## Index

*Note:* Entries printed in *boldface* type and followed by a lower-case *f* or *t* refer to figures or tables.

acquire process, 30, 31f

administration: and PDM systems, 186; and program office, 86; and support functions, 73; *see also* business management

- American Production and Inventory Control Society (APICS), 301, 306, 310
- balance of power, and resistance to change, 219, 220f

behavior, of IPT members, 234–7; *see also* organizational culture and management

benchmark testing, 40

- benefit streams, and program/project management, 83
- bill of material (BOM): and PDM systems, 183, 302, 303–4, 305–6, 309; and project charter, *197f*
- body of knowledge: definition of, 3; and holistic approach, 4, 9; and integrated product development, 4–6; organizational change and political management, 7; and process management, 7; and PDM, 7–8; and project/product management, 6–7; and systems engineering, 8; *see also* knowledge
- brainstorming, and concurrent engineering, 246–7

brokers, and resistance to change, 219-20

- budgets: and initiative program, 200; IPTs and responsibility for, 130–1; and program/project management, 82; *see also* costs and cost management business case, and program/project
- management, 82

business initiatives, and program/project management, 83–5

business management: and support functions, 73; *see also* administration; management systems and tools business process reengineering (BPR) initiatives, 200, 201f

- case study, of IPT implementation: and communication, 244–5; and decision making, 242–3; and leadership, 238–40; roles and responsibilities of members, 243–4; and setup, 241–2; skills and training of, 245–8
- change and change control: definition of, 167; and hierarchical force, 225*f*; and IPTs, 230–4; organizational culture and resistance to, 208–23; and program execution, 143; and program/project management, 83; risk management and technological, 124–5; *see also* engineering change
- Change Masters, The (Kanter, 1985), 7
- check-in and check-out functions, of PDM systems, 180, *181f*
- chief engineering officer (CEO), and IPT, 224
- classification, of data by PDM systems, 183–4
- collaborative engineering, and PDM systems, 177
- colocation: and IPD process, 6; and IPTs, 229; and program initiation, 137–8
- commodities, possession of and resistance to change, 218–19
- communication: and high-quality product definition, 11; and holistic approach, 19–20; and IPTs, 72, 244–5; and PDM systems, 184; and program initiation, 138, 194; and program/project management, 82, 84
- Competitive Strategy (Porter), 21

concurrency matrix, 75

## 320 Index

concurrent engineering (CE): and business strategy, 21; and implementation, 238; and integrated product development, 5; and new methods, 246-7; and organizational culture, 229; and PDM systems, 177, 187; and program structuring, 101; and team-based approach to engineering organization, 223; and training of IPTs, 131; see also holistic approach configuration management (CM), 304-5 conflict, and IPTs, 235 consensus decision making, 132, 234, 242 - 3consultants: and initiative program, 196-7; and organizational change, 213–15 contracts: contract-unique requirements and integrated master plan, 45, 47; and performance measures, 82; and program initiation, 136-7; and program/project management, 86 control: and IPD approach, 12; and program/project management, 78, 82 core members, of IPTs, 134 core process: and customer deliverables, 32-3; and holistic approach, 22f, costs and cost management: and design, 126, 127f, 136; and PDM systems, 188; and product/process development in serial approach, 15, 16f; and program initiation, 126, 130-1, 136; and program/project management, 83, 86; and workplans, 109; see also budgets; estimating critical design review (CDR), 168-9 customer: focus on as critical factor in holistic approach, 18; and program execution, 144; and program/project management, 80-1; and progress reporting, 142; and project manager, 64-5, 66; and risk management, 124; roles and responsibilities of, 51, 56-7; and training of IPTs, 131 customer deliverables: and engineering change, 171, 172-3f; and engineering process management, 30-3, 34f, 35; and phase objectives, 258-65t; and phases in definition process, 266-71t; and program structuring, 101, 102-5; and quality assurance, 156, 159; roles and responsibilities of customer, 56; and understanding of individual work products, 94-5 customer tailoring, and integrated master plan, 45, 47

- data transport and translation, and PDM systems, 185
- data vaults, and PDM systems, 179-81
- decision making: and IPD philosophy, 13; and IPTs, 132, 234, 235, 242–3
- Define process: and acquire process, 30, 31f; and maturity gates, 33; phases of, 24, 25, 26f; and process maturity, 38; program structuring and planning, 98 deliverables: *see* customer deliverables
- deployment plan, and initiative program, 200, **201***f*
- design: and critical factors in holistic approach, 18; and design tip, 90–3; and PDM systems, 182, 187; *see also* design freezes
- design-to-cost model, 126, 127f, 136
- design freezes, and engineering change, 168–9
- design for manufacturing and assembly (DFMA) manual, 44–5
- detail definition phase, 168, 169
- documentation: and quality product definition, 11; and repositories, 133; *see also* log; product data management
- drafting manuals, 93-4
- dysfunctional social systems, and resistance to change, 221
- e-business, and integrated enterprise framework, 20–1; *see also* internet economic system, and resistance to change,
- 215–17, 218, **219f**, 221
- education, and initiative program, 199; see also training
- effectivity dates, and PDM/ERP integration, 308–9
- emotional resistance, to change, 220-1
- empowerment, of IPTs, 16-17, 19
- end users, of PDM systems, 186
- engineering: *see* concurrent engineering; engineering change; engineering process management; reengineering; systems engineering
- engineering change: definition of, 167; and design freezes, 168–9; and PDM systems, 188, 304; process of, 167–8; and program management, 169–76; *see also* change and change control; engineering change request (ECR)
- engineering change request (ECR): and customer deliverables, *172f*; evaluation of, 175–6; and program management, 169–71
- engineering manuals: and drafting manuals, 93–4; and specific tasks, 88; task guidelines and design tips, 90–3

More information

Index 321

engineering module, in enterprise resource planning, 304-6 engineering policy and procedure (EPP), and numbering systems, 48 engineering process framework, 24-7 engineering process management: and customer deliverables, 30-3; and engineering process framework, 24-7; milestones and maturity gates, 33-7; and process maturity, 37-41; and work breakdown structure, 27-30; see also process management engineering tasks: see tasks enterprise resource planning (ERP), and product data management, 301-10; see also resources environment: of IPTs, 20; and program initiation, 133, 138 estimating: and IPD approach, 12; and program planning, 113-15; see also costs and cost management evaluation: see quality and quality assurance evaluators, and program review, 155-8 event-driven scheduling, 18 execute business process, 22f, 23 five-level maturation concept, 38, 39f functional director: and program review board, 165; roles and responsibilities of, 62–3, **64**f functional manager, roles and responsibilities of, 66-7 groupthink, and IPTs, 225 Guide to Integrated Product and Process Development (U.S. Dept. of Defense), 5 Guide to the Project Management Body of Knowledge (Project Management Institute), 6 high-quality product, 11 holistic approach: and bodies of knowledge, 4, 9; and integrated enterprise framework, 20-3; and integrated product development, 10-20; motivation for, 9-10; and quality assurance, 153; and training of IPTs, 131-2 image viewing utilities, and PDM systems, 185 - 6implementation: of change in organizational

culture, 211–12; and IPT leadership, 238–40; of PDM systems, 188; roles and responsibilities of program participants, 54–5t; see also initiative program; program initiation improvement indicators, 151, 152, 153 inefficiencies, and process maturity, 41 infrastructure: and PDM systems, 186–8;

- and program/project management, 82, 86 initiative program: and budgeting, 200; and consultants, 196–7; and deployment plan, 200, **201f**; divisional and corporate structures, 205–6; and elements for effective management, 193–5; potential pitfalls of, 206–7; presentation of plan for, 205; and process of organizing, 191–2; and program charter, 196, **197f**; and program planning, 197–8; roles and responsibilities of team members, 201–2, 204–5; and steering committee, 192–3; and team member assignment, 195–6; *see also* implementation; program initiation
- integrated enterprise framework, and holistic approach, 20–3
- integrated master plan (IMP): and engineering tasks, 45–7; and life cycle planning, 18; and numbering systems, 43–4; *see also* planning
- integrated master schedule (IMS): and engineering tasks, 47–8; and event-driven scheduling, 18; and numbering systems, 44; and program initiation, 135–6; *see also* scheduling
- integrated product development (IPD): and bodies of knowledge, 4–6; and holistic approach, 10–23; and maturity self-evaluation tools, 251–7; phase objectives and customer deliverables, **258–65t**; and program initiation, 128–9, 131; *see also* product and process development
- integrated product teams (IPTs): and autonomous team, 227-8; and colocation, 229; and communication, 244-5; and decision making, 132, 234, 235, 242-3; differences in orientation of, 224; and empowerment, 16-17; and full-time, full-duration team, 228; and functional management, 63; goals of, 227; and inequalities among members, 224-5; and integrated product development approach, 5-6, 13; leaders of and change management skills, 230-4; leadership of and implementation, 238-40; members of and performance of specific tasks, 87–97; and members as specialists, 230; obstacles to effectiveness of, 224; and organizational politics, 226-7; and PDM systems, 182; and program initiation, 126, 128–31, 133–9; and program review board, 165; and project manager, 64, 65; and quality advisor, 166; and risk

## 322 Index

integrated product teams (IPTs) (cont.) management, 125; roles and responsibilities of leaders, 68-71; roles and responsibilities of members, 71-2, 73f, 87, 243-4; setup of, 241-2; size of, 229; skills of, 245-8; and synergy, 17; and team behavior, 234-7; and team myth, 225; and team rewards, 230; and trade studies, 127; and training, 75, 131-3, 245-8; and work-related teams, 16, 17f integration team (IT): and communication, 245; and program initiation, 134-5 International Council on Systems Engineering (INCOSE), 8 International PDM Users Group, 307, 308 internet, and IPT operations, 138; see also e-business interpersonal skills, of IPT members, 246 IPD: see integrated product development IPTs: see integrated product teams issues log, 142-3 joint ownership approach, and customer, 56 key deliverable, 31, 32 kick-off meeting, and program initiation, 129knowledge, and concept of value, 31; see also body of knowledge labor unions, and initiative programs, 207 leaders and leadership: and initiative programs, 194; and IPTs, 20, 68-71, 230–4, 238–40; and program directors, 81; and program/project management, 84-5 liaisons, and IPT communication, 245 life cycle, of product: and critical factors in holistic approach, 18, 19; and IPTs, 6; and phases, 25; and quality evaluations, 160, 161f living arrangements, and program environment, 133 log, and engineering change management, 174-5; see also documentation; issues log management systems and tools: and holistic approach, 19; and program coordinator, 68; and program/project management, 80-1, 84; see also business management manuals: see engineering manuals Marketing Requirements and Objectives (MR&O), 100 markup, of images in PDM systems, 185 - 6

materials requirement planning (MRP), and PDM systems, 301, 309 maturity gates: and engineering process management, 33-7; and program initiation, 128 maturity indicators, 251-2 maturity self-evaluation tools, and integrated product development, 251-7 meetings: and communication of IPTs, 138; and program execution, 143-4 mid-level plans, 108 milestones: and engineering process management, 33-7; and example of process, 272–3t; and program/project management, 82, 86 multidisciplinary teamwork, and holistic approach, 19 multivoting, and decision making, 243 notification utilities, and PDM systems, 184 numbering systems, and single-number tracking system, 43 organization culture and organizational management: adaptability of and success of program/project management, 81-2; and bodies of knowledge, 7; and concurrent engineering, 229; and initiative programs, 205-6; and resistance to change, 208-23; and team-based approach, 223-30; and work breakdown structure, 130f; see also politics, organizational partners: internet and collaboration by, 138; and program/project management, 80–1; and project manager, 65, 66; roles and responsibilities of, 57-9; see also customer; sponsors PDM: see product data management performance efficiency improvement (PI), 239 performance measures: and contracts, 82; and program execution, 141; and quality assurance, 150, 151, 152 personnel: see roles and responsibilities; staffing phase/maturity alignment matrix, 35, 36f, 37f

Maslow's hierarchy of needs, 217, 218f

phases: and customer deliverables, 258–71t; of Define process, 24, 25, 26f; objectives of, 258–65t; and work breakdown structure, 27

planning: checklist for, 283–4; and customer, 56; and general program plan, 198–200; and holistic approach, 11; and initiative program, 197–8; and integrated

master plan, 105-18; objectives of, 198; and planning window, 107-8; principal activities of, 98-100, 109, 110f; program execution and replanning, 143; and program/project management, 77, 82; and risk assessment, 66; scope and environment of program, 100; selecting and tailoring of subphases and deliverables, 102-5; and task descriptions, 274-81t; see also enterprise resource planning; integrated master plan politics, organizational: and bodies of knowledge, 7; and focus on future, 211-12; and IPTs, 226-7; management of, 209-11; and reasons for resistance to change, 215-23; tactics of, 212-15 preliminary definition phase, of engineering change, 168 preliminary design review (PDR), 168-9 process defects, 148 process definition, 11 process framework: and integrated enterprise framework, 21, 22f, 23; and IPT members, 88-9; and planning, 118f process management: and bodies of knowledge, 7; and PDM systems, 181-2; see also engineering process management process maturity, and engineering process management, 37-41 process team managers, and initiative program, 204 product data management (PDM): administration of, 186; benefits of, 186-8; and bodies of knowledge, 7-8; and classification or retrieval of data, 183-4; and communication or notification services, 184; and data transport or translation, 185; data vault and document management, 179-81; and enterprise resource planning, 301-10; functions of, 176-9; and image viewing, 185-6; and product structure/ configuration management, 182-3; and program/project management, 184; and project repository, 97; users of, 186; workflow and process management, 181 - 2product definition, and program initiation, 127 - 8product and process development: concurrency of as critical factor in holistic approach, 18; and PDM systems, 182; and serial approach, 14–15; see also

integrated product development product structure/configuration management, and PDM systems, 182–3

program advisor, and quality assurance, 158

- program charter, and initiative program, 196, *197f*
- program coordinator, roles and responsibilities of, 67–8
- program director: and effective leadership, 81; and performance efficiency improvement, 239; and program review board, 165; and progress reporting, 142; roles and responsibilities of, 59–62
- program execution: and monitoring, 140–1; and performance measurement, 141; and program/project management, 77–8; and progress reporting, 141–3; and quality assurance, 154
- program initiation: definition of, 126; and establishment of goals, 126–7; and IPTs, 128–39; and product definition, 127–8; and program environment, 133; and program/project management, 77; *see also* implementation; initiative program
- program manager, and initiative program, 194; *see also* project manager
- program offices, 79–80, 86
- program plan variances, 148
- program/project management: and bodies of knowledge, 6–7; and business initiative, 83–5; and colocation of IPTs, 229; critical success factors for, 80–2; definition of, 76; and engineering change, 169–76; framework for, 85; and holistic approach, 11–12; and PDM systems, 184; and planning, 117–18; processes and elements of 76–9, 82–3; and program office, 79–80, 86
- program review board (PRB): and program review progress, 163–6; and quality evaluators, 157–8
- program reviews: and planning, 116; process of, 153–66; and program/process management, 78; and quality assurance factors, 145–53; *see also* quality and quality assurance
- program size, and risk assessment/ management, 122, 123
- program start-up, and roles or responsibilities of participants, 53t
- program structuring: benefits of, 100; checklist for, 282–3; definition of, 98; process of, 101–2; and progress reporting, 141–2; and quality assurance, 153–4; and risk assessment and management, 105, 122, 124, **292–300t**; selecting and tailoring of subphases and deliverables, 102–5
- progress meetings, 144
- project estimating: see estimating
- project execution, and IPD approach, 12

## 324 Index

project manager, roles and responsibilities of, 64–6; *see also* program management Project Management Institute, 6 project/program management: *see* program/project management project repository, 97

proposals: requests for and flexibility, 18; and roles or responsibilities of participants, 52t

- quality advisor, 165
- quality control, and quality assurance, 146–8
- quality function deployment (QFD), 139, *140f*

quality and quality assurance: definition of, 146; and evaluators, 155–8; factors in and elements of, 145–8; and holistic approach, 153; and integrated master plan, 116; and measurement, 148–53; and PDM systems, 188; as preventive measure, 165; and program/project management, 83; and program structuring, 153–4; and quality advisor, 165–6; *see also* program reviews questionnaires, for risk assessment, 122,

- 286–91t; see also surveys
- reengineering: organizational politics and resistance to, 211; and process maturity, 40
- reference copies, and PDM system, 180

reference numbers, and engineering policy and procedure, 48

- related objective and deliverables maps (ROADMAPs), 88, 89, *90f*
- replanning, and program execution, 143 reports and reporting: and program

execution, 141–3; and support functions, 73–4

repositories: *see* documentation; project repository

Requests for Proposals (RFPs), 18; see also proposals

resources: and initiative program, *203f*; and program planning, 115; and resource profiles, 78–9, 129–30; *see also* enterprise resource planning

- retrieval, of data by PDM systems, 183-4
- revision/version control support, and PDM systems, 182
- risk and risk management: benefits of, 119–20; definition of, 119; and holistic approach, 19; and planning, 68, *111–12f*, 114–15; process of, 120, *121f*; and program/project management, 83; and program structuring, 105, *292–300t*; and

questionnaire, 122, **286–91***t*; strategies for management of, 122–5; and systems engineering, 8; timing of, 120

- ROADMAPs: *see* related objective and deliverables maps
- roles and responsibilities: of customer, 51, 56–7; of functional director, 62–3, *64f*; of functional manager, 66–7; and initiative program, 201–2, 204–5; of IPT leaders, 68–71, *232f*; of IPT members, 71–2, *73f*, 87, 243–4; of partner, 57–9; of program coordinator, 67–8; of program director, 59–62; and program implementation, *54–5t*; and program start-up, *53t*; of project manager, 64–6; and proposal phase, *52t*; of sponsor, 59; and support functions, 73–4; *see also* staffing

sample deliverables, 95-6

scheduling: holistic approach and event-driven, 18; and planning, 115; and program initiation, 131, 198–9, 207; and support functions, 74; and workplans, 109; *see also* integrated master schedule

second shifts, and program initiation, 137–8 selection worksheet, and quality evaluation, 156–7

- serial approach: compared to IPD, 14; and product and process development, 14–15
- shadow system, and resistance to change, 215–16, 218, **219***f*, 220, 221
- single-number tracking system, 42–5
- Six Sigma Quality, 41
- skills types: and deployment team, *203f*; IPT leaders and change management, 230–4; IPTs and training, 245–8; and roles and responsibilities in engineering programs, 74–5; *see also* staffing
- social factors, and organizational culture, 212–13
- Society of Manufacturing Engineers (SME), 310
- sociological approach, to implementation of change, 213–15
- solutions demonstration laboratory (SDL), 125

specification tree, 43–4

- sponsors, roles and responsibilities of, 59; *see also* partners
- staffing: and program initiation, 130, 133–5; and program/project management, 83; and quality assurance, 148–9; *see also* roles and responsibilities; skill types
- stakeholder maps, for IPTs, 235, 236f

Statements of Work (SOWs), 18, 43-4

steering committee, and initiative program, 192–3

Index 325

subphases: and process framework, 89; and product maturity, 35; and program structuring, 101, 102-3; and work breakdown structure, 28; and workplan, 107, 108 subproject leads, and initiative program, 201 subteams, and concurrent engineering, 246 - 7suppliers, and program execution, 144 support functions: and members of IPTs, 134; roles and responsibilities of, 73-4 surveys: and maturity self-evaluation tools, 252-7; and PDM/ERP integration, 308-9; see also questionnaires system engineering integration team (SEIT), 135 systems engineering, and bodies of knowledge, 8 task groups: and work breakdown structure, 28; and workflow diagrams, 111-12, 113 tasks, engineering: and guidelines, 90-3; initiative program and scheduling of, 198-9; and integrated master plan, 45-7; and integrated master schedule, 47-8; IPT members and performance of specific, 87-97; and planning process, 274–81t; and single-number tracking system, 42-5; and subphases of work breakdown structure, 28; and workplan template, 47f, 48; see also task groups team-based approach, to engineering organization, 223-30 team-building, and IPTs, 246 technical team managers, and initiative program, 202, 204 technology: and PDM systems, 188; and risk assessment/management, 122, 124-5 templates: see workplans and workplan templates terminology, project teams and use of common, 12 testing: and benchmarks, 40; and planning, 117; see also performance measures;

program reviews; quality and quality assurance thumb voting, and decision making, 243

time span, of initiative program, 207

- top-level process model, *22f*, 23 trade studies, and IPTs, 127
- training: and benefits of holistic approach, 13; and initiative program, 199–200; and IPTs, 75, 131–3, 245–8; and partners, 58; and planning, 117; and program coordinator, 68; and risk management, 125

values, and organizational politics, 222 virtual product development (VPD), 125

- walkthroughs: and planning, 116–17; and program review process, 159–60
- WBS: *see* work breakdown structure
- "where-used" searches, and PDM system, 182

work breakdown structure (WBS): and engineering process management, 27–30; and IPT setup, 241; and numbering systems, 43–4; and organizational structure, *130f*; program initiation and integrated product development, 128; and program/project management, 82; and project planning, 11

workflow: and PDM systems, 8, 181–2; and ROADMAPs, 89; and task groups, 111–12, 113

- workplan and workplan template: and engineering tasks, *47f*, 48; and planning, 107, 108–13, 115
- work product, and customer deliverables, 31
- workspace, and program environment, 133 worksteps, and work breakdown structure,
  - 28

worldview, individual, 214

wrap-up, and program/project management, 78

zero-sum game, 219