



- Attendance
- Customer Presentation Templates
- Business Drivers
- Metrics
- Perceived Value
- Workgroup Summaries
- Next Steps



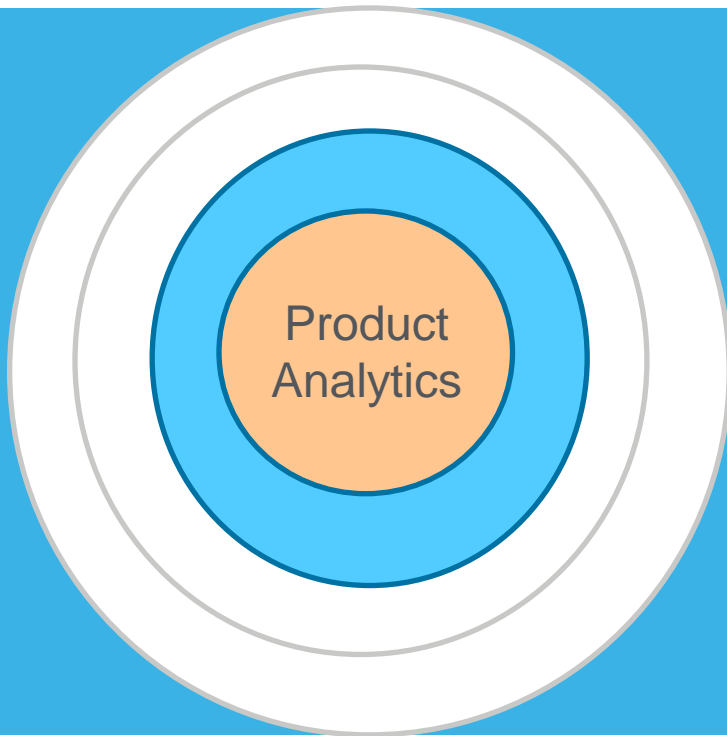
The following companies attended the CAB.



# Customer Presentation Template

# Windchill Product Analytics

## Focus On Customer Business Environment



### Your Company's Business Environment

- Describe your company and role.
- Identify your number of parts, BOMs, and products\*
- What are your key business drivers for the system?
- Who uses WPA in your organization?
- What value do they receive from the tool?

*\*Run the WPA script that has been provided*

# Windchill Product Analytics

## Focus On Data Acquisition



Product  
Analytics

### Your Company's Data Acquisition Strategy

- Describe your company's data acquisition strategy.
- Do you perceive value using third party providers?
- Which providers have proven successful for your company?
- How and where do you store most of your environmental data?

# Windchill Product Analytics

## Focus On Environmental Trends



### Your Company's Engagement in Environmental Trends

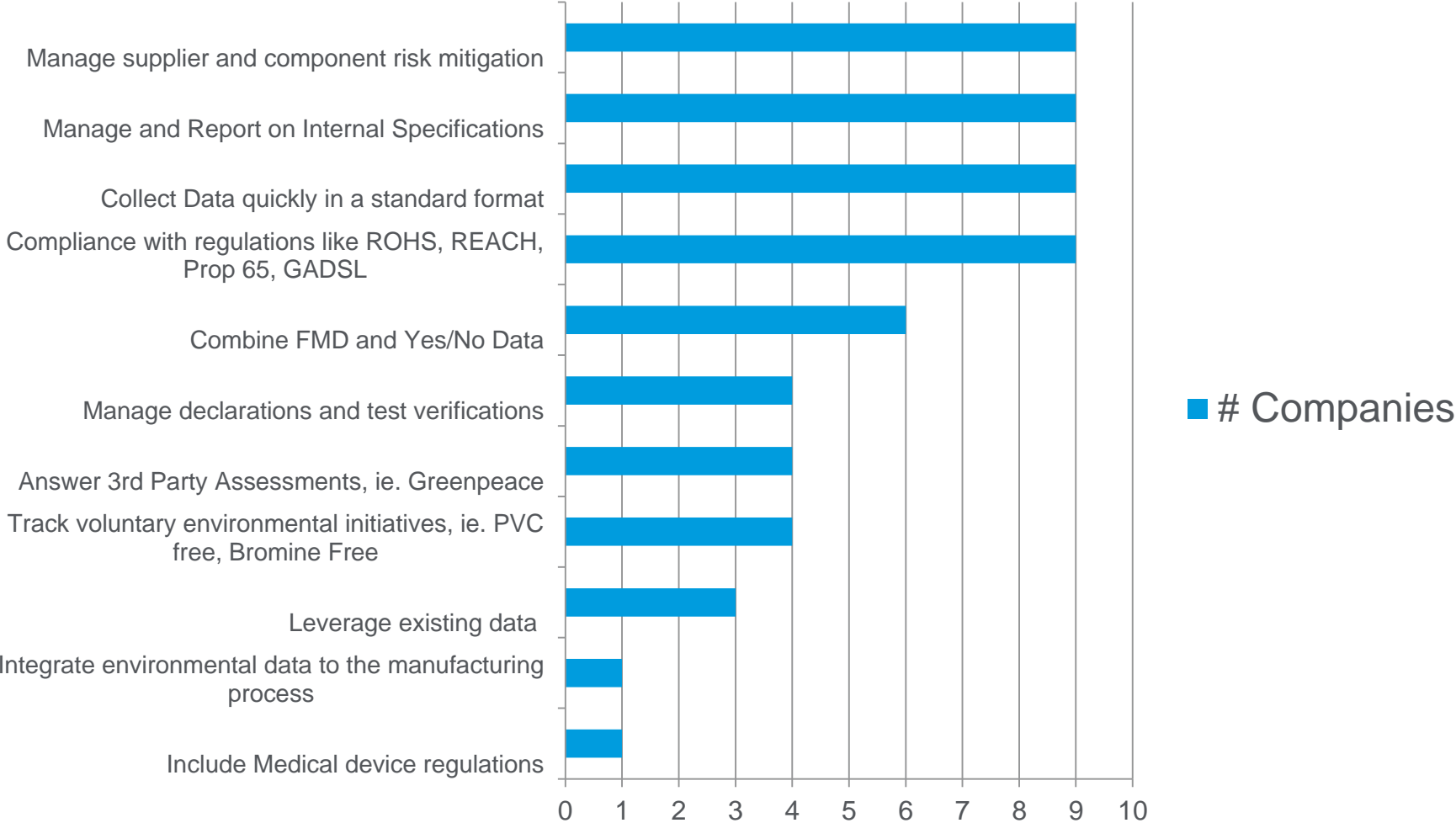
- Describe your most pressing environmental concerns.
- Do you use the data in WPA to solve these concerns?
- What regulations, barriers, or trends are you following?
- What specifications, modules, or “first of a kind” solutions are important to your company?
  - *i.e. Rare Earth Minerals, Trade Compliance, Recycling*

# Summary of What They Said



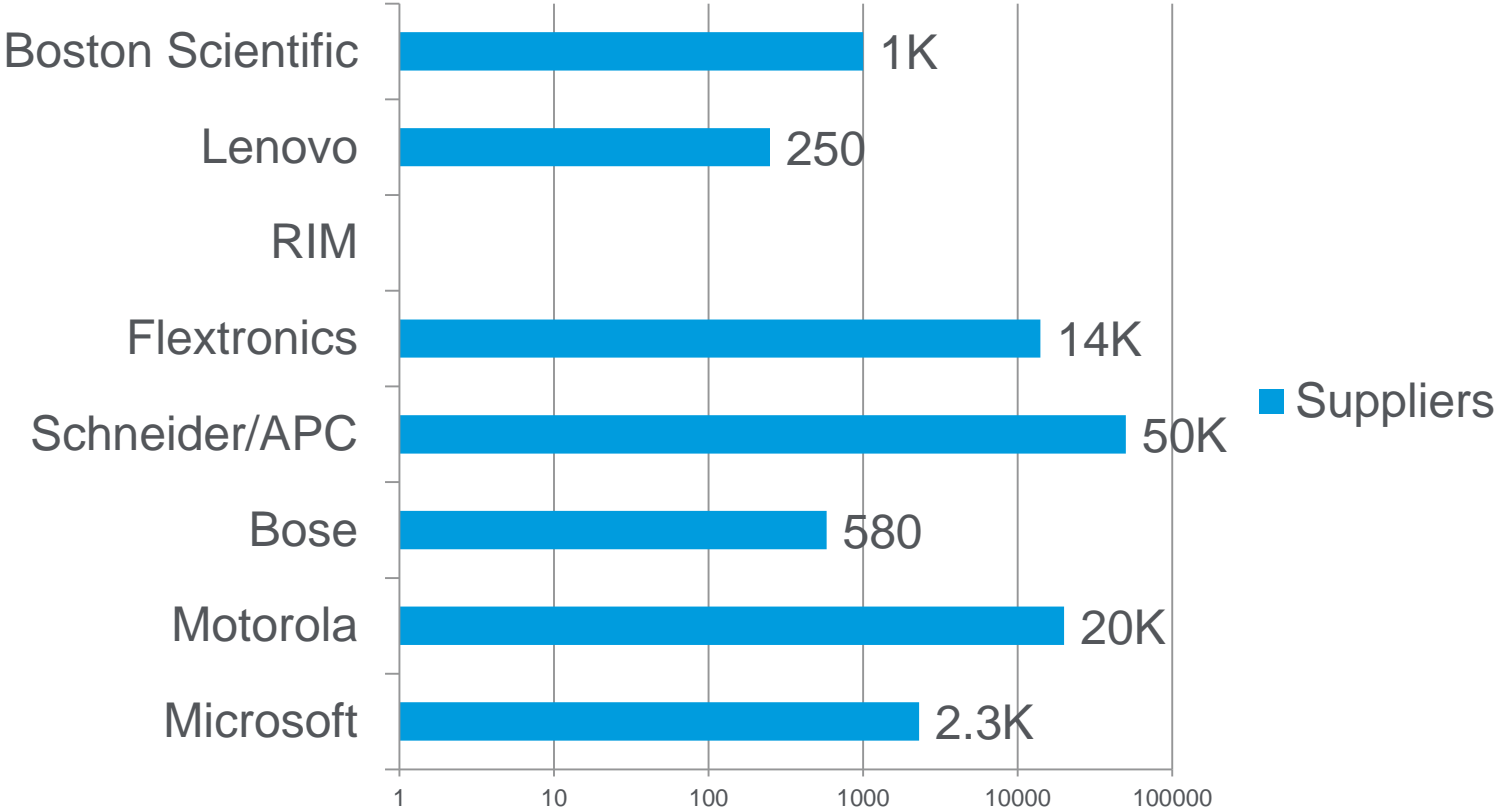
Most customers have these key business drivers in common.

### Responses



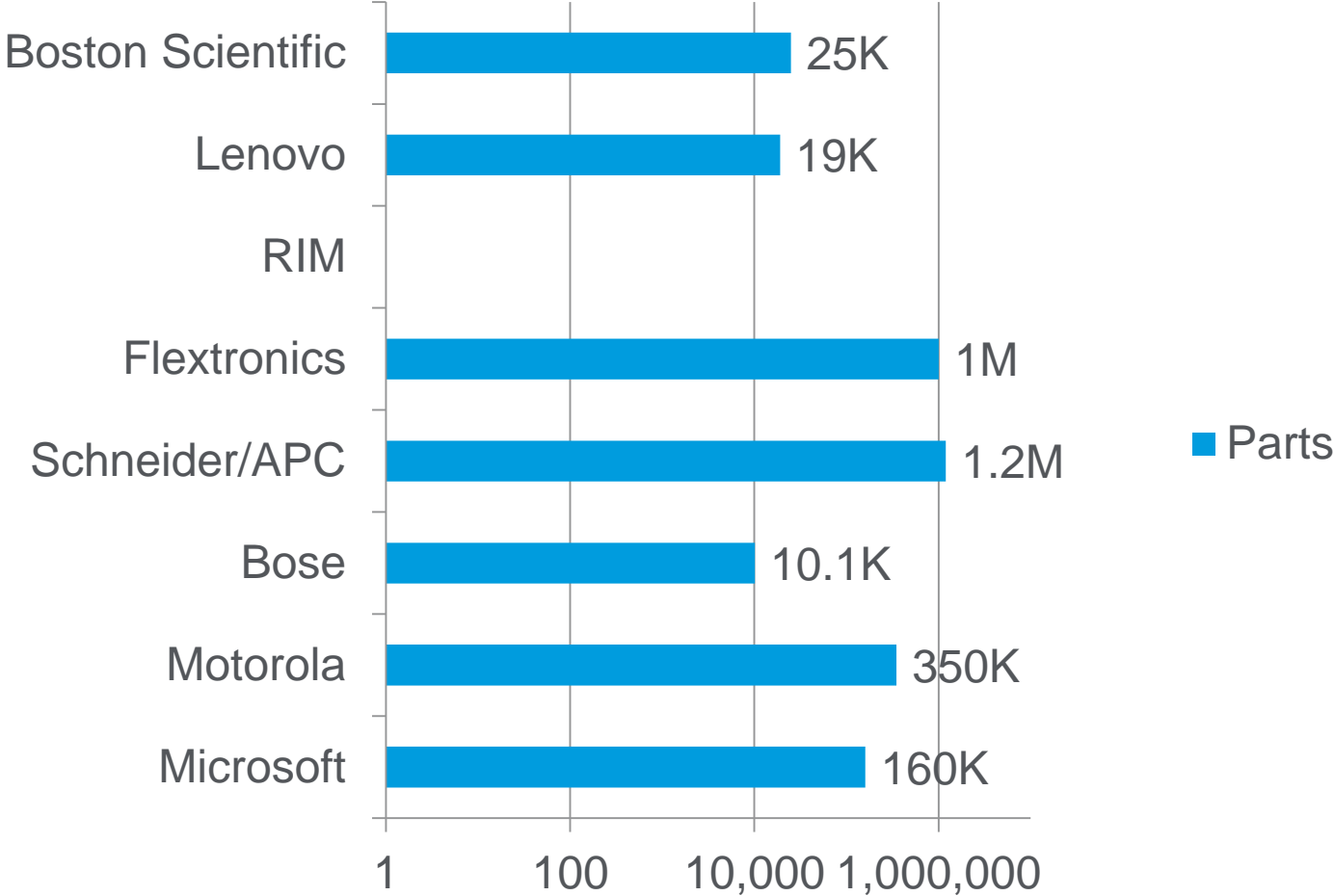
Number of Suppliers Managed By WPA Customers

Number of Suppliers Per Customer



Number of Parts Managed By WPA Customers

Number of Parts Per Customer





- Quicker assessment for BOM compliance for parts
- Ability to investigate impact of new SVHCs
- Increased awareness from upper management for compliance
- Ability to acquire FMD for all parts
- Scalability and flexibility while maintaining small staff
- Product Approvals, Ship Acceptance and Maintaining Compliance
- Management of Internal Specifications
- Consolidated Repository of Substances Material Declarations
- Dynamic compliance reports
- Management / Addition of New CAS Numbers

# Work Group Summary

# Certificate Compliance

## AS IS

- Part of NPI, defined in requirements
- Used for material, safety, EMC, energy validation
- Mainly internal website listings, hard to maintain
- Product risk for all markets unknown
- Need to show evidence by Supplier/Product
- Can't access archived evidence/No history
- Each project team has their own system

## Negative Consequences

- Lack of visibility
- Can't keep up with changes
- Can't evolve the spec
- Can't track evidence gathering process
- Can't prove compliance for shipments in field
- Can't provide evidence easily
- "After the fact" corrective action

## TO BE

- “FRU” level rollups
- Docs in PLM need to link to CC
- Docs in WPA are the output for CC
- Requirement effectivity
- “Look Forward”
- Encompass Safety, EMC, Environmental Compliance, Energy, Trade
- Integrated scope to ERP
- Product Labeling process

## Positive Outcome

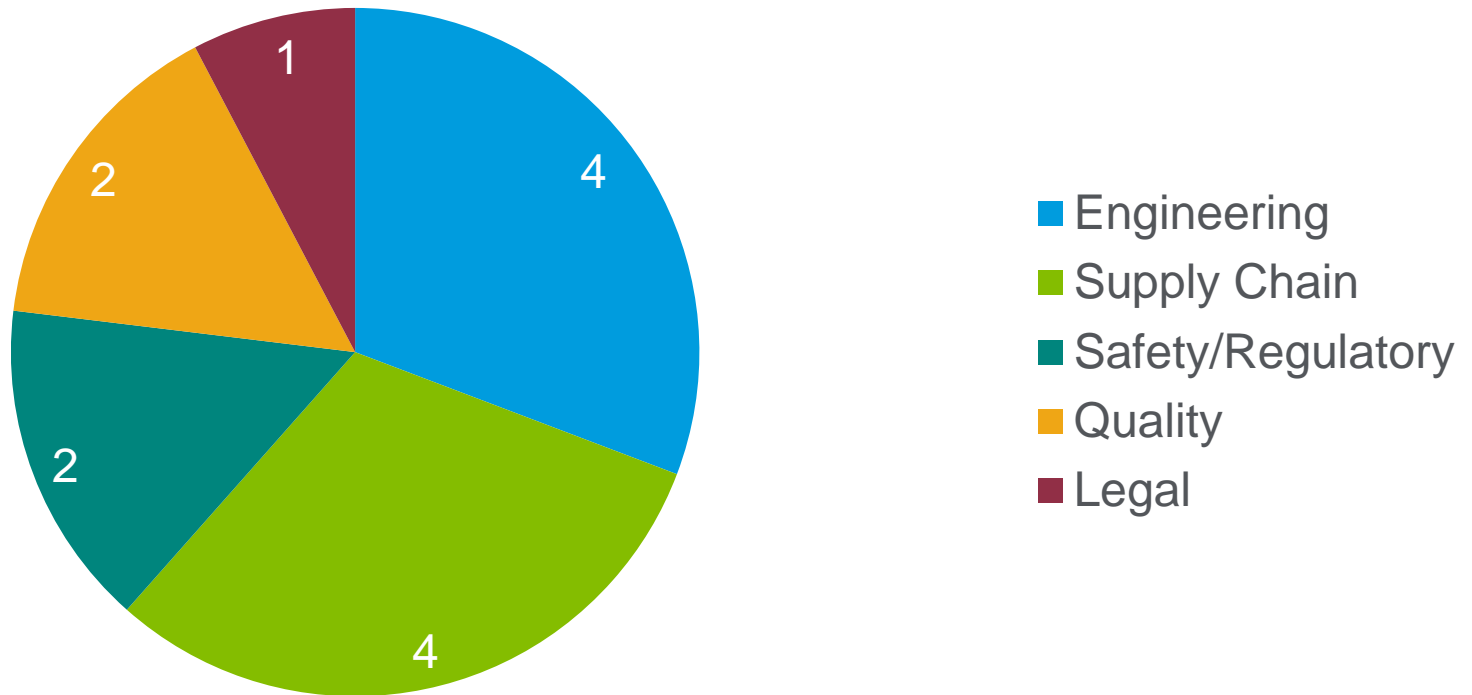
- No more corrective action expense
- Manage scrap and rework better
- Reduce compliance resources needed
- Answers to questions like, “Can this non-compliant product be used somewhere else?”
- No more delayed product, meet deadlines faster without scrambling
- Improved standardization, communication is consistent
- Early visibility to requirements



# Value Cards

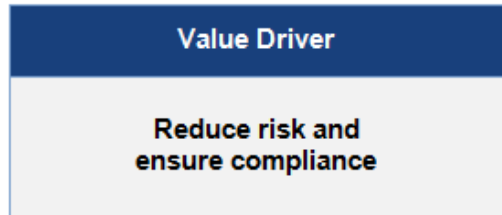
“In what organization does compliance reside in your company?”

## Customer Responses



*\*Multiple customers from a single company responded*

Enables and educates the PTC sales force about customer needs and value



Value Driver: Compliance, Traceability, and Material Profiling	
<b>Before</b>	<ul style="list-style-type: none"> <li>No prior US legislation based on social challenges/No Precedent</li> <li>No legal reporting requirements regarding supply chain visibility</li> <li>Limited manual process for data collection, compliance, and risk assessment</li> <li>Material data for Product Design contained in disparate systems across the enterprise</li> <li>Lack of ability to view numerous material uses across parts and products</li> <li>Most Tier 1 companies based decisions on cost and availability not material origins</li> <li>Checking compliance was a process completed at Release To Manufacturing</li> </ul>
<b>Negative Consequences</b>	<ul style="list-style-type: none"> <li>Impact to Brand</li> <li>Delisting from US Stock Exchange</li> <li>Future sourcing issues and labeling use of "Conflict Free"</li> <li>Inability to determine virgin versus scrap/recycled materials</li> <li>Heavy, manual process to assess supplier compliance</li> <li>Increased risk of supply chain disruptions and parts shortages</li> <li>Failed audits</li> <li>Inability to report Form SD with 10K Filings in 2014</li> <li>Black mark on Corporate Social Responsibility Reporting</li> </ul>
<b>After</b>	<ul style="list-style-type: none"> <li>Systematic enterprise process to manage regulatory obligations</li> <li>Achieve and report compliance with Dodd-Frank 1502</li> <li>Early, real-time and continuous enterprise visibility into supplier compliance metrics</li> <li>Enterprise visibility into single and sole sourcing, and supply availability drivers</li> <li>Automated and systematic process to collect compliance data (materials &amp; substance, audit &amp; certification evidence, etc.) from supply chain</li> </ul>
<b>Positive Business Outcomes</b>	<ul style="list-style-type: none"> <li>Lower the resource costs to ensure compliance and mitigate risk</li> <li>Reduce frequency of failed audits</li> <li>Fewer supply chain and operational disruptions</li> <li>Improve transparency throughout the supply chain</li> <li>Protect revenue and brand reputation with customers and new markets</li> <li>Promote with Corporate Social Responsibility Reporting</li> </ul>
<b>Required Capabilities</b>	<ul style="list-style-type: none"> <li>Product Regulatory Compliance</li> <li>Corporate Social Responsibility Reporting</li> <li>Environmental Performance Management</li> <li>Change and Configuration Management</li> <li>Component and Supplier Qualification</li> </ul>
<b>Metrics</b>	<ul style="list-style-type: none"> <li># of Suppliers with No, Partial or FMD</li> <li># of Product, Parts, BOMs/Assemblies with/without CFM</li> <li># of parts, products, BOMs containing scrap/recycled metals</li> <li># of Conflict Free Suppliers</li> <li># of Suppliers using the Conflict Free Smelter Program</li> <li># of Conflict "Indeterminate" Suppliers</li> <li># of Approved Suppliers</li> </ul>

## AS IS

- Difficulty demonstrating compliance
- Inability to produce multiple formats for customers
- Increasing complexity
- Legacy systems, difficult to support
- No link to PLM systems
- Multiple disconnected systems
- Unable to scale with proliferation of regulations
- Increase in customer requirements/requests

## Negative Consequences

- Inaccurate invalid data
- Compliance not related to product data
- No traceability
- Potential delayed shipments
- Lost customer sales/difficult to meet
- Inefficient and expensive process
- Bad reputation with customers
- High cost of ownership for compliance process

## TO BE

- Reduce risk of supply chain disruption
- Ease of use
- Share data throughout the enterprise with PLM
- Low cost of ownership
- Positive Brand Image
- Single source of material/compliance truth
- Adapt to rapidly changing requirements and regulations

## Positive Outcome

- Better quality of reports, less defects
- New business opportunities
- Positive communications/brand management
- Reduced risk of business impact
- Less Delays, Fines/penalties, contract loss, defects
- Metrics
  - # of parts sent/response, % disclosure, % FMD, Productivity per man hour

# Supplier Dashboard

## Workgroup Summary Notes

# Supplier Dashboard

## Status Management

- Pending, Overdue
- On Hold, Cancelled
- Delete requests
- Escalation Closed
- Change ownership
- Data Collected/Missing
- Access Controls

## Reporting

- Breakdown by commodity, part type, flex field
- Compliance at the supplier level
- Sourcing Decisions
- Executive Reporting
- Disclosure Summaries
- Supplier Audit Score
- Visibility to Engineers

## Metrics

- Total Open Requests
- Total New Requests
- Request by Type
- # of IPC Forms processed
- #of supporting documents
- Response time by Suppliers, States

# Materials Management



## Workgroup Summary Notes

### Portal

- Built In Library
- Create Materials
- Resolve Supplier Certification Issues

### Recycled Content

- Include classifications and categories

### Minimal Disclosure

- Wildcards for plastics, resins
- Need Data from Formulators
- Chemical Reaction Tracking

### Risk Analysis

- Commodity Tracking
- Compliance
- Cost

### Tools

- Include packaging materials in 1752Builder as well as standard materials
- Provide Mom and Pop Data Entry

# Packaging

## Workgroup Summary Notes

### EU Directive

- Start with EU Packaging
- Manage thresholds
- Manage Tariffs/Fees
- Transport and Point of Sale

### BOMs

- BOM Collections capability
- Standardize packaging BOM
- Enable SKU management and configuration

### Standards

- IPC1758
- Reduce manual processes

### Materials

- Use 10.1 M20 “Create a Material” functionality
- Disclose “What’s in it?”
- WEIGHT module for packaging weights

### Ease of Use

- APIs to ERP
- Easy to use UI
- Import a CSV file
- Flex fields for Product Package Ratio and PVC Free

## Follow Up From The November CAB

- Invite customers to join PlanetPTC Community
- Continue workgroup discussion to refine future capability packages
- Present sprint demos to customers
- Share feedback and documentation from CAB
- Plan the next CAB for early May/early June 2013!

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