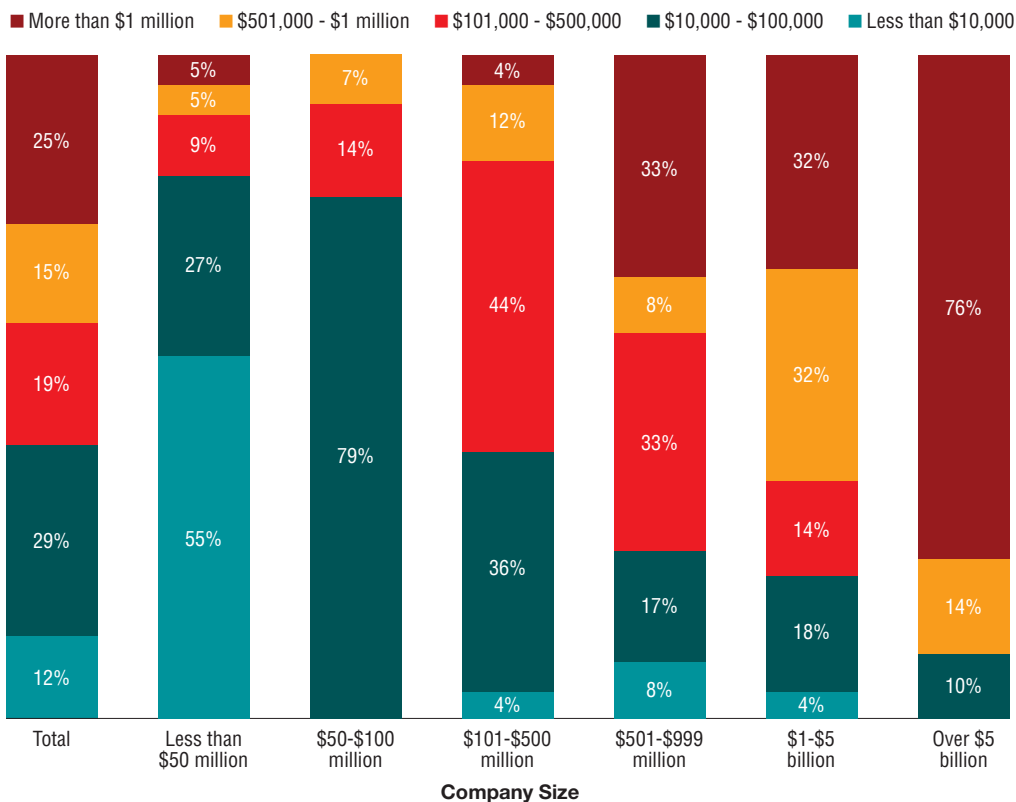
trend to increasing spending and viewing PLM as a strategic investment is irrefutable.

As planned spending on PLM increases, companies have become more realistic about the timeframe to achieve return on investment (ROI) from PLM initiatives. In last year's study, 58 percent of participants expected a full ROI to be achieved in a year or less. That number dropped sharply to 36 percent this year, with many more companies predicting achieving ROI between one and two years after the initial investment **(see Figure 6)**.

Even more indicative of the rapid maturing of the PLM market: Nearly one quarter of companies don't plan for an ROI for two or more years. Building an effective global product development platform has taken its place among other enterprise systems as a long-term business investment designed to strengthen the long-term performance of the company.

Homegrown systems make a comeback.

Commercial off-the-shelf (COTS) packaged PLM applications have arrived for the AFS market, but home-grown systems remain a popular alternative. In our 2006 study, just 50 percent of respondents planned to or were already using COTS software in their PLM projects, and in 2007

this number jumped to 85 percent. This year, 24 percent of companies plan to build custom applications to support their PLM processes, up from 10 percent in 2007. Encompassed in this number are AFS companies that turn to third party services, including offshore firms, to build targeted applications to address their specific needs. As the economy continues to send mixed signals, outsourced solutions, including hosted and software-as-a-service (SaaS) models of deployment, may become more attractive to companies looking to avoid large up-front expenditures required by traditional behind-the-firewall deployments.

For implementation services, nearly half of survey participants used or plan to use in-house resources to conduct their PLM projects, and 31 percent have relied or will rely on software vendor partner resources. This marks a significant shift from last year, when 60 percent of AFS companies used or planned to use software vendor partner resources to manage the implementation and 28 percent used or planned to use in-house resources.

With the shift of project leadership into the overall IT governance and project management structure, companies are more confident in their ability to successfully manage PLM projects. For those companies that have completed one or

Figure 5 – Additional PLM Investments

Legend: ■ More than $1 million ■ $501,000 - $1 million ■ $101,000 - $500,000 ■ $10,000 - $100,000 ■ Less than $10,000

Company Size						
Total	Less than $50 million	$50-$100 million	$101-$500 million	$501-$999 million	$1-$5 billion	Over $5 billion

Total: 20%, 11%, 30%, 34%, 5%
Less than $50 million: 10%, 20%, 40%, 30%
$50-$100 million: 50%, 50%
$101-$500 million: 29%, 71%
$501-$999 million: 33%, 33%, 33%
$1-$5 billion: 19%, 25%, 31%, 25%
Over $5 billion: 67%, 11%, 22%
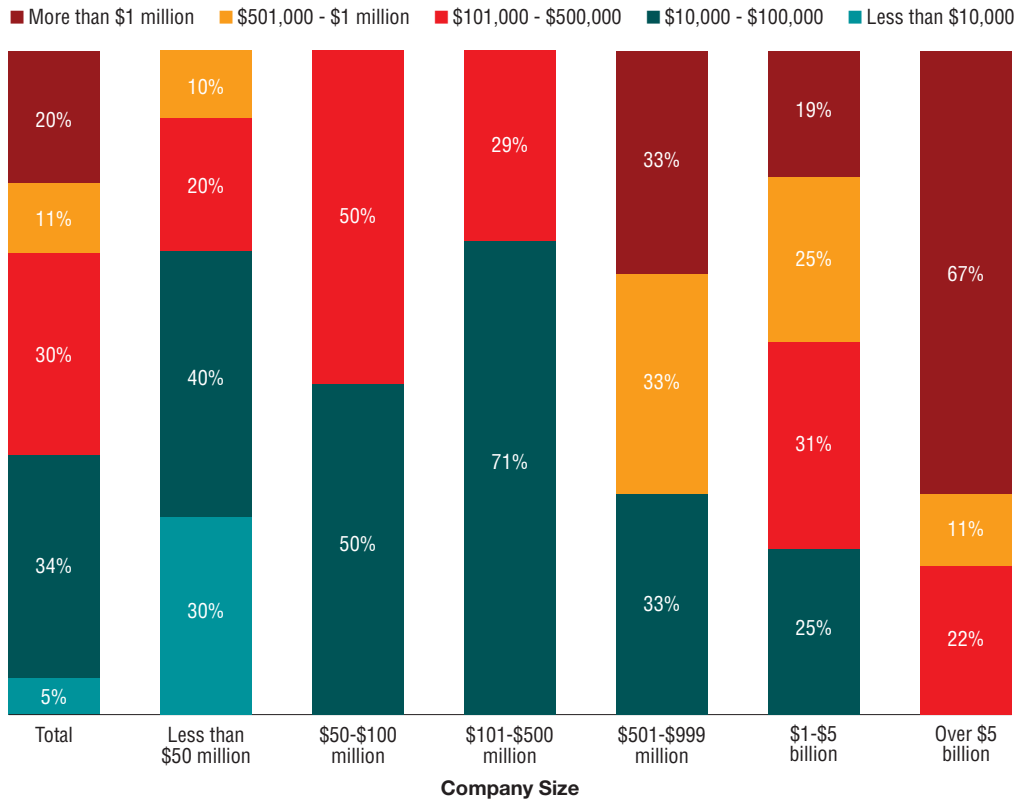
more phases of PLM rollouts, familiarity with the applications being implemented and comfort with the procedures and teams assembled for earlier phases lead companies to take control of ongoing functional rollouts where the software vendor may have led before. And, some AFS companies have not found the combination of functionality and domain expertise required to support their PLM initiatives and have instead chosen to build, deploy and service their PLM solution entirely in-house.

As the economy improves and COTS PLM application providers continue to ramp up apparel functionality along with enriching sourcing, calendar management and dashboard features, apparel manufacturers will increasingly look to software partners for support. But in the short term, homegrown internal and custom outsourced development will remain viable alternatives for AFS companies to consider.

Tight integration with demand signals for demand-driven retailing.

Integration between product and demand is not as tight as it needs to be — and with ever-changing and unpredictable consumer tastes, in no other industry is this integration more important than in the AFS. It is vitally important to incorpo-

rate issue tracking and demand sensing into the front-end of product development. When there is a quality or performance issue with an existing product, that product can be reproduced to a company's liking; and when a product is not selling, either generally or in a specific geography, that product or product line can be either discontinued or tweaked.

Too often, what ends up happening is different groups own the innovation processes, and they don't communicate. Marketing and brand management own idea management; design owns design and data management; and sales and operations own demand management. These silos of information are a deterrent to product innovation. Substantial value currently locked away can be accessed by connecting these silos, so brand management and marketing can sense demand, garner new product ideas and see when a product is ready for market, and design and manufacturing can see the pipeline of new products and ramp up accordingly.

Ultimate demand signal connectivity for AFS companies reaches down to the point of sale. AMR Research defines demand-driven retailing (DDR) as a system of technologies and processes that captures consumer behavior at each point of interaction. It facilitates real-time, profitable response across a network of suppliers and employees to fulfill cus-

Figure 6 – When Expect a Positive ROI?
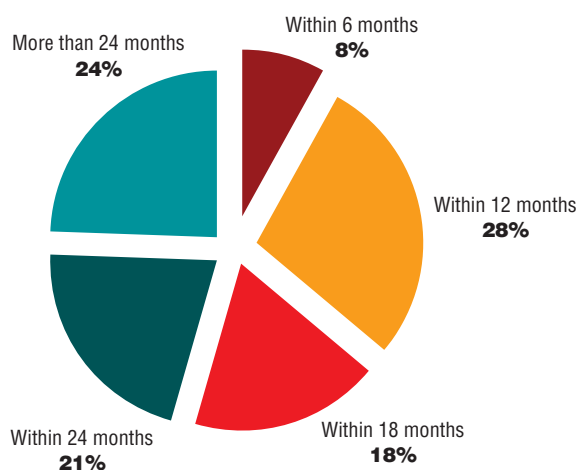
tomer expectations and shape future demand. When brand companies sell product to retailers and retailers move up the supply chain to become wholesalers, DDR and the DDSN (Demand-Driven Supply Network) meet at the point of collaboration with the ultimate demand signal, POS data, being shared up and down the entire value chain.

At the NRF show in New York City earlier this year, many of the apparel company speakers referenced the need to understand customer needs and respond to demand more quickly. One manufacturer spoke of this as "empathizing with the customer," or put another way, getting to know your customer so well that a retailer or brand company can predict what they likely will buy.

Another apparel manufacturer said that retailers are "moments away from commodity hell," and that product design needs to be democratized across sourcing, production, manufacturing and even the end consumer so that the voice of customer is heard. This doesn't mean simply reacting to customer needs, but rather sharing designs and concepts to ultimately get to the point where apparel manufacturers and retailers can anticipate needs and preferences. Integration with the demand signal at the store level would enable brand owners and vertical manufacturers to essentially build a profile of the customer over time that could be leveraged during the design process across the multiple seasons of apparel. Whereas sourcing and calendaring are the current focus, linking to the demand signal in this fashion is the next step.

Recent studies by AMR Research on trends in the PLM market have shown an increased interest in Customer Needs Management (CNM), the most immature of segments of the PLM footprint (the other PLM segments are: PDM, collaborative design, direct materials sourcing and product portfo-

lio management). In the past year, there was 22 percent growth in CNM market size, and a planned increase in spending among business and IT management.

But PLM and its sub-processes such as CNM alone will not enable the strong demand sensing necessary to respond quickly to customer needs and demand. Without integrating other enterprise systems such as CRM, ERP and Supply Chain Management (SCM) into the NPDL process, PLM cannot be a fully effective decision support platform. To get to richer decision support for new ideas, PLM must be integrated with sourcing to determine materials costs and supplier availability to develop the product, with sales and operations planning (S&OP) to align sales forecasts and demand, and with manufacturing to determine capacity and processes required to build the product.

Open innovation is also the reason why there is increased interest in design collaboration and CAD sharing, according to this year's survey. To truly have an open dialog with external NPDL constituents during product development, whether they are employees in a captive development center or partners, suppliers and customers, the ability to share CAD designs is critically important. One interesting finding is that most AFS companies keep their color management process separate and have no current plans to integrate their color management process with their PLM system (**see Figure 7**). We expect this to change over the next 12 to 18 months in that once retailers address other integration priorities (calendars, line planning and sourcing), they will recognize the benefits of integrating color management with the rest of the NPDL process.

The bottom line: PLM continues to grow and mature in apparel.

In a fast-moving market such as AFS, the full power of PLM must be brought forth to respond quickly and efficiently to market trends and customer needs — not simply product data management and collaborative design, but portfolio management (line planning), direct materials sourcing and customer needs management.

Globally located designers, procurement, suppliers and partners must be working off a single version of the truth as easily as if they worked in the same office. To achieve this, product data must be integrated with direct materials sourcing, multiple calendars across the globe must be linked together, and market and customer demand signals need to be tied to the front end of innovation. In short, integrating PLM (design, data management, collaborative product design, customer needs management and line planning) closely with the store (to understand the voice of the customer) and the shop floor (to streamline manufacturing processes) will enable brand and apparel companies to truly be able to respond quickly to demand.

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NGC Receives Highest Possible Rating in Leading Analyst Firm's PLM Report

NGC is pleased to announce that we were rated as "Strong Positive"– the highest possible rating – in Gartner's "MarketScope for PLM in Apparel, Footwear and Accessories, 2008."

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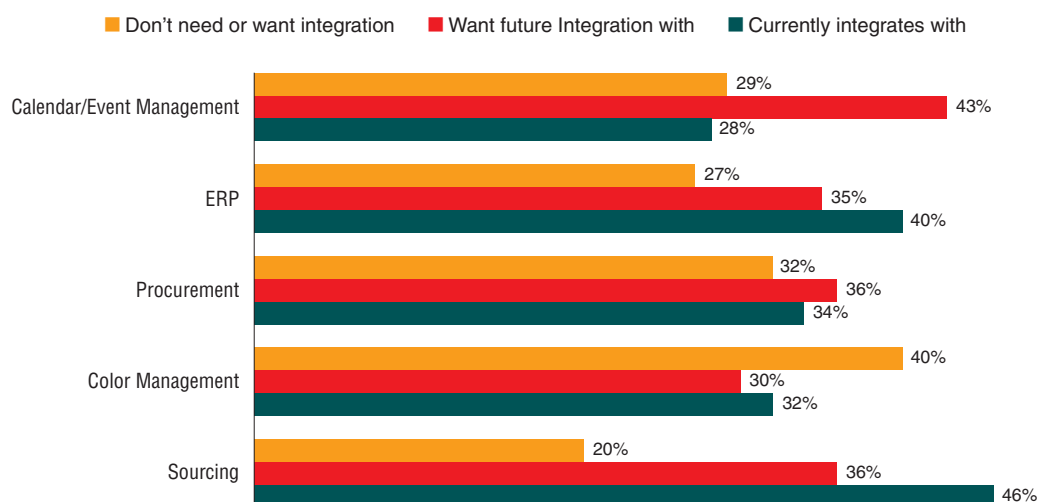**Miami:** 305.556.9122 **New York:** 212.768.0101 **Los Angeles:** 323.497.4200
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Figure 7 – PLM System Integration

■ Don't need or want integration ■ Want future Integration with ■ Currently integrates with

Calendar/Event Management
- 29%
- 43%
- 28%

ERP
- 27%
- 35%
- 40%

Procurement
- 32%
- 36%
- 34%

Color Management
- 40%
- 30%
- 32%

Sourcing
- 20%
- 36%
- 46%

There are two parts to this: technology and people. Technology offerings from PLM vendors are slowly maturing, as evidenced by the increase in home-grown applications from 2007, but looking at the product and business development activity among these vendors that has already taken place in 2008, we believe in the next 12 months this maturation will accelerate. The people aspect will be more of a challenge for PLM vendors to address as many of them do not come from an AFS background. But concerns about this too will alleviate as tighter partnerships with AFS systems integrators increase, and these vendors continue to hire retail experts to augment their offerings.

Last year's survey revealed plans to get business line management more involved, a need to integrate design with sourcing, and interest in technology and services from one vendor. These trends continue, however have been modified slightly:

- IT is now more involved in managing global product development;
- Line planning and calendar integration has joined the list of must-haves; and
- Interest in home-grown solutions has increased.

The bottom line is the need and opportunity for PLM in AFS continues to grow. And brand owners and vertical retailers will continue to strive toward achieving value chain orchestration with or without packaged PLM solutions. The multiple seasons of retail and fickle trends of consumers demands this. ■

ABOUT THE AUTHORS

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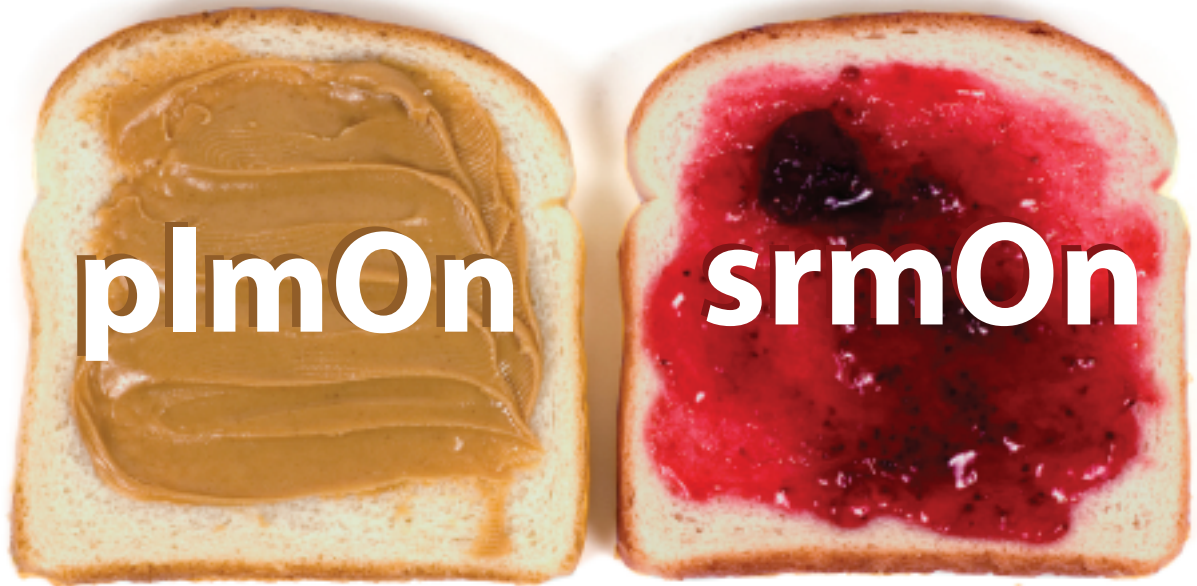
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System Facts

Serving Size - 1 per User
Servings per Container - Unlimited Scalability

	% Daily Value*
User Friendliness	100%
Ease of Implementation	96%
Mac and PC	100%
Support and Service	94%
Industry Knowledge	100%
Web Based	100%
Adobe Illustrator Integration	100%
Agent Vendor Access	100%
Long Term Vision	100%
Written in the USA	100%

* Percentage of Daily Values are based on Apparel Magazine Vendor Scorecard and customer feedback

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