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MANAGEMENT ROUNDTABLE'S 5TH ANNUAL CONFERENCE ON

# Product Pipeline & Portfolio Management: BALANCING PRIORITIES with CAPACITY

*Identify winning opportunities early, allocate resources dynamically to substantially increase portfolio value*

## HOW TO:

APPLY LEAN PRINCIPLES TO PIPELINE MANAGEMENT—  
WHY “LESS IN” EQUALS MORE OUT

IMPLEMENT STRATEGIC ROADMAPPING TO ANTICIPATE  
SHIFTS IN MARKETS AND TECHNOLOGIES

OFF-LOAD AND ON-LOAD THE PIPELINE TO ENSURE  
MAXIMUM PORTFOLIO VALUE

DYNAMICALLY ALLOCATE (AND RE-ALLOCATE) RESOURCES  
IN FAST-PACED, MULTI-PROJECT ENVIRONMENTS

## KEYNOTE PRESENTATIONS



**Dr. Scott J. Edgett**  
CEO & Co-Founder,  
Product Development  
Institute, on the  
*strategic alignment*  
*between portfolio,*  
*pipeline and resources*



**Don Reinertsen**  
Author of *Managing the*  
*Design Factory* and co-  
author of *Developing*  
*Products in Half the Time*,  
on the *benefits of*  
*applying lean concepts*  
*to pipeline management*

**PRACTITIONER  
CASE STUDIES FROM:**  
*Texas Instruments*  
*Medtronic*  
*Hospira*  
*Cisco Systems*  
*Boeing*  
*TransUnion*  
*Analog Devices*  
*Boston Scientific Corp.*  
*Affymetrix*  
*and others*

**PLUS 3 PRE-CONFERENCE WORKSHOPS** by leading experts on  
*effective multi-project management, resource capacity management*  
*and strategic roadmapping*

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APRIL 25–27, 2005  
CHICAGO

Strategic Focus  
+ Leaner Pipeline

Greater Throughput,  
Innovation, and  
Portfolio Value

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# Product Pipeline & Portfolio Management:

## BALANCING PRIORITIES with CAPACITY



APRIL 25–27, 2005  
CHICAGO

Despite an improving economy, the pressure to do more with less in product development has not waned. In fact, many companies have raised the stakes — expecting “innovation” and game-changing products, with the same or even fewer resources. The idea is to not just increase productivity, but to increase portfolio *value*.

To meet these demands, product developers must continually re-prioritize in response to changes in technology, markets, and corporate strategy. They must be ready to jump on emerging opportunities; they must allocate (and reallocate) resources dynamically to ensure that the *right* projects get resourced at the *right* time.

The challenges are two-fold. First, what should go in the pipeline? Can “less in” equal “more out”? What does your strategy dictate? Second, which of your scarce resources should be allocated to which projects — and when? Are there tools to help decide?

Management Roundtable's upcoming conference, *Product Pipeline and Portfolio Management: Balancing Priorities with Capacity*, to be held April 25–27, 2005 in Chicago, brings together the foremost experts in NPD/R&D to give you the latest insights and approaches to link strategic direction with operational execution. By participating you will learn to:

- Effectively “off-load” and “on-load” products in your pipeline — determine the right balance of existing and new opportunities and maximize portfolio value.
- Measure and manage your resource capacity; add structure, visibility, and accountability — with buffers for uncertainty.
- Understand the benefits of applying lean principles to pipeline management — stop diluting your scarce resources and focus them on the clear winners.
- Implement strategic roadmaps for better, more informed portfolio management decision-making.
- Integrate your innovation strategy with your portfolio management and product development processes for greater return on your investment.

By participating, you will come away with strategies, tools and fresh approaches to balancing (and properly resourcing) your product portfolio based on strategic fit, ability to generate innovation, growth and revenue.

### WHO SHOULD ATTEND

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

- **R&D**
- **Product Development**
- **Engineering**
- **Capacity Management/  
Planning**
- **Strategy**
- **Process Management**
- **Functional Managers**
- **Senior Program  
Managers**

*“an excellent opportunity  
to meet other peers to  
review best procedures,  
lessons learned and  
benchmark performance  
against best in class,  
across a variety of  
industries”*

*Jim Beierschmitt, Senior Director,  
Program Management, Gen-Probe Inc.*



## Monday, April 25, 2005 Pre-Conference Workshops

- 7:00 – 8:00 Continental Breakfast / Registration
- 8:00 – 5:00 Workshop A: **Get Twice the Projects from the Same Resources with Effective Multi-Project Management** – TONY RIZZO, Product Development Institute
- 8:00 – 12:00 Workshop B: **Under the Hood of the Product Development Engine: Understanding and Managing the Drivers of Pipeline Performance** – J. KENT HARMON, Sophios Solutions, LLC
- 12:00 – 1:00 Lunch
- 1:00 – 5:00 Workshop C: **Implementing Strategic Roadmapping to Improve Pipeline and Portfolio Management Decisions** – Dr. IRENE PETRICK, Penn State University

## Tuesday, April 26, 2005 Conference Day One

- 7:00 – 8:00 Continental Breakfast / Registration
- 8:00 – 8:15 Opening Remarks, Management Roundtable
- 8:15 – 9:30 Keynote: **Strategic Alignment of Portfolio Management** – Dr. SCOTT J. EDGETT, CEO and Co-Founder, Product Development Institute

### EFFECTIVE STRATEGIES FOR PIPELINE AND PORTFOLIO BALANCING

- 9:30 – 10:30 Case Study: **Cisco Systems** – BRIAN BOEGGEMAN, Manager, Product Management
- 10:30 – 10:45 Refreshment Break
- 10:45 – 11:45 Case Study: **Efficient Solution Engineering through Portfolio Management** – CATHY MADDEN, VP Business Planning, and PIYUSH SANGHANI, Sr. Product Research Manager, **TransUnion**
- 11:45 – 1:00 Lunch
- 1:00 – 2:00 Case Study: **A Dual Method Approach to Increase Portfolio Value and NPD Productivity** – JERRY GROEN, Senior Program Manager, **Hospira**, and EUGENE KANIA, Consultant, **mc2solutions**

### LINKING STRATEGIC ROADMAPS TO PORTFOLIO MANAGEMENT

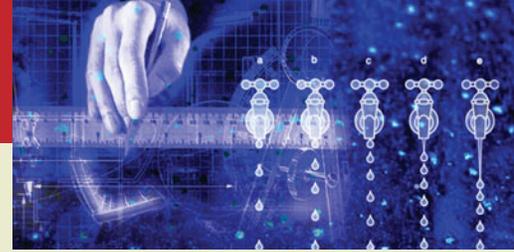
- 2:00 – 3:00 Case Study: **Exploring Synergies Between Strategic Roadmapping and Portfolio Management** – BEN ALMOJUELA, Associate Technical Fellow, **Boeing Commercial Airplanes**
- 3:00 – 3:15 Refreshment Break
- 3:15 – 4:15 Case Study: **Technology Roadmapping for Product Portfolio Management at Boston Scientific** – RICHARD TRAXLER, Manager, Technology Planning, **Boston Scientific Corporation**
- 4:15 – 5:15 Facilitated Roundtable Discussions
- 5:15 – 6:30 Networking Reception

## Wednesday, April 27, 2005 Conference Day Two

- 7:30 – 8:30 Continental Breakfast
- 8:30 – 9:45 Keynote: **Applying Lean Principles to Pipeline Management** – DON REINERTSEN, Author, Managing the Design Factory, and President, Reinertsen & Associates
- 9:45 – 10:00 Refreshment Break

### ALIGNING RESOURCES & ORGANIZATIONAL CAPACITY

- 10:00 – 11:00 Case Study: **Leveraging Organizational Structure, Portfolio Management Process and Roadmapping Tools to Optimize the Product Portfolio** – DAVID GRIFFITHS, Sr. Project Manager, **Affymetrix**
- 11:00 – 12:00 Case Study: **Key Considerations When Implementing Pipeline Management** – HAL KAUFMAN, Sr. Manager, Cardiac Rhythm Management, **Medtronic**
- 12:00 – 1:30 Lunch
- 1:30 – 2:30 Case Study: **New Product Development Knowledge Reuse for Project Pipeline Management** – CURT RASCHKE, Sr. Member Technical Staff, **Texas Instruments**
- 2:30 – 3:30 Case Study: **Reclaiming Buried Treasure in Your Corporate Backyard: Leveraging Knowledge Assets to Increase New Product Success** – DERMOT O'FARRELL, Director of Business Processes, **Analog Devices**, and KEN BRUSS, Consultant, Red Oak Group
- 3:30 – 3:45 Conference Wrap-up



## *You Will Learn:*

How to apply lean principles to pipeline management — quantify the cost of queues, decrease batch sizes and better manage flow

About techniques to balance your portfolio — weighing the level of complexity with resource availability

Strategies, techniques, and approaches to dynamically “off-load” and “on-load” the pipeline

What tools are most effective for prioritizing projects in the portfolio — what their limitations are

To determine the best data points for decision making — simplify, simplify, simplify

How to fit portfolio management into your NPD process and learn to set product priorities that align with strategy and growth goals

To engage strategic roadmaps to reduce the gap between the technologies that marketing wants and what engineering can deliver

About tools to prioritize technology projects to ensure that resources get allocated to projects that meet business needs/strategy

How to successfully integrate Stage-Gate® and CCPM to achieve effective portfolio, resource and project management

How variations in task time, resource utilization levels and prioritization schemes interact to steal TTM and decrease productivity levels

How to manage the interface between strategic roadmaps and pipeline and portfolio management

About ways to integrate innovation strategy, portfolio management process and new product development process into one seamless process

How to align the strategic direction of the portfolio with product and technology roadmaps

How to leverage knowledge reuse within your portfolio management process to significantly increase new product success

*“I exited this seminar with a comprehensive understanding of current practices regarding resource management challenges and tools required. This session will enhance our approach to planning not only R&D resources but all functional areas.”*

*Jim Bienias, Senior Product Manager, Rheem Manufacturing*



TUESDAY, APRIL 26 / 8:15 – 9:30 AM

## *Strategic Alignment of Portfolio Management*



**DR. SCOTT J. EDGETT**  
CEO & Co-Founder, Product Development Institute

Leading organizations are integrating their innovation strategy, portfolio management process and new product development process into one seamless process. The goal is to effectively blend strategy with tactics. Easier said than done!

In this presentation, Dr. Scott Edgett presents how leading companies are using portfolio management as the critical joiner to link strategy with pipeline management and how they are looking to portfolio management to achieve focused resource and pipeline balance. Topics include how to create a winning innovation strategy; strategic linkage via roadmaps; portfolio metrics; pipeline alignment and effective resource allocation approaches and techniques.

*Dr. Scott J. Edgett is CEO and co-founder of the Product Development Institute, Ontario, Canada. An internationally recognized expert in the field of new product development and portfolio management, Scott has consulted with numerous companies, including ABB, Alcan, American Express, Barclays Bank, Clorox, Delta Airlines, Dianippon Ink & Chemical, Diageo, Dofasco, Domtar, DowElanco, Genum, Hallmark, Hollister, Hydro-Quebec, ICI, ITT, Kelloggs, Kennametal, Life Technologies, Manulife Financial, Masterfoods, The Mutual Group, Nova Chemicals, PECO Energy, Pennzoil-Quaker Oil, Pepsico, Roche, Rohm & Haas, The Royal Bank of Canada, R.W. Johnson Pharmaceutical, State Farm, Sun Life Assurance, Toray, U.S. Filter, Warner Lambert, W.R. Grace and Xerox. He has published more than 60 articles and papers, including the “Best Practices” series. He has also co-authored five books. His latest are entitled Portfolio Management for New Products (second edition) and Product Development for the Service Sector.*

WEDNESDAY, APRIL 27 / 8:30 – 9:45 AM

## *Applying Lean Principles to Pipeline Management*



**DON REINERTSEN**  
President, Reinertsen & Assoc.,  
and author, *Managing the Design Factory*

The typical pipeline management process is very far from being “lean.” It contains massive queues, large batch sizes, and imbalanced flows. Scarce resources are diluted over many projects, making everything move slowly. Long cycle times lead to long planning horizons, making forecasting very risky. To deal with this risk, even more “just-in-case” projects are added, further clogging the system. In this keynote address, Don Reinertsen will present a very different approach to pipeline management, one that applies the logic of lean. He will explain:

- How to quantify the cost of queues in the pipeline
- Why the concept of project priorities is fundamentally flawed
- How the concept of batch size applies to pipeline management
- How “pull-based” control can reduce dependency on forecasting
- Why traditional metrics undermine a “lean” pipeline

*Don Reinertsen is president of Reinertsen & Associates, specializing in the management of the product development process. Before forming his own firm, he consulted at McKinsey & Co. and was Senior VP of operations at Zimmerman Holdings. His contributions in the field of product development have been recognized internationally. He is particularly noted for bringing fresh perspectives and quantitative rigor to development process management. In 1983, while a consultant at McKinsey & Co., he wrote a landmark article in *Electronic Business* magazine that first quantified the value of development speed. This article has been cited in the frequently quoted McKinsey study that indicated “6 months delay can be worth 33 percent of lifecycle profits.” He coined the term “fuzzy front end” in 1983 and began applying world-class manufacturing techniques in product development in 1985. His latest book, *Managing the Design Factory*, is recognized as a powerful application of manufacturing thinking to product development. Don is also co-author of *Developing Products in Half the Time*.*



## Effective Strategies for Pipeline and Portfolio Balancing

### Efficient Solution Engineering through Portfolio Management

CATHY MADDEN, VP Business Planning, and PIYUSH SANGHANI, Sr. Product Research Manager, **TransUnion**

Developing successful new products in today's marketplace requires more than just great ideas. Similar to an architect engineering the construction of a new apartment building, product developers at information solutions companies must consider their objectives, resources and perceived customer value proposition long before a blueprint can be drawn. To this end, companies are using progressive portfolio management practices to create enterprise alignment with the goal of increasing profitable growth and gaining efficiencies for centralized resources.

This case study will focus on a newly launched TransUnion business and will show how they leveraged portfolio management practices to support strategy, build alignment and improve resource allocation.

#### TAKE-AWAYS:

- Strategies for fitting portfolio management into your product development process—set product priorities that align with strategy and growth objectives
- How to create tangible outcomes of business planning initiatives—allow for strategic deployment of resources

### A Dual Method Approach to Increase Portfolio Value and NPD Productivity

JERRY GROEN, Senior Program Manager, **Hospira**, and EUGENE KANIA, Consultant, **mc2solutions**

Recent surveys on new product development cite that a Stage-Gate® process is used in 96% of organizations today—yet, few use it effectively. This session will examine Hospira's successful integration of a Stage-Gate process and Critical Chain Project Management (CCPM). At the portfolio level, CCPM can be used to synchronize project work flows across global resources and at the project level, it engages buffer management to manage uncertainty in timelines and set task level priorities for resources. The speakers will also share current results, lessons learned and next steps.

#### TAKE-AWAYS:

- Strategies to successfully integrate Stage-Gate and CCPM to achieve effective portfolio, resource and project management
- Understand how Stage-Gate provides structure and accountability to keep the entire portfolio on track and in constant view of senior management
- Learn how CCPM manages resources globally to ensure portfolio achievability and locally to eliminate bottlenecks during project execution

## Linking Strategic Roadmaps to Portfolio Management

### Exploring Synergies Between Strategic Roadmapping and Portfolio Management

BEN ALMOJUELA, Associate Technical Fellow, **Boeing Commercial Airplanes**

Many organizations use portfolio management to allocate R&D resources, make decisions about R&D projects, and align the project portfolio to goals and strategies. However, portfolio management is only one of the critical components of a long-term strategic planning process. In fact, a complementary strategic roadmapping process can significantly impact the effectiveness of portfolio management.

Mr. Almojuela will discuss the synergy between strategic roadmapping and portfolio management based on his leadership in development work for both processes at Boeing.

#### TAKE-AWAYS:

- Understanding why strategic roadmapping and portfolio management are key to a robust strategic planning process
- How to integrate strategic roadmapping and portfolio management processes for optimal strategic planning
- How to promote collaboration rather than conflict with strategic roadmapping and portfolio management

### Technology Roadmapping for Product Portfolio Management at Boston Scientific

RICHARD TRAXLER, Manager, Technology Planning, **Boston Scientific Corporation**

Mr. Traxler will examine how Boston Scientific Corporation is roadmapping its technology development into a predictable frequency of product launches that meet market needs. This roadmapping process has proven successful in portfolio planning for both small and large business franchises.

#### TAKE-AWAYS:

- Tools to reduce the gap between “what technologies marketing wants” and “what technologies R&D can deliver”
- Tools to translate “market-speak” (Voice of the Customer) into “techno-speak” (project scope)
- Tools to prioritize technology projects to ensure that resource allocation meets business needs
- Tools to acknowledge that both Marketing and R&D have valuable perspectives on R&D priorities



## Aligning Resources and Organizational Capacity

### Leveraging Organizational Structure, Portfolio Management Process and Roadmapping Tools to Optimize the Product Portfolio

DAVID GRIFFITHS, Sr. Project Manager, **Affymetrix**

Affymetrix is a medium-sized biotech company providing genomic and genetic analysis solutions to customers in life science research, development, and other markets. It established market leadership by pioneering technology; often creating markets it now serves. Currently, the key challenge is to simultaneously grow its customer base while expanding into new markets and shift from a focus on pure technology to a market focus. Affymetrix has recently implemented a comprehensive portfolio management process to better align product offerings with customer needs; this talk will give an overview of the key successes and lessons learned.

#### TAKE-AWAYS:

- Strategies to develop an organizational structure that can deliver inputs and outputs required to optimize the portfolio
- Benefits of developing a calendar based process to define the timing, roles and responsibilities for stakeholders and contributors
- Proven methods to better integrate customer facing groups with groups that drive strategy, technology and products

### Key Considerations When Implementing Pipeline Management

HAL KAUFMAN, Sr. Manager, Cardiac Rhythm Management, **Medtronic**

It's a common problem, right? You think you have too many projects going on, they're not properly staffed, schedules are slipping, and people feel over-committed. To top it off, you've got some projects near completion and you're not sure when (or if) you should start the next one. Unfortunately, you lack the data to drive these decisions and the needed changes in behavior. You make the decision to collect data, but what's the best approach—from which functions should you collect data? What detail level is required: quarterly or monthly, individual person or just to the discipline or skill level, data for all projects or just NPD? Is a software tool necessary to make sense of all the data?

Hal Kaufman will speak to his experiences and learnings while implementing pipeline management practices across the core development functions.

#### TAKE-AWAYS:

- Strategies to fit together pipeline management, portfolio management, and resource management
- Key issues to consider when implementing pipeline management practices
- Potential role that software tools can play, as well as potential issues to avoid

### New Product Development Knowledge Reuse for Project Pipeline Management

CURT RASCHKE, Sr. Member Technical Staff, **Texas Instruments**

Most NPD professionals are familiar with the “rob Peter to pay Paul” pipeline management technique: a project gets behind schedule, resources get pulled from other projects and then worry later about the impact of reallocating these resources. Unfortunately, attributing these problems to poor risk management or poor project planning only describes the symptoms without attacking the root cause.

A comprehensive study of problem projects at Texas Instruments revealed that in most cases the “unforeseen” risks, risk mitigation strategies, and development activities were well known—just not by the project team. To address the issue, a NPD knowledge reuse system was deployed to identify and continually update the knowledge deemed valuable for reuse and was delivered as needed to the teams in an easy-to-use form. This session will give an overview of the system, the methodology used to develop it, and the impact on project portfolio goals.

#### TAKE-AWAYS:

- Strategies to develop and implement an effective NPD knowledge reuse system
- Measurable impact of NPD reuse system on meeting project portfolio goals and lessons learned

### Reclaiming Buried Treasure in Your Corporate Backyard: Leveraging Knowledge Assets to Increase New Product Success

DERMOT O'FARRELL, Director of Business Processes, **Analog Devices**, and KEN BRUSS, Ed.D., Consultant, **Red Oak Group**

For mature product development companies with mature processes, PLM improvement initiatives often only produce incremental gains. Many best practice companies now supplement these efforts by pursuing opportunities to leverage their knowledge assets. This talk will present a business case for knowledge asset management (KAM) including how to define what KAM does and does not involve as well as how to identify where reductions in costs and increased profits can be gained. Although IT is an enabling technology, this talk will focus on low cost/low tech actions that companies can take to secure quick gains. To illustrate the competitive gains achieved through effective KAM, the presenters will examine how Analog Devices successfully leveraged knowledge reuse in its portfolio management processes for several product lines.

#### TAKE-AWAYS:

- A clear understanding of the bottom-line benefits tied to effective KAM
- How to identify opportunities where low-cost and low-tech KAM activities can yield significant positive gains
- Strategies to effectively use KAM in a portfolio management framework

## FULL DAY SESSION

**Twice the Projects with the Same Resources through Effective Multi-Project Management**TONY RIZZO, *Product Development Institute*

In this workshop, attendees will participate in the simulated operations of a small, multi-project organization. The simulation will require participants to abide by currently accepted policies and practices that include infinite capacity scheduling, the extreme dilution of resource capacity, and multi-tasking. The schedule and financial performance of the simulated operation will be tracked throughout the session.

After nearly 20 weeks of simulated operation, the pace will shift. Participants will discover which policies within their organizations limit performance and which ones must be deployed to improve performance in a multi-project organization.

After discussion, participants will resume their simulations, play out the new policies, measurements, and accompanying behaviors and review the impact on speed and overall costs. The session will conclude with a review of three advanced methods to further improve performance in a multi-project organization.

**TAKE-AWAYS:**

- You will gain the ability to identify policies that can cause multi-tasking and severely limit schedule and financial performance
- Understand how more effective policies can free up development and IT organizations to perform projects with unprecedented speed
- Learn how to accomplish two times (or more) as many projects with the same resources



**Tony Rizzo** has extensive experience in product development and began his technical career with Bell Laboratories in 1983. After a few years as a design engineer for Bell Labs, Tony created an internal consulting operation within the company, specializing in computer modeling and analysis techniques. In 1995,

Tony shifted the focus of his analysis efforts, from the optimization of physical systems to the optimization of organizational systems. Tony holds an MS in mechanical engineering from Cooper Union for the Advancement of Science and Art.

## MORNING SESSION / 8:00 – 12:00

**Under the Hood of the Product Development Engine: Understanding and Managing the Drivers of Pipeline Performance**J. KENT HARMON, *Sophios Solutions, LLC*

If you are a project, resource or process manager, you already know the difficulties of getting the right resources on your development project at the right time to meet schedule. There are always resource constraints, changing priorities, unplanned project work, emergencies and non-project work to contend with. Competitive pressures increasingly demand more new products with fewer resources. To meet these challenges, product development leaders are seeking the answers to important questions such as:

- How can we get more productivity from our product development process?
- How can we better organize and schedule our work?
- What tools and techniques can we use to better manage our product development pipeline?

This interactive workshop, involving learning activities and computer simulations, will examine how factors such as schedule variation, resource availability, management policies and uncertainty interact to produce very different outcomes for product development. Participants will clearly understand the fundamental principles that drive the complex interplay of resources and activities in the product development pipeline.

**TAKE-AWAYS:**

- Gain a deeper understanding of how variations in task time, resource utilization levels, rework cycles and prioritization schemes interact to steal time-to-market, reduce schedule predictability and limit productivity
- Learn the key to avoiding the vicious cycle of resource overloads, missed schedules and poor quality while benefiting from improved time-to-market
- See how to use your existing project management software to uncover hidden opportunities for improving schedule predictability and development productivity



**J. Kent Harmon** specializes in improving product development performance. Utilizing his expertise built through more than twenty years experience managing and improving product development in the high technology industry, he guides organizations to sustainable improvement in time-to-market and product development results. Knowledgeable and experienced in project management, portfolio management, technology strategy and development methodologies, Mr. Harmon has helped over two dozen organizations reduce their time-to-market by up to 50% and improve customer satisfaction with better predictability. Mr. Harmon holds a BS in engineering physics and an MS in engineering management.



AFTERNOON SESSION / 1:00 – 5:00

## Implementing Strategic Roadmapping to Improve Pipeline and Portfolio Management Decisions

DR. IRENE PETRICK, Asst. Professor, Information Sciences & Technology, Penn State University

Linking new product development, technology investment and R&D initiatives across the supply chain leverages the collective strength of the technical experts and reduces the uncertainty inherent in launching new products. Roadmapping gives product developers a crystal ball to look into future products by keeping them abreast of near-, mid- and long-term technology plans of those involved in the community.

Such networked innovation requires that decision-makers possess the information needed to choose among alternatives, including assessing the ROI and opportunities for technology reuse across product platforms. Understanding the pipeline of incoming technologies, and matching it with product gaps and emerging market needs is essential for successful product innovation.

Strategic technology decisions require corporate memory as well as current information. This information must be evaluated at multiple points within the organization and must be considered simultaneously by executives who rarely have the expertise needed to singly evaluate the scope of impact that the decision will have. Critical resource allocation and technology choice decisions must balance near term needs with longer term opportunities. Successful companies are those that make these tradeoffs consciously.

This workshop will introduce the technique of strategic technology roadmapping. Participants will explore ways that roadmapping supports technology reuse across product platforms, technology refresh in complex systems, decision-making using real-options, and portfolio selection using scenario analysis.

### TAKE-AWAYS:

- Roadmapping methods and the application of these methods to traditional decision-making activities
- How roadmapping can support other company management practices, including stage-gate program management, licensing, and other technology choice decisions



**Dr. Irene Petrick**, assistant professor at Pennsylvania State University, School of Information Science Technology, specializes in technology forecasting, digital roadmapping, product and process development, and systems management. Within the past five years she has had research funding from a diverse group of industry and government sponsors. She also advises companies such as Boeing, Motorola, Kennametal, Mead-Westvaco, and Bayer, among others, in technology planning and strategic roadmapping.

## MANAGEMENT ROUNDTABLE



Management Roundtable is the leading knowledge and networking resource for product developers. Practitioner-oriented and unbiased, our focus is on providing action-

able 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 newsletters, hosts a variety of specialized conferences, workshops, and audio-sessions and conducts onsite training. Its premium web-based service, Knowledge Roundtable, was launched in 2004 to advance product development, innovation and collaboration. This service offers continuous, unlimited access to competitive insights and facilitates introductions among industry practitioners for benchmarking and partnering.

## SUPPORTING ORGANIZATIONS

### PMI NPD SIG



The PMI New Product Development Specific Interest Group is a group of project management and product development professionals dedicated to

advancing the state-of-the-art in these fields, and interested in drawing on each other's expertise to achieve and maintain world-class project management practices within the world of new product development. The objectives of the SIG are:

- To explore new ideas, applications, and solutions to project management and product development challenges.
- To learn how other companies manage product development projects and avoid pitfalls.
- To foster communication and networking opportunities.

## KNOWLEDGE ROUNDTABLE



Knowledge Roundtable was launched in 2004 to connect people globally and provide intelligence quickly for superior product development and col-

laboration. Formed jointly by Management Roundtable (based in the US) and Knowledge Futures (based in the UK), Knowledge Roundtable is a membership-based knowledge service comprised of product development executives, managers and practitioners around the world. Knowledge Roundtable's mission is to offer unparalleled learning, networking, and collaboration opportunities among individuals and firms—across industries, cultures and countries.

For details, visit [www.knowledge-roundtable.com](http://www.knowledge-roundtable.com) or call 800-338-2223.



# SPECIAL FEATURES

## Dynamic Keynote Speakers

Provide the latest thinking on strategic alignment between portfolio, pipeline and resources and the benefits of applying lean logic to pipeline management.

## Practitioner Case Studies

Implementation and how-to focused, these case presentations offer the latest thinking and lessons learned from diverse industry perspectives.

## Facilitated Roundtable Discussions

Offer you an excellent opportunity to learn how your peers at other companies are tackling pipeline and portfolio management challenges. Come prepared with your questions and find out what's working (as well as what's not) for others. To add further insight, conference faculty members will facilitate these sessions (see full details on page 11).

## Reference Binder

Complete with presentation materials and access to web-downloadable slides after the conference.

## Networking and Social Opportunities

Ample opportunities to connect and ask your specific questions of conference faculty and other participants at breakfast, refreshment breaks and receptions.

## Team Benefits

Sign up with 2 or more of your colleagues (teams of 3 or more) and save \$100 each. The larger the team, the greater the savings — and more consensus to take action when you return to the office.

## Early Bird Savings

Sign up by March 1 and save \$200.

## MRT's Unique NO-RISK Policy

Not only is your satisfaction 100% guaranteed (for credit or refund of fee), we have a penalty free cancellation policy up to 5 business days from the program. There is a \$200 administration fee if you need to cancel after that, but you may send a substitute at any time). Sign up early and get the lowest fee without worrying what happens if your plans change.

*“Knowledgeable speakers, case studies with practical examples of portfolio management design and implementation and an opportunity for networking; what more could one ask of a Management Roundtable event?”*

*Steve Schmid, DSM Desotech*

## *Partial list of past participant companies:*

3M ■ Abbott Labs ■ Access Business Group ■ Affymetrix ■ Alcoa ■ Algonquin Automotive ■ Amgen ■ Andrew Corporation ■ Applied Biosystems ■ AstraZeneca ■ Aventis ■ Baxter Healthcare ■ Boeing ■ Caterpillar ■ Centoco ■ CIBA Vision Corporation ■ Cisco Systems ■ Corning ■ Covance ■ Deere & Company ■ Delphi Automotive ■ Diebold ■ Dow Chemical ■ DSM Desotech ■ Dupot ■ Eastman Chemical ■ Eastman Kodak ■ Eaton ■ Eli Lilly ■ EXFO ■ Ethicon Endo-Surgery ■ Fisher Controls ■ FreddieMac ■ GM ■ Gen-Probe ■ GlaxoSmithKline ■ Gojo Industries ■ Hamilton Beach ■ Harley-Davidson ■ Hill-Rom ■ Honeywell ■ Hospira ■ HP ■ Husky Injection Molding ■ J.M. Huber ■ Kimberly Clark ■ Kraft Foods ■ Lockheed Martin ■ LSI Logic ■ MedImmune ■ Medtronic ■ Merck ■ Medrad ■ Motorola ■ Naptheon ■ National Semiconductor ■ Nike ■ Novartis ■ Nuskin Enterprises ■ Pfizer ■ Phillips Electronics ■ Polymer Sealing Solutions ■ PTC ■ Qualcomm ■ Research In Motion ■ Rheem Manufacturing ■ Rolls-Royce ■ SAP ■ Seagate ■ Shure ■ Siemens Medical Systems ■ Sprint ■ State Farm Insurance ■ Stryker Medical ■ Texas Instruments ■ IAMS Company ■ Thermo Electro Water Analysis ■ Toshiba ■ Townsend Engineering ■ TransUnion ■ Wacker ■ Westinghouse ■ York International



## Special Facilitated Roundtables

Get cross-industry perspectives on key issues in pipeline and portfolio management. Led by conference faculty and leading experts, these sessions will provide you with an opportunity to find out what methods, approaches and tools your peers are using to balance growing portfolio demands with limited resources. Specific topics for discussion will include:

- Understanding the true benefits of **applying lean logic** to pipeline management. How to get started and gain buy-in from senior management.
- What is the **status and maturity of portfolio management tools**? Who's using what? Pros, cons and what's the ROI? Can you succeed without them?
- How to develop, implement and gain buy-in to support a **knowledge reuse system**. What are the key challenges to gain company-wide involvement and support? Who is accountable for maintaining and updating the system?
- How does **strategic roadmapping** contribute to the success of portfolio management? How to get started—who needs to be involved and how do you tie roadmapping to pipeline, portfolio and resource management?
- Everyone's talking about **dynamic resource allocation**. But who's really doing it? What does it take to achieve it?
- How do you **plan for innovation earlier** and ensure that you can identify winning opportunities? Should you strive to attain a leaner pipeline and be able to allocate resources to the identified winners sooner—increasing throughput and ultimately, portfolio value?
- How do you effectively blend strategy with tactics? How do you achieve **strategic alignment between portfolio, pipeline and resources**?

### Dates

*Product Pipeline and Portfolio Management* will be held April 26–27, 2005. Registration and continental breakfast begin at 7:00 am. Sessions begin at 8:00 am on Tuesday, April 26 and conclude at 3:45 pm on Wednesday, April 27. Pre-conference workshops offered Monday, April 25, from 8:00–5:00; registration and breakfast begin at 7:00 am.

### Location and Accommodations

The conference will be held at the Chicago Renaissance Hotel. Please call 800-228-9290 (or 312-372-7200) for reservations and mention *Management Roundtable* to receive the special conference rate of \$189/person (a limited block of rooms is available—reserve your room early).

### Program Fees

Fees include materials binder, breakfast, lunch, networking receptions and follow-up materials.

### Registration Options

	Before March 1	After March 1
<i>COMPLETE PACKAGE:</i>		
2 day conference + 1 full-day workshop (or 2 half-day workshops)	\$2485	\$2685
2 day conference + 1 half-day pre-conference workshop	\$1990	\$2190
2 day conference only	\$1495	\$1695
2 half-day workshops (stand-alone)*	\$1390	\$1390
1 half-day workshop (stand-alone)*	\$695	\$695

### Early-Bird Discount

Reserve by March 1, 2005, and save \$200 per person!

### Team Discounts

Groups of 3 or more may deduct \$100 per person. Groups of 5–10 may deduct 15%, groups of 11 or more may deduct 20%. Groups of 5 or more may attend pre-conference workshops at half-price.

### No Risk Guarantee

Your satisfaction is 100% guaranteed—money back or credit. If you are not satisfied with the quality of this program, let us know in writing and we will refund your registration fee.

### Conference Attire

Business casual

### Cancellations/Substitutions

You may send a substitute attendee in your place at any time with no penalty (please inform us in advance, if possible). Cancellations made within 5 business days of the conference are subject to a \$200 cancellation fee or the full fee can be credited towards a future purchase. No-shows are liable for the full fee.

*SPECIAL NOTE: If you have a disability that may affect your participation, please call us regarding your needs at least two weeks in advance of the conference.*

# REGISTRATION FORM

MANAGEMENT ROUNDTABLE'S 5TH ANNUAL CONFERENCE ON

## Product Pipeline & Portfolio Management: BALANCING PRIORITIES with CAPACITY

APRIL 25-27, 2005  
CHICAGO



### 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:** [www.roundtable.com](http://www.roundtable.com)

**Mail to:** **Product Pipeline & Portfolio Management**  
c/o Management Roundtable  
92 Crescent Street  
Waltham MA 02453

Please accept the following registration(s): (Please use photocopies for additional people)  
Please check the days you plan to attend. See page 11 for pricing.

- Day 1: Pre-Conference Workshops  
 A. Effective Multi-Project Management (FULL DAY)  
 B. Understanding & Managing the Drivers of Pipeline Management (MORNING)  
 C. Implementing Strategic Roadmapping (AFTERNOON)  
 Day 2: Conference  
 Day 3: Conference

Total # days \_\_\_\_\_ Total fee \$ \_\_\_\_\_

### Payment Information

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

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- I cannot attend; please send me \_\_\_\_\_ conference handbooks with case studies, data, all handouts and more, at \$595 each (to be shipped within 3 weeks after the event).  
 Please send me information about sponsorship/exhibitor opportunities.

**ACHIEVE** greater portfolio value — identify game-changing new product ideas faster.

**ALIGN** resource capacity with portfolio demands — ensure priority projects are properly resourced.

**ANTICIPATE** technology and market shifts — implement strategic roadmaps to drive and improve pipeline and portfolio management decisions.

**ALLOCATE** key resources to the RIGHT project at the RIGHT time.

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