



Leveraging Trace One Devex PLM

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90+

**YEAR OLD
AGRICULTURAL
CO-OP**

**(AKA We Specialize in All
Things Cranberry)**

**Founded 1930 by three
independent cranberry
growers who shared a
passion for cranberries.**

**Ocean Spray is now one of the most
successful cooperatives today. With
roughly 700 family farmers across
North and South America delivering
cranberry goodness to just about
every corner of the globe**

**They believed that by
joining forces, they could
create a strong cooperative
that would one day allow
them to share their love of
cranberries with the world.**

LEADERS IN ALL THINGS CRANBERRY

#1 World's leading producer of
cranberry products

1,000+ products that include our
cranberries

Licensed Products

Ocean Spray® Products



We offer cranberry ingredients for any application



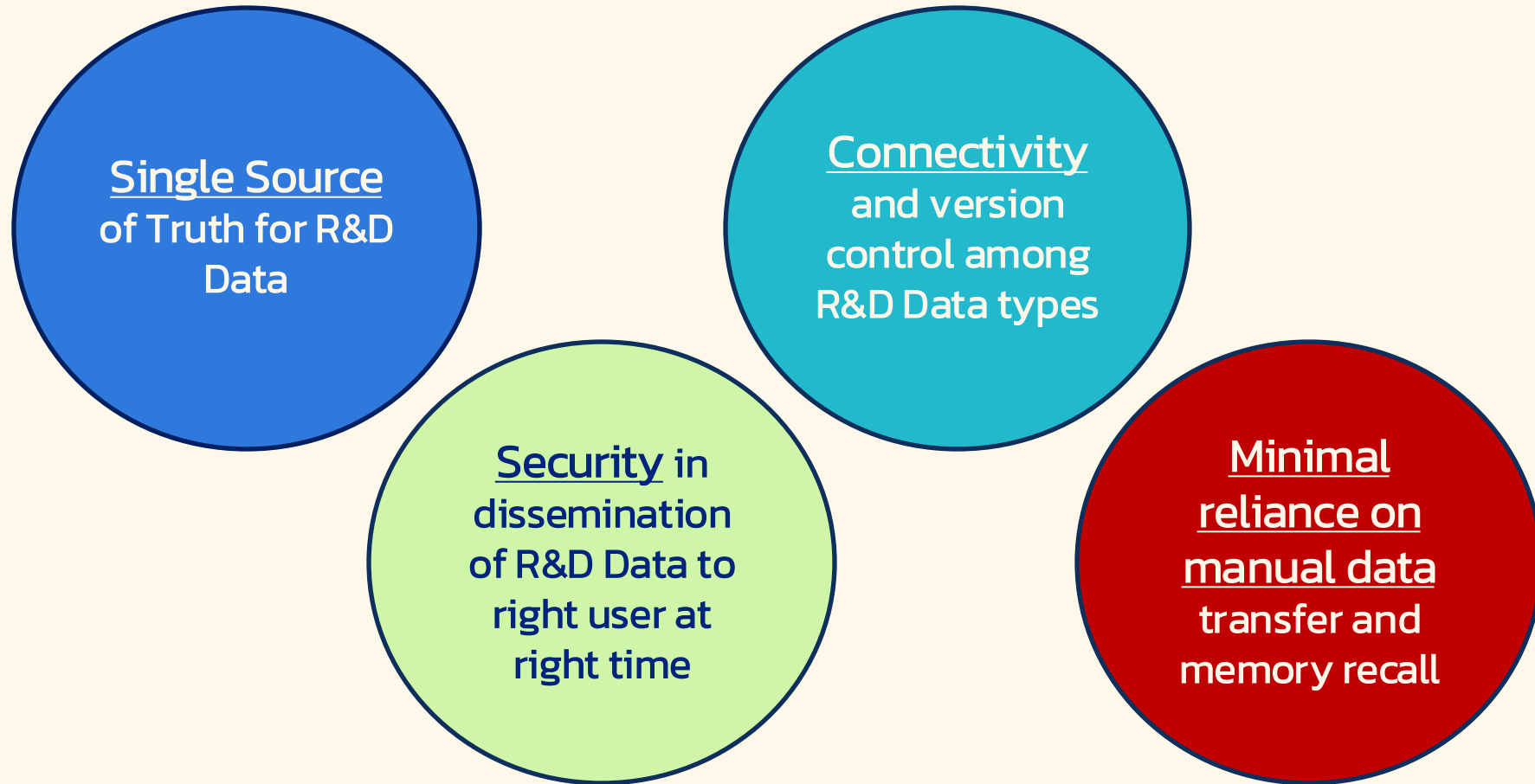
Ingredients
Applications

PLM Journey



Leveraging the power of PLM

A Modern Tool to Help Our Company Be Ready For The Future



PLM Approach

Key Steps

- Business Need > Project Objective
- Setting a Vision
- Defining Scope, Approach & IT Architecture
- Understand Data/Business Processes/Staff
- Document Best Practices & Lessons Learned

Business Need > Project Objective

Assessment

- Map current state of R&D Data
 - Numerous stand-alone and dated tools
 - Pain-points across organization
 - Understand how R&D data is shared
- Identify productivity & cost improvements along with risk mitigation opportunities with a move to a PLM solution.
- Identify potential Partners and CPG best practices

R&D Data Sources and Methods – Current State

Foundational		Optimize with Integration			
Specification Management	Recipe Management	Regulatory Compliance	Supplier Management	Production Compliance	Portfolio Project Mgmt-
Ingredient Specifications	Formula Development	Claims	FDA Documentation	Change Management	Project Management
Packaging Component Specifications	Food Bill Of Material	Regional Laws	Supplier Ingredient Specification	Integrate for Quality Checks	Communication
Warehouse Specification	Formula Specifications	Label Requirements	Packaging Food Contact	Integration for Ingredient Inventory Management	R&D Resource Utilization
Process Specifications		Regulatory Finished Product Documentation	Compliance Performance Management	BOM component traceability to specifications	
Product Technical Record			Global Co-Packer Portal to manage formulas, specs and suppliers		

Source Legend:

- MS Doc on Shared Site
- ERP/MDM
- Stand Alone Formula System
- ERP Integration
- Various Internal Sources & Sites
- Stand Alone Supplier Mgmt
- Stand Alone Labeling Tool
- LIMs
- Global Regulatory Database
- PPM

Manual transfer

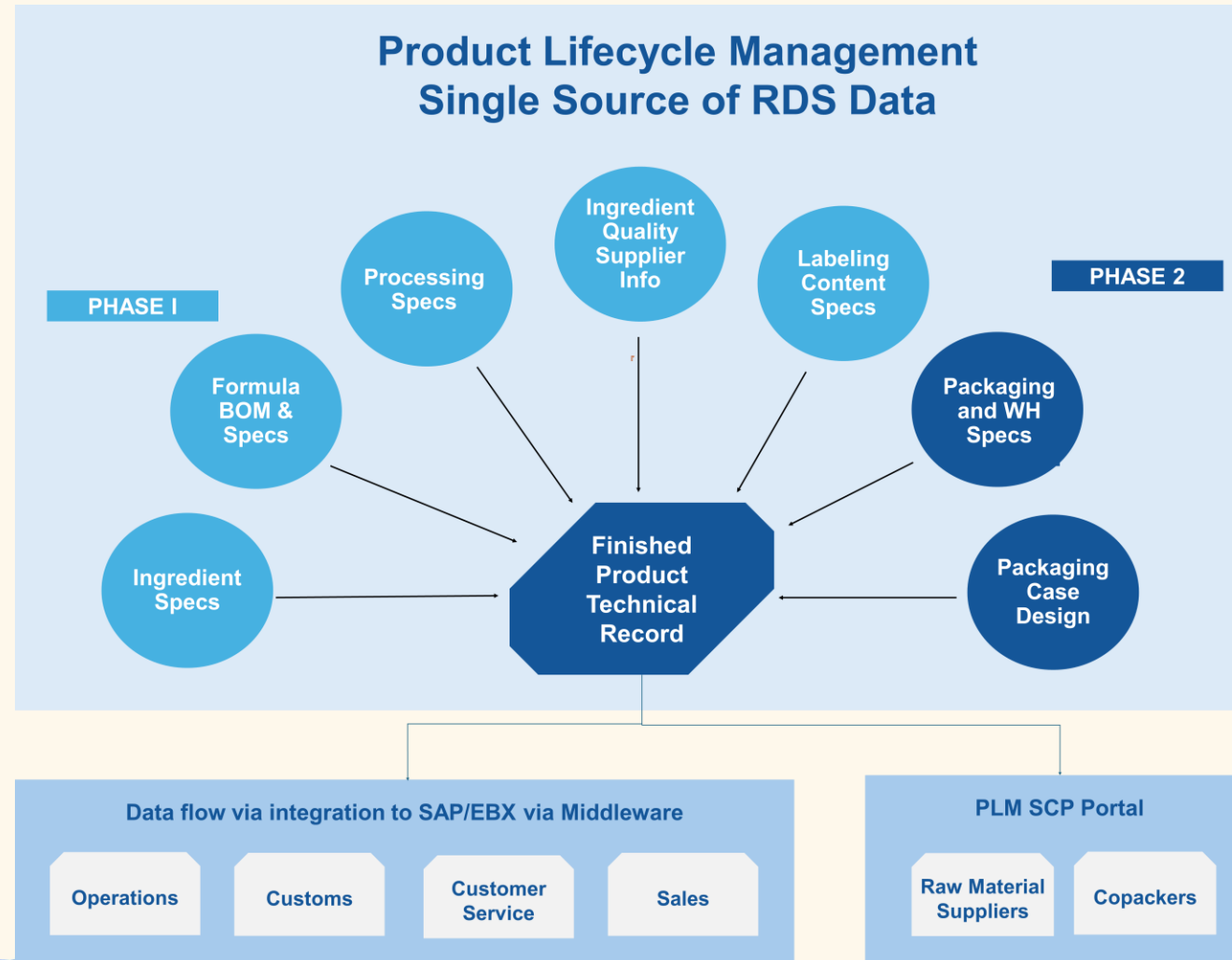
System Connection

Result = Project Objective:

A PLM solution for R&D data with connectivity to Enterprise-Wide Systems that would provide a secure and streamlined foundational solution to R&D data management and distribution.

PLM Vision

One Home, Connected Data Within and Integrated Downstream



Scope

Approach & IT Architecture

Identify what information you want to include in the PLM project & RACI is for:

- Identify integration needs – into and out of PLM
- Big Bang or Phased Approach? On-Prem vs SaaS?
- Define your output needs
- Send out RFPs
- Select your PLM partner

PLM

Cloud Based Software Aligned with Business Needs



FORMULATION
SUITE

Product Development
and Recipe
Management



REGULATORY

Regulatory Compliance
& Labeling



PRODUCT
DATA
MANAGEMENT

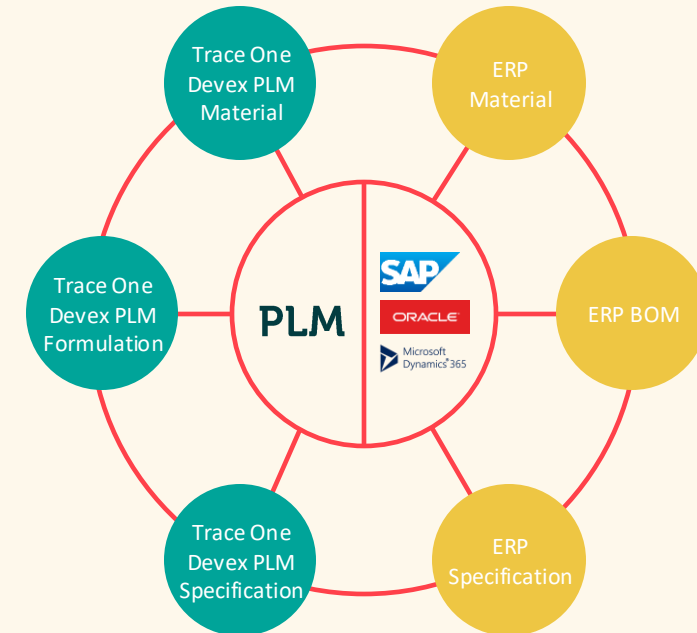
Ingredient,
Packaging, and
Finished Product
Management



SUPPLIER
COLLABORATION
PORTAL

Supplier Relationship
and Quality
Management

PLM to ERP/MDM Integration



Where to start?

Data/Business Processes/Staff

- Understand your data sources and RACI
- Start data cleansing early and target to finish prior to any data migration.
- Understand current business processes.
 - Formal and the informal ones. Consider **all** your business partners.
 - Question the process when you hear the phrase: “*This is how it’s always been done.*”
 - Keep “*Best Practice*” top of mind as you assess where you want your future to be.
- Define your data output needs: reports and electronic data.
- Staffing your project
 - Business & IT leads, Project Manager, Workstream leads, Subject Matter experts
 - Status: Full time project, “Borrowed”, External temp/Consultant.
 - Duration/Time Commitment.
 - Key is to have excited & knowledgeable team members.

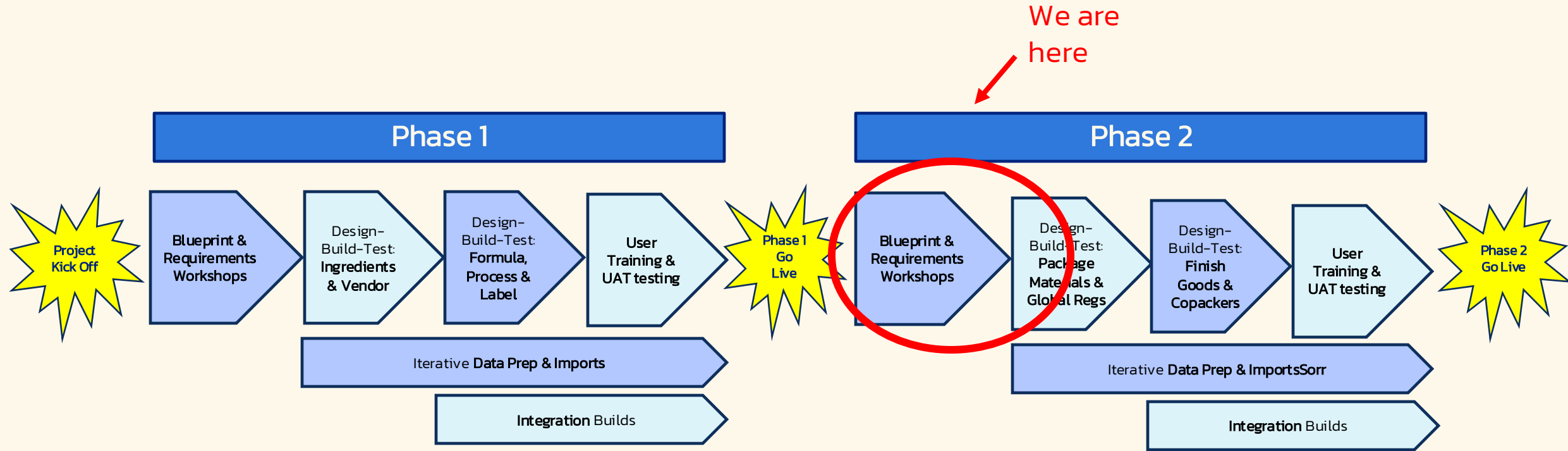
Tips

Best Practices and Lessons Learned

- Look to staff with excited and knowledgeable team members
- Engage heavy data contributors/creators throughout design & testing
- Engage downstream partners who will be receiving your data
- Do not be afraid to question
- Document a lot and often
- Remember decisions you make early on will be used to continue the build, as there is a lot of interconnectivity within Devex PLM
- Create strong testing protocols as you will continue to use them
- Create a training plan, realizing your SMEs will be trained as trainers
- Create communication plans for all users & teams impacted
- Plan for the sunseting of the legacy systems when the time is right

Progress

Where We Are On Our Journey



Testimonials

What We Are Hearing

We thank you for setting up a PLM, it make communications much easier!
-Vendor

Having all our data in one location make my job so much easier!
-OSC Product Development Employee (1)

No more having to retype data into multiple tools!
-OSC Regulatory Employee (1)

This new system feels more complicated and makes my job 'slower', but I understand that in the long term, the discipline and data governance will be worth it.
-OSC Product Development Employee (2)

Really like the strong links between vendors, labeling documents, ingredients and formulas.
-OSC Regulatory Employee (2)

Summary

- Solid PLM Design and Install – Phase 1
 - Kept close to stakeholders
 - Kept asking questions and relied on vendor's expertise, as well as internal knowledge and intuition
 - Relied on SME expertise of business needs
 - Met timeline and budget targets
- Lessons Learned
 - Think through your business needs as completely as possible
 - Document a lot and often
 - Keep asking questions and consider other points of view
 - Expect the “unintended consequences” and lean into trying to anticipate

Thank you.

Questions?

