

select

rationalize

allocate

deploy

Management
Roundtable
presents

PIPELINE & PORTFOLIO MANAGEMENT: Balancing Multiple Projects With Limited Resources

Chicago > September 24–26, 2001

- How to leverage products, platforms and profits
- Strategic insight and practical alternatives for doing more with less

Announcing the
**New Product
Development
Executive
Roadmap
Series**

See pages 12-13



RECEIVE:

- > Agile, adaptive, and high-speed approaches to manage risk and uncertainty
- > Specific tools to enable swifter, smarter decisions and resolve conflicting requirements
- > Guidance on how to achieve greater throughput — how to organize, motivate, deploy

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To register > 800 338 2223 > www.ManagementRoundtable.com

Management
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presents

PIPELINE & PORTFOLIO MANAGEMENT: Balancing Multiple Projects With Limited Resources

Chicago > September 24–26, 2001



More with less.

Too often the expectation is that you'll do more projects with less staff, less budget — in the same or shorter time frame. Meanwhile, the pipeline is clogged, people are burnt-out, and nobody knows where to begin. Given the current economy (and cutbacks), this situation could get even worse.

But what if this phrase meant *more* throughput with *less* in the pipeline? Or *more* results with *less* rigidity? Organizations that have re-thought their pipeline, portfolio and project management systems are, in fact, seeing dramatic improvements in the bottom line. By reducing the number of projects, using agile approaches, and effectively sharing resources across teams, they are able to achieve remarkable growth without increasing costs. Morale is high.



How did they do it? How can you?

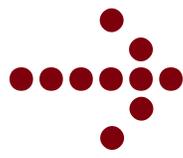
To give you answers and implementation details, Management Roundtable is bringing together leading product development experts and practitioners at **"Pipeline & Portfolio Management: Balancing Multiple Projects with Limited Resources"** on **September 24-26, 2001** in **Chicago**.

Sessions will cover strategic alignment, overcoming organizational and political obstacles, decision-making methods, resource management alternatives, IT systems, communication, and more. Best practices will be shared — as will mistakes to avoid and the challenges ahead. Informal discussion breakouts, networking opportunities, and a choice of optional pre- and post-conference workshops are also offered to give you specific, one-on-one recommendations for your unique requirements.

Take control. By participating in this highly practical program, you will come away with immediate action steps and tools to truly achieve more with less.

Who should attend

- > This conference is highly recommended for VPs, Directors and Managers of Product Development, Engineering, R&D and Technology Development. Program Managers, Project Leaders, Team Leaders and anyone with responsibility for portfolio management, cross-functional development and/or business process improvement. The conference also provides an excellent setting to align priorities across functions and business units. (*Group rates are offered, please see page 15.*)



24 Key Benefits

By participating in this highly practical conference, you will learn:

- 1.** How to weed out losing projects; prioritize by profit potential
- 2.** How to share fixed resources (including scarce technical talent), product platforms, and key components across projects and teams — for much higher return on engineering hours invested
- 3.** How to manage multiple projects, accelerate product introductions, and spread risk
- 4.** How to determine the most effective way to organize, deploy and motivate people for your company's unique needs
- 5.** How to use new IT tools to guide bottom-line portfolio and pipeline decisions
- 6.** How to implement non-traditional, fast-results methods such as critical chain, constraints-based portfolio management, and agile project management
- 7.** About the 6 characteristics of an adaptive lifecycle — mission-focused, component-based, iterative, time-boxed, risk driven and change tolerant
- 8.** How to balance flexibility and project predictability
- 9.** Whether to centralize or decentralize decision-making
- 10.** How to manage very short cycle times and overlapping shared resources
- 11.** How to use polarity mapping to balance conflicting requirements
- 12.** How to make difficult tradeoffs and correctly limit the number of development projects
- 13.** How to load fewer projects into the pipeline and get more into the market
- 14.** How to use the Internet to facilitate project team communication
- 15.** How to optimize the "closed loop" new product introduction process
- 16.** How to manage cross-divisional development
- 17.** How to gain organizational buy-in to focus resources on the highest value activities
- 18.** How to best organize for speed and maximum throughput
- 19.** How to reconcile project versus functional allegiances
- 20.** How to make better allocation decisions
- 21.** What kind of information system will help you manage, and what information should be tracked and shared
- 22.** To anticipate when to shift resources
- 23.** How to prepare for new technologies and rapid market changes
- 24.** How to resolve conflicts among competing priorities, across multiple projects and teams

September 24, 2001 **Pre-Conference Workshops**

7:00 – 8:00	Registration and continental breakfast
8:00 – 12:00	A. Setting Project Priorities for Effective Pipeline and Portfolio Resource Management Mark Deck and Jeff Dupuie, Pittiglio Rabin Todd & McGrath (PRTM)
12:00 – 1:00	Lunch
1:00 – 5:00	B. Agile Pipeline/Portfolio Management: How to Create Buy-in Greg Githens, Catalyst Management Consulting
8:00 – 5:00	C. Implementing the TOC Multi-Project Method Tony Rizzo, PD Institute

September 25, 2001 **Conference Day One**

7:15	Registration and continental breakfast
8:15	Welcome and Introduction, Management Roundtable
AGILE PIPELINE AND PORTFOLIO MANAGEMENT	
8:30 – 9:45	Keynote: Agile Project Management: Problems, Principles and Practices Jim Highsmith , author <i>Adaptive Software Development</i>
9:45 – 10:15	Break
10:15 – 11:15	Case Study: Curt Raschke, Texas Instruments , and Greg Githens, Catalyst Management Consulting
11:15 – 12:15	Case Study: Linda Blauner, LSI Logic
12:15 – 1:45	Lunch and Breakout Sessions
RESOURCE MANAGEMENT AND ALLOCATION APPROACHES	
1:45 – 2:00	Overview: Mark Deck, PRTM
2:00 – 3:00	Case Study: Paul Sapenaro, SPRINT NCO
3:00 – 3:30	Break
3:30 – 4:30	Case Study: Bob Frazier, Cisco Systems
4:30 – 5:30	Keynote: Dr. Scott Edgett , Product Development Institute
5:30 – 6:30	Wine and Cheese Reception

September 26, 2001 **Conference Day Two**

7:30	Continental breakfast
PLATFORMS, PEOPLE AND INFORMATION FLOW	
8:00 – 9:30	Keynote: Multiproject Management in Product Development Michael Cusumano , MIT/Sloan
9:30 – 10:00	Break
10:00 – 11:00	Case Study: Toyota (invited)
11:00 – 12:00	Case Study: Noo Mangat, Hercules Corp. , and Paul O'Connor, The Adept Group, Ltd
12:00 – 1:00	Lunch
1:00 – 2:30	Optional Post-Conference Mini-Workshops (complimentary)
	D. Real Benefits in Only 60 Days: A Non-Threatening, Incremental Approach to Critical Chain Project Management Implementation Eugene Kania, consultant, formerly with Lucent Technologies
	E. Integrating Process Management with Program Management Stephen Armstrong, principal, AMGI

Agile Project Management: Problems, Principles, and Practices

Those who view the dot-com debacle as vindicating a return to traditional modes of operation are in for a wicked surprise. The turbulence, change, and uncertainty of our New Economy preceded the dot-coms, and it will linger on and intensify as leading companies continue their competitive drive towards an e-business and e-commerce future.

But as the dials are turned up on change and uncertainty, traditional project management practices are showing the strains of age. Enter today's "agile methodologies,"* particularly those in the all-important software and information technology arena — Extreme Programming, Lean Development, Scrum, Crystal Methods, and Adaptive Software Development — are gaining recognition. Why? What **problems** are these agile methodologies solving? What key **principles**, if any, are common among the various approaches? Finally, how do organizations navigate among Agile Methodology **practices**?

This presentation, geared to understanding the problems, principles, and practices of agile methodologies will help practitioners explain the benefits of these approaches to both customers and management and assist them in adapting and scaling them to a diverse set of e-business projects.



Jim Highsmith is director of the Cutter Consortium's e-Project Management Practice and author of *Adaptive Software Development: A Collaborative Approach to Managing Complex Systems*, which recently won *Software Development* magazine's

prestigious JOLT award for product excellence. He has 30 years of experience as a consultant, software developer, manager, and writer. Jim has published dozens of articles in major industry publications, and his ideas about project management in the Internet era have been featured in *ComputerWorld* in the U.S. and *The Economic Times* in India. In the last ten years, he has worked with companies around the world to help them adapt to the accelerated pace of development in increasingly complex, uncertain environments.

* While derived from the software world, agile project management applies to all product development in a high-speed, high-change environment.

Strategic Portfolio Management: Leveraging Your Pipeline

What are the key drivers for successfully managing an NPD portfolio? How are leading organizations dealing with this issue? In this presentation, Dr. Scott Edgett will provide insights into how companies are using portfolio management to:

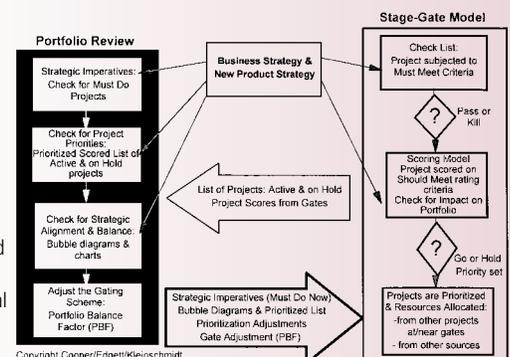
- > Allocate resources to maximize the value of the portfolio (e.g., long term profitability; or ROI)
- > Achieve a desired balance of projects across competing demands; for example:
 - between long term & short, fast projects
 - between high risk and low risk
 - across various markets
 - across different technologies (e.g., embryonic, pacing, base)
 - across different types of innovation: new products, improvements, cost reductions, fundamental research
- > Obtain the right number of projects for your pipeline
 - balancing resource demands with resource availability
- > Linking the new product effort to the business strategy ensuring that projects are "on strategy":
 - that spending on projects reflects the strategic priorities of the business
 - that the business strategy will be realized via the list of active projects



Dr. Scott J. Edgett is an internationally recognized expert in the field of new product development and portfolio management. He is CEO and co-founder of the Product Development Institute and an associate professor of marketing at the Michael G.

DeGroote School of Business, McMaster University, Ontario, Canada. Scott is also on the board of directors for the Product Development Management Association and Vice President of Publications.

"The Portfolio Review provides a holistic view of the portfolio of all projects considered together and is a key part of the total Portfolio Management Process."



Robert G. Cooper, Scott J. Edgett and Elko J. Kleinschmidt, *Portfolio Management for New Products* (Perseus Books Publishing), p. 190

Product Development Multi-Project Management

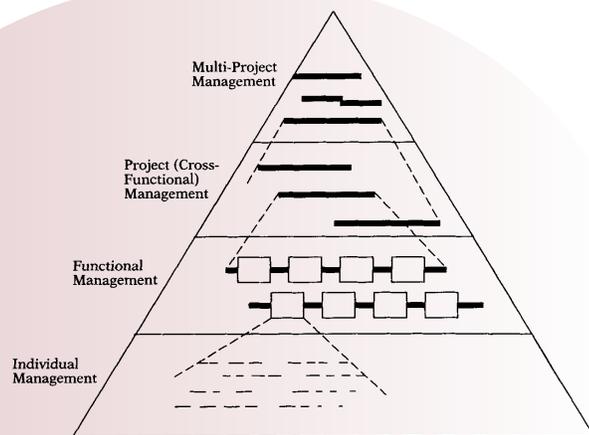
How do you manage product development more strategically and efficiently? Learn how *multi-project management* can leverage projects and bring enormous benefit to companies. The basic idea is to create new products that share key components but utilize separate development teams to ensure that each product differs enough to attract different customers. If possible, projects that share components and engineering teams should overlap in time so that a firm can deliver many products quickly and utilize very new technologies. The evidence suggests that, if they follow these principles, firms can achieve dramatic improvements in performance – huge savings in development costs (engineering hours) as well as remarkable growth in sales and market share. The examples and data are mainly from the automobile industry. The ideas, however, apply to many companies that have more than one product and want to expand the number of new products rapidly and efficiently.



Michael A. Cusumano, MIT Sloan professor and noted author (*Competing on Internet Time: Lessons from Netscape and Its Battle with Microsoft*, *Microsoft Secrets*: and *Thinking Beyond Lean: How Multi-Project Management Is Transforming Product Development*

at Toyota and Other Companies) specializes in strategy and technology management in the computer software, automobile, and consumer electronics industries.

Multiple Levels of Product Development Management



Source: Modified from Kamimoto and Hashimoto, 1995.

"[This diagram] provides another perspective on how a multi-project organization differs from a functional organization. To integrate across one or more projects, multi-project management requires a level of control above the project manager that coordinates different projects as well as individual functional departments and individual engineers."

Michael A. Cusumano, *Thinking Beyond Lean: How Multi-Project Management Is Transforming Product Development at Toyota and Other Companies*, with Kentaro Nobeoka (The Free Press)

Agile Pipeline and Portfolio Management Approaches

Balancing Strategies for Program Management

Curt Raschke, Texas Instruments, Inc., and **Gregory Githens**, Catalyst Management Consulting

This case study will discuss a program management tool kit that can handle a number of seemingly conflicting requirements:

- > Flexibility (since each project outcome by definition is new and uncertain) and project predictability (to achieve portfolio financial goals);
- > Centralization and standardization of tools and methods (for efficiency) versus decentralization (for flexibility and responsiveness in the pipeline).

Curt and Greg will describe how distributed program management helped achieve measurable improvements in NPD efficiency. They will also introduce a simple tool, polarity mapping, to help reconcile the balancing decisions that organizations must make.

Implementing Constraint-Based Program and Resource Management at LSI Logic

Linda Blauner, Director of Program Management, ASIC Technology, LSI Logic

Linda will share her experience of implementing constraint-based program and resource management in LSI Logic's ASIC Technology division. This division is responsible for development of the LSI Logic's libraries, design tools, and methodologies. Linda will discuss how applying constraint-based program and resource management has helped LSI Logic address the problems in multi-project environments. She will discuss the steps taken, the challenges, and the lessons learned.

"This was by far the most content-rich conference I've attended. I am very pleased with all that I've learned and can take home with me."

Pamela Greca,
Confluence Technologies

Resource Management and Allocation Approaches

Telecommunications Service Development Pipeline Management— “Just Say No”!

Paul Sapenaro, Vice President of **Sprint** NCO Product Management, Product Development and Broadband Operations

Paul Sapenaro will describe how NCO learned to get a handle on the resources involved in product and system development, make difficult tradeoffs to balance the pipeline, and just say “no” to development projects. He will also discuss:

- > How putting fewer projects into the pipeline resulted in more projects getting to market;
- > The role of portfolio management in pipeline decisions;
- > How Sprint NCO will apply these concepts to the next frontier: cross-divisional development.

Anticipating Change: Optimizing Resources at Cisco

Bob Frazier, Customer Solutions Senior Manager, Internet Business Solutions Group, **Cisco Systems**

This case study looks at how Cisco manages the portfolio process that includes a focus on the customer and continued awareness of technology advancements in the market. Find out how Cisco teams anticipate market needs and continuously changing customer requirements. Also learn how Cisco uses the Internet, both internally and with business partners, to create efficiencies in resource management, enhance project teams, and optimize the closed loop new product introduction processes.

“Real data tied with theory, open discussion.... Great conference!”

Courtney Morgan,
MCI Group Leader, **Ciba Vision**

“One of the best conferences overall; measured by actionable principles and ideas.”

Bob Willoughby,
Manager of Engineering R&D,
Senco Products, Inc.

“Another success by MRT, exceeded expectations and delighted thoroughly.... Creme de la creme of speakers...”

Michael Kobrehel,
Manager, New Product Development,
Excel Industries

“Information received in just one session was worth the cost of the entire conference.”

Roland Bouchard,
Director, Product Development,
Smiths Industries

Platforms, People and Information Flow

Implementing Lean Project Management

Toyota (invited)

This case study will look at how the principles of lean thinking (i.e., focus on value, reduce waste) guide the management of multiple product development projects. Learn how these concepts are being applied — find out how they are working and what is necessary to successfully support them.

Optimizing a Portfolio Across an F2B Product Development Architecture

Dr. Noo Mangat, Manager Technology and Development Processes, **Hercules Corporation**, and **Paul O’Connor**, Managing Director, The Adept Group, Ltd

Many organizations focus on optimizing the mix of projects in their stage-gate process and on allocating resources across these projects (pipeline optimization). But expertly prioritizing and managing only those projects in the stage-gate process is not sufficient to optimizing the speed, scale and strategic impact of NPD. A front-to-back (F2B) product development architecture recognizes that what’s in the “front-end” and what’s in the “back-end” or market has enormous influence over portfolio performance. In this case study, Dr. Mangat and Mr. O’Connor will cover:

- > Specific portfolio objects needed to drive a F2B architecture
- > Key knowledge components that support F2B architecture
- > Why product innovation charters are more important than product development projects
- > Integrating predictive metrics into a full F2B portfolio
- > IT support to speed and facilitate use of portfolio objects
- > Designing and implementing a full F2B portfolio approach

“Organized and structured the technologies and disciplines required for implementation... definitely worth the ‘price of admission.’”

Fred Meyer,
Head CAM/Computer Science,
National Avionics Center

“Format is outstanding. Program well planned and executed.”

Elizabeth Hammack,
R&D Manager, **ACS**

Monday, September 24, 2001

Three pre-conference workshops are offered as a modular part of the program. They are designed specifically to give you hands-on experience and individual attention; you will come away from these workshops with new tools and immediate action steps.

Please note that these workshops are offered at an additional fee; workshops **A** and **B** are half-day sessions and workshop **C** is full-day. Pre-registration is advised to ensure your place.

Morning Workshop > 8:00 am – 12:00 noon

A. Setting Project Priorities for Effective Pipeline and Portfolio Resource Management

Managing resources across projects requires making management tradeoffs between project opportunities. Firms must strike a balance between factors such as strategic goals, market windows, fiscal realities, customer demands, project timing, resource availability, resource requirements, and outsourced leverage.

This workshop will provide practical insights into making these balancing decisions. In particular, the workshop will cover topics such as:

- > How to measure portfolio performance and identify project value drivers
- > How to link business strategy and goals to individual project decisions and priorities
- > How to help an executive decision team develop project priorities using value driver charts and dashboards
- > How to avoid decision-making traps and pitfalls
- > How to communicate and align project priorities across the organization
- > How to dynamically manage the new product portfolio under changing market, technology, and project conditions
- > How to leverage integrated project and portfolio information systems to facilitate advanced resource, pipeline, and portfolio management

Participants will also work through an interactive, hands-on case example using a portfolio management system and a complete portfolio data set.



Mark Deck



Jeff Dupuie

This workshop will be conducted by **Mark Deck** and **Jeff Dupuie**, both with PRTM Consulting. Both Mark and Jeff have extensive experience implementing portfolio and resource management best practices with a

broad set of high-technology companies. Mark is a director responsible for PRTM's overall ePACE® practice (Product And Cycle-time Excellence®). Jeff is a principal who leads the Dynamic Portfolio Management segment of ePACE.

Afternoon Workshop > 1:00 pm – 5:00 pm

B. Agile Pipeline/Portfolio Management: How to Create Buy-In

Many organizational improvement initiatives fail, including those focusing on portfolio and pipeline management. There are many tools and approaches, but also just as many divergent opinions on what to do. Furthermore, external conditions can change so rapidly that whatever is ultimately decided upon may become irrelevant.

This highly interactive workshop will provide a framework for making sure people are aligned, that pipeline and portfolio decisions are supported, and that you have the agility to adapt as necessary. In addition, you will learn to choose and effectively apply the right management techniques for your unique environment. Your take-away will be a customized agile deployment strategy, and you will have the opportunity to compare approaches and insights with your peers.

Depending on participants' specific interests, implementation techniques to be covered include:

- > Recognizing the "death spiral" that overwhelms organizations with work
- > Creating buy-in and commitment
- > Managing "popcorn priorities"
- > Assessing risks during the rollout of new initiatives
- > Creating organizational agility
- > Polarity mapping
- > Creating a sense of urgency in the organization



Greg Githens has over 20 years of experience in program management. He is a managing partner with Catalyst Management Consulting. He works with firms of all sizes and industries to solve specific problems, and to create new capability or improve existing capability. This

includes rapid project development (improved time-to-market) performance, tools/practices for both the "fuzzy front end" of development, as well as the deployment back end. He has considerable experience in facilitating strategic and tactical planning.

C. Implementing the TOC Multi-Project Method

Dr. Russel L. Ackoff writes the following, about systems. "Imagine that you are able to collect in your garage the best automobile engine ever built, the most sophisticated transmission, the best engineered fuel injection system and suspension system, the sleekest automobile body ever designed by Ferrari, and the most successful example of every automobile part ever produced anywhere in the world. When you complete your collection, will you have a car? No! When you complete your collection, you will have nothing more than an aggregation of car parts. A car is a system, and a system is not defined by its parts but by the interactions between its parts." A product development organization, too, should be a system. But, most organizations that exist today do not perform as effective systems. Rather, they perform as aggregations of functions, mere collections of organizational parts, which interact poorly if at all.

With the Theory of Constraints, your new-product introduction organization can become one of the most effective, most profitable for-profit systems in the world. During this workshop you will learn:

- > About Goldratt's Theory of Constraints
- > How to apply the Boyd Cycle & Maneuver Warfare to new product introduction
- > How to leverage the Product Development Information Cycle
- > How to use the Critical Chain method
- > The difference between Type-A organizations and Type-B organizations
- > About the components missing from your system today
- > How to create an immediate burst of speed
- > How to select the **right** cut-over project
- > How to create effective schedules
- > How to use the planning buffer to keep your system running efficiently
- > How to use the placeholder method to accommodate urgent customer needs
- > How to dramatically improve your system's financial performance while controlling costs
- > How to apply TOC's Five Focusing Steps to your entire enterprise and prepare for success

A special feature of this workshop is the opportunity to use PDI's exclusive physical simulator. From this hands-on activity, you will clearly see how to create and manage a more effective system within your own organization.



Tony Rizzo was fortunate to have participated in the very first TOC Multi-Project Management Method implementation in the world while he was at Lucent Technologies. Tony personally guided that first implementation and others to success. In all, Tony has launched nearly a dozen such implementations. Today, Tony Rizzo runs the New Jersey-based Product Development Institute, an independent management consulting firm that specializes in the improvement of profitability through TOC methods.

"Excellent! Provided practical tools to free up capacity."

Rob Wardlow
Manager, Product
Development Process
CNH Global

"Extremely well presented. Tony demonstrated and delivered a great deal of insight ... clarified a fairly complex paradigm well."

Rick Mueller
Ford Motor Company

"Good content. Very powerful presentation!"

Eduardo Miranda
Senior Specialist
Ericsson Research, Canada

"Should this workshop be offered again? Yes! — or rather, no. I don't want my competitors learning this before I've implemented it."

Kevin Ley
Principal Engineer
Medtronic, Inc.

Tuesday, September 25, 2001 > 12:15 – 1:45 pm

The purpose of the breakout luncheon is to provide you with information about a specific approach or solution and to give you the opportunity to ask questions in an informal setting. It is also a chance for you to meet with others who have similar interests.

Make Profits, Not Processes: Using Constraint-Anchored Throughput Management

Sanjeev Gupta, CEO,
Speed to Market



Do you want nicely documented processes in an ivory tower? Or do you want economic benefits? One does not necessarily lead to another. In fact, more than 90% of all business process reengineering efforts fail to deliver bottom line results.

This session will present a powerful approach successfully used by companies like LSI Logic, Lucent, Medtronic, Phillips and Seagate to:

- > Identify NPD constraints
- > Optimize processes to get the most from these constraints
- > Develop strategies to remove the constraints

Knowledge-centric New Product Development: Accelerating NPD Decision Making

Charles Weinstein, Director,
Knowledge Management Services,
Sopheon Corporation



Research indicates that nearly half of new product development (NPD) efforts fail. This presentation explores how a growing number of companies are beating these odds by deploying proven information management technologies and techniques and improved market, competitive and technology research in novel ways. These NPD organizations are becoming “knowledge-centric,” demonstrating:

- > Improved ideation and innovation
- > Better informed strategic decision making, selecting winning projects, etc.
- > Coordinated and informed project teams
- > Collaborative work processes within and among project teams
- > Learning that is shared among projects and captured for future re-use.

This presentation will focus on an evolutionary process for developing these features, using examples from research and client engagements.

Tuesday, September 25, 2001 > 5:30 pm – 6:30 pm

Meet the speakers and your colleagues from other organizations at informal discussions over beer, wine and appetizers. This is a time to ask more questions, swap war stories, get the lowdown on what works (and what doesn't), and make valuable new acquaintances.

Wednesday, September 26 > 1:00 – 2:30 pm

BONUS! You may choose one of the following two 90-minute sessions to focus on deployment of new techniques upon return to your organization. These complimentary sessions provide practical implementation ideas.

Pre-registration is required to guarantee your place.

D. Real Benefits in Only 60 Days: A Non-Threatening, Incremental Approach to Critical Chain Project Management Implementation

In this workshop, you will learn a common-sense Critical Chain Project Management (CCPM) implementation approach that is direct, non-threatening and incremental. It has been successfully applied from small to huge product development organizations. This approach will not only appeal to “early adopters,” but it has the potential to allow CCPM to “cross the chasm” so that the vast majority of product development organizations can use CCPM to deliver quality products very quickly without sacrificing content or adding development staff.

Some things that you will learn in this workshop are:

- > The 2 keys to a successful CCPM implementation
- > The 3 disciplines that you must acquire to be the best
- > The “old-fashioned” method that is the foundation for CCPM
- > The role of communication in excellent project execution
- > How to create urgency and focus without causing burn-out and frustration

Since 1997, **Eugene Kania** has been an internal management consultant at Lucent Technologies pioneering the use of CCPM in new product development. Mr. Kania, who recently left Lucent to help other companies gain the benefits of CCPM, is a certified Jonah from the A.Y. Goldratt Institute (AGI), the founding organization of the Theory of Constraints (TOC), as well as an expert in CCPM and other TOC methods.

E. Integrating Process Management with Program Management: How to Achieve Cross-Functional, Concurrent Product Development

This session will focus on how to establish a process framework to guide development projects and determine roles and responsibilities. It will cover the maturity gates and formal reviews that control progress of new products through a life cycle, as well as sub-processes that re-engineer the product development process into a cross-functional, concurrent approach.

A special focus will be on implementation issues. What attributes should the leader possess? Where should he/she look for support? How should the team be organized? What is the first order of business for the project team? How do you implement cross-functional teams and consensus decision making? What do you do about individuals who try to sabotage change?

Case studies will highlight the five pitfalls typical PD projects face — you will learn how to overcome them and develop strategies to ensure success.

Stephen Armstrong, principal at AMGI, is uniquely qualified to talk about this subject. An apprenticed trained tool maker/manufacturing engineer, professional engineer, and certified management consultant, he has headed AMGI, a Toronto based consulting practice, for seven years. He has led many of the world’s leading aerospace companies to successfully implement collaborative product development — including managing the politics required to transfer ownership of the new system.

Announcing the

New Product Development (NPD) Executive Roadmap Series

Portfolio & Pipeline Management

September 24-26, 2001 / Chicago

- > Select the portfolio
- > Determine how to share resources across projects
- > Increase throughput

Product Development and R&D Metrics

October 15-17, 2001 / Chicago

- > Measure the financial impact of investments
- > Align metrics across projects
- > Improve performance and ROI

Managing the Product Lifecycle

November 13-15, 2001 / Santa Clara

- > Optimize timing
- > Plan technical and other resource requirements
- > Optimize long-term profitability

Management Roundtable is pleased to introduce an exclusive conference series on planning and decision making for product development executives. If your organization is mapping out its product portfolio and resource requirements for 2002, this series will provide expert individualized guidance and competitive insights to enable greater overall profitability.

How the Series Works

Three conferences,* complete with leading-edge case studies, keynotes, and workshops are offered roughly a month apart. The first conference, **"Pipeline & Portfolio Management: Balancing Multiple Projects with Limited Resources"** focuses on selecting the portfolio, rationalizing the pipeline, allocating resources, and organizing people effectively. The second, **"Product Development and R&D Metrics: Quantifying and Justifying Product Portfolio Decisions,"** adds performance measurement and economic analysis to the equation. The third event, **"Managing the Product Lifecycle: Timing and Transitions,"** covers the art and science of long-term planning and optimization of both products and resources.

Since portfolio management, metrics and lifecycle management are interconnected and interdependent, the learning at these conferences will also be linked. The facilitators who will help participants synthesize the information and learning are **Dr. Robert G. Cooper** and **Dr. Scott J. Edgett**, creators of the widely used Stage Gate™ process and

portfolio management, and world-renowned in new product development (see next page.)

Cooper or Edgett will be at each of these conferences, providing a keynote talk as well as leading a private session for Series subscribers.

The private sessions will be held toward the end of each event and will be a time for Series participants to discuss their individual situations, questions, and forward plans with each other as well as with Dr. Cooper or Dr. Edgett. Because Cooper and Edgett will work with subscribers through all three events, the learnings will be integrated and synthesized.

A final summary report of key findings will be provided to Series subscribers after the conclusion of the third event. Questions that come up between events (or after) may be directed to Dr. Cooper or Dr. Edgett via e-mail or through Management Roundtable. All participants will also be offered the opportunity to continue their working relationship as part of an ongoing e-mail networking group.

Enroll in the NPD Executive Roadmap Series by July 31 and receive a complimentary subscription to PDBPR.com! (See page 14)

Summary of Benefits

Subscribers to this Series receive:

- > **Individualized planning input** from two of the foremost product development experts in the world
- > **New learning** from 3 cutting-edge conferences plus a choice of hands-on workshops — different approaches synthesized by Series facilitators, with **context to apply to your organization**
- > **Full registration package for each event** (2-day conference plus full one-day workshop or two half-day workshops, plus complete set of reference materials); **transferable to anyone from your organization**, i.e., the same individual need not attend all three sessions
- > **35% cost-savings** over individual conference/workshop fees
- > **Summary report of findings** from the private sessions
- > Special **networking opportunities** with Series and conference faculty and follow-up **question privileges**
- > **Ongoing access to information** through Management Roundtable. Subscribers may call and ask for contact information, copies of slides, additional literature, and more, as needed.

Learning Objectives

By participating in this Series, you will learn:

- > How to choose and manage your product portfolio to create high value and ROI
- > How to allocate resources strategically
- > How to select and implement metrics linked to your corporate strategy
- > About IT systems and tools to enhance decision-making and communication
- > How to plan resources, technology and components for the entire life of a product
- > How to transition seamlessly from one project to the next
- > How to balance between high and low risk, long term and short, across markets and technologies, across different types of innovation
- > How to ensure realization of business strategy through your new product efforts

About Our Facilitators

Dr. Robert G. Cooper is a world renowned expert in the field of new product management. He has been labeled “the quintessential scholar” in the field of new products in the U.S. publication, *Journal of Product Innovation Management*, and “one of the preeminent experts on new product development” in an editorial in the US publication, *Industrial Marketing Management*. He is the author of the classic, best-selling *Winning at New Products* and *Product Leadership*, as well as co-author of *Portfolio Management for New Products*. He is a professor of industrial marketing and technology management at the Michael G. DeGroote School of Business, McMaster University in Ontario, Canada.

Dr. Scott J. Edgett is an internationally recognized expert in the field of new product development and portfolio management. He has been called “a leading expert in the field of developing effective new product processes.” He is co-author of *Portfolio Management for New Products* and *Product Development for the Service Sector*. He is an associate professor of marketing at the Michael G. DeGroote School of Business, McMaster University in Ontario, Canada.

To register > 800 338 2223 > www.ManagementRoundtable.com

*More information about all three conferences and the Series is available upon request. Call 800 338 2223 or visit our web site at www.ManagementRoundtable.com

About the Management Roundtable

“In a crowded over-conferenced world, Management Roundtable provides an effective platform for learning the latest product, service and business management innovations from leading experts. MRT makes the decision on what conferences to attend simple.”

John Waraniak
Director, Magna International



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 innova-

tions, 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.

About Product Development Best Practices Report

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, remote collaboration, 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.

PDBPR.com: Product Development Best Practices Online is an interactive database of case studies and research which can be used as a knowledge-resource throughout your organization. An easy-to-use website with intuitive features for both searching and sharing content, it is invaluable to organizations who wish to benchmark, compare data, and stay on top of competitive trends.

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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.

Summary of Deliverables

By participating in **Pipeline & Portfolio Management: Balancing Multiple Projects with Limited Resources**, you will come away with:

- > Insight into portfolio and resource management approaches being used successfully by leading companies
- > Access to some of the nation's foremost product development and multi-project management experts
- > Specific action steps and implementation guidelines to use right away
- > Full set of materials, case studies, charts, checklists which can be shared with others upon return to your organization
- > Follow-up material, including online presentation slides and e-mail networking directory
- > One-year complimentary subscription to *MIT Sloan Management Review*
- > 3-month complimentary subscription to *Product Development Best Practices Report*



Dates

The conference will begin at 8:15 am (registration and continental breakfast at 7:15 am) on Tuesday, September 25, 2001 and will adjourn at 1 pm on Wednesday, September 26, 2001, with **optional post-conference** offered from 1-2:30pm (no additional charge). **Optional pre-conference** workshops are offered on Monday, September 24, 2001 from 8:00am-5:00pm.

Location & Hotel Accommodations

The conference will be held at the Chicago Hyatt O'Hare, please call **847-696-1234** or **800-233-1234** directly for room reservations. Please mention Management Roundtable to receive a special rate (we have a limited block of rooms).

Conference Fee

\$1395/person (**save \$200**) through July 31; \$1595/person beginning August 1. 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 each **half-day** pre-conference workshop is \$495 with the conference (\$695 as stand-alone) and includes breakfast, lunch, reception and all materials. The fee for the **full-day** workshop or **2 half-day** workshops is \$990 with the conference (or \$1295 as stand-alone). **TEAM DISCOUNT:** Groups of 3 or more may deduct \$100 per person on the 2-day conference. Groups of 6 or more please call for special pricing.

The New Product Development (NPD) Executive Roadmap Series
(See pages 12-13)

The subscription fee for 3 events plus semi-private sessions is \$5000 for one individual (may be transferred within your organization), \$8500 for 2 individuals, and \$2500 for each additional individual you wish to add. **For just two of the events**, the fee is \$4000 for one individual, \$7500 for two individuals and \$3000 for each additional person. Fees are paid in advance of the first event.

BONUS: Enroll by July 31 and receive a complimentary corporate subscription to **PDBPR.com** (see page 14).

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**
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Please accept the following registration(s):

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- 2-Day Conference**, September 25-26
- Pre-Conference Workshop(s)**, September 24 (check one):
A ___ (am) **B** ___ (pm) **OR A** and **B** ___ **OR C** ___ (full day)
- Post-Conference Mini-workshop**, September 26 — *No additional fee* (check one):
D ___ **OR E** ___
- NPD Executive Roadmap Series** (see pages 12-13; full details of October and November events will be sent to you upon enrollment):
 - all 3 events
 - 2 events only (please indicate which ones):
 ___ Pipeline & Portfolio Management
 ___ Product Development and R&D Metrics
 ___ Managing the Product Lifecycle

Name: Mr. / Ms. _____
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- I can not attend, please send me ___ conference handbooks with case studies, data, all handouts and more at \$398 each (shipped within 3 weeks after the event).
- Please send me information about MRT's customized on-site corporate conferences.
- Please send me information about sponsorship opportunities.
- Please enroll me as a subscriber to *Product Development Best Practices Report*, (see page 14) at \$219 per year.
- Please enroll me as an subscriber to **PDBPR.com** (see page 14):
 individual at \$300/year corporate (call for fee information)

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- > **Jim Highsmith**, acclaimed author and director of Cutter Consortium's e-Project Management Practice, on **agile project management methods and practices for managing complexity and unpredictability**
- > **Dr. Scott J. Edgett**, internationally recognized expert in the field of new product development and portfolio management, on **how to allocate resources to maximize ROI (while balancing resource demands with resource availability)**
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