

7TH ANNUAL CONFERENCE

Metrics for Portfolio & Resource Management

DRIVING PRIORITIES, ACHIEVING RESULTS

October 28–30, 2002 • Chicago

- **Determine where the real economic value is in your product portfolio — analyze, prioritize, and make the right moves**
- **Implement practical metrics for effective resource allocation**
- **Collect and benefit from real-time metrics; become more agile**

FEATURING...

KEYNOTE

Arthur M. Schneiderman, former VP of Quality and Productivity Improvement at Analog Devices and noted expert in Total Quality Management, on performance measurement and balanced scorecard systems

IMPLEMENTATION AND HOW-TO CASE STUDIES

From **3M, Honeywell, MDS SCIEX, CNH Global, DuPont, National Semiconductor, Rogers Corporation, Medrad, Eli Lilly** and more

NEW: EXPERT CLINICS

Interactive sessions led by foremost metrics experts. Receive drill-downs, troubleshooting, and specific recommendations to improve your metrics program. (see pp. 10-11)

PLUS: 3 IN-DEPTH PRE-CONFERENCE WORKSHOPS

- A** *Developing Metrics Portfolios: Defining and Selecting Key Measures for Product Development Performance*
- B** *Metrics for Managing Dispersed Teams, Partners and Suppliers*
- C** *Creating and Executing a Strategic Scorecard*

presented by



7TH ANNUAL CONFERENCE

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Why this conference is important to you

IN A CLIMATE WHERE RESOURCES ARE INCREASINGLY scarce and the pressure to make financial gains quickly continues to escalate, knowing what projects to invest in and which projects to cut is vital. More and more organizations are emphasizing portfolio analysis and performance measurement techniques to ensure that they are able to select the right number and mix of projects for maximum short and long-term value. If your organization is like most, you undoubtedly struggle to create and implement a streamlined set of metrics that can drive the organization towards strategic objectives without causing confusion or wasted efforts.

Management Roundtable's 7th annual conference on **Metrics for Portfolio and Resource Management: Driving Priorities, Achieving Results**, to be held **October 28–30, 2002** in Chicago, Illinois, will bring together leading industry experts and advanced practitioners to help you:

- Successfully define, implement and USE a set of key metrics to drive portfolio and resource management decisions
- Effectively balance the product portfolio to give you enough products to meet short-term financial goals without compromising long term product strategy
- Implement practical resource management metrics—to effectively allocate and/or re-deploy resources
- Take advantage of real-time metrics data to enable quick data analysis and swift decision-making

Who should attend

Vice Presidents and Directors of:

- R&D
- Engineering
- Product Development
- Quality

Functional Managers
Senior Program Managers

About

The Management Roundtable

The Management Roundtable is the leading knowledge and networking resource for product developers. Practitioner-oriented and unbiased, our focus is on providing actionable information about new innovations, processes, tools, and technologies that enable faster time-to-market, increased profitability, and overall competitive advantage. Founded in 1980, The Management Roundtable publishes the PEER-award-winning Product Development Best Practices Report, offers an online database of PD best practices, hosts a variety of specialized conferences and workshops, and conducts customized research, onsite training and expert referrals.



Monday, October 28 Pre-conference Workshops

7:00 - 8:00	Registration and Continental Breakfast
8:00 - 5:00	A. <i>Developing Metrics Portfolios: Defining and Selecting Key Measures for Product Development Performance</i>, Bradford L. Goldense, Goldense Group Inc.
8:00 - 12:00	B. <i>Metrics for Managing Dispersed Teams, Partners and Suppliers</i>, Jerry McColgin and Eduardo São Clemente, McColgin Consulting
12:00 - 1:00	Lunch
1:00 - 5:00	C. <i>Creating and Executing a Strategic Scorecard</i>, Arthur M. Schneiderman, Process Management Consultant

Tuesday, October 29 Conference Day 1

7:00 - 7:45	Registration and Continental Breakfast						
7:45 - 8:00	Welcome: Management Roundtable						
SESSION I. MEASURING VALUE, LINKING TO STRATEGY							
8:00 - 9:15	Keynote Address: <i>How to Avoid Metrics Overload and Paralysis</i> Arthur M. Schneiderman, Process Management Consultant						
9:15 - 10:15	Case Study: <i>Tying Metrics to the Active Management of NPD and Overall Company Performance</i>, Patrick Carluccio and Michel Stanier, MDS SCIEX						
10:15 - 10:30	Refreshment Break / Exhibits						
SESSION II. METRICS FOR OPTIMIZING RETURN ON TECHNOLOGY INVESTMENTS							
10:30 - 11:30	Case Study: <i>Creating the Environment for Growth and Innovation through Metrics</i>, Richard Bingham, DuPont						
11:30 - 12:30	Case Study: <i>Technology vs. Product Portfolio Management</i>, Peter Dierauer, Honeywell Embedded Controls						
12:30 - 1:30	Lunch						
SESSION III. METRICS FOR ALLOCATING/REDEPLOYING RESOURCES							
1:30 - 2:30	Case Study: <i>Applying Predictive Metrics for Early Problem Identification and Dynamic Resource Allocation Adjustments</i>, Les Stewart, Medrad, and Wayne Mackey, Product Development Consulting Inc.						
2:30 - 3:30	Case Study: <i>Process and Metrics for Effective New Product Development at Rogers Corporation</i>, Michael Bessette, Rogers Corporation						
3:30 - 3:45	Refreshment Break / Exhibits						
3:45 - 5:45	<table border="1"> <tr> <td rowspan="2"> Expert Clinics See pages 10-11 for details </td> <td rowspan="2">OR</td> <td>3:45 - 4:45</td> <td><i>RD&E Resource Capacity Management Practices Survey Results</i> Bradford L. Goldense</td> </tr> <tr> <td>4:45 - 5:45</td> <td><i>Special Session on Criteria for Diagnosing Successful & Effective Metrics</i>, Arthur M. Schneiderman</td> </tr> </table>	Expert Clinics See pages 10-11 for details	OR	3:45 - 4:45	<i>RD&E Resource Capacity Management Practices Survey Results</i> Bradford L. Goldense	4:45 - 5:45	<i>Special Session on Criteria for Diagnosing Successful & Effective Metrics</i>, Arthur M. Schneiderman
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		4:45 - 5:45	<i>Special Session on Criteria for Diagnosing Successful & Effective Metrics</i>, Arthur M. Schneiderman				
5:45 - 7:00	Networking Reception / Exhibits						

Wednesday, October 30 Conference Day 2

6:45 - 8:00	Registration and Continental Breakfast
7:00 - 7:45	Tactical Metrics Discussion Group , Facilitator: Robert J. Wardlow, Manager, Global Product Development, CNH Global
8:00 - 9:15	Keynote Address: Lockheed Martin (invited)
SESSION IV. STRATEGIES FOR EFFECTIVE PORTFOLIO MANAGEMENT	
9:15 - 10:15	Case Study: <i>Managing an R&D Portfolio Process in Real-Time</i>, Jay Andersen, Eli Lilly and Company
10:15 - 10:45	Refreshment Break / Exhibit
10:45 - 11:45	Case Study: <i>Evolution and Challenges of R&D Metrics at National Semiconductor</i>, John Cordes, National Semiconductor
11:45 - 12:45	Lunch
12:45 - 1:45	Case Study: <i>Metrics: Closing the Loops to Drive Growth</i>, Thomas Gregory, 3M, and Curtis D. Hargadine, Development Professionals, Inc.
1:45 - 2:45	Case Study: <i>Metrics for Balancing Scope, Schedule and Resources</i>, Robert J. Wardlow, CNH Global
2:45	Close of Conference

Pre-Conference Workshops Monday, October 28

Workshop A (Full Day) 8:00am–5:00pm

Developing Metrics Portfolios: Defining and Selecting Key Measures for Product Development Performance

Bradford L. Goldense, President, Goldense Group Inc.

This highly practical workshop will take you through a step-by-step process of developing a critical set of R&D/product development metrics for your organization. You will identify key measures to assess: overall/corporate R&D performance; project performance; functional performance; and improvement initiative performance. To get you started, Mr. Goldense will provide current survey data to describe the measures most frequently used by industry, as well as the sizes/ranges of sets of metrics used to monitor and guide performance.

Workshop deliverables:

- You will learn how to select metrics that can measure both a specific performance and can be synthesized to measure overall performance
- You will be able to identify 3–10 value added metrics for each of the four key performance areas outlined above; from these metrics you will determine which 6–10 metrics will comprise your “top level” set of metrics for R&D and/or product development
- Strategies for implementing metrics systems



Brad Goldense, president of GGI, has been assisting engineering and manufacturing companies for the past twenty years in assessing, developing, and implementing competitive business changes. Mr. Goldense has consulted to over 75 Fortune 1000 companies and has done work in well over 250 manufacturing plants. He specializes in several

areas including: strategic planning, reengineering, product development, manufacturing management, and engineering/manufacturing design/information systems.

“Many components of this conference will be implemented into our product development strategy.”

Jim Bienias, Rheem Manufacturing Company

Workshop B (Morning) 8:00am–12:00 Noon

Metrics for Managing Dispersed Teams, Partners and Suppliers

Jerry McColgin, Principal, and **Eduardo São Clemente**, Consultant, McColgin Consulting

Project leaders live in a tough environment. Not only must they deliver on the traditional expectations of “on time,” “on budget” and “meet performance standards,” they must do so in light of additional complexities such as outsourced partners and dispersed project teams. While the former items have a myriad of metrics to gauge progress and status, the latter items have traditionally been managed less formally. Conflicting goals and interpersonal issues can easily slow a team down, or worse, lead to ultimate failure. A leader needs tools to help keep a team on track, not a rigid set of measurements that will bog the team down.

This workshop will provide you with tools to manage these less tangible issues. Predictive metrics will enable a project leader to identify problems and provide remedies before it is too late. In this interactive workshop, you will learn:

- What should be measured; at what frequency
- Metrics to avoid
- How to set parameters; when to proactively intercede
- Daily techniques to keep a dispersed team on track
- Metrics as motivational tools



Jerry McColgin founded McColgin Consulting in 1997 and has enabled a variety of companies across different industries to create high-performance teams focused on understanding unmet consumer needs and improving product development processes. He brings fifteen years of cross-functional experience with Whirlpool Corporation,

which includes personal leadership of a variety of product development teams, both domestic and international. Jerry holds an Executive MBA from Ashland University and a BS degree in industrial engineering from Purdue University.



Eduardo São Clemente, consultant with McColgin Consulting, has more than 10 years of global cross-functional experience with Multibras, the major appliance producer in Brazil (Brastemp-Consul). Eduardo received an Executive MBA from Univille (Brazil) and a BS degree in mechanical engineering from Faculdade de Engenharia de

Joinville (Brazil).

Creating and Executing a Strategic Scorecard

Arthur M. Schneiderman, Process Management Consultant

This workshop will use a 9-step process to create and execute a Balanced Scorecard that links an organization's strategy to the actions required for its successful implementation. This process differs from others in three important ways:

- It uses targeted stakeholder requirements as the link between strategy and internal process improvements, which provide the basis for scorecard metrics
- It quantifies the linkage between strategy and improvement to yield a rank ordering of candidate metrics that can be used to limit the number of scorecard metrics
- It operates closed-loop to assure continuous refinement and learning

This workshop will provide a rigorous framework that can be adapted to your organization's current scorecard maturity and capacity, while assuring that a roadmap exists that will get you to your overall objective in the shortest possible time.



Art Schneiderman is an independent consultant on process management. From 1986 to 1993 Art was vice president of quality and productivity improvement at Analog Devices, Inc. He was responsible for planning, facilitating, and supporting Analog's worldwide implementation of total quality management, as well as its

performance measurement and balanced scorecard systems. Art was a senior examiner for the Malcolm Baldrige National Quality Award and served on the Conference Board's US Quality Council II. He is a visiting fellow at the Centre for Business Performance at Cranfield University's School of Management (UK). He has authored many articles concerning quality goal setting (the half-life concept), quality costs, performance measures, and the balanced scorecard.

"Extremely beneficial to take time away from day-to-day activities to discuss problems with others struggling with the same issues and people who have helpful insight."

Richard Hall, Kendro Laboratory Products

By participating in Metrics for Portfolio and Resource Management, you will come away with:

- A clear plan for prioritizing your portfolio and effectively allocating scarce resources
- Insight into how to uncover the economic leverage in your portfolio for greater ROI
- Access to some of the nation's foremost metrics and product development experts
- Specific action steps, tools, processes and roadmaps to adapt and use within your own organization
- Full set of materials and case studies that can be shared with others upon return to your organization
- Follow-up materials, including online presentation slides and e-mail networking directory
- One-year complimentary subscription to **MIT Sloan Management Review**

MIT SLOAN Management Review provides senior managers with the best current management theory and practice. The peer-reviewed, quarterly journal covers all the management disciplines, with an emphasis on corporate strategy, leadership, and the management of technology and innovation.

- Three-month complimentary subscription to **Product Development Best Practices Report**

PDBPR is an unbiased, non-commercial monthly newsletter which provides expert insight and practitioner case studies on topics such as: product definition, R&D metrics, portfolio management and project prioritization, cycle time reduction techniques, web-based product development management, supply chain integration and more. The editors of *PDBPR* continuously seek out cutting-edge, implementation-oriented stories and consult regularly with the world's foremost product development experts.

"The product development and R&D Metrics conference provided the intellectual capitalist in all of us the opportunity to learn, ask, and network with a variety of corporations. This program was well worth it!"

Chad Renbarger, The Patent and License Exchange



How to Avoid Metrics Overload and Paralysis

Arthur M. Schneiderman

Former Vice President of Quality and Productivity Improvement, Analog Devices

One of the most difficult organizational challenges is to select the right manageable set of metrics. Having too many metrics can lead to paralysis and a focus on projects that will not yield the highest value. Art Schneiderman will address the critical distinction between measures for control and strategic improvement: control measures have target levels essentially equal to their historic value, while strategic improvement measures have goals that require significant process improvements. Art will discuss how vital it is to develop effective metrics that meet the following basic criteria:

- Measures should always have a strong visible link to stakeholder satisfaction
- Measures should have unambiguous operational definitions
- Measures should be critical for control or strategic improvement
- Measures should form a complete set that avoids undesirable tradeoffs

“A very good opportunity to see the problems I face viewed from multiple perspectives and assessed using various solution sets. A thought-provoking experience which when combined with the strong networking opportunity will drive meaningful, continuing refinement to our process.”

Ed Laben, Harley-Davidson

SESSION I: MEASURING VALUE, LINKING TO STRATEGY

Tying Metrics to the Active Management of NPD and Overall Company Performance

Patrick Carluccio, Project Manager, and **Michel Stanier**, Manager, Project Management Group, **MDS SCIEX**

The NPD group at MDS SCIEX has the challenge of fueling the growth of the organization, executing flawlessly and all the while meeting project timelines in an environment where time-to-market is increasingly critical. With the rapid growth of product development projects and staff, the depth of experience on project teams was at risk. Teams of new personnel and contractors were running large portions of the NPD projects while existing, experienced, staff was overseeing multiple projects to keep everything on track. In order to better manage projects and tie product development performance to the company's balanced scorecard, a suite of forecasting metrics was implemented to facilitate communication and early problem identification. This presentation will outline:

- The background that led to the use of project metrics at MDS SCIEX
- The philosophy and overview of the metrics used at MDS SCIEX
- Lessons learned in implementing the metrics system

SESSION II: METRICS FOR OPTIMIZING RETURN ON TECHNOLOGY INVESTMENTS

Creating the Environment for Growth and Innovation through Metrics

Dr. Richard Bingham, Strategic Planning Manager, Corporate R&D, **DuPont**

Metrics, both output and in-process, are one of the most effective ways for leadership to communicate what really matters, what is expected and what will be rewarded. Used wisely, metrics can bring tremendous alignment, focus and energy to an organization. This presentation will share lessons learned in DuPont on effective and not-so-effective uses of metrics to optimize return on technical investment.

Technology vs. Product Portfolio Management

Peter Dierauer, Technology Leader, **Honeywell Embedded Controls, North America**

Due to constant market pressure to reduce new product development times, Honeywell has recognized the need to separate technology development from new product development. Today, the ideal project in a new product development pipeline will reuse engineering work from other existing products and utilize only proven technology. Furthermore, the technology pipeline contains projects which will turn into profit further down the road, thus reinforcing the critical need to appropriately manage the technology project portfolio. This presentation will examine and discuss:

- **Significant differences in selection and measurement criteria for product and technology portfolios**
- **Metrics systems for technology projects vs. product projects**
- **Major differences between both management processes and utilized metrics**

SESSION III: METRICS FOR ALLOCATING / REDEPLOYING RESOURCES

Applying Predictive Metrics for Early Problem Identification and Dynamic Resource Allocation Adjustments

Les Stewart, Director of European Operations for Sales/Service, **Medrad**, and **Wayne Mackey**, Principal, **Product Development Consulting Inc.**

In the fall of 2000, Medrad implemented predictive metrics and a responsive governance system within its supply chain organization. They applied a simple but effective approach of collecting metrics data electronically and reviewing the data on their company network. By discovering problems early and adjusting resources dynamically to meet those needs, Medrad's predictive metrics have delivered tangible results. Based on the success of predictive metrics in the supply chain, Medrad rolled out predictive metrics to the entire corporation. This presentation will discuss:

- **An overview of the predictive metrics approach used**
- **Medrad's metrics implementation timelines and tasks**
- **Lessons learned in the real-world application of leading-edge metrics**
- **How to simplify the collection and review of metrics using the company network**
- **Specific examples where predictive metrics identified problems early, allowing rapid corrective actions**

Process and Metrics for Effective New Product Development at Rogers Corp.

Michael Bessette, Director, Product Development in Corporate Technology, **Rogers Corporation**

Rogers Corporation develops, manufactures and markets advanced circuit materials and high performance foams for the communications and computer markets. Strategies invariably involve technology leadership positions and success requires rapid product development of new products that meet customer needs. To provide management systems necessary for sustaining growth, Rogers developed and implemented a toll-gate/concurrent product development (CPD) process and executive management portfolio reviews to align technical and business strategies. Rogers is currently integrating Design for Six Sigma (DFSS) and Business Process Management (BPM) to identify and track key R&D metrics such as new product sales ratio, value of R&D portfolio and adequacy of pipeline filling. This presentation will highlight:

- **Overview of Rogers CPD process, keys to its successes and challenges**
- **Portfolio review methods which address priority setting and pipeline filling**
- **R&D metrics from staffing the organization through idea generation, product development and technical service**
- **Tools and culture for DFSS**

SESSION IV: STRATEGIES FOR EFFECTIVE PORTFOLIO MANAGEMENT

Managing an R&D Portfolio Process in Real Time

Jay Andersen, Research Advisor, Decision Sciences, **Eli Lilly and Company**

Traditionally, R&D portfolio management is seen as a periodic or cyclic process. Senior executives meet on an annual or semi-annual schedule to review their portfolio of projects, set priorities, and make resource allocation decisions. During the weeks preceding the portfolio review, support groups from project management, marketing, and finance examine each project and update the portfolio. Unfortunately, portfolio decisions need to be made by senior executives on a real-time basis. Waiting until the next scheduled review to make decisions may not be convenient or prudent. The decision-makers need a portfolio process that can provide relevant data in a real-time setting. This presentation will discuss how to transition from a cyclical to a real-time portfolio review process.

Metrics: Closing the Loops to Drive Growth

Thomas Gregory, Technical Director, Surface Conditioning Division, **3M**, and **Curtis D. Hargadine**, President, **Development Professionals, Inc.**

This presentation shows how a 3M business unit employed a systematic analysis of its recent new business-to-business offerings to develop metrics for screening and prioritizing opportunities and managing their realization. Key points covered include:

- **First-look criteria for potential programs**
- **Tools to guide comprehensive business analyses**
- **Techniques to support rapid program assessment**
- **Prioritizing based on business impact metrics**
- **Feedback mechanisms to keep programs on target**
- **Networked tools for collaboration from concept to completion**

Evolution and Challenges of R&D Metrics at National Semiconductor

John Cordes, Manager, Business Process Improvement, **National Semiconductor**

National Semiconductor is evolving from a broad-based supplier of integrated circuits to a key partner for its system-on-a-chip customers. Comprised of four major divisions and 19+ business units, the company has globally dispersed product development teams in more than 30 design and development centers with project teams ranging from five to 150 people. Since 1995 the company has undergone major evolutions in R&D metrics, business processes, and enabling IT systems that support them to streamline the product development process. This presentation will outline:

- **The challenges, failures and successes encountered during this evolution**
- **How National Semiconductor's R&D metrics evolved from reactionary measures based mainly on cost tracking to a more balanced approach of both output (results) metrics & process (predictive) metrics**
- **The methodology for driving changes in R&D metrics and the resultant impact on the development process**

Metrics for Balancing Scope, Schedule and Resources

Robert J. Wardlow, Manager, Global Product Development, **CNH Global**

CNH Global, a multi-billion dollar agricultural and construction equipment maker, faced multiple challenges in managing its product development organization. PD teams needed real-time guidance on how to balance risks to scope, schedule, and resources. Business unit managers needed effective measures to evaluate product development maturity, and senior management required analysis metrics to assess return on R&D investments. Find out how CNH Global N.V. structured a framework of PD metrics to address these three critical levels. Learn about:

- **The proactive and predictive metrics that CNH coupled with a risk management methodology to provide PD teams with real-time, effective decision-making guidance**
- **How CNH business units use metrics to evaluate the current state of product development maturity, reinforce behaviors that move the organization along the path to higher levels of maturity, and support senior management in evaluating R&D investment levels**

Networking Opportunities

Tuesday, October 29, 2002
5:45pm–7:00pm

Networking Reception

Meet the speakers and your colleagues from other organizations at informal discussions over beer, wine and appetizers. This is an excellent opportunity to ask more questions, find out how others are progressing with their metrics initiatives, find out what works (what has not) and make valuable new connections.

Wednesday, October 30, 2002
7:00am–7:45am

Breakfast Discussion on Tactical Metrics

Does your organization face difficulties in evaluating the day-to-day operations for individual product development programs? You're not alone. Participate in this facilitated discussion with **Robert Wardlow, Manager, Global Product Development, CNH**, and find out how to develop real-time tactical metrics to aid your product development teams (and senior management) to keep on top of the current state of the development program.

Key Benefits

By participating in this conference, you will learn:

- How to avoid metrics overload and paralysis; how to select and implement an effective but manageable set of metrics for your organization's unique needs
- How to determine the right mix and number of projects in your portfolio—and stay focused on those projects that yield the highest return
- How **National Semiconductor** transformed its R&D metrics from reactionary based to a balance of output (results) and process (predictive) metrics
- The differences in scoring models and selection criteria for technology projects versus product projects
- How to measure hard-to-quantify variables including the value of R&D investments, intellectual property and product concepts
- How **3M** implemented a systematic analysis of new business-to-business offerings to develop metrics for screening and prioritizing opportunities and managing their realization
- How to use metrics to manage dispersed teams, partners and suppliers—what works, what doesn't
- How **Medrad** simplified its collection and review of metrics data—enabling early problem detection and efficient resource allocation adjustments
- How to measure and boost return on R&D investments
- How **CNH Global** coupled proactive and predictive metrics with risk management methodology to provide real-time decision making guidance at all organizational levels
- How to use metrics to move your organization along the path to higher levels of PD maturity
- How to make sure your metrics have unambiguous operational definitions that result in either control or strategic improvement
- How to use metrics to make real-time, agile decisions
- How to take corrective action to improve your current metrics program—troubleshooting strategies and organizational change approaches
- About a 9-step process for creating and implementing a strategic scorecard to link organizational strategy to the actions required for successful implementation
- How **Eli Lilly** transformed its cyclic portfolio review process to a real-time process to ensure efficient and effective resource allocation
- About **Rogers Corporation's** successful implementation of a toll-gate/ concurrent product development process, portfolio review analysis, and R&D process metrics to enable rapid new product development
- How to implement practical metrics to effectively allocate and/or re-deploy resources

NEW TO THE CONFERENCE THIS YEAR...

Expert Clinics

**LIMITED TO
15 EACH...**

*First come, first served!
Reserve early to ensure
your place!*

In order to provide you with an opportunity to gain more interactive, hands-on experiential time with leading metrics experts, we are offering four complimentary clinics examining timely issues and providing you with strategies, tools and roadmaps to take back and adapt to your organization's specific metrics initiatives.

The sessions will run concurrently with the plenary session on Tuesday, May 29, from 3:45pm-5:45pm

(Please note: all materials from the plenary sessions during this time will be available to those who attend the expert clinics).

Clinic A

Balancing the Product Portfolio

Mike Brennan, Brennan Consulting

This clinic will examine how to select the best projects for your portfolio through early customer interactions, rapid prototyping technologies, and by delaying resource allocation decisions as long as possible. Strategies to balance the overall product portfolio will include allocating resources based on the magnitude of the opportunity and making trade-offs between product specifications and time-to-market objectives.



Mike Brennan is president of Brennan Consulting, a management consulting firm that helps clients create new products, manufacturing start-up and product marketing strategies. He is senior consultant with Sigma Breakthrough Technologies in the enterprise-wide application of Six Sigma to strategic planning, executive training in Six Sigma, and design for Six Sigma.

“Cutting-edge tools backed by benchmarking in top-quality organizations which is sure to help me deliver industry changing products.”

Richard Sayers, Director, Development Engineering,
Gojo Industries

Clinic B

How to Measure Return on Innovation Investment

Thomas Kuczmariski, Kuczmariski & Associates

This clinic will prepare you to create or improve your own existing metric systems by first exploring the key principles for productively measuring innovation. These include: Strength in Simplicity; Standardize and Commit; and Systematizing Data. You'll learn the differences between *performance metrics* (such as return on innovation and survival rate) and *program metrics* (including R&D innovation emphasis ratio and speed to market) and examine ways to customize these measures for your organization's unique needs. In order to determine why and how new products have performed in the past, you will conduct a diagnostic audit of your new product performance. After completing this assessment, you will have a clear picture of how your company stacks up against the competition in terms of new product building blocks.



Thomas Kuczmariski is president of Kuczmariski & Associates, a management consulting firm that helps clients create products, services and brand strategies. He is an adjunct professor at Northwestern University's Kellogg Graduate School of Management and The University of Chicago Graduate School of Business. He is the author of *Managing New Products* (3rd edition), *Innovation*, *Innovating the Corporation* and *Values-Based Leadership*.

Clinic C

Auditing Portfolio Metrics: Checking for Quality, Utility and What Else?

Robert Frost, Measurement International

As fact-based management and performance metrics become more widespread, a need develops for reviewing, auditing or otherwise evaluating the quality of the metrics in a given organization. Learn why doing an audit of your portfolio metrics is vital. Come away with a solid understanding of what an audit should accomplish, the factors that should be gauged, the audit practices that should be followed, and what outcomes an organization should hope to achieve from an audit process.



Bob Frost has over 25 years experience as a faculty member, corporate manager, and consultant with a constant concern for improving organizational effectiveness and, in particular, the tools available to leaders for fact-based management. He has held positions at RCA,

Upjohn, and Interfirst corporations. He founded Measurement International in 1986.

Clinic D

Metrics Trouble-Shooting and Problem Solving

Wayne Mackey, Product Development Consulting, Inc.

This clinic offers a unique opportunity to review your specific individual metrics issues with a highly experienced facilitator. A special online discussion group will be made available for you to interact with the facilitator and other participants prior to the October session in Chicago to determine the agenda for the clinic. You'll be asked to submit your problems/issues, engage in ongoing discussions, and then convene at the event to collaborate on next steps and strategies for your metrics program.



Wayne Mackey's expertise is grounded in over 20 years of hands-on management of large engineering, manufacturing, and procurement organizations. Mr. Mackey has been a principal with Product Development Consulting, Inc. since 1997. Prior to joining PDC, he worked in

automotive, aerospace and high-tech industries for 20 years.

OFFERED CONCURRENTLY WITH THE EXPERT CLINICS:

3:45 p m – 4:45 p m

RD&E Resource and Capacity Management Practice Survey Results

Bradford L. Goldense, President, GGI

Hear exclusive survey results on research, development and engineering product development metrics. The survey will address the following major areas related to resource and capacity management:

- Loading the RD&E capacity pipeline
- Providing capacity for RD&E activities
- Balancing cross-functional resources
- Using systems, tools and metrics to manage capacity
- RD&E metrics used in industry

To participate in the survey and receive a summary of the of the survey results, visit www.pdmetrics.com for more details. Survey deadline: August 12, 2002.

4:45 p m – 5:45 p m

Criteria for Diagnosing Successful and Effective Metrics

Facilitated by **Arthur M. Schneiderman**

Attend this interactive session and learn how to diagnose whether your metrics are effective by applying these straightforward but key criteria for success:

- Are the metrics a reliable proxy for stakeholder satisfaction (when the metric improves, does satisfaction improve)?
- Are the metrics documented in an unambiguous operational definition (leaves no room for interpretation)?
- Are the metrics useful in driving improvement (leads directly to improvements—ways that YOU can improve it)?
- Are the metrics part of a complete system of metrics (makes visible all undesirable trade-offs)?

Registration Form

7TH ANNUAL CONFERENCE

Metrics for Portfolio & Resource Management

DRIVING PRIORITIES, ACHIEVING RESULTS

October 28–30, 2002 • Chicago

Dates

The conference will begin at 7:45am (registration and continental breakfast at 7:00 am) on October 29, 2002 and will adjourn at 2:45pm on October 30, 2002.

Optional pre-conference workshops are offered on Monday, October 28 from 8:00am–5:00pm.

Location & Hotel Accommodations

The conference will be held at the **Marriott Chicago Downtown**, 540 North Michigan Avenue, Chicago, IL. Please call **1-800-228-9290** or **312-836-0100** directly for room reservations. Please mention Management Roundtable to receive a special rate (we have a limited block of rooms).

Conference Fee

\$1595/person. Fee includes program materials, luncheons, reception, continental breakfasts, refreshment breaks, complimentary 3-month subscription to *Product Development Best Practices Report*, and a complimentary one-year subscription to the *Sloan Management Review*.

Pre-Conference Workshops: The fee for either half-day workshop is \$495 *with* the conference (or \$695 as stand alone); full-day pre-conference workshop is \$990 *with* the conference (or \$1295 as stand-alone) and includes breakfast, lunch, and all materials.

Team Discount

Groups of 3 or more may deduct \$100 per person on the 2-day conference. Groups of 6 or more please call 800-338-2223 for special pricing.

No-Risk Guarantee

Your satisfaction is 100% guaranteed—money-back or credit.

Four Ways to Register:

Call: **1-800-338-2223** or **781/891-8080**
(weekdays, 9:00am–5:30pm EST)

Fax to: **781/398-1889**

Internet: **info@roundtable.com** or
www.ManagementRoundtable.com

Mail to: **Management Roundtable,**
92 Crescent Street, Waltham MA 02453

Please accept the following registration(s):

(Please use photocopies for additional people.)

- Conference (October 29–30)
- Pre-Conference Workshops (October 28):
 - A** (full-day) OR **B** (morning half-day)
 - C** (afternoon half-day)
- Expert Clinics (October 29)
 - A** **B** **C** **D** Please select first choice (complimentary)

Name: Mr. / Ms. _____

Title: _____

Company: _____

Address: _____

City/State/Zip: _____

Phone: _____

Fax: _____

Email: _____

Payment Information (Amount \$ _____)

Check enclosed, payable in US funds to *Management Roundtable, Inc.*

Please bill by: Visa Mastercard AMEX Diner's Club

Account # _____ Exp. Date: _____

Signature _____

Please bill my company PO# _____

Registration Code: WEDOWNLOAD