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EFS
CONSULTING

平台创建&生命周期管理
业务简介

Platform Creation & Lifecycle Management
Business Overview

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2024.08

业务领域总览 | Business Areas Overview

品牌与产品战略
Brand & Product Strategy

塑造未来，把握先机
Shaping the future, before it happens

平台创建 & 生命周期管理
Platform Creation & Lifecycle Management

创建模块化平台，管理全生命周期的复杂度
Creating modular platforms and manage their complexity over lifecycle

出海战略及海外运营
Overseas Strategy & Operation

进入海外市场需要纵身御风的勇气，更需要稳操胜券的着陆
Entering the overseas market requires the courage to ride the wind, but also the landing of the victory

成本、价格策略与盈利模式
Cost, Price, Margin

通过降低成本和优化定价策略来提高利润
Enhancing margin by reducing costs and optimizing the pricing position

售后 & 循环经济
Aftersales & Circular Economy

在不断变化的市场环境中，售后 & 循环经济是增加客户粘性和创造价值的机会
In a changing environment, aftersales is the opportunity to create value and retain customers

供应链、生产与质量管控
Supply Chain, Production & Quality

通过坚实而高效的全球和本地战略运营来创造竞争优势
Creating competitive advantage by implementing robust and efficient strategies & operations – globally and locally

业务数字化 & IT战略
Business Digitalization & IT Strategy

通过将业务和IT完美链接来为客户创造价值
Creating customer value connecting Business & IT

合规及法律法规
Compliance & Legal

全球化为企业带来了新机遇，相关合规性问题必须要受到重视
Providing insight and support in the field of product compliance & Open-Source-Software compliance

信息安全 & 网络安全
Information Security & Cyber Security

数字化世界的核心是信息安全
Information Security is the center of a digitalized world

模块化平台定义

市场细分、产品定位、产品基本型组合、特征规划

- 基于目标细分市场、产品定位和技术路线图定义和规划产品的配置特征
- 产品的基本型组合，包括基本型的配置特征规划、定价策略和销量规划



Modular Platform Definition

Market segmentation, product positioning, product base type portfolio, feature planning.

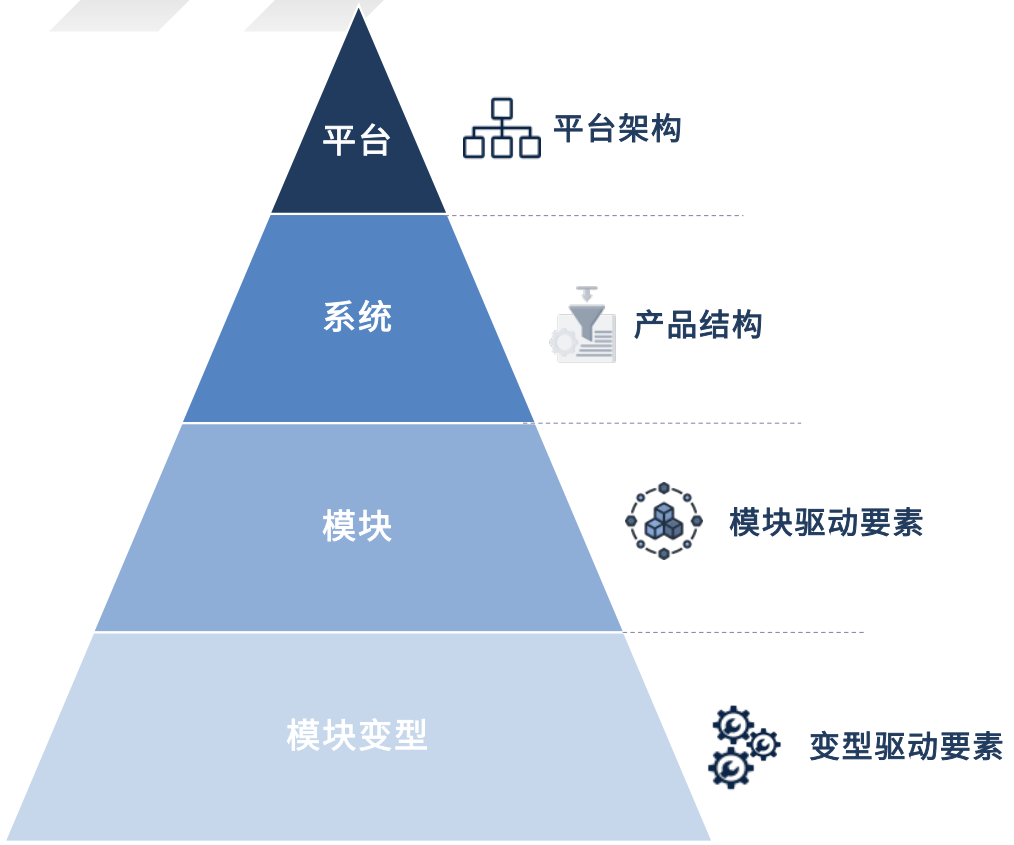
- Define and plan product features based on target market segments, product positioning and technology roadmap
- Product base type portfolio, including base type feature planning, pricing strategy and sales volume planning



模块化平台创建

平台架构、产品结构、模块定义、模块变型

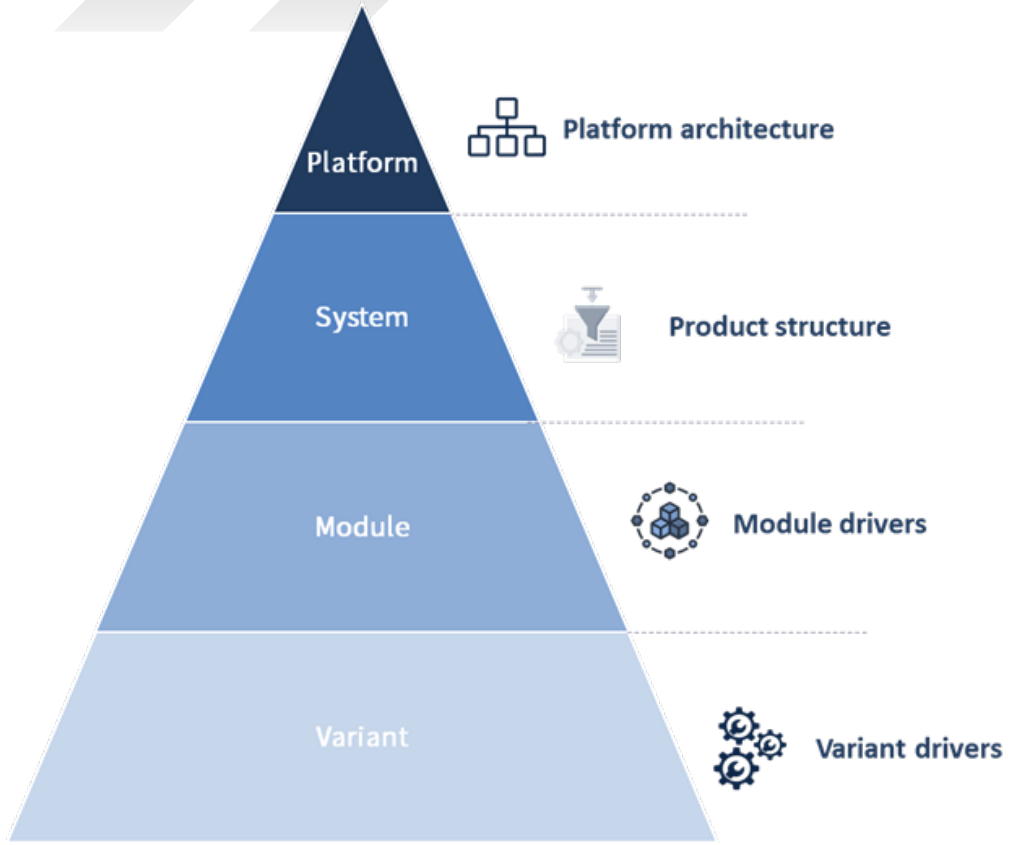
- 平台架构规划，包括平台维度的模块化概念设计原则和基于功能的关键尺寸定义
- 产品结构定义，包括平台、系统、模块的三个层级的设计原则和驱动要素分析
- 模块变型驱动要素分析和模块变型定义



Modular Platform Creation

Platform architecture, product structure, module definition, module variants.

- Platform architecture planning, including platform modular conceptual design principles and functional measure concept
- Product structure definition, including 3-level design rules for vehicle platforms, systems, modular kits and module driver analysis
- Module variant driver analysis and module variant planning

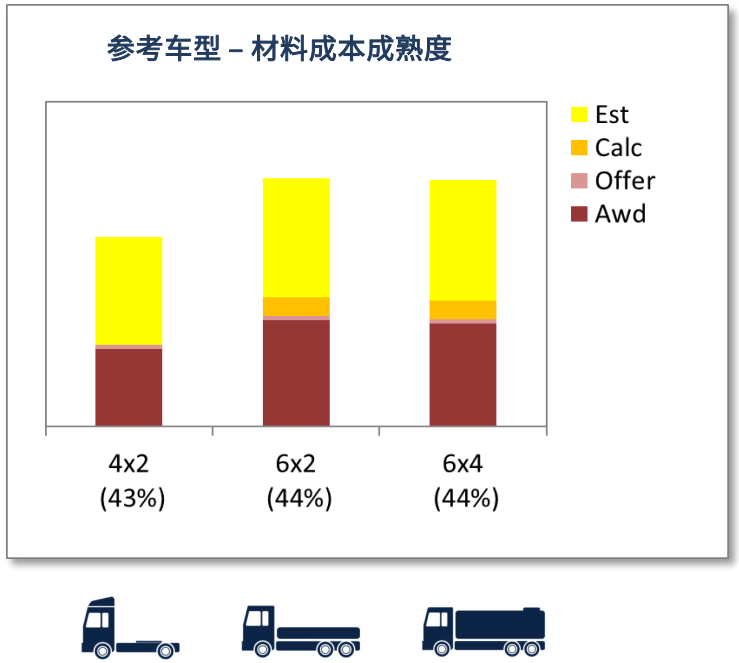


成本估算和销量规划

成本估算、销量预测、商业案例分析、可行性验证

- 成本估算包括开发成本、材料成本、模具成本、供应商采购价格等
- 基于战略目标的销量规划，销量规划可细化至零部件层级

我可以相信自己的预期吗?
哪些是已经确定的，哪些是需要加强的?

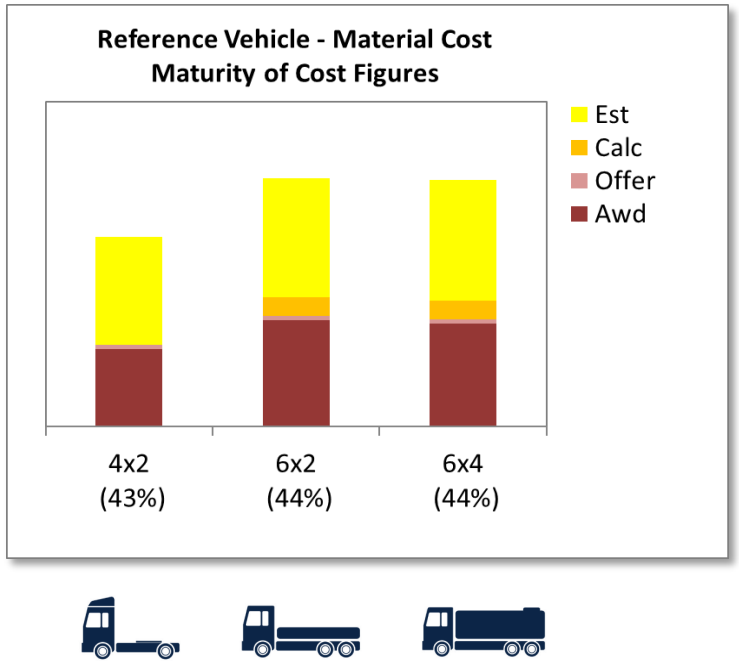


Cost Planning & Volume Prediction

Cost estimation, sales volume forecast, business case analysis, feasibility validation

- Cost estimation including development Cost, material Cost, tooling Cost, supplier procurement price, etc
- Sales planning based on strategic targets, with sales planning down to the component level

Can I trust my expectation?
What is fixed, what is 'weak'?

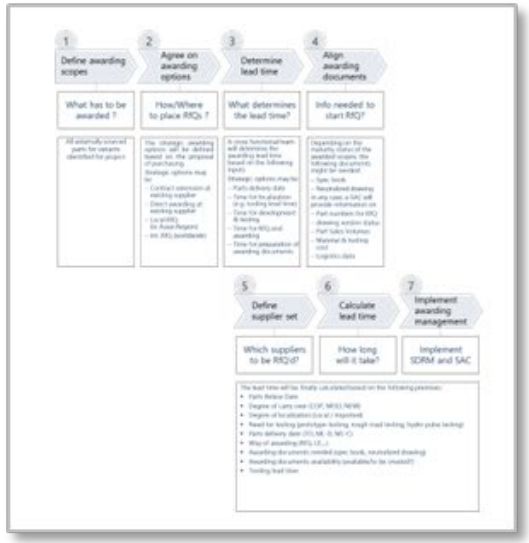


采购落地规划

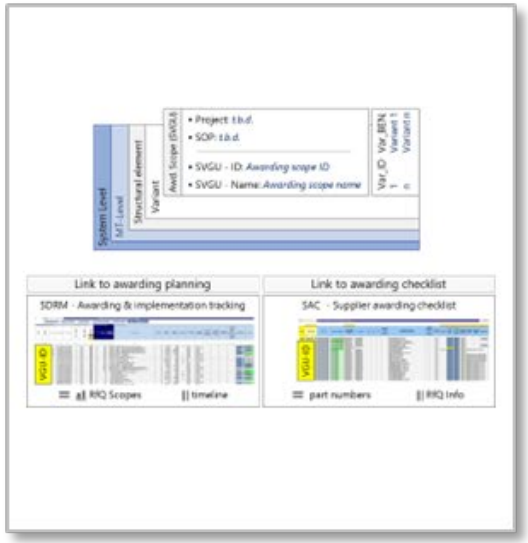
采购流程规划、采购内容规划、时间线规划

- 定义RfQ，通过明确的采购范围、采购要求、招标时间、潜在供应商等落地采购目标

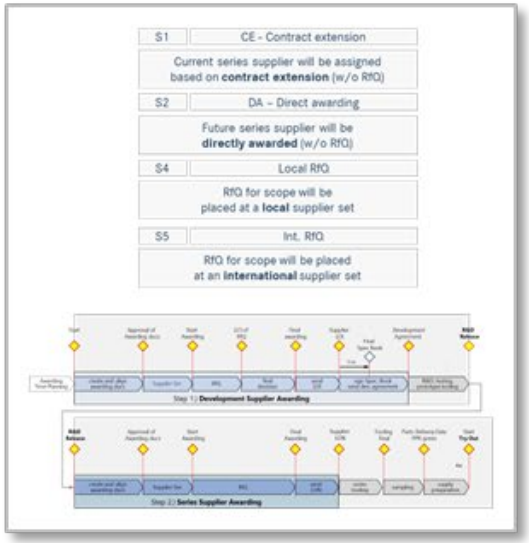
采购规划流程



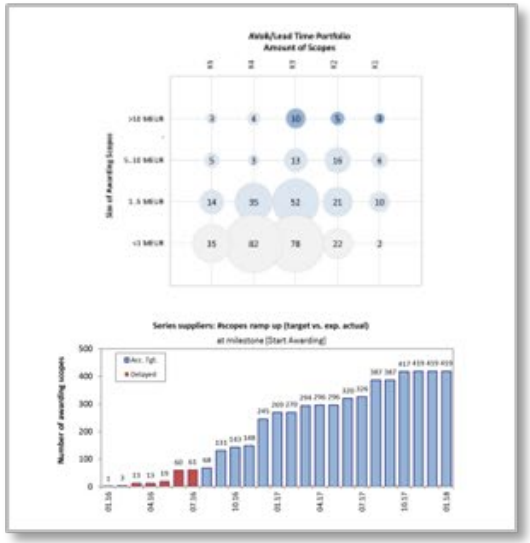
采购规划工具



采购战略与时间安排



报告与追踪

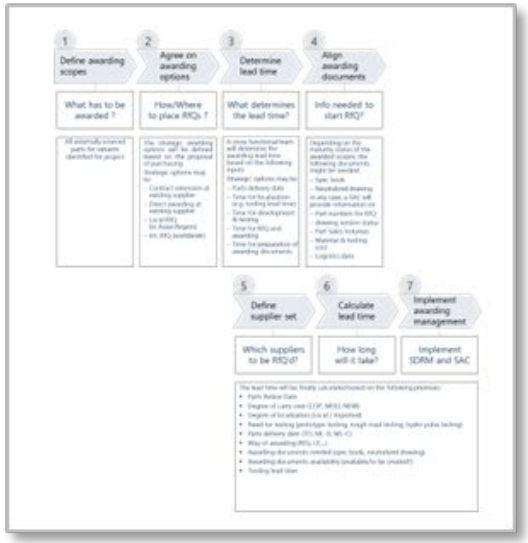


Awarding & Implementation Planning

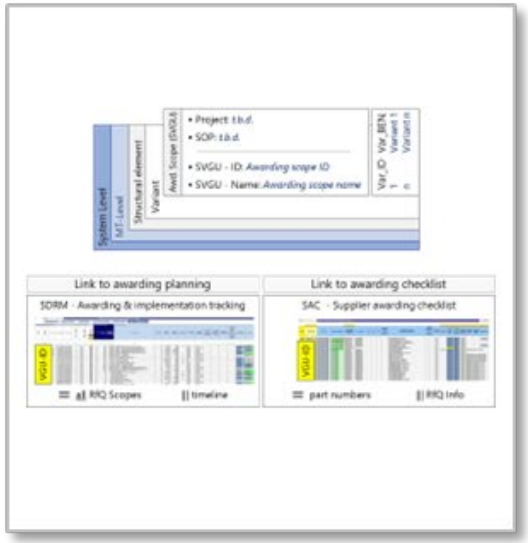
Procurement process planning, procurement content planning, timeline planning

- Define RfQ and achieve procurement goals through clear procurement scope, procurement requirements, bidding time, and potential suppliers, etc.

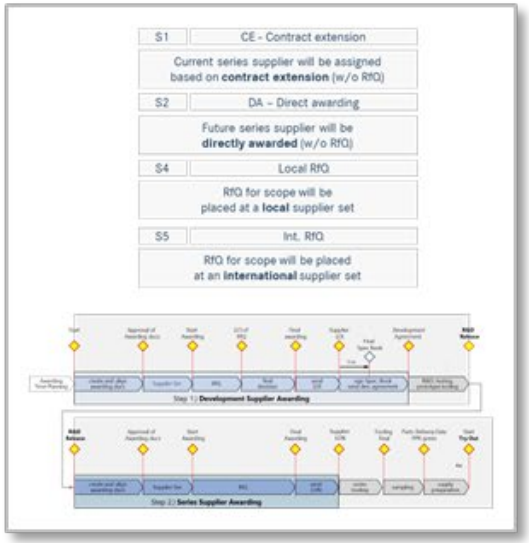
Sourcing Planning Process



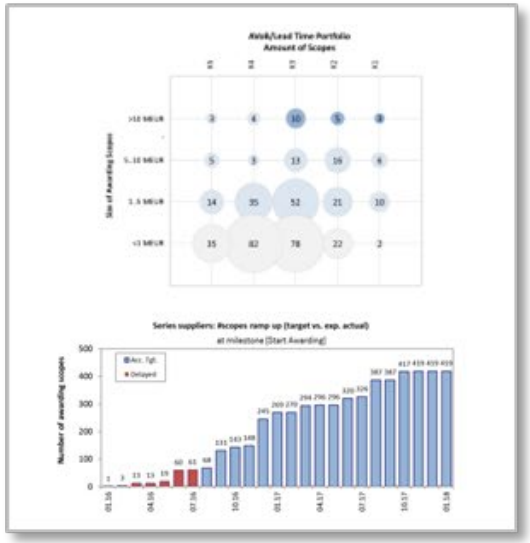
Sourcing Planning Toolset



Sourcing Strategies and Timeline



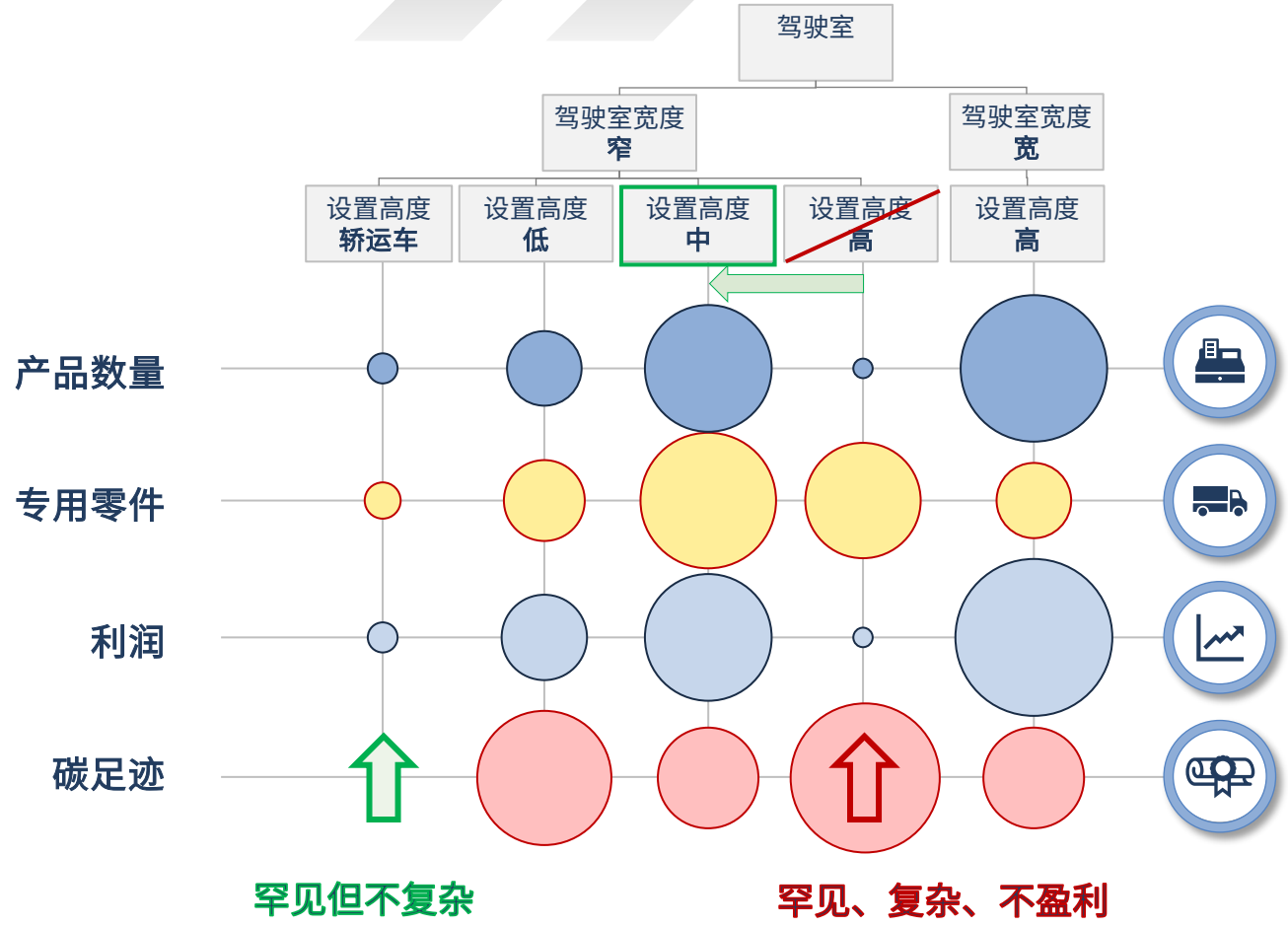
Reports and Tracking



生命周期管理

成本估算、销量全生命周期管理、复杂度管理、产品组合优化

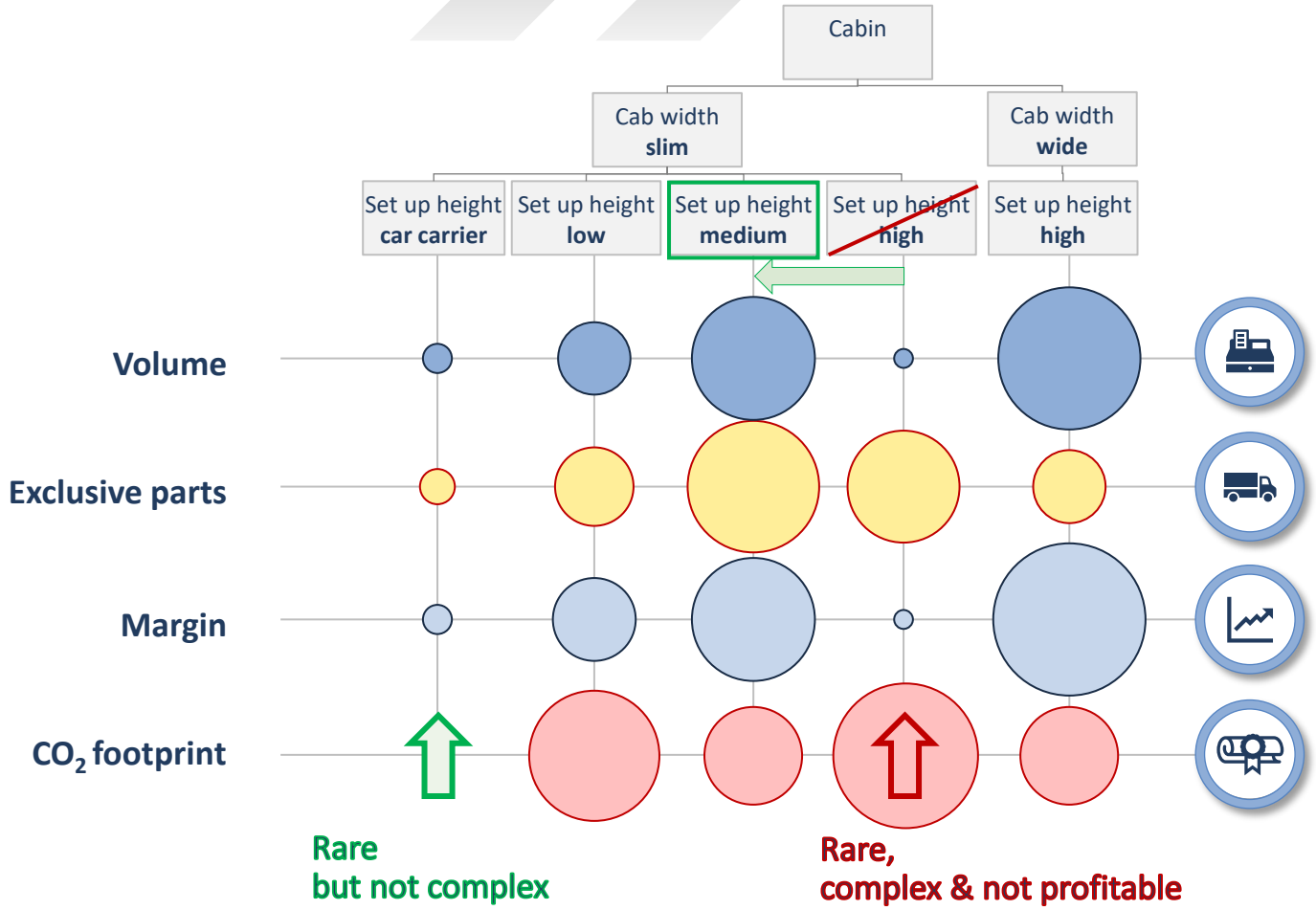
- 产品生命周期管理规划，包括上市规划、改款升级和下市规划原则
- 产品和平台维度的复杂度分析和优化建议
- 基于企业战略、市场表现和复杂度管理要求的产品组合优化



Lifecycle Management

Platform lifecycle management, complexity management, product portfolio optimization

- Product lifecycle management planning, including SoP, facelift and EoP planning
- Complexity analysis and optimization recommendations for product and platform
- Product portfolio optimization based on company strategy, market performance and complexity management requirements

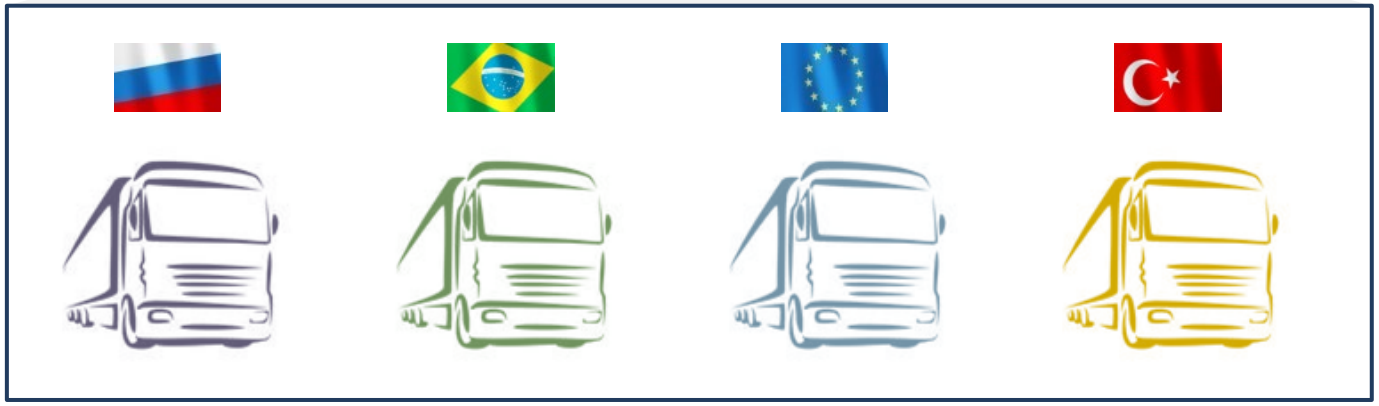


全球推广

全球产品特征规划、开发规划、生产规划、采购规划、变更管理。

- 基于全球范围内目标市场特定需求的产品配置特征规划
- 全球推广和本地化支持，包括开发规划、生产规划、采购规划、变更管理等



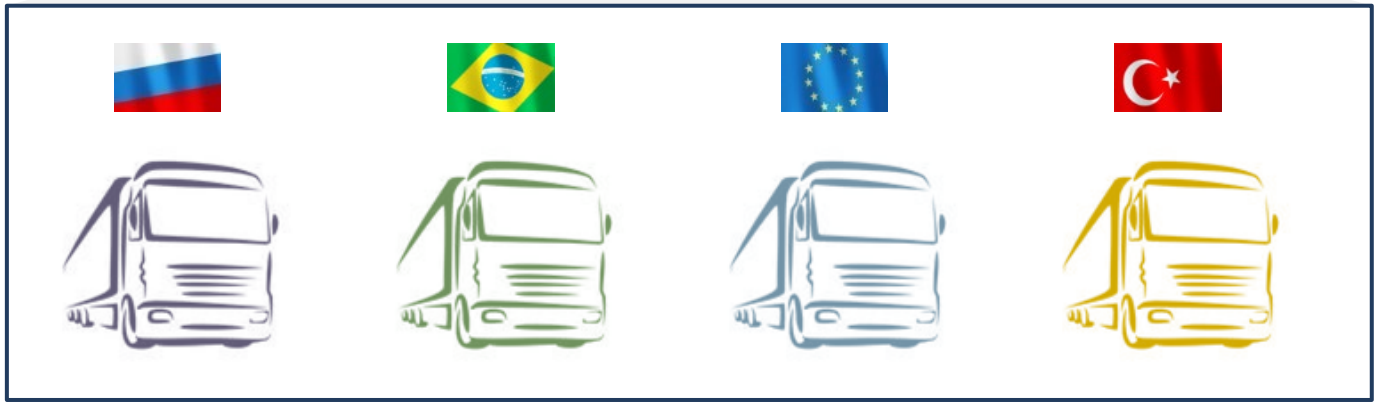


Global Rollout

Global product feature planning, development planning, production planning, procurement planning, change management

- Product feature planning based on the specific needs of target market segments on a global scale
- Global rollout and localization support, including development planning, production planning, procurement planning, change management, etc.



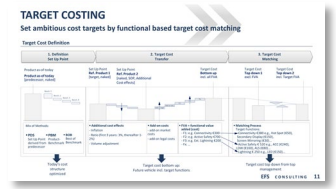


成本优化

目标成本设定、实际成本追踪、降本优化措施

- 基于产品功能和技术维度建立目标成本，为成本管理做指导
- 跟踪实际成本产生情况，并管理变更产生的成本变化
- 采用EFS成本优化方法和工具，实现持续的成本优化工作

目标成本设定

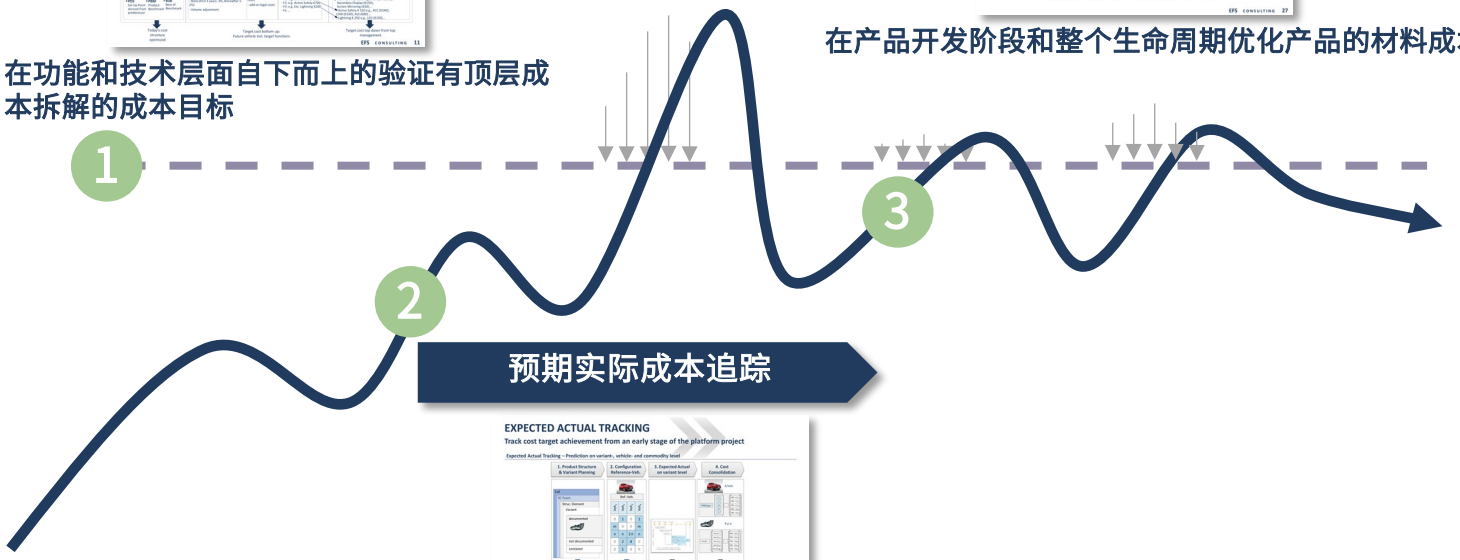


在功能和技术层面自下而上的验证有顶层成本拆解的成本目标

成本优化



在产品开发阶段和整个生命周期优化产品的材料成本



预期实际成本追踪

从研发早期阶段到生产，追踪预实际料成本和目标成本的偏差

材料成本目标

预期材料成本

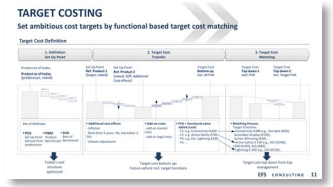
项目开始 — SOP — EOP

Cost Excellence

Target cost setting, actual cost tracking, cost reduction

- Set target cost based on functional and technical level of the product to guide cost management
- Track actual costs and manage cost changes resulting from changes
- Implement EFS cost optimization methods and tools to achieve continuous cost optimization

Target Costing

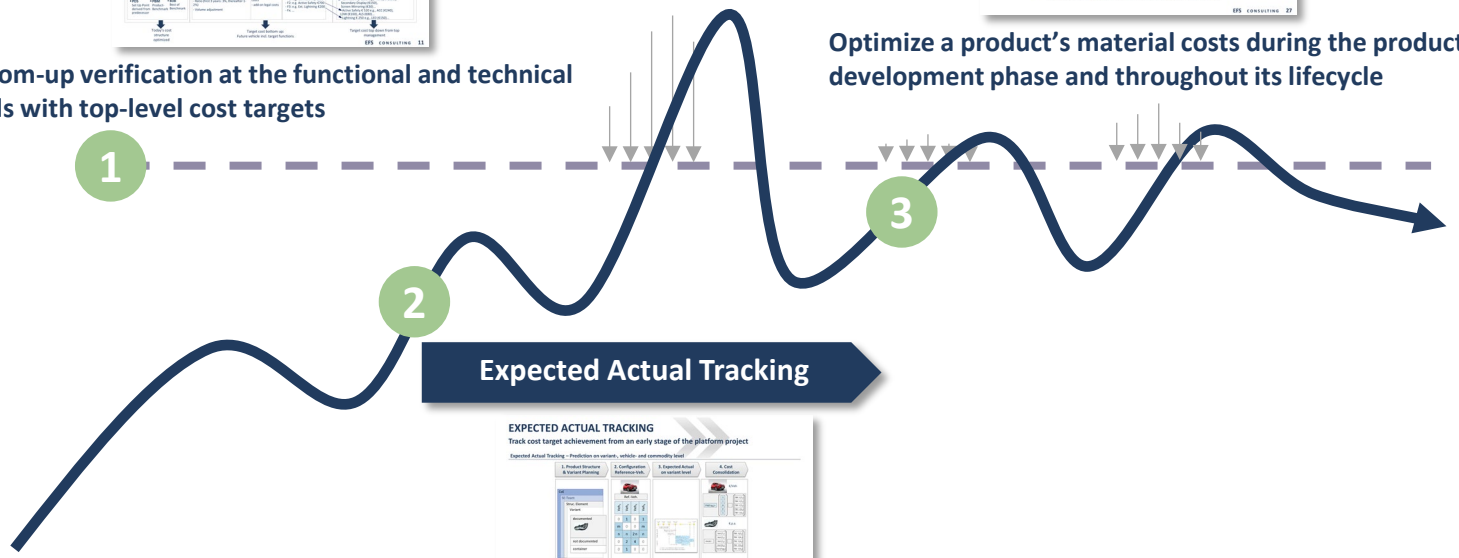


Bottom-up verification at the functional and technical levels with top-level cost targets

Cost Optimization



Optimize a product's material costs during the product development phase and throughout its lifecycle



Expected Actual Tracking

Track deviations from projected actual material costs and target costs from the early stages of R&D production

Material cost target

Expected Material Cost

Project Start — SOP — EOP

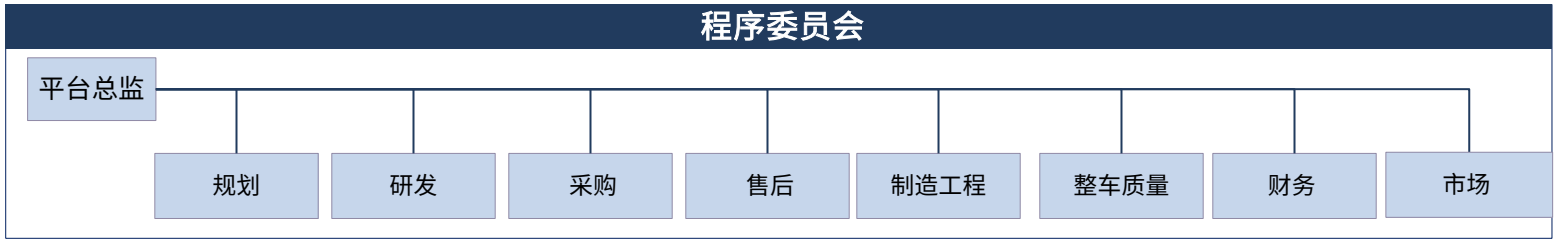
平台管理机制

管理组织架构优化、平台模块化团队建立、跨职能协作机制、KPI绩效管理

- 结合企业当前的组织结构和行业最佳实践案例，优化企业的管理组织架构
- 建立平台模块化管理团队，并进行专业培训
- 建立跨职能协作机制，定义运作方式、目标、职责和任务等
- 建立高效且透明的考核机制

平台管理组织





跨职能团队

模块团队	研发 (PMT经理)	模块团队助理经理	规划	市场	采购	制造工程	财务	整车质量	售后
▪ 白车身/驾驶室悬置	✓	✓	✓	✓	✓	✓	✓	✓	✓
▪ 内饰系统	✓	✓	✓	✓	✓	✓	✓	✓	✓
▪ 外饰系统	✓	✓	✓	✓	✓	✓	✓	✓	✓
▪ ..…….	✓	✓	✓	✓	✓	✓	✓	✓	✓

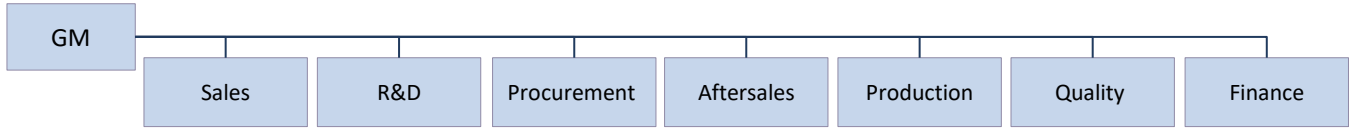
Platform Governance

Organization structure optimization, platform modularity team creation, cross-functional collaboration mechanism, KPI management

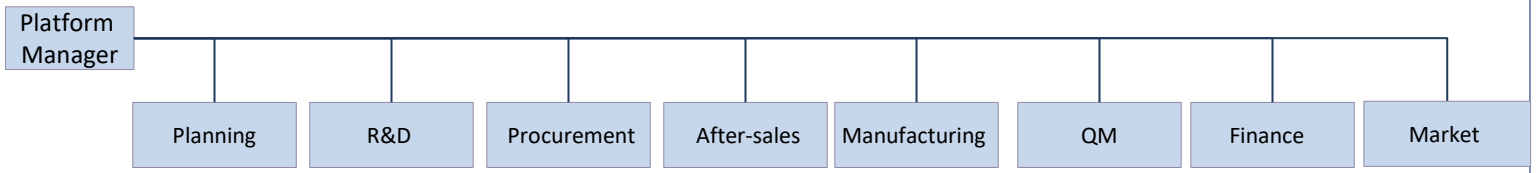
- Optimize the management organization by combining the company's current organization structure and industry best practice
- Establish a platform modularity management team and provide professional training
- Establish cross-functional collaboration mechanisms to define operations, goals, responsibilities and tasks
- Establish an efficient and transparent assessment mechanism

Management Organization

Steering Committee



Program Committee



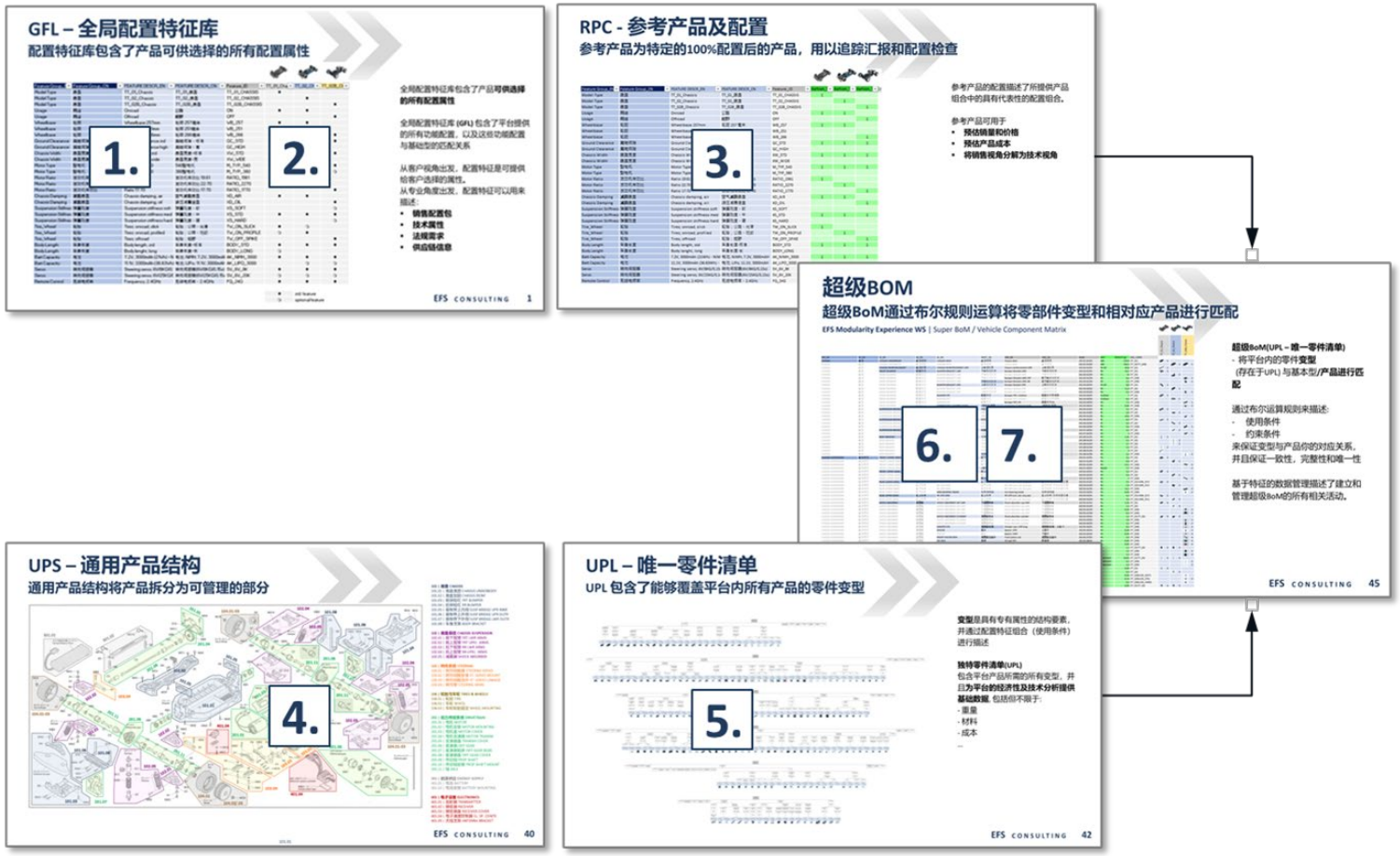
Cross-Functional Teams

Modular Team	R&D (PMT Manager)	Assist manager	Planning	Sales	Procurement	Manu-facturing	Finance	QM	Aftersales
▪ Body in White/ Cab..	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍
▪ Interior System	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍
▪ Exterior System	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍
▪ …	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍	🧍

平台模块化数据管理

基于特征的文档管理、超级BoM数据与架构管理。

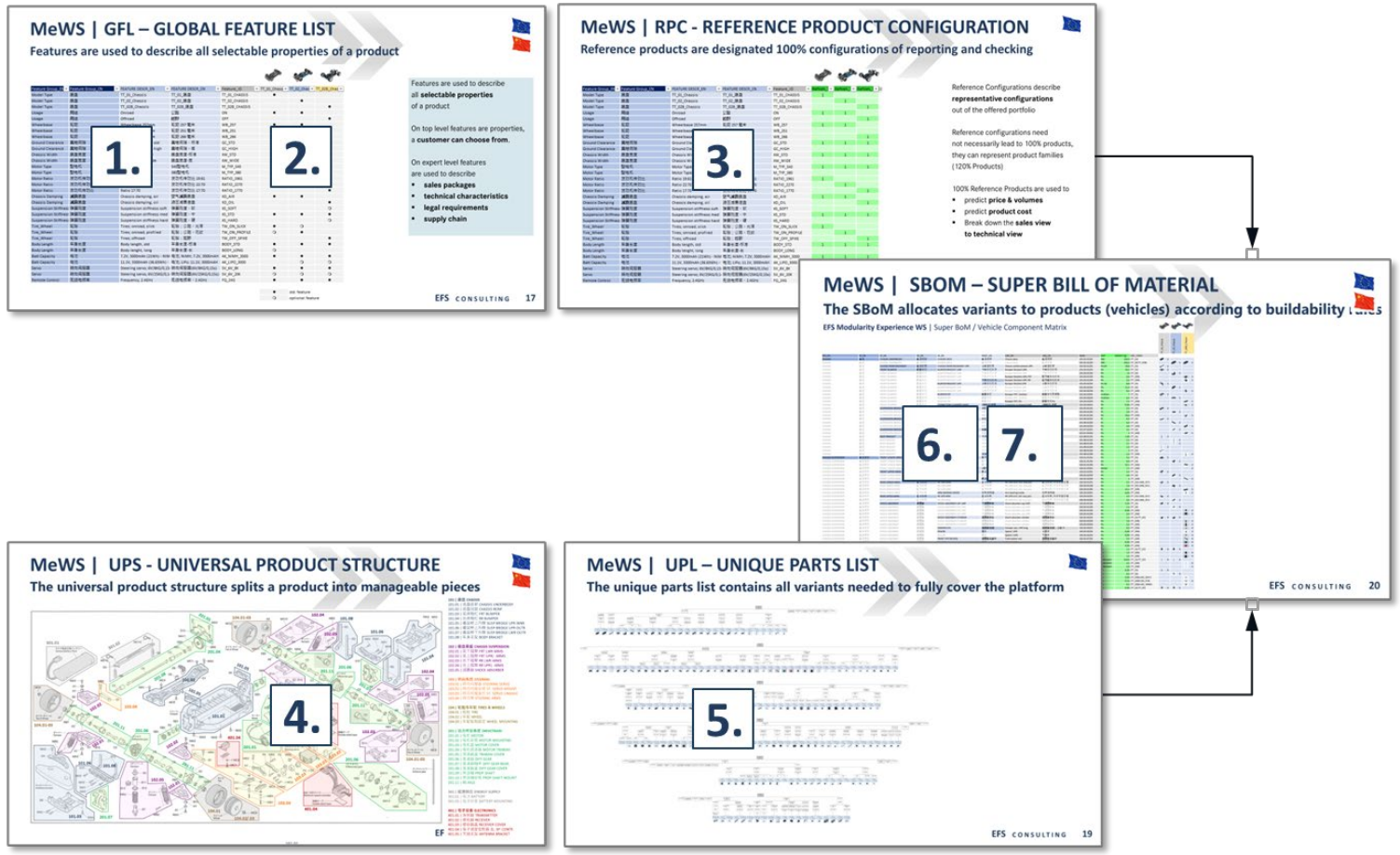
- 基于特征的文档管理保证集中地记录和管理平台模块化的所有数据
- 建立超级BoM数据与架构管理，用以管理产品组合中的所有物料，并为优化和决策提供支持



Platform Data Management

Feature-based documentation management, super BoM data and architecture management

- Feature-based documentation ensures that all data for the platform modularity is centrally documented and managed
- Super BoM data and architecture management to manage all materials in the portfolio and support optimization and decision making



EFS平台模块化管理套件

EFS平台模块化管理套件是一套可视化的在线工具，用以高效地进行产品变型规划

- 主要应用功能包括：通过已定义的配置特征和约束条件，快速计算出特征值的排列组合；对已开发或待开发产品的模块进行现状识别或提前规划；对模块变型开发的完整性和唯一性进行检查；识别不合理的配置特征组合并进行调整。
- 更多内容：
  https://efs.consulting/en/businessareas/research-and-development/variantplanner/

完整性



“空缺”识别
尚未定义任何变型来实现有效配置

独特性



“冗余”识别
有 2 个或更多变型可实现相同配置

一致性



“无效”识别
某变型因受到限制而无法订购

EFS Modularity Suite

EFS Modularity Suite is a set of visual online tools for efficient product variant planning

- The main applications include quickly calculating combinations of feature values from defined features and constraints; identifying the current status or planning ahead for developed or future product modules; checking the completeness and uniqueness of module variant development; and identifying unreasonable combinations of features and adjusting them.
- More info: https://efs.consulting/en/businessareas/research-and-development/variantplanner/

Completeness



Identification of **White Spots**
There is **no variant** yet defined
to fulfill a **valid configuration**

Distinctiveness



Identification of **Redundancies**
There a **2 or more variants**
to fulfill the **same configuration**

Consistency



Identification of **Blockings**
A variant can not **be ordered,**
as it is blocked by restrictions