

Project Kickoff: Classification Program

2018



Introduction



Our Mission

Help our customers extract more value out of their enterprise systems with improved **part data**.

15 Years Experience

- Providing services to
- Aerospace/Defense
 - Electronics
 - Automotive/Industrial
 - Consumer/White Goods
 - Oil/ Gas

Cleanse & Normalize Data

Data from disparate sources (Purchased parts, MRO, design parts, etc.)

Prepare

Data for migrations: ERP, PLM, MDM, PIM

Support

Parts re-use initiatives, mitigate parts proliferation

Provide

Analytics supporting cost reductions – duplicates, near duplicates

Kickoff Meeting Agenda

Examples provide for each area below

- Project Management including Roles & Responsibilities
- Project Team Structure
- Project Goals
- Project Scope
- Project schedule
- Training
- Next steps after kickoff
- Additional Resources

Core Team & Customer Responsibilities

CDS Classification Core Team - Responsibilities

CDS Project Mgmt

- CDS Core Team Resources
- Data & Image Harvesting process and delivery
- Manage the CDS Outsourced Data Services Team
- DFR Classification software Training
- Project Communication
- Project Financials Management
- Data Services Risk/Issues
- Data Services Change and Acceptance

Customer/Business Responsibilities

Project Manager

- Overall customer Project and Goals
- Project Team & Resources
- Project team meetings
- Acceptance & Approval of Delivered Data
- Use of DFR Classification software for approvals, structure updates/changes, issue reporting, and on going use
- Identification of Training plan
- Identification of Customizations

Project Team Members

CDS Core Team

- Executive Sponsor
- Project Manager
- Director of Engineering
- Account Manager
- CDS Support Team
- India Data Services Team

Business

- Executive Sponsor
- **Project Owner & Product Mgr SME**
- Project Manager
- SME Parts Standardization Team
 - Digital Side Systems Expert – Customer Experience – Data Expert
 - System Expert for Part Creation in PLM today
 - POC for SMEs on Engineering side. SME Attribute approvals
 - Supplier Procurement SME
- Technical / IT resource
 - Technical systems – Extract/Delivery of data to destination systems
 - Business Analyst
 - ERP Expert feeds POS
 - PLM Resource as needed (part creation source)

Project Goals

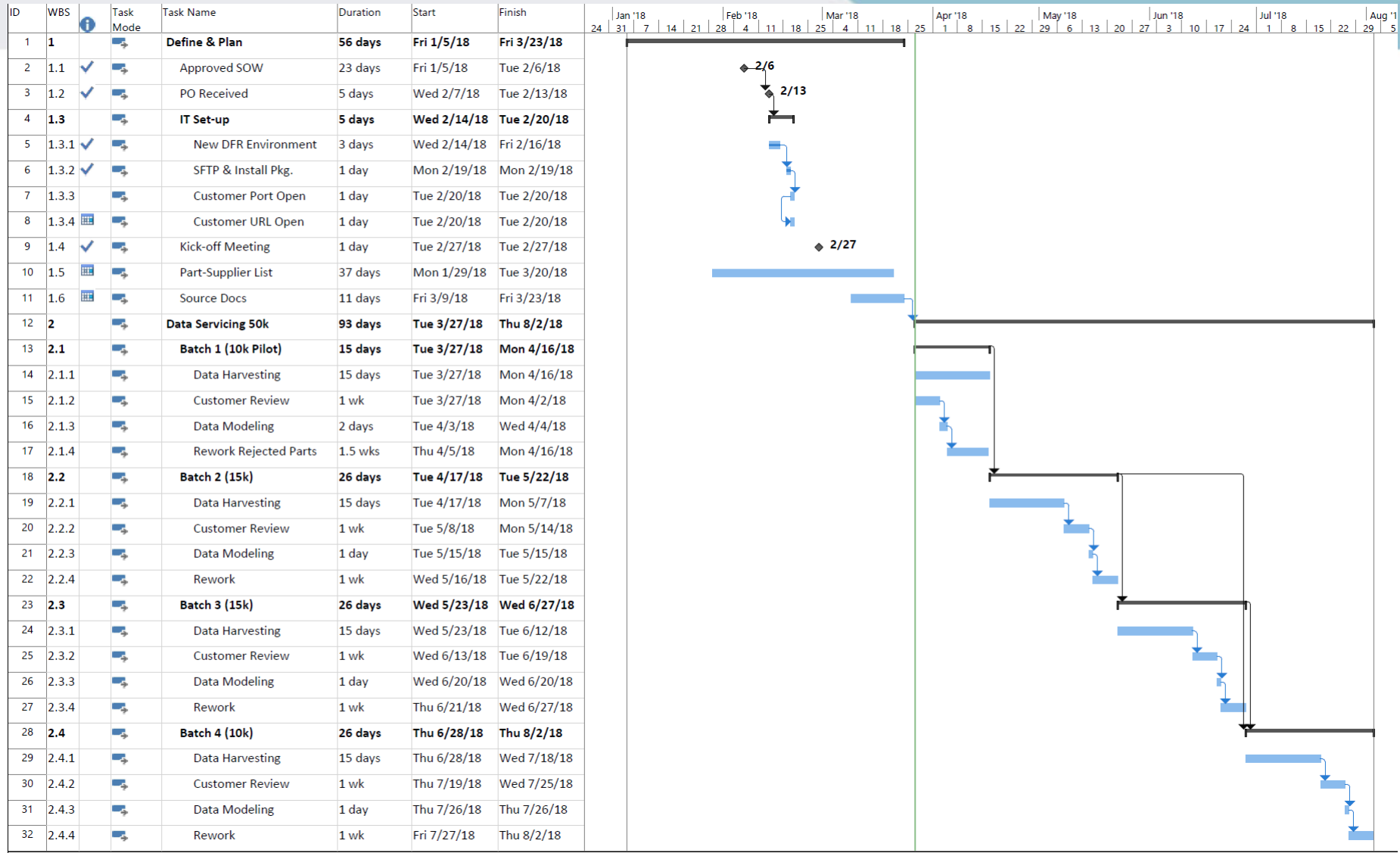
1. Increase adoption by creating a better user experience and enable upsell of service parts with more attribute data.
2. Cost Efficiencies through the use of Duplicate and Near Duplicate reports in DFR once the data is cleansed and normalized.

Project Scope – 50k part project

Scope

1. **Length:** 6 month engagement
2. **Data Services:** Bulk Data Cleansing up to 50,000 parts
 - Part Attribute & Image Harvesting: Web Sourced
 - Approvals: DFR online Part Attribute approvals
 - Delivery: approximately 10,000 – 15,000 per month after system setup
3. **Project Management:** 6 month 25 hours a month
4. **Classification & Attributes**
 1. Business will provide classification structure
 2. CDS will make recommendations
 3. Business will be final approver & Structure & Attributes
5. **Train:** key employees in DFR software (SME)
6. **Part Approval:** Setup workflow / approvals by SME to review harvested information and classification model.
7. **Data Exports** – export part data in excel format; API is available if needed

Project Plan for 50k parts



DFR Classification Training Plan

DFR 7.3 Training



DFR Software Training

Preparation

Before any training can begin we will want to review some house keeping items:

- Roles & Responsibility Setup
- Who will need access to which modules
- Read/write access
- Client Installation
- Train the Trainer
- Location of Training

Post Training

After training it is recommended that users start utilizing their new skills and try it out on their Development instance.

- Development Database – sandbox for playing
- Training videos available for review.
- Support@ConvergenceData.com

DFR Software Training

Classification Admin Training

This training will be for power users who will be creating, editing and validating data. We will focus on the modules below. (~ 2 hours)

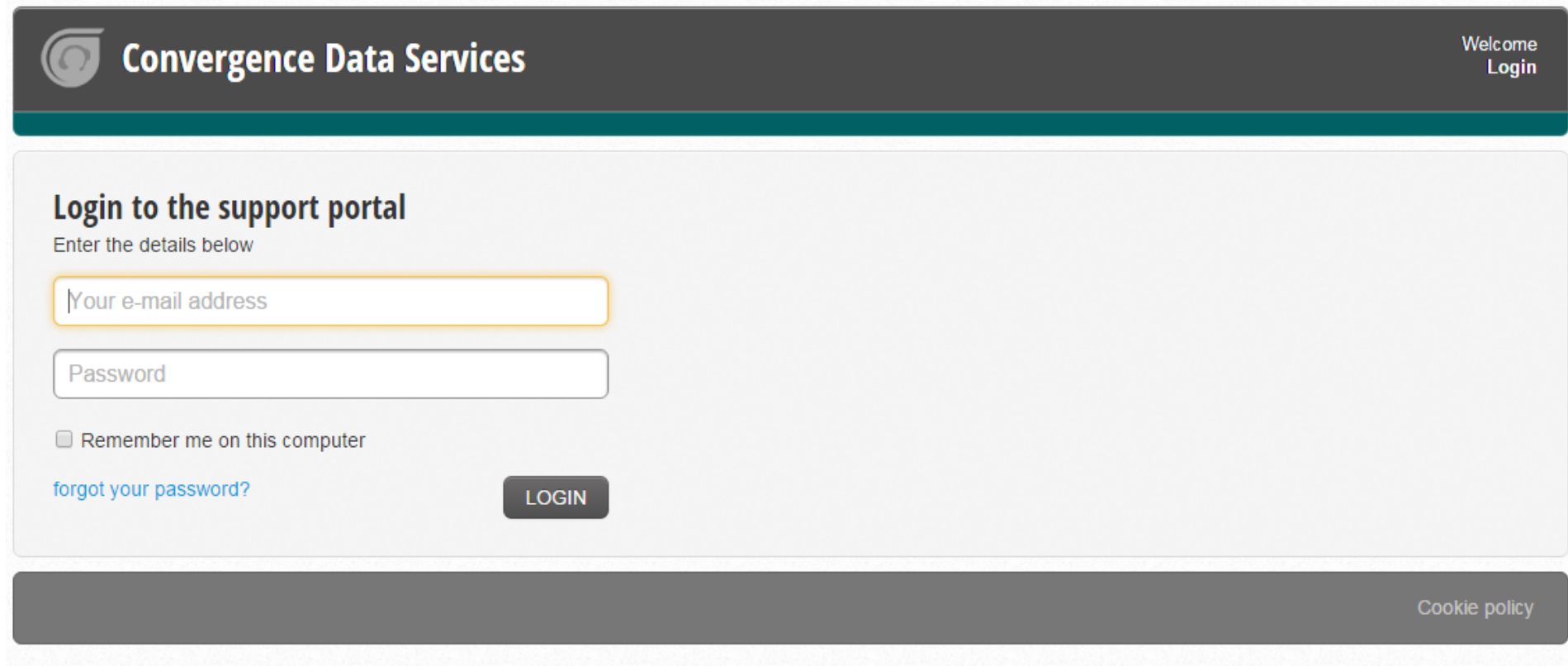
- Classification Manager
- Attribute Manager
- Data Developer
- Export Manager
- Import Manager

General User Training

This training will be for those who will make read/write changes but also those who will train other users in searching and reporting capabilities (approx. 1 hour)

- SmartReports
- Smart Analytics
- SmartClass
- SmartFind
- SmartCreate
- SmartTrack

CDS Support Portal



The screenshot shows the login page for the Convergence Data Services support portal. At the top, there is a dark header with the company logo and name on the left, and a 'Welcome Login' message on the right. The main content area is a light gray box with the heading 'Login to the support portal' and the instruction 'Enter the details below'. It contains two input fields: 'Your e-mail address' and 'Password'. Below the password field is a checkbox for 'Remember me on this computer' and a blue link for 'forgot your password?'. A dark 'LOGIN' button is positioned to the right of the password field. At the bottom of the page, there is a dark footer with a 'Cookie policy' link.

<https://convergedataservices.freshdesk.com/support/login>

OR

Email: support@convergedata.com

Next Steps after Kickoff

Next

- Obtain Parts List
- Review & Approve Classification tree
- Setup a regularly scheduled project meetings
 - (weekly, what days/times are best).
- Setup permissions
- Training Schedule

Additional Resources

- **CDS Blogs**
 - Insightful Industry posts - <http://blog.convergedata.com/>
- **Classification Community Group**
 - 30 mins meetings including Q/A – signup – <http://classificationcommunitygroup.com/>
- **PLM / ERP Conferences**
 - Siemens PLM Connection
 - June 2018 – Phoenix, Az
 - PTC Live Works
 - June 2018 – Boston Ma.



A screenshot of the Convergence Data website. The top navigation bar includes 'Company', 'Products', 'Services', 'Blog', 'Your Value', and 'Contact'. The main content area features a blog post titled '3 Ways to Attack The #1 Cost Driver' by Richard Turner, dated Feb 9, 2017. The post includes social media sharing buttons (Twitter, LinkedIn, Facebook, Email, Print) and a 'NEW PARTS' image. The text discusses cost reduction strategies in manufacturing. To the right of the post is a 'SUBSCRIBE TO EMAIL UPDATES' form with fields for 'First Name' and 'Email', and a 'Subscribe' button. Below the form is a 'POST BY TOPIC' section with a list of categories and their respective post counts. At the bottom of the page, there is a 'convergence data' logo and a 'Classification Community Group' logo.