Overview of PDP Phases

Phase 1: PDP Kickstart

During this initial phase, select the brand and define the product you will be working with for the duration of the PDP. Discuss the project purpose, direction, and justification statements. Research is a critical component of this phase. Perform a competitive analysis, including a retail audit, to understand your unique positioning. Describe the target market for your product. Outline your supply and distribution chains at a high level.

Phase 2: Project Management Essentials

The benefits of project management serves everyone involved in the process: the manager who oversees the project, the client who anxiously awaits the completed project, and the production team that gets the project up and running. Project management isn't rocket science, yet it often gets dressed up that way. In reality, project management is just a set of tools - a roadmap if you will, that enables managers to guide a project from point A to point B in a way that demonstrates efficiency, cost-savings and plain 'ol ingenuity. In this phase, you will outline what project management tools work for you!

Phase 3: Regulations and Sustainability

Next it is essential to consider the regulations and standards that your product must abide. The expectation of environmentally conscious products is growing immensely. This popularity has caused private organizations to develop standards and models for green packaging. For a company to sell and market a product as green, it must meet specified rules and regulations. It is also necessary to educate yourself on the regulatory agencies that impact the product categories you serve.

Phase 4: Materials I

This course is designed to take you through the art and science of enclosing and protecting products for use and sale. There are a myriad of packaging materials available, so many, that this is the first of two courses on packaging materials. This course focuses on glass, polymers, and metal which are typically used in primary packaging. Primary packaging is the term used to designate the layer of packaging in immediate contact with the product; in other words, it is the first packaging layer in which the product is contained. For example, consider a beverage can, a sachet for a tea bag, the bag inside the cereal box, and the wrap around a candy bar. These examples are all primary packages, as their main function is to contain and preserve the product. However, some products are enclosed in beautiful primary packaging, and secondary packaging may serve as a showcase, while for some products the primary packaging is not visible until the

consumer arrives home and opens the package, so it is the secondary packaging that acts as a salesperson. This course takes a deep dive into the manufacturing, design, and application of glass, polymer, and metal options to help you make more informed business decisions when choosing the packaging material for your next project.

Phase 5: Materials II

It is not enough to know just about glass, polymers, and metal for your packaging needs. What about paperboard and corrugated? These packaging options can make up your primary, secondary, and tertiary packaging needs. Paperboard encompasses a wide variety of packaging options from that orange juice carton you drink out of every morning to your cereal box. Your Cheerios box, as secondary packaging, is not intended to survive any form of distribution - just stabilize the primary packaging while it communicates the product's value to the shopper. The paperboard carton maintains the structural integrity of a lower-cost pillow pouch - the pillow pouch would fall off the shelf without it's secondary carton counterpart. But how does your favorite cereal get to the grocery store intact and ready to be purchased? A well designed corrugated shipping container is used, after all 95% of all products in the U.S. are shipped in corrugated boxes. Retail packaging is distributed within unitized systems - carefully organized pallets that are transported through truckload carriers and just a few stages compared to eCommerce packaging. In this phase, you will select the primary, secondary, and tertiary material as well as the shipper system that works best for your product.

Phase 6: Package Labeling and Finishing

The role of labeling has become quite significant as it helps to grab the attention of the audience. A product's label can communicate many things, from what the product can do for your customers to your company's values. Labels and finishing would not be possible without first understanding the all encompassing print process. With the printing industry now approaching $350 billion and projected to hit $600 billion around 2020, it is a massive industry in and of itself. Starting from the beginning, artwork and color theory is the foundation of print. However, to get your final package label, there are a plethora of printing processes to choose from, ranging from lithography to digital printing. In this phase, you will outline the best printing method for each level of your packaging.

Phase 7: Packaging Development Workflow

If you work for a large and established organization, you'll most likely have an arsenal of visual and branding assets. However, for many small businesses, this is not the case. Sometimes, even large organizations do not have accessible retail- and packaging-ready visual assets, so this phase is used to develop, assess, and organize these files. A brand style guide should be composed of logos, brands, approved fonts, colors, and proper use of imagery.

Phase 8: Capital Equipment and Scale Plan

Each aspect of your supply and distribution plan must be assessed for constraints. Some suppliers can only produce so much product at a time, or your co-packer is limited by speed, material, process, etc. In this phase, you'll take a 5 year outlook on sales, and make a plan to grow. Ideally, this time is used to think through the steps required when sales hit a specific limit, so you have a plan ready when Supplier X or Machine Y is unable to meet your sales forecast. In tandem with the Scale Plan comes the Capital Investment plan. Maybe you'll start production internally, and when sales hit a specific limit, you'll transition to a co-manufacturer. Regardless, you'll certainly be purchasing equipment when dealing with physical goods, so consider these investments now so they can be accounted for in the Final Business Case.

Phase 9: Supply/Distribution Plan

The plan should now identify companies you have selected to procure supplies from, co-package, co-manufacture, the 3rd party logistic companies (3PL) like USPS, UPS, FedEx, DHL, and regional carriers who transport your products, fulfillment agencies, packaging supplies, substrate providers, printers, etc. who produce the value of your product as it reaches the end consumer. Before you finalize your supply and distribution plan, take a moment to consider the various test and check protocols that exist to help you reduce issues. ISTA laboratory testing can simulate trucks, planes, and sea container forces, so you can test your packages in a lab to ensure they withstand the rigors of your distribution channels.

Phase 10: Human Factors

Studying human factors is important for everyone in the development process. If you are developing packaging, understanding how your shoppers interact with your media is essential. If you are responsible for sales and performance, it's essential you understand these factors to assess design a high level, and give feedback and guidance to your staff to optimize the potential success of your product. Please take the time to fill out the discussion board within the course for each section of human factors: perception, cognition, appeal, and decisions. This will enable the class to interact by sharing packaging examples they found for each section. The discussion board will then be reviewed in the same manner your PDP typically is. Along with filling out the discussion boards as you move along in this course, please take time to finalize and edit your PDP document. You are in the home stretch now!