**IUPUI Initiative for Product Lifecycle Innovation (IPLI)** Third Roundtable on Product Lifecycle Management (PLM) Indianapolis, IN March 26, 2015

### Life Cycle Management: Evolving Challenges and Emerging Solutions

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### Is this your "tomorrow", or a distant future?

From "The Hardware Renaissance Arrives: A New Dawn for Gadgets", *The Wall Street Journal*, March 23, 2015:

"Recently, as I gazed into the prototype of a smart breast pump, I had a vision of the future. I saw an age in which new products—actual, physical electronics products—will go from idea to store shelves in a matter of months. A future in which warehouses and distribution centers cease to exist, because factories produce finished goods from raw materials on demand, and they never stop moving through the supply chain. <u>Only it turns out all of this is possible today</u>. The "hardware renaissance" that began in Silicon Valley in just the last five years, born of rapid prototyping technologies, has become something much larger and more important. It has been a sea change in every stage of producing physical objects, from idea to manufacturing to selling at retail . . ."

-- Christopher Mims, *The Wall Street Journal*, p B1,6, March 23, 2015 -- emphasis added

#### Abstract

Shrinking innovation cycles and rising complexity raise challenges throughout the life cycles of the products and systems that teams manage. A spectrum of remarkably predictable problems has repeatedly surfaced across diverse industries, as enterprises, their products and services, their customers and suppliers, and the global economy have wrestled with more complex and rapidly-changing systems.

It has been said that "All Innovation Is Innovation of Systems". The powerful paradigm behind this view brings a family of new solution methods and tools, increasingly supported by scientific foundations. Implications of these solutions are far-reaching, as they impact technical teams, product and market strategists, production and support processes, leadership at all levels, and the integrated infrastructure of information, processes, and tools.

Product Lifecycle Management (PLM) methods and systems play critical, high-value roles in this emerging integrated framework, which is itself a system, with its own life cycle. The same underlying methods that improve management of products and services can be used to organize the framework of in which PLM systems are implemented, integrated, and evolved.

This talk will include examples, including a project currently underway with IPLI. 3

# Contents

- Life cycles are embedded in innovation
- All innovation is innovation of systems
- Life cycle processes <u>vs</u>. life cycle information
- Explicit representation, IP, and the Model Based Economy
- Systems for learning from experience
- Agility in life cycle management
- Information system roles
- The importance of community; roles for IPLI & partners
- Example IPLI collaboration
- Challenges & opportunities—conclusion
- Discussion
- Attachments, references

### Life Cycle Management: Evolving Challenges and Emerging Solutions

- The <u>life cycles</u> of products, services, and other systems offer <u>challenges</u> and <u>opportunities</u> in competitive markets and institutions.
- This talk is to stimulate awareness and discussion of the systemic challenges and solution opportunities for Product Life Cycle Management (PLM).



 We will spotlight some underlying issues not always emphasized in "pure PLM" conversations.



### Life cycles are embedded in innovation

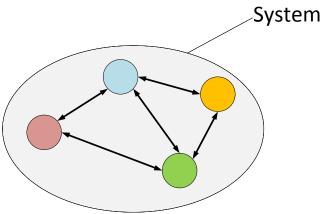


For purposes of this discussion:

- Life cycles of products & other systems will mean either--
  - A single instance of such an entity, from the time it is fabricated until it is destroyed, or . . .
  - A product line, product model type, family or class of products or technologies, from conception through use and eventual withdrawal.
- Innovation of products & other systems:
  - Realization of improved value by stakeholder;
  - This view emphasizes full delivery of benefit, not just ideation or invention.
  - Innovations may be small and incremental, or large and disruptive.

## All innovation is innovation of systems

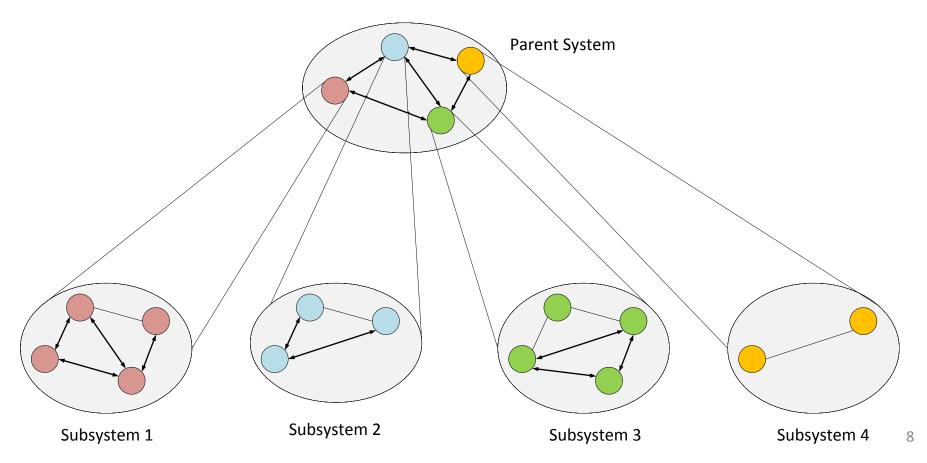
• A system is a set of interacting components:



- By interact, we mean the components exchange force, energy, mass, or information with each other, thereby changing each other's states.
- By state, we mean the condition of a component that influences its future interactions.
- All the physical laws discovered by the hard sciences are expressed in terms of these interactions! 7

### All innovation is innovation of systems

 A component can itself be another system, called a <u>subsystem</u>:



## All innovation is innovation of systems

- By the <u>System Phenomenon</u> we mean:
  - The behavior a system as a whole exhibits emerges from its component interactions, not simply a listing of its component properties:

- That emergent behavior may be obvious or unexpected, and may be highly valuable or detrimental to human stakeholders.
- It is also the immediate origin for all observed discipline-specific phenomena of physics, chemistry, mechanics, biology, electromagnetics, thermodynamics, etc.
- Examples:
  - Vehicle stability, aircraft dynamics, cooked food taste, satellite receiver performance, manufacturing line quality, distribution system capacity, drug efficacy, business team performance, engine emissions, machine safety, equipment corrosion resistance, power train losses, nanostructure toxicity, cardiovascular health, medical instrument accuracy, enterprise cyber security.

#### So what? Why is this important to our discussion?

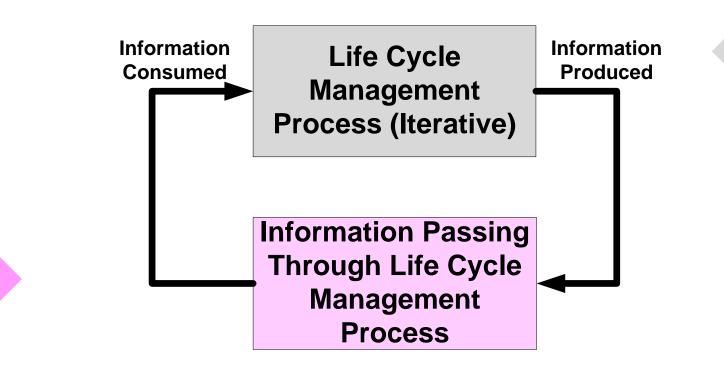
- What's the connection to PLM?
- Many, if not all, of the challenges and opportunities of managing life cycles arise from the Systemic nature of:
  - The managed systems (products, services, others)
  - The systems that manufacture or produce them
  - The systems that distribute and service them
  - The systems of innovation that improve them
  - Including the PLM Systems, themselves!
- A well-known set of predictable, system-based challenges can be learned and addressed.
- Powerful methods and tools for understanding and managing these systems exist.

#### So what? Why is this important to our discussion?

- Even though these subjects are critical to PLM . . .
- Because they are more recently recognized as emerging, they are not always explicitly covered by typical PLM conversations—whether as formal standards or more informal attention:
  - Some of what we'll discuss is in the form of certain standards-based information not specific to PLM, and ...
  - Some is emerging in literature and practice, not yet visible as formal standards.

### Life cycle processes vs. life cycle information

- First, key points about the processes of PLM;
- Second, recognition that the nature of the PLM information is shifting, in a way even more fundamental than process:



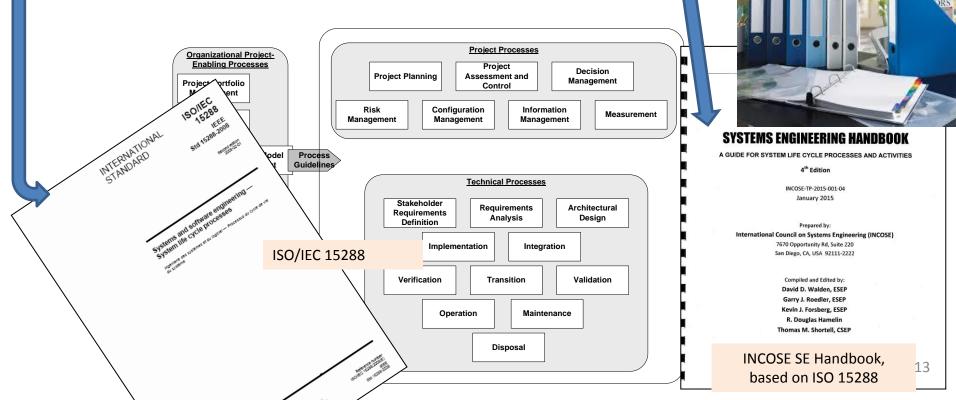
#### Life cycle processes vs. life cycle information

- Enterprises and standards bodies have lots of <u>procedural</u> guides to their work, including those about life cycles:
  - International Standards (consider ISO 15288, also ISO TR24748)

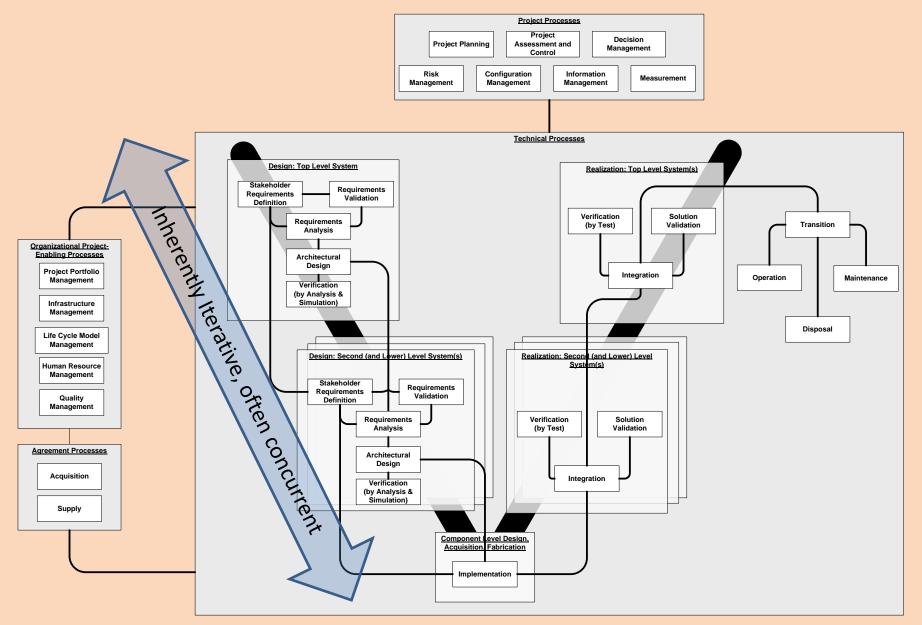
Corporate Processes.

Procedures

- Professional Society and Trade Group Publications
- Enterprise-specific processes and procedures



#### Logical Architecture View of ISO 15288 Life Cycle Management Processes



Current version: 2008. A new 2014/5 draft standard has passed balloting and will be published as a standard in 2015.

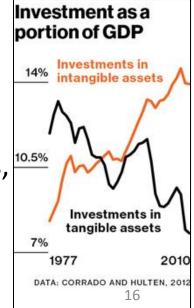
### Life cycle processes vs. life cycle information

The rise of Model-Based Engineering, Model-Based Design, and Model-Based Systems Engineering (MBSE):

- Structure of system representation is moving <u>from</u> models of business data in the traditional database modeling sense <u>to</u> STEM models of the real systems they describe, in the sense of science and engineering of those systems.
- This changes the focus from (what is a 'good' business information model?) to (what is the actual science-based representation of the engineered system?).
- Amounts to a shift from subjective opinion to objective science shifting from document prose to 'models'.
- A key question, from science: What is the smallest model of a system, for purposes of understanding (or life cycle managing) it?
- This question can define the <u>System Configuration Space</u>, to be tracked by a future PLM schema.
- It is within that space that the iterative PLM Process moves candidate systems through System Configuration Space.

# Explicit representation, IP, and the rise of the Model-Based Economy

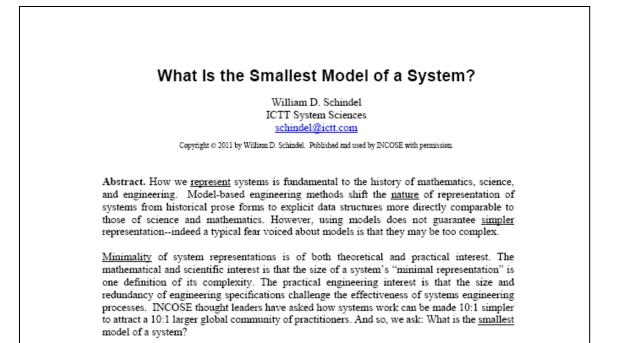
- A central theme of this talk is the movement to <u>explicit</u> representation of systems with 'models' sufficient to actually manage their life cycles
- Key evidence for the power behind this movement:
  - Explicit models of physical interactions are the basis for describing virtually all the laws discovered by the physical sciences—including well known product problems.
  - Once unlocked by the rise of STEM, human innovation supported by these representations has powered 300 years of dramatic human progress.
  - Annual US capital investment in intangible intellectual property, compared to capital investment in hard assets, recently reached the cross-over point: annual IP investment is now larger than bricks and mortar.
  - We are moving to the Model-Based Economy.
  - S\*Patterns can be financially capitalized, under FASB.



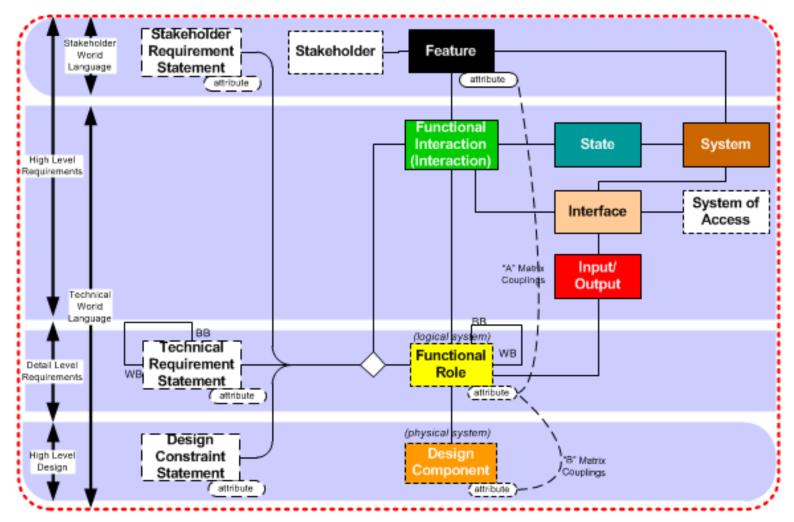
- However, because we are living in the middle of this change, it is not so well understood:
  - The majority of all representation of systems, even in automation databases, continues to be based on "data models" that are other than the explicit model representation of the smallest explicit model necessary for life cycle management.
- We can't fool Mother Nature:
  - The underlying nature of systems will continue to challenge life cycle management until this reality is understood and represented explicitly.
- A simple and widely-observed example of this impact is the cross-functional physical interaction of real delivered systems that span enterprise functional silos: product design, manufacturing, distribution, service and support.
  - These receive relatively tortured attention because the simple physical interactions evident almost immediately in deployed systems are not explicitly represented in life cycle management representations of the implemented systems.

# Explicit representation, IP, and the rise of the Model-Based Economy

 Based on decades of testing and refinement, our best understanding of the smallest model of a system necessary for the purposes of science, engineering, and life cycle management is the S\*Metamodel:

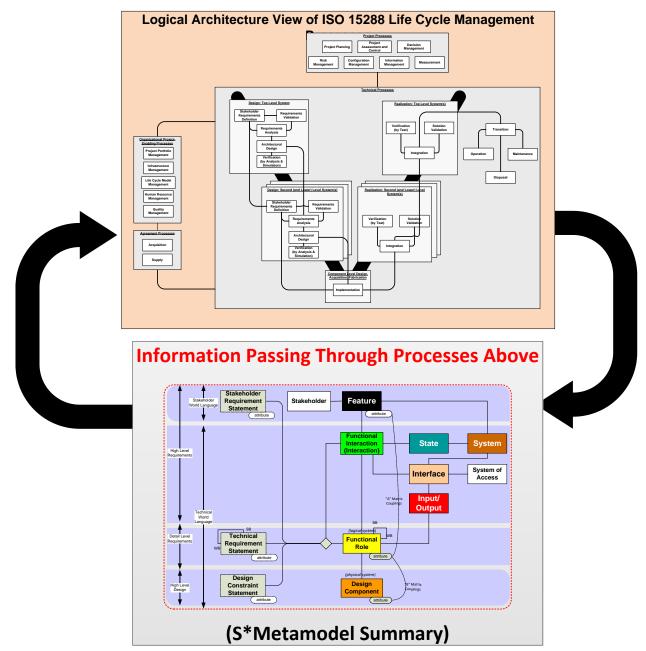


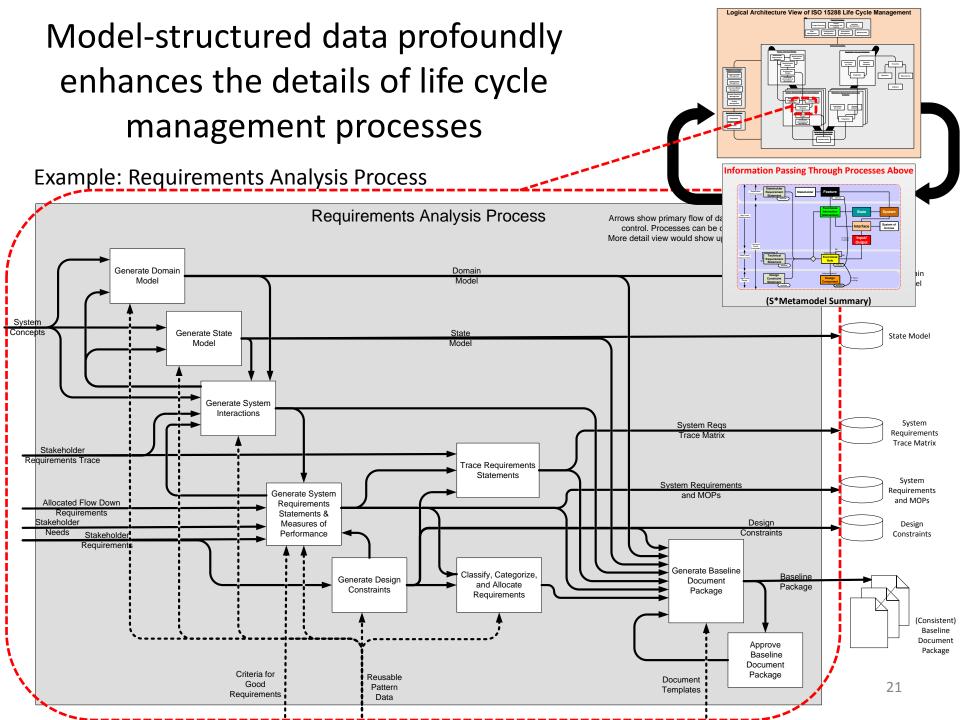
# Extract from the S\*Metamodel



S\*Metamodel = smallest model necessary for purposes of science, engineering, life cycle management

#### Life cycle processes vs. life cycle information





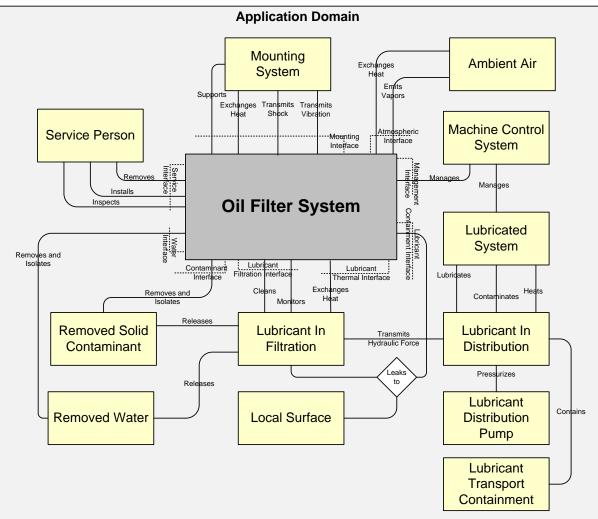
### A simple example

- Manufactured Oil Filter Product Line Family and
- Oil Filter Manufacturing System

Functional Requirements are all captured as models of physical Interactions with its environment . . .

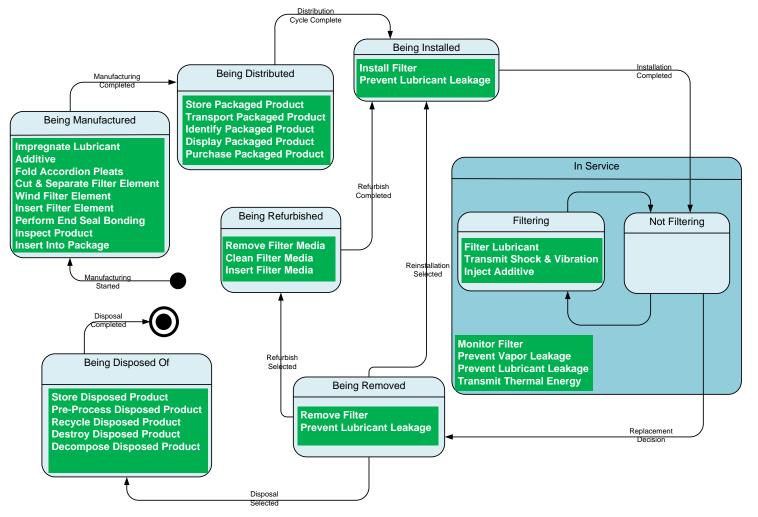
#### **Oil Filter Product Line Family**

• Using explicit modeling language databases, the interactions of the product are captured and manifest all the functional requirements.



#### Life Cycle of an Oil Filter Product Instance

• Using explicit modeling language databases, the interactions of the product are captured and manifest all the functional requirements.

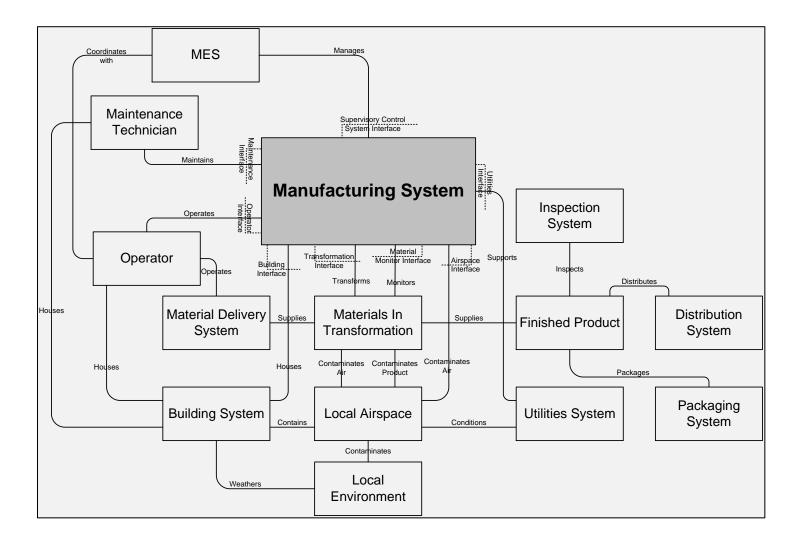


#### **Product Requirements Extract**

• Using explicit modeling language databases, the interactions of the product are captured and manifest all the functional requirements.

Interaction	Role	ID	Requirement Statement	
Filter Lubricant	Oil Filter System	OF-50	For a Return Lubricant stream of [Lubricant Viscosity Range] and [Lubricant Pressure Range], the Oil Filter	
			shall separate Filtered Contaminant particles from the Lubricant output stream, according to the [Filter Particle	
			Size Distribution Profile].	
Filter Lubricant	Oil Filter System	OF-51	The Oil Filter shall operate at lubricant pressure of [Max Lubricant Pressure] with structural failure rates less	
			than [Max Structural Failure Rate] over an in-service life of [Min Service Life].	
Filter Lubricant	Oil Filter System	OF-52	The Oil Filter shall accommodate a Lubricant flow rate of [Lubricant Flow Rate].	
Filter Lubricant	Lubricant Distribution Pump	OF-53	The Pump shall maintain oil pressure within the [Lubricant Pressure Range].	
Filter Lubricant	Lubricant In Filtration	OF-54	The Lubricant in Filtration shall have viscosity within the [Lubricant Viscosity Range].	
Filter Lubricant	Lubricant Lubricated Machine OF-55 The Lubricated Machine shall contribute a Contaminant L		The Lubricated Machine shall contribute a Contaminant Load to the lubricant, not to exceed [Lubricant	
			Contaminant Load Rate].	
Filter Lubricant	Lubricated Machine	OF-56	The Lubricated Machine shall not heat the lubricant above [Max Lubricant Temperature].	
Inject Additive	Oil Filter System	OF-57	The Oil Filter shall inject additive of type [Additive Type] into the Lubricant flow, at a rate of [Additive	
			Injection Rate] per unit of lubricant flow, over the service life of the filter element.	
Remove Filter Media	Oil Filter System	OF-90	The Oil Filter System shall permit the removal of its used Filter Media.	
Remove Filter Media	Oil Filter System	OF-91	The Oil Filter System filter media removal process shall allow the service person to avoid direct contact	
			contamination with filtered contaminants and lubricant.	
Clean Filter Media	Oil Filter System	OF-92	The Oil Filter System shall permit the cleaning of its used Filter Media, for reuse purposes, using cleaning	
			solvent and method of type [Filter Media Cleaning Method and Solvent].	
Clean Filter Media	Oil Filter System	OF-93	The Oil Filter System filter cleaning process shall allow the service person to avoid direct contact contamination	
			with filtered contaminants and lubricant.	
Insert Filter Media	Oil Filter System	OF-94	The Oil Filter System shall permit the insertion of its Filter Media, of type [Filter Media Type].	
Insert Filter Media	Oil Filter System	OF-95	The Oil Filter System filter media insertion process shall allow the service person to avoid direct contact	
			contamination with filtered contaminants and lubricant.	
Transmit Shock & Vibration	Oil Filter System	OF-100	The system shall meet its other requirements when subject to a vibration spectrum not exceeding [Max Vibration	
			Spectrum] during its in-service life.	
Transmit Shock & Vibration	Oil Filter System	OF-101	The system shall meet its other requirements when subject to shock intensity and frequency not exceeding [Max	
			Shock Intensity and Frequency] during its in-service life.	
Monitor Filter	Oil Filter System	OF-102	The system shall provide a means of inspection of its remaining service life before requiring servicing, using	
			[Filter Monitoring Method].	
Prevent Vapor Leakage	Oil Filter System	OF-103	When operating within its rated lubricant pressure and temperature, at altitudes not exceeding [Max Service	
			Altitude], the system shall maintain Vapor Leakage to the ambient air space below [Max Vapor Leakage Rate].	
Prevent Lubricant Leakage	Oil Filter System	OF-104	When operating within its rated lubricant pressure and temperature, at altitudes not exceeding [Max Service	
			Altitude], the system shall maintain Fluid Leakage to the surrounding space below [Max Fluid Leakage Rate].	
Transmit Thermal Energy	Oil Filter System	OF-105	The system shall meet its other requirements while operating in external ambient air temperatures of [External	
			Temperature Range] and lubricant temperatures of [Lubricant Temperature Range].	
Install Filter	Oil Filter System	OF-106	The Oil Filter shall be manually installable in ten minutes or less, using only a screwdriver.	
Install Filter	Oil Filter System	OF-107	The Oil Filter shall have installation instructions printed on its exterior surface, in [National Language] language.	
Install Filter	Oil Filter System	OF-110	The Oil Filter shall not present sharp edge hazards to the installer during the installation process.	
Install Filter	Oil Filter System	OF-111	The Oil Filter shall be clearly labeled with instructions to shut down pressurized equipment prior to installation.	
Install Filter	Service Person	OF-112	The Service Person with the visual acuity and hand strength of an average 40 year old adult shall be able to	
			install the Oil Filter System.	
Install Filter	Service Person	OF-113	The Service Person shall be capable of reading [National Language] at the tenth grade level.	

# This also applies to the related Manufacturing System

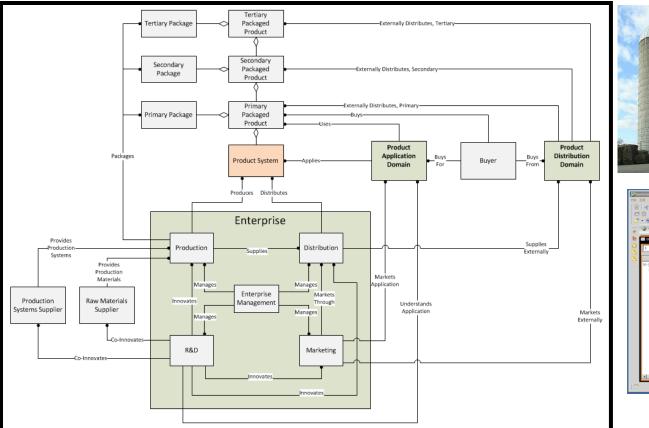


## This also applies to the related Manufacturing System

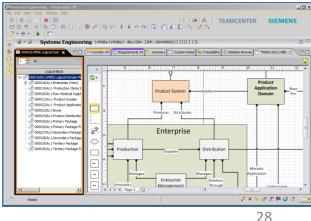
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# Even More Important: The Higher Level Enterprise Model

 Reveals interactions crossing functional "silos", and the requirements for collaboration:

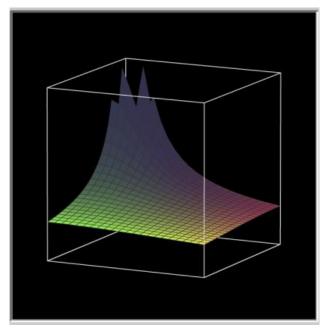






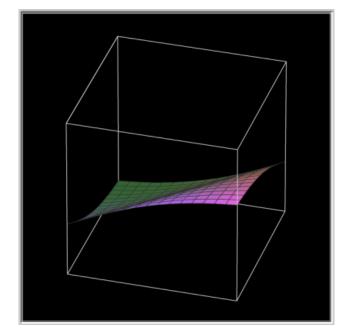
### Even More Important: The Higher Level Enterprise Model

• Drives all the way down to detailed crossfunctional inter-dependencies:



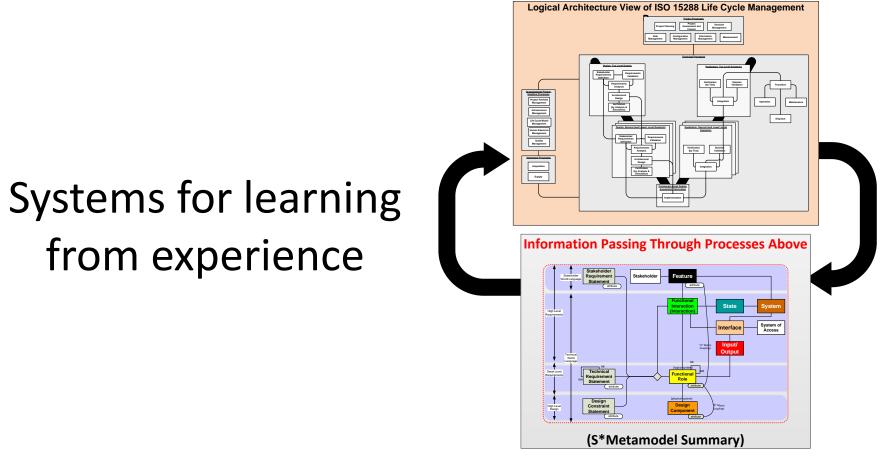
Oil Filter manufacturing throughput as a function of Heat Time and Spray Time:

- X-Axis (Horizontal 1): Heat Time
- Y-Axis (Horizontal 2): Spray Time
- Z-Axis (Vertical): Unit Throughput



Oil Filter Additive Life as a function of Heat Time and Spray Time

- X-Axis (Horizontal 1): Heat Time
- Y-Axis (Horizontal 2): Spray Time
- Z-Axis (Vertical): Additive Life



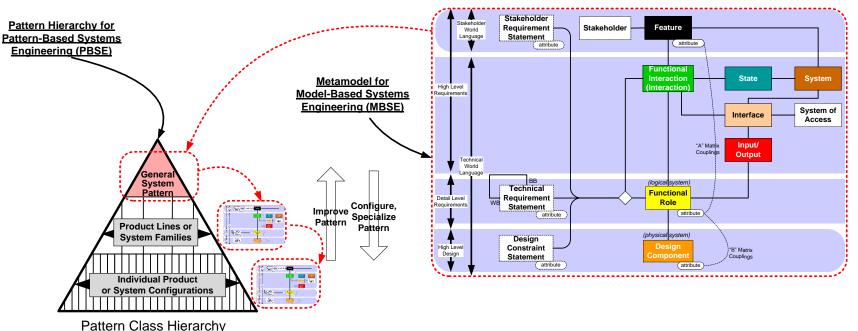
- Learning what is known about general life cycle management practices:
  - Use what is already known about life cycle management processes that apply in principle for all types of systems (e.g., ISO15288).
  - This includes systems-originating challenges and opportunities inherent to the nature of those processes.
- But what about future lessons . . .

### Systems for learning from experience

- Learning and agility about your own enterprise and its offerings, markets.
- How will you manage:
  - What is learned about the configuration of those processes to your individual enterprise and business units—including the life cycle management processes and systems employed.
  - What is learned about your enterprise's products and services including the dynamic and uncertain environment in which they are challenged to survive.
- To think about these, you should think about:
  - Pattern-Based Systems Engineering (PBSE), and
  - Agile Systems Engineering Life Cycle Management . . .

### Pattern-Based Systems Engineering

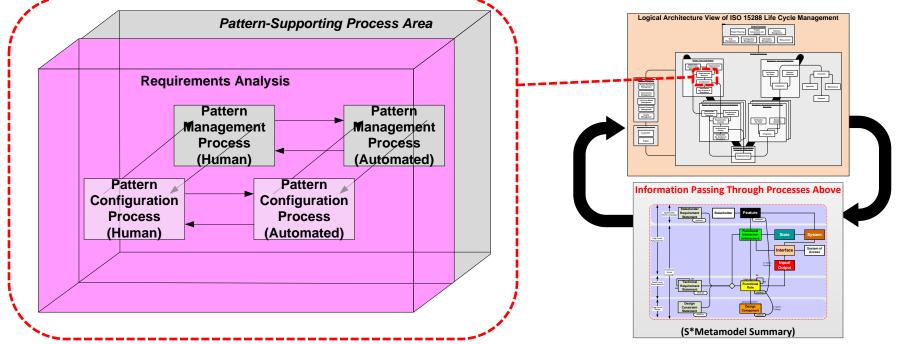
- S\*Patterns are S\*Models describing families of systems, product lines, platforms, or otherwise similar systems.
- S\*Patterns are reusable and configurable, and the focus of the INCOSE/OMG MBSE Initiative Patterns Challenge Team.
- In the traditions of 300 years of science, S\*Patterns are used to dynamically accumulate and apply what we learn about our systems: products, manufacturing, distribution, service, development.



#### Agility in Life Cycle Management

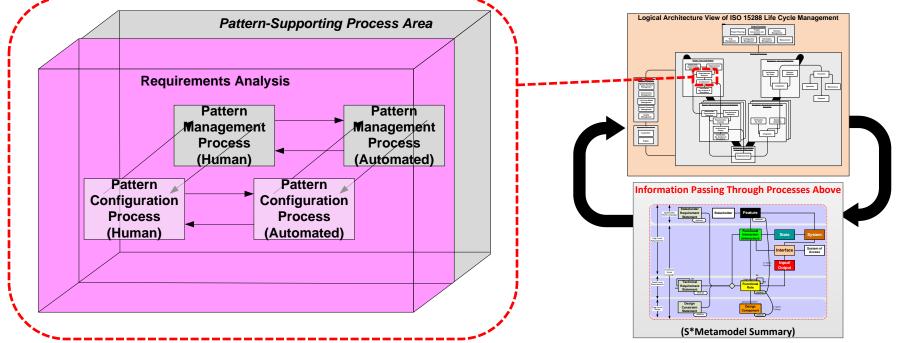
- The International Council on Systems Engineering (INCOSE) <u>www.incose.org</u> is the 25 year old global parent professional society concerned with the discipline of systems engineering across all domains: automotive, aerospace, health care, consumer products, advanced manufacturing, telecommunications, etc.
- INCOSE has begun a global 2015-16 project, the Agile Systems Engineering Life Cycle Model (ASELCM) Project.
- A community project of enterprises and institutions across the U.S. and Europe, to explore and report the current state of the art in the practice of agility across the life cycle of systems, in dynamic and uncertain environments.
- Based on exploratory workshops / clinics to be held at participating enterprises across the U.S. and Europe during 2015 – 2016.
- The result will include publication of the Agile System Engineering Life Cycle Management Pattern, as an input to the next update to ISO15288.
- You or your organization can participate in this project, as a visiting clinician or a visited workshop site.
- See <a href="http://www.parshift.com/ASELCM/Home.html">http://www.parshift.com/ASELCM/Home.html</a>

### Information system roles, across the life cycle



- Each of the Life Cycle Management Processes has potential roles for humans and info systems.
- The introduction of model-based (MBSE) data structures opens the door for integration of a wide range of model-oriented tools, integrated by a common fabric.
- Merely using PLM information technology not a guarantee of MBSE model coverage, unless managed.

### Information system roles, across the life cycle



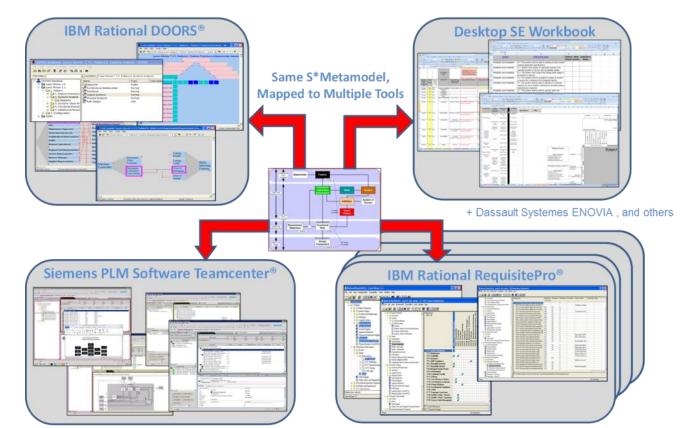
- The introduction of pattern-based (PBSE) data structures opens the door for machine-assisted platform and product line management.
- PLM suppliers increasingly reach out to this integration opportunity through not only more functionality, but also integration gateways and integration technologies (e.g., OSLC).
- A common federated conceptual reference model (S\*Metamodel) further enables this vision.

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 Critical priority sequence of planning: Information first, then Process, then Automation—all as a system.

#### Existing PLM systems and other tools are S\*capable

- The S\*Metamodel has been mapped to a diverse range of PLM information systems, engineering tools, and databases, using their built-in schema capabilities.
- Substantially all the contemporary systems are capable of this representation.
- Examples: Has been mapped into Siemens Team Center, IBM/Rational DOORS, Requisite Pro, Dassault Systemes ENOVIA, Sparx Enterprise Architect, others.

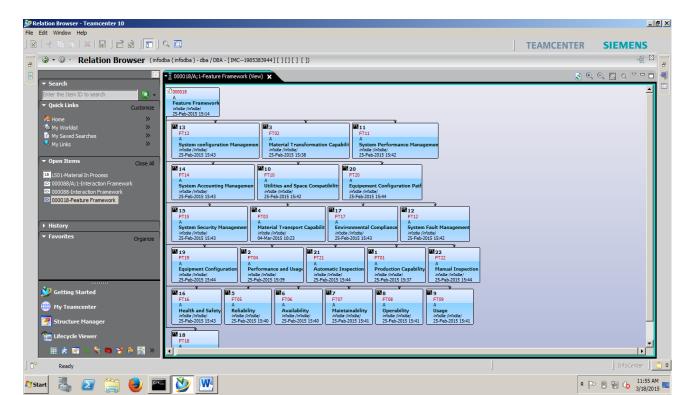


# The importance of community; roles for IPLI & partners

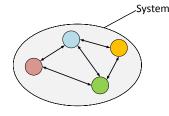
- As summarized here, this is a time of significant change in the <u>foundations</u> of innovative life cycle management, from concept through production, distribution, utilization and support.
- During such times of change, <u>learning from others and</u> <u>working together</u> become more important to the success of organizations and individuals.
- A consortium such as IPLI enhances the <u>community</u> needed to more effectively learn and advance together.
- Example: Agile methods have taught us how important it is to <u>experiment</u>. The IPLI consortium provides a way to plan and <u>share</u> those experiments, improving the leverage of these learning efforts.

#### **Example IPLI collaboration**

- One such recently-started collaboration with IPLI was undertaken by ICTT System Sciences:
  - Evaluation of a third party commercial PLM system ability to leverage model-based representation of generalized manufacturing systems, configurable to different process types and products.
  - Participation by graduate student and faculty members of IPLI.



### Challenges & opportunities--conclusions



- 1. As complexity and rate of change increase, the <u>systems</u> nature of products and their enabling systems (e.g., innovation, production, distribution, support) brings both new challenges and opportunities to managing life cycles.
- 2. Effective <u>representation</u> of systems is at the heart of 300 years of revolutionary success that innovation has brought to humanity.
- 3. Emerging advances in Model-Based Systems Engineering (MBSE) support that more powerful representation of systems, bringing it into line with earlier science-supported engineering disciplines (e.g., mechanics, chemistry, electronics).
- 4. Contemporary PLM information systems can be directed to use those explicit model-based representations, if they are arranged to do so.
- 5. In dynamic or uncertain environments, agility across the life cycle is enhanced by explicit model-based representation of systems, as the means of capturing explicit learning and exploiting it.
- 6. Simply installing information technology does not guarantee success--the priority planning order is underlying information first, life cycle process second, and automation third.
- 7. During a time of advance and change in these areas, community and partnership provide effective means of better understanding and exploiting this landscape.

### Discussion

#### Speaker:

William D. (Bill) Schindel President, ICTT System Sciences <u>schindel@ictt.com</u>



Bill Schindel is co-lead of two global industry teams: (1) the System Patterns Challenge Team, part of the Model-Based Systems Engineering (MBSE) Initiative of the International Council on Systems Engineering (INCOSE), and (2) the INCOSE Agile Systems Engineering Life Cycle Model Project. His forty-year engineering career has included aerospace engineering with IBM Federal Systems, teaching engineering and mathematics at Rose-Hulman Institute of Technology, founding and leading a supplier of telecom carrier network control systems for the public network, and leading ICTT System Sciences, a systems engineering enterprise that has pioneered Pattern-Based Systems Engineering methods for transforming the productivity of the innovation process in medicine and health care, advanced manufacturing, aerospace, automotive, and consumer products. Bill is also president of the Crossroads of America (Indiana) chapter of INCOSE.

### Attachments

#### (see also References for more sources)

"Interactions: Making the Heart of Systems Visible", INCOSE Great Lakes Conference on Systems Engineering, 2013.

"Requirements Statements Are Transfer Functions: An Insight from Model-Based Systems Engineering", *Proceedings of INCOSE 2005 International Symposium*, (2005).

"Accelerating MBSE Impacts Across the Enterprise: Model-Based S\*Pattern", to appear in *Proc. of INCOSE International Symposium IS2015*, Seattle, July, 2015.

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#### References

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- 1. W. Schindel, "Requirements statements are transfer functions: An insight from model-based systems engineering", *Proceedings of INCOSE 2005 International Symposium*, (2005).
- 2. W. Schindel, "What Is the Smallest Model of a System?", *Proc. of the INCOSE 2011 International Symposium*, International Council on Systems Engineering (2011).
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Medical Devices	Construction Equipment	Commercial Vehicle	Space Tourism Pattern
Patterns	Patterns	Patterns	
Manufacturing Process	Vision System Patterns	Packaging Systems	Lawnmower Product
Patterns		Patterns	Line Pattern
Embedded Intelligence Patterns	Systems of Innovation (SOI) Pattern	Consumer Packaged Goods Patterns (Multiple)	Orbital Satellite Pattern
Product Service System Patterns	Product Distribution System Patterns	Plant Operations & Maintenance System Patterns	Oil Filter Pattern
Life Cycle Management	Production Material	Engine Controls Patterns	Military Radio Systems
System Patterns	Handling Patterns		Pattern
Agile Systems Engineering Life Cycle Pattern	Transmission Systems Pattern	Precision Parts Production, Sales, and Engineering Pattern	Higher Education Experiential Pattern