

Product Information Management Best Practices

1. **Product Information Management (PIM)** competes with and complements functionality provided by Product Life-cycle Management (PLM), Content Management Systems (CMS) and Publishing systems (e.g. Adobe InDesign). PIM is focused on the consolidation of structured data from suppliers and data pools (e.g. GDSN) and manages the workflows, data quality and synchronization of product master data. A PIM solution may also assist with traditional content management (unstructured data) and publishing. Make sure you understand why you need a PIM and what business problems you are trying to solve with PIM.
2. **Develop a financially factual business case before embarking on a PIM project.** PIM solutions are expensive and require many months of time and attention from key resources across IT and the business to integrate and get up and running. Common metrics used in PIM business cases are: Reduced Returns, Increased Conversion, Faster Product On-boarding, Reduced Contact Center expense and so on.
3. **PIM is not an IT project.** Master data management (MDM), which includes PIM, has definite IT benefits, but the business case is unlikely to achieve the ROI by relying on IT alone. The business, from Merchants to Customer Service to the eCommerce team needs to be involved and lead.
4. **PIM requires new organizational constructs.** Product information is not created, used and managed in a silo and a PIM deployment will impact the organizational horizontally while creating the need for central management of product information processes. Consider appointing a 'data steward' with real organizational authority and meaningful accountability to oversee the PIM deployment and ongoing management.
5. **Define your product information pain points.** These are the operational and tactical issues associated with product information that complicate achievement of organizational goals. There may be dozens of pain points and identification of them will assist in developing a business case and success criteria for a PIM project.
6. **Document your current product information processes.** Understand how products are managed and maintained within your organization, paying particular attention to the unofficial and ad hoc systems that currently exist outside of your current standard processes. Ad hoc systems exist for a reason and they are fulfilling some organizational or business need that you want to include in your requirements for a PIM. Know how and where product information is consumed so that key supply, sales, internal and external users' requirements are included in project requirements.
7. **Create a Product Information vision and standards that support it.** Before selecting a vendor, make sure you know what you want to accomplish and the guidelines for introducing, maintaining and deploying product information into your organization and to your product consumers. Standards range from on/off-boarding criteria, description templates, abbreviation usage, style guides, data quality guidelines and so on. There are very few meaningful vendor-supplied templates that will apply to the complexity of your organization and its product information.
8. **Phase your project.** Consider starting with a meaningful slice of organization's assortment but do not do everything at once. This will allow business case testing and refinement, a sense of project progress and an opportunity to introduce course correction into subsequent phases.
9. **Change management will be a key task.** You will have identified key stakeholders before you start a PIM project. Ensure that they are engaged in the project, believe in it and are working together to achieve its goals. Create collateral to train and internally market the PIM project. Do not forget external stakeholders like suppliers or customers. If your customers are serviced by an outside sales force it is critical that the sales team can articulate the advantages of a PIM.
10. **Monitor post go-live usage, adoption and benefits.** Your PIM vision and business case need to be achieved. Review post go-live metrics against your assumptions. Pay close attention to the continuation of informal processes or the creation of new ones that supply missing information or value not provided by the PIM. Do this in the initial project phases as optimization and changes become increasingly problematic, as PIM is more widely deployed?

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eCommerce Diligence™ Checklist

PIM Key Questions to Ask Providers

Company

1. How long have you been in this business?
2. How many customers have you sold? How many have left your service, and why?
3. What size or types of clients fall into your “sweet spot”? Won any awards in that space?
4. What other services do you offer?

Products/Services

1. Is your solution offered as perpetual licensed software or on-demand solution?
If perpetual license:
 - a. What are the hosting requirements?
 - b. What should I expect regarding upgrades (both timing and pain)?
 - c. What is the technology stack?
 - d. Do you provide customization /implementation services?
 - e. Can outside third parties provide customization/implementation?**If SAAS/ASP:**
 - a. Do all tiers include maintenance and support?
 - b. How often are new features introduced?
 - c. What can I do if I need a feature you don't have or plan to have soon?
 - d. What security do you provide against external intrusion and malicious manipulation?
2. What optional services do you provide as part of your solution?
3. What ROI should I expect from implementing your solution?
4. What type of training do you provide to use your solution?
5. What skills does my organization (or hired third party) need to implement this platform?
6. What technical support services are available? What is your SLA for support issues?
7. Do you have a support knowledgebase, community forum, or applications that are shared by customers?
8. Which third party product and eCommerce platform providers have you worked with in the past?
9. How can I export if I need to change platforms?
10. Describe your global/regional support organization.
11. What is the implementation effort on your side, are there extra fees associated with that?

Features

1. Can you manage unstructured data? If so, what kind?
2. Do you provide publishing functionality or interfaces to publishing platforms?
3. Please describe your data governance functionality
4. What is your workflow functionality?
 - a. How many levels of approval are possible?
 - b. Can different users approve different sections of the same product instance?
 - c. Do you have organizational hierarchy in the approval chain? In other words, can a manager overrule and/or approve subordinates' approvals?
 - d. How does your system migrate content from one server to another?
 - e. Is your workflow product standards (e.g. BPEL) based?
5. Please describe your data quality functionality.
6. Do you provide version control?
 - a. Can a set of products be part of a unique build?
7. Can your system identify changes to the individual files/visually compare?
8. Can a release be rolled back? Can an individual a product be rolled back?
9. Please describe your information editing tools for all the types of content your system can manage?
10. Please describe how you can search for information and navigate through information using your tools.
11. Please describe your reporting capabilities (real-time, batch, ad hoc, etc.).
 - a. What features can you report against?
 - b. Please provide a list of standard reports.
 - c. What standard metrics do you provide?
 - d. Is it web-based, application-based, other?
12. For which ERPs, applications, ecommerce, web servers, etc., do you have standard integrations available?
 - a. Which ones have you integrated with on a custom basis?

Pricing

1. Please describe your pricing model.
 - a. Are there different levels?
 - b. Why do I want to pay to upgrade to the next level?
2. How do you charge for annual support? What about maintenance?
3. Are there any hidden fees (e.g., implementation, transaction costs, revenue sharing)?

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