

THE industry event on Metrics!

RESERVE BY JULY 30  
& SAVE \$200! See page 11

MANAGEMENT ROUNDTABLE'S 9TH ANNUAL CONFERENCE

# Product Development and R&D Metrics: From Ideation to Commercialization

SEPTEMBER 28 – 30, 2004 ■ CHICAGO

**How to evaluate concepts, opportunities, and resource capacity to accelerate new product and revenue generation**

## FEATURING

### Conference Co-Chairs:



Leading innovation expert  
**Tom Kuczarski**, President,  
Kuczarski & Associates, on the  
future of innovation and metrics  
to boost ROI



### Keynote:

**Lorraine Segil**, acclaimed author of  
*Measuring the Value of Partnering*, on  
R&D alliance metrics — from development  
to implementation. Make sure your metrics  
align with your partners'!



Foremost R&D metrics authority  
**Bradford L. Goldense**,  
President, GGI, on intellectual  
property, innovation, project  
selection and resource approval  
processes of leading firms  
(See page 7)

### Real-world implementation examples from:

HEWLETT-PACKARD ■ PITNEY  
BOWES ■ ARMSTRONG ■  
AVENTIS ■ ADOBE ■ MICROSOFT  
■ REICHHOLD ■ MEDTRONIC  
PHYSIO-CONTROL ■ ALBERTO  
CULVER ■ more

**PLUS** — Exclusive 2004  
Metrics Survey Results (See page 4)

PRESENTED BY  
  
The  
MANAGEMENT  
ROUNDTABLE

Call 800.338.2223 or 781.891.8080



[www.ManagementRoundtable.com](http://www.ManagementRoundtable.com)

ideation > valuation > selection > resourcing > commercialization

# Product Development and R&D Metrics: From Ideation to Commercialization

SEPTEMBER 28 – 30, 2004 ■ CHICAGO

## Why This Conference Is Important To You

To stay ahead of the competition, you can't afford to let your next big product idea flounder somewhere in the ideation phase. In fact if you do, it could cost you BIG — up to 30–50% of your market share.

Having a defined system in place to capture new product concepts, evaluate their potential value and ensure proper resourcing is critical. That's why more companies are deploying metrics further upstream — streamlining their ideation process, assessing and extracting the most value from resultant IP and leveraging new product opportunities to the fullest.

Management Roundtable's 9th annual conference, **Product Development and R&D Metrics: From Ideation to Commercialization**, to be held **September 28–30, 2004** in Chicago, Illinois, will bring together leading industry experts and advanced practitioners to examine the steps companies have taken to map out their ideation processes, add structure, and ensure that new ideas with merit are not overlooked or under-resourced. In addition, the program will highlight best practices in pipeline and portfolio management to drive portfolio execution and revenue generation.

### By participating you will receive:

- The latest approaches, techniques, and tools to capture new product concepts and measure their potential ROI; decide in which opportunities to invest.
- Practical case examples of using metrics to ensure that the highest-value projects are properly resourced.
- Proven IP valuation methodologies and strategies to extract the most value from your non-commercialized IP.
- Repeatable templates and metrics to successfully engage in co-development efforts.

**This is a new era in product development with new rules — it is time to update your metrics. While cycle time and output are still critical, these are not the measures to get you ahead. Now you must track, measure and manage resource capacity, external partners, IP, and other intangibles — find out how at *Product Development and R&D Metrics: From Ideation to Commercialization*.**

“An excellent mix between academic theory and industry experience. Every session generated one or two ideas to bring back to my organization.”

Nick Cassella,  
Group Marketing  
Manager,  
Thomas & Betts



## Who Should Attend

*This conference is a must-attend for anyone involved in assessing, measuring and improving NP&D and R&D results. It is especially worthwhile for:*

**Vice Presidents, Directors and Managers of:**

- R&D
- Engineering
- Product Development
- Process Improvement
- Technology
- Advanced Concept Development
- New Business Development
- Finance

*If your organization seeks to accelerate innovation and returns on R&D investment, it is recommended that senior and functional managers attend together. Having the opportunity to learn jointly and receive guidance from the faculty will facilitate alignment and successful implementation. Group rates are offered (see page 11).*

## 6 Key Deliverables:

- 1** Summary of top metrics used in industry for R&D — including IP management and resource management
- 2** Tools and processes to assess and select high-value projects
- 3** Metrics and practices to balance resources and maximize capacity
- 4** Metrics and practices for co-development and alliances; align internally and with partners
- 5** Metrics and practices for intellectual property management and valuation
- 6** Metrics and practices for different levels of business and project maturity

### Partial list of companies that have attended past MRT Metrics conferences:

3Com • AAI Corporation • Abbott Laboratories • Adobe • AeroControlex • Aerojet • Air Products & Chemicals • Alcoa Automotive Engineering • Allison Engine Company • American Power Conversion • Ameritech • AMI Industries • Amoco Corporation • Analog Devices • Apple Computer • Applied Materials • Artisan Industries • Ashland Specialty Chemical Co. • AT Kearney • AT&T • AT&T Wireless Services • ATPCO • Baker Oil Tools • Barry Controls • Baxter Healthcare • Bayer Diagnostics • BBN • Bell Helicopter Textron • BellSouth Cellular • Bettis Atomic Power Laboratory • BF Goodrich Aerospace • Bio-Rad Laboratories • Bissell • Black & Decker • Bodine Electric Company • Boehringer Mannheim • Boeing • Bose • Boston Scientific • Bristol-Myers Squibb • Brother International Corp. • Bunn-O-Matic • Carrier • Case • Caterpillar • Cherry Semiconductor • Chips and Technologies • Coca-Cola • Compaq Computers • Cooper Tire & Rubber • Cordis • Corning • Cummins Engine • Danaher Controls • DataCard • Dell Computer • DeVilbiss Health Care • Dow Chemical • Dresser Industries • E.D. Bullard • Eastman Software • Eaton • ECC International • EcoWater • Education Testing Services • Eldec • Electro Scientific Industries • Eli Lilly • EMC • Ericsson • Ethicon • First Data Solutions • FMC • Fort James Corporation • Frasier Papers • Fujitsu • Gas Research Institute • Genie Industries • Gilbarco • Glasstech • Graco Children's Products • Gray Research • Grimes Aerospace • Grote Industries • H.J. Heinz • Halliburton Energy Services • Hamilton Beach/Proctor-Silex • Harley Davidson • Harman-Motive • Hasbro • Henkel Chemicals Group • Hercules • Hewlett-Packard • Hillenbrand Industries • Hill-Rom • Hobart Brothers • Hon Industries • Honeywell Technology Center • Howmet Corporation • Hughes Aircraft • Hughes Electronics • IBM • IMS Health • Intel • International Paper • ISCO • ITT Aerospace Communications • Johnson & Johnson • Kaiser Electronics • Keithley Instruments • Kendall Healthcare • Kimberly Clark • KLA-Tencor • Kodak Health Imaging Systems • Kollsman • Krueger International • Laerdal Medical • Level One Communications • Lexis-Nexis • LifeScan • Lincoln Electric • LSI Logic • Lucas Aerospace • Lucent Technologies • Magna Seating Systems • Magnetek • Master Lock • Maxtor • McDonnell Douglas Aerospace • MCI WorldCom • Medrad • Medtronic • Mercury Computer Systems • Millipore • Moen • Molex • Monsanto • Motorola • Nabisco • National Semiconductor • NCR • Nellcor Puritan Bennett • Nestle Frozen Foods • New Venture Gear • New York Airbrake • Newport News Shipbuilding • Nissan Research & Development • Nortel Networks • Northern Telecom • Northrup Grumman • Oil-Dri Corporation • Oracle • Ortel • Osram Sylvania • Outboard Marine Corporation • Packard Instruments • Pfizer • Philips Broadband Networks • Phoenix International • PictureTel • Pitney Bowes • Plantronics • Polaroid • Pratt & Whitney • Praxair • Pressco Technology • Procter & Gamble • Rain Bird • Raychem • Raytheon • Reflexite • Reichhold • Rheem Manufacturing • Robert Bosch • Robertshaw Controls • Roche Diagnostics GMBH • Rockwell Automation • Rogers Corporation • Rohm & Haas • Rolls-Royce North America • S.C. Johnson Polymer • Sandia National Labs • SB Power Tool • SC Johnson & Son • Searle • Senco Products • Shared Medical Systems • Shive-Hattery • Shure Brothers • Siemens Medical Systems • Simplex • Sprint • Square D • Standard Register • State Farm Insurance • Steelcase • Sun Microsystems • Sunbeam • Swagelok Marketing • Symantec • Teradyne • Texas Instruments • Thermo King • Thomson Consumer Electronics • Timken • U.S. Precision Lens • Unisys • Unitech Systems • United Defense • United Parcel Service • Varian Associates • Viewsonic • Viking • Visteon • Volvo Trucks • Warner Electric • Warner-Lambert • Westinghouse—Commercial NF • Whirlpool • WL Gore & Associates • Xerox • York International • Zimmer • Zoll Medical

**“The Product Development and R&D Metrics conference provided the intellectual capitalist in all of us to learn, ask, and network with a variety of corporations. This program was well worth it!”**

Chad Renbarger,  
The Patent and License Exchange

## 12 Key Benefits

### LEARN TO:

Use metrics to screen opportunities, diagnose performance and measure returns — make decisions about what to support, what to cut, and how to tap into hidden profit sources.

Develop a multidisciplinary, iterative and measurable process for innovation.

Integrate IP creation into your development process and budget — a forward-thinking, competitive strategy.

Create R&D metrics for each stage of project maturity — from entry to retirement to rejuvenation. Learn to transition and mix metrics in an emerging, agile business.

Determine the economic feasibility of developing new products internally compared with partnering or outsourcing.

Build a New Opportunity Development process with clearly defined roles, templates and metrics.

Structure successful co-development relationships with greater innovation capacity. Establish independent and joint metrics to monitor performance throughout the alliance lifecycle.

Measure and recalibrate co-development efforts to ensure mutuality.

Assess and maximize the value of your IP. Learn several approaches to valuation based on different drivers such as cost, market, and income.

Quantify value propositions and develop stronger business cases as part of the innovation process.

Identify new technologies and products to fill the pipeline — integrate with company capabilities.

Measure and speed performance from idea development to product development hand-off.

**EARLY BIRD AND TEAM DISCOUNTS** — Reserve your place by July 30 and save \$200; teams save even more! (See page 11.)

## Special Features

### RECEIVE:

**FREE COPY OF TOM KUCZMARSKI'S MANAGING NEW PRODUCTS: USING THE MAP SYSTEM TO ACCELERATE GROWTH** — offering a detailed and disciplined approach to developing a steady stream of new product successes. Tom outlines key steps to organize for new product innovation, determine true customer needs and develop a culture that embraces the type of creative decision-making needed to foster real innovation.



**BRAND NEW CASE EXAMPLES, TEMPLATES, DASHBOARDS, AND IMPLEMENTATION TIPS** — complete reference binder and follow-up materials, including select downloadable slides and summary of key learnings.

**3 IN-DEPTH AND UNIQUE PRE-CONFERENCE WORKSHOPS** — on linking metrics portfolios, making innovation more predictable, and metrics for co-development.

**NETWORKING RECEPTION AND INFORMAL IDEA EXCHANGE** — opportunities with your colleagues from other firms. Compare notes, benchmark, receive expert advice from faculty.

**100% SATISFACTION GUARANTEED!** — No risk, no obligation

### **EXCLUSIVE 2004 METRICS SURVEY RESULTS: COMPLIMENTARY EXECUTIVE SUMMARY** —

Special report analyzing the findings of Goldense Group Inc.'s newest study. Discover the key measures and relationships between new product innovation, intellectual property management, and project approval/funding. Receive resource and capacity management metrics and practices, IP management processes, and top corporate RD&E metrics used by industry.

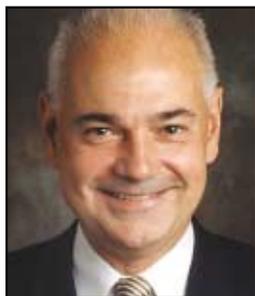
“Our company is at the point of trying to measure the process we put in place and trying to improve. I’ll be taking back many examples of metrics — an excellent conference.”

Bryan Katz, Director, Financial Analysis/Control, Moen, Inc.



# Keynote Sessions

“The conference topics were right on target for me. They addressed the critical business problems that I am facing.”  
Brain Montgomery, Sr. Project Manager, Lexis-Nexis



**Tom Kuczmariski**  
President, Kuczmariski  
& Associates, and  
Conference Co-Chair

## The Future of Innovation: Metrics and Mindset

A pioneer in the innovation field, Kuczmariski will address his vision of the key pillars required for successful innovation in the future. To win, every company will need to adopt (1) metrics that diagnose performance and measure returns and (2) a mindset that encourages risk-taking and nurtures an innovative environment.

In order to improve success rates of new products and services launched and better allocate resources, innovation must be measured — for you cannot manage what you do not measure. Similarly, unless employees and managers experience a culture of “disciplined freedom” where failure is celebrated, risk-taking is valued, and success is shared, innovation will not be optimized. Leadership needs to undergo a major mindset shift in order to change company cultures to better embrace the milieu needed for successful innovation.

Tom will provide participants with ways to get there, best practices for innovation success, and tips on how each individual can make an impact on both metrics and mindsets.

*Thomas Kuczmariski, president of Kuczmariski & Associates, is a nationally recognized expert in the management of new products and services, innovation, and marketing strategy. He has worked extensively with clients on how leadership in innovation serves as the foundation for the firm’s values-based leadership expertise. Prior to founding Kuczmariski & Associates, he was a principal at Booz Allen Hamilton and assisted more than 100 U.S. consumer and industrial goods companies in the areas of marketing, new product development, strategic business analysis and organizational planning. Mr. Kuczmariski has written three books and his most recent book, *Innovating the Corporation*, reveals the seven key steps for achieving growth through innovation. He is also an adjunct professor of New Products and Services at Northwestern University’s Kellogg Graduate School of Management and The University of Chicago Graduate School of Business.*



**Lorraine Segil**  
Partner, Vantage Partners,  
and author of *Measuring  
the Value of Partnering*

## Innovating through Co- Development—Key Approaches, Tools and Metrics

Since partnering and/or outsourcing are part of almost every NPD effort these days, you need reliable co-development metrics — starting with the decision to partner through to selection, implementation and eventual termination. Otherwise it’s tough to track progress, achieve goals and ensure mutuality.

It’s also important to have a roadmap for the handoffs that inevitably occur after the alliance is formed. As Lorraine writes in *Measuring the Value of Partnering*, “development metrics need to be communicated to all future members of the alliance implementation team to answer the often heard question: ‘What idiot got us into this mess?’”

Whether you’ve inherited a “mess” or just want to avoid one, Lorraine Segil’s keynote talk will give you a template which is repeatable, proactive and can be shared. She will outline a clear, practical and concise approach to managing and measuring co-development projects.

*Lorraine Segil is a partner of Vantage Partners, one of the foremost consulting firms with expertise in building corporate relationship management capabilities. Prior to Vantage Partners, Ms. Segil was cofounder of the Lared Group, international consulting firm, specializing in helping companies develop and maintain successful domestic and global business alliances. She conducts programs and provides consulting on alliances, online alliances, and developing global competency for over 3,000 corporations through Caltech, Stanford’s CEO Series, and in Europe, China, Singapore, Argentina and Chile. Clients include HP, Praxair, Sun Microsystems, Starbucks, Cisco and others. Ms. Segil is recognized as an expert in alliances, and is a regular commentator for CNN and CNBC on alliance. Author of five business books, her most recent book, *Measuring the Value of Partnering* (published January 2004 by AMACOM) is the first book on alliance metrics. Ms. Segil holds JD and MBA degrees.*

# Case Studies

WEDNESDAY–THURSDAY, SEPTEMBER 29–30

## Achieving a Customer Centered Innovation Process at Pitney Bowes

**James A. Euchner**, Vice President, Advanced Technology, and Chief E-Business Officer, Pitney Bowes

Mr. Euchner will give an overview of Pitney Bowes's process for innovation that starts with the customer and invents into the needs of the customer. This approach combines ethnographic research into customer needs, structured brainstorming, rapid prototyping, and targeted trials of technology in use and is highly multi-disciplinary and iterative. The innovation process has evolved to the point where it includes stage gates for framing the strategic question, definition of the value proposition, and metrics to determine business feasibility.

## Assessing the Merits of New Opportunities at Armstrong—Roles, Templates & Dashboards

**Leslie Kulis**, Manager, New Business Development, Armstrong World Industries

Armstrong developed a new opportunity development process (including defined roles, templates and dashboards) to ensure that its portfolio of new products is balanced and complete, regardless of market. To maintain a steady influx of new product ideas and assess their merits, Armstrong engages multidisciplinary marketplace teams to examine key strategies for each business; new product ideas are then assigned to project managers who serve as “concept shapers.” Within 2–4 weeks, the teams spearhead the development of the best new ideas into product or service concepts.

Ms. Kulis will provide a detailed overview of Armstrong's definition of the roles, templates (including business cases) and dashboards used in this unique process and will examine the lessons learned in implementation and execution.

“An excellent and varied platter of well-structured presentations—useful for any effort.”

Harry Coene, Eastman Kodak

## R&D Metrics in Emerging, Agile and Efficient Businesses

**Paul H. Henderson**, Principal Managing Consultant, HP Product Generation Strategy Practice, Hewlett-Packard

As businesses transition through the phases of market maturity from entry to maturity and back to renewal, they need different R&D metrics in order to stimulate change and overcome organizational inertia. One division in Hewlett-Packard has activities going on in multiple stages of market maturity and needed a metrics system to both guide the different activities and also enable them to coexist in harmony. Mr. Henderson's talk will introduce the distinctions between emerging, agile and efficient product generation and then use a case study to explore the selection of R&D metrics that are appropriate to the business situation.

## Co-Development Across Cultures: A Process for Opportunity Identification and Associated Metrics

**Mosongo Moukwa**, Vice President, Global Technology–Coatings Products, Reichhold

This presentation will give an overview of how Reichhold developed a process to identify and assess technologies and products to fill its pipeline of opportunities and bring them to commercialization. By reviewing its past experience of transferring technology and products from other organizations, Reichhold developed a number of metrics to ensure that new opportunities were properly identified and screened and that new technologies and products were integrated within company capabilities. This talk will examine actual cases of technology transfer from Reichhold's parent company and the metrics deployed.

## Metrics to Improve Overall Cycle Time

**Randy Merry**, Vice President, R&D, Medtronic Physio-Control

How do you measure performance from idea development to product development hand-off and, finally, to product release? Randy Merry will discuss the tools and metrics Medtronic uses to reduce cycle time and ensure smooth transitions in its technology development process.

“This [conference] offered the tools to use and insights to evaluate my company’s processes and practices.”

Keith Brightbill, Project Mgr., Rubbermaid Commercial Products

“Practical tools and ideas learned that can be understood and implemented in my company.”

Paula Lank, Program Director, Physio-Control Corporation

## Establishing a Measurable Basis for Technology Alliances

**Dr. Shiv Krishnan**, Global Alliance Management & External Networks, **Aventis DI&A**

Alliances play an increasingly critical role for pharmaceutical and biotech companies to meet productivity targets and competitive growth rates. Approximately 20 percent of revenues of the top 20 pharmaceutical companies are expected to come from licensed products by 2007. Similarly, large biotechnology firms expect significant revenues from alliances. Yet studies show that about 60% of alliances fail to deliver the desired result. Less than 30% of these failures are due to technical reasons.

Based on internal research across a portfolio of nearly 300 relationships with biotechnology firms and academia, a pattern of critical success factors emerges. This presentation will outline the key learnings — including how to establish a measurable basis for alliances, especially in the area of innovative technologies.

## Intellectual Property Considerations in Technology Development

**Tanya K. Moore**, Director, IP Licensing, **Microsoft Corporation**

Ms. Moore will discuss the advantages of integrating IP creation into your development process and budget and strategies to achieve it. She’ll also review key considerations when integrating IP licensing into your development process, budget and business plan including:

- Inbound technology licensing for time-to-market considerations: make vs. buy valuation scenarios
- Patent cross-licensing for freedom of action: valuing potential costs and/or income
- Outbound technology licensing as part of a go-to-market strategy and plan to monetize the created IP

Finally, she will review case examples of established IP valuation methodologies.

## Encouraging Innovation Through Proper IP Valuation

**Jim Markwith**, Corporate Counsel, Worldwide Products and Marketing, **Adobe Systems Inc.**

Quantifying the worth of patents and other intangible assets is becoming increasingly important as R&D extends to outside partners. While proper IP valuation can greatly encourage innovation, under- or over-valuation can impede it. Based on his first-hand experience with complex intellectual property licenses and agreements, Jim Markwith will discuss how to get it right given different situations and scenarios. He will outline and provide case examples of several approaches: General IP Valuation, Cost-based Approach, Market Approach, and Income Approach. In addition, he will address key aspects of due diligence and licensing to ensure maximum IP value is obtained.

### SPECIAL FEATURE PRESENTATION

## EXCLUSIVE SURVEY RESULTS 2004 Biennial Metrics Survey

**Bradford L. Goldense**, President, GGI, and Conference Co-Chair

Hear exclusive survey results on research, development and engineering product development metrics. The focus of this year’s biennial survey is on the processes and relationships between the selection of innovative new products and the intellectual property that is produced — prior to the approval of a project/product for development. The survey will address the following major areas related to product selection and IP:

- Product Selection Process
- Product Selection Tools
- IP Management Process
- IP Management Tools
- Top Corporate Metrics Used in Industry RD&E

**Conference attendees receive a 40-50 page executive summary of the survey findings.**



# Pre-Conference Workshops

TUESDAY, SEPTEMBER 28

## FULL-DAY SESSION, 8:00 AM – 5:00 PM

### Workshop A:

## Product Development Metrics Portfolios

**Bradford L. Goldense**, Conference Co-Chair,  
President, Goldense Group, Inc.

This highly interactive 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 4 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: advantages/disadvantages

*Bradford L. Goldense, President of Goldense Group, Inc. has assisted engineering and manufacturing companies for the past twenty years to assess, develop, and implement 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. For the past five years, Mr. Goldense has concentrated his efforts in the concurrent engineering and engineering automation areas to reduce cycle times in product development and manufacturing functions.*

“One of the most knowledgeable on engineering metrics/measurement systems that I have come across. A visionary in this important field.”

Joe Kushuba, Manager Business Planning,  
GM Powertrain

## MORNING SESSION, 8:00 AM – 12:00 PM

### Workshop B:

## The Future of Innovation: Evolving Beyond the “Customer Driven” Paradigm

**Tony Ulwick**, President, Strategyn

Leading-edge companies have come to realize that being customer-driven is just not good enough. Breakthrough solutions are still rare and most innovation initiatives are either abandoned or fail. It is time to take innovation to the next level – but how? When evolving any critical business process, companies must start by asking:

- Do I have the right process inputs?
- Can I control the factors that introduce process variability?
- Can I ensure a predictable result?

As it turns out, customer-driven thinking and capturing the “voice-of-the-customer” fails on all these fronts and often causes the failures that companies are fervently trying to avoid. With this discovery, learn why many leading-edge companies including Microsoft, AIG and others are now adopting an outcome-driven approach to innovation.

### What You Will Learn:

- The shortcomings of listening to the ‘voice-of-the-customer’ and how to get “requirements” in green space
- What inputs are needed to truly master the innovation process — and to create breakthrough products and services
- How to identify new, high-potential growth opportunities before others do
- How to optimally segment markets for the purpose of innovation
- How to bridge the communication gap between marketing and development

*Tony Ulwick is CEO of Strategyn, a research and consulting firm specializing in the management of innovation. Since 1991 he has worked with dozens of companies throughout Europe, Asia, the Pacific Rim and North America, helping to develop product and market strategies for telecommunication systems, pace makers, surgical equipment, test equipment, avionics, water filtration systems, industrial packaging, power tools, two-way portable and mobile radios, composite materials, software products and other products and services. He is the author of Turn Customer Input Into Innovation, published in the January 2002 issue of the Harvard Business Review and recognized as one of the years best business ideas by HBR editors in the March 2002 issue. He is also the author of Business Strategy Formulation, published by Quorum Books in 1999.*

“The conference delivered a good message — reinforcing my own belief in metrics and its need within my organization. I now have the information that I can utilize in persuading others to come on board.”

Mike Hodges, General Motors Canada

## AFTERNOON SESSION, 1:00 – 5:00 PM

### Workshop C:

## Co-Development Metrics— Best Practices and Framework

**Wayne Mackey, Principal,**  
Product Development Consulting, Inc.

The best practices in co-development won't help you or your company unless you can assess and manage them effectively. The first step is to capture the right metrics.

Mr. Mackey will outline the results of an in-depth survey (conducted by Product Development Consulting Inc.) on the current state of collaborative design for 25 leading companies. Summary results will encompass benchmarking data on how co-development is objectively measured, key trends in co-development and tangible results achieved from co-development projects.

Participants will then be facilitated through the process of how to systematically generate, evaluate and prioritize co-development metrics. The group will specifically address:

- Metrics at the joint development agreement stage versus more predictive metrics
- Independent versus joint metrics
- Metrics to determine ongoing health of the alliance
- Differences in metrics for partnership/alliance relationship arrangement versus supplier relationship
- The output of the session will be a basic framework of co-development metrics

#### Key Take-aways:

- Understanding of the “state of the industry” in co-development
- Examples of top issues in co-development and how they have been successfully dealt with by leading companies
- A co-development metrics framework

*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 over 20 years.*

“Collected many key thinkers in this field to give a well-rounded approach.”

Bob Matheson, NPD Process Coach,  
Reichhold, Inc.

## 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, 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.

**Management Roundtable's annual Metrics conference has a long and successful track record as the premier event on this topic.**

## Supporting Organizations

**Knowledge Roundtable**, a premium service of the Management Roundtable and Knowledge Futures, offers direct and timely access to peer-based insights, opportunities and advice.

**www.knowledge-roundtable.com**  
or **800-338-2223**



**APQC** is a nonprofit, member-based organization and a recognized leader in benchmarking, knowledge management, and best-practice information.

**www.apqc.org** or **800-776-9676**



Project Management Institute® New Product Development Specific Interest Group (**NPD SIG**) provides a forum for networking, sharing information and advancing the state-of-the-art of project management applied to NPD.

**www.pminpdsig.org**



**SCPD** (Society of Concurrent Product Development) is a not-for-profit educational organization for professionals involved with new products.

**www.scpdnet.org**



# Agenda

## Tuesday, September 28, 2004 Pre-Conference Workshops

- 7:00 – 8:00 Registration and Continental Breakfast  
 8:00 – 5:00 A: **Product Development Metrics Portfolios**, Bradford L. Goldense, Goldense Group Inc.  
 8:00 – 12:00 B: **The Future of Innovation: Evolving Beyond the "Customer Driven Paradigm,"** Tony Ulwick, Strategyn  
 1:00 – 5:00 C: **Co-Development Metrics Best Practices and Framework**, Wayne Mackey, PDC Consulting

## Wednesday, September 29, 2004 Conference Day One

- 7:00 – 8:00 Registration and Continental Breakfast  
 8:00 – 8:15 Opening Remarks: Management Roundtable

### DIAGNOSING PERFORMANCE AND MEASURING RETURNS

- 8:15 – 9:30 Keynote Address: **The Future of Innovation: Metrics and Mindset**, Tom Kuczumski, Kuczumski & Associates, Conference Co-Chair  
 9:30 – 9:45 Refreshment Break  
 9:45 – 10:45 Case Study: **Measuring Return on Innovation Investment**  
 10:45 – 11:45 Case Study: **Creating the Environment for Growth and Innovation Through Metrics**  
 11:45 – 1:00 Lunch

	TRACK A: Measuring the Value of New Concepts— Creating a Repeatable Innovation Process	TRACK B: Best Practices: Metrics for Pipeline and Portfolio Management
1:00 – 2:00	Case Study: <b>Achieving a Customer Centered Innovation Process</b> , James A. Euchner, Pitney Bowes	Case Study: <b>Metrics to Improve Overall Cycle Time</b> , Randy Merry, Medtronic Physio-Control
2:00 – 3:00	Case Study: <b>R&amp;D Metrics in Emerging, Agile and Efficient Businesses</b> , Paul H. Henderson, HP	Case Study: <b>Practical Resource Management Metrics to Dynamically Allocate (and Reallocate) Resources</b>
3:00 – 3:15	Refreshment Break	
3:15 – 4:15	Case Study: <b>Assessing the Merits of New Opportunities at Armstrong—Roles, Templates and Dashboards</b> , Leslie Kulis, Armstrong World Industries	Case Study: <b>Maximizing Portfolio Value: Selecting and Prioritizing Winning Projects</b>
4:15 – 5:15	Case Study: <b>Co-Development Across Cultures: A Process for Opportunity Identification and Associated Metrics</b> , Mosongo Moukwa, Reichhold	Case Study: <b>Linking NPD Efforts to the Bottom Line</b>
5:15 – 5:30	Day One Wrap-up: Tom Kuczumski, Conference Co-Chair	
5:30 – 6:45	Networking Reception	

## Thursday, September 30, 2004 Conference Day Two

- 8:00 – 8:15 Co-Chair Opening Remarks: Bradford L. Goldense, GGI

### CO-DEVELOPMENT METRICS

- 8:15 – 9:30 Keynote Address: **Innovating Through Co-Development—Key Approaches, Tools and Metrics** Lorraine Segil, Partner, Vantage Partners  
 9:30 – 10:30 Case Study: **Establishing a Measurable Basis for Technology Alliances**, Dr. Shiv Krishnan, Aventis  
 10:30 – 10:45 Refreshment Break

### EVALUATING AND MANAGING IP

- 10:45 – 12:00 Feature Presentation: **Metrics 2004 Survey Results**, Bradford L. Goldense  
 12:00 – 1:00 Lunch  
 1:00 – 2:00 Case Study: **IP Considerations in Technology Development**, Tanya K. Moore, Microsoft  
 2:00 – 3:00 Case Study: **Encouraging Innovation Through IP Valuation**, Jim Markwith, Adobe  
 3:00 – 3:15 Conference Wrap-up: Bradford L. Goldense, Conference Co-Chair  
 3:15 Conference Concludes



# Conference Information / Registration

MANAGEMENT ROUNDTABLE'S 9TH ANNUAL CONFERENCE

## Product Development and R&D Metrics: From Ideation to Commercialization

SEPTEMBER 28 – 30, 2004 ■ CHICAGO

# 4

## WAYS TO REGISTER:

- Call:** 1-800-338-2223 or 781-891-8080  
(weekdays, 9:00am–5:30pm EST)
- Fax to:** 781-398-1889
- Internet:** [www.ManagementRoundtable.com](http://www.ManagementRoundtable.com)
- Mail to:** Metrics Conference  
c/o Management Roundtable  
92 Crescent Street, Waltham MA 02453

### Dates

**Metrics from Ideation to Commercialization** will be held September 29–30, 2004. Registration and continental breakfast begin at 7:00am September 29, 2004, and will adjourn at 3:15pm on September 30, 2004. Optional pre-conference workshops are offered on Tuesday, September 28, 2004, from 8:00am–5:00pm. Registration and breakfast begin at 7:00am.

### Location & Hotel Accommodations

The conference will be held at the **Hyatt Regency O'Hare**, 9300 W. Bryn Mawr Ave., Rosemont, IL 60018. Please call **800-233-1234** (or 847-696-1234) directly for room reservations. Also be sure to mention that you will be attending the "Management Roundtable Metrics Conference" to receive a special room rate of \$159/night when you make your reservation before September 7, 2004. Only a limited block of rooms is available, so please reserve early.

### Program Fees

Fee includes materials, luncheons, receptions, continental breakfasts and refreshment breaks.

### Team Discount/Group Rates

Groups of 3 or more may deduct \$100 per person on the 2-day conference. Groups of 6 to 10 may deduct 15% from the total, groups of 11 or more may deduct 20%. Fee includes materials, luncheons, receptions, continental breakfasts and refreshment breaks.

### No-Risk Guarantee

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

### Conference Attire

Business casual.

### Please accept the following registration(s):

(Please use photocopies for additional people)

NAME **Mr. / Ms.** \_\_\_\_\_

TITLE \_\_\_\_\_

COMPANY \_\_\_\_\_

DIVISION/DEPT. \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY/STATE/ZIP \_\_\_\_\_ COUNTRY \_\_\_\_\_

PHONE \_\_\_\_\_ FAX \_\_\_\_\_

EMAIL \_\_\_\_\_

- I cannot attend; please send me \_\_\_\_ conference handbooks with case studies, data, all handouts and more, at \$395 each (to be shipped within 3 weeks after the event).
- Please send me information about sponsorship/exhibitor opportunities.

### Please select your conference/workshop package:

	Before 7/30	After 7/30
<input type="checkbox"/> 2-day conference only	\$1395	\$1595
<input type="checkbox"/> 2-day conference + 1 half-day pre-conference workshop	\$1795	\$1995
<input type="checkbox"/> 2-day conference + 1 full-day pre-conference workshop or 2 half-day pre-conference workshops	\$2195	\$2385
<input type="checkbox"/> 1 half-day pre-conference workshop (stand-alone)	\$650	\$650
<input type="checkbox"/> 1 full-day or 2 half-day pre-conference workshop (stand-alone)	\$1300	\$1300

### Please select the pre-conference workshop you plan to attend (if any):

- A. Product Development Metrics Portfolios** (full day)
- B. The Future of Innovation: Evolving Beyond...** (half-day morning)
- C. Co-Development Metrics—Best Practices and Framework** (half-day afternoon)

### Payment Information

- Check enclosed, payable in US funds to Management Roundtable.
- Please bill my  VISA  Mastercard  AMEX  Diner's Club

CARD NO. \_\_\_\_\_ EXP. DATE: \_\_\_\_\_

NAME AS IT APPEARS ON CARD: \_\_\_\_\_

SIGNATURE \_\_\_\_\_

- Please bill my company. PO# \_\_\_\_\_

ideation > valuation > selection > resourcing > commercialization

MANAGEMENT ROUNDTABLE'S 9TH ANNUAL CONFERENCE

# Product Development and R&D Metrics: From Ideation to Commercialization

SEPTEMBER 28 – 30, 2004 ■ CHICAGO

“[A] tremendous conference... excellent speakers and a lot of valuable information and contacts.”  
James Snyder,  
Medtronic, Inc.

- Measure, accelerate, and increase returns on R&D investment
- Evaluate opportunities, ensure timely resources, make stronger business cases
- Receive the newest practices and emerging metrics for critical, hard-to-measure areas such as:
  - IDEATION
  - INTELLECTUAL PROPERTY AND TECHNOLOGY TRANSFER
  - CO-DEVELOPMENT AND ALLIANCES
  - RESOURCE CAPACITY AND PIPELINE MANAGEMENT
  - PROJECT SELECTION

## Metrics 2004

c/o Management Roundtable  
92 Crescent Street  
Waltham MA 02453

PRSR STD  
U.S. Postage  
**PAID**  
Tampa, FL  
Permit No. 3311