



# Reinventing the Product Portfolio: *Creating a Sustainable Innovation Pipeline*

A highly interactive month long state-of-the-art online portfolio management course focused on how to

- **Build cross-functional commitment** to implement sound portfolio management practices
- **Evaluate the potential economic value of projects**, kill losers early and ensure proper resourcing of high-value projects
- **Drive project prioritization** and key portfolio strategy decisions with sound project evaluation data

## This innovative and collaborative course features

Three (3) live, online workshops:  
April 8, 22 and May 6, 2010  
All Sessions Noon - 4:00pm ET

One-to-One phone coaching sessions with the course instructor

**Intersession Activities:**  
Downloadable articles, case presentations, practical exercises and course materials

**Networking Sessions**  
to provide an opportunity for cross industry learnings, shared perspectives on dealing with common evaluation issues and overcoming typical implementation challenges.



**Course Instructor**  
**David Matheson**  
President and CEO  
SmartOrg, Inc.  
and author of *The Smart Organization: Creating Value through Strategic R&D*

Space is limited! To reserve your place online  
[www.ManagementRoundtable.com](http://www.ManagementRoundtable.com)

**Bring your team together** to learn how you can create the highest value from your company's investments in new products, innovation and R&D in the convenience of your own office.



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## Why Is An Online Course Format Ideal for Portfolio Management?



Successful portfolio management requires cross-functional buy-in and a team investment in gathering, assessing and evaluating data. Sending a team to external conferences and workshops requires travel; it's expensive and takes time away from your job. This unique course enables you to attend on your own or bring your entire team without leaving your offices.

Management Roundtable has partnered with SmartOrg, the leader in value-based product portfolio management to deliver a state-of-the-art course that will help you create exceptional value by reinventing your product portfolio. The on-line course will be presented in three segments to make the best use of your time and enhance learning as you interact with the instructor, your team and peers in other organizations.

1. **Applicable to your job** - This is no abstract course, based on generic principles. You will apply learnings to your own portfolio, using your data in an environment where you can protect confidential information. During the course you will have the opportunity to develop a first draft of your reinvented portfolio.
2. **Flexible Schedule** - If your schedule changes and you or team members are unable to attend a live session, you will be able to download a recording of the session to view when convenient.
3. **A Great Deal** - The price for your entire team is just \$2,995 regardless of the size of the team.



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## Course Deliverables

As a participant in this new course offering, you will receive:

1. Downloadable recordings of each workshop session to review with your extended team
2. Internet access to a library of articles, case examples and book excerpts.
3. Access to a dedicated web-site to post learnings, review content, and network with other course participants before, during and after the course
4. Tools, templates and guidelines for each step of the process.
5. Step-by-step guidance on how to develop a draft of your new product portfolio

## About the Instructor



**Dr. David Matheson, President and CEO of SmartOrg, Inc.**, has helped senior management of firms in the United States and Europe improve the value of R&D, product development, innovation, capital investment and strategy. His practical experience covers a wide variety of industries, including software development, biotechnology, telecommunications, chemicals, pharmaceuticals, manufacturing, electric power and entertainment. He is co-author of the best selling book, *The Smart Organization: Creating Value through Strategic R&D* (Harvard Business School Press). After a decade of consulting as a principal at the international consulting firm SDG, he co-founded SmartOrg in 2000. SmartOrg is a leading provider of Value-Based Management solutions, processes and software that optimize project and portfolio value. His Ph.D. is from Stanford University where he also teaches portfolio management classes in the Strategic Decision and Risk Management program.



*Your course consists of a combination of offline and online coursework designed to guide participants through diagnostic evaluations, interactive lectures, exercises and progress reviews.*

## Course Initiation and Pre-Course Survey

Prior to the first workshop, you will have an opportunity to check in and introduce yourself to your classmates. You may post issues you face in managing your portfolio and your expectations for the course. A pre-course survey of your business challenges and frustrations will assure that the instructor addresses participants' issues during the course. Visit our website to take the survey.

## Online Workshop 1 - The “What and Why” of Strategic Portfolio Management

**Thursday, April 8, Noon-4:00pm ET**

- **Portfolio Simulation** – you’ll participate in a highly interactive simulation where you will choose a set of projects, create a portfolio and compete with others to obtain the highest value. You’ll learn how to make uncertainty work for you rather than against you.
- **Portfolio Case** – learn how a real company used the principles of strategic portfolio management to avoid common pitfalls; make faster, better decisions and create new value.
- **The Key Principles of Portfolio Management** - learn the basic principles of strategic portfolio decision making and rate your organization against these principles. Learn how to use a template-based evaluation process that enables you to successfully apply the principles.

## Intersession Home Work

- Complete a worksheet: the What, Why, Who and When components of product portfolio management
- Complete an in-depth survey on how your company stacks up against the key principles of portfolio management
- One-on-one phone or web-based discussion with Dr. Matheson
- Read the background of “HP Photo Finish,” a case to be used throughout the course.
- Post comments, questions and lessons learned to the course web site and review your classmates' postings

## Online Workshop 2 - The “How” of Strategic Portfolio Management: Project Evaluation

**Thursday, April 22, Noon-4:00pm ET**

- Overview of project evaluation

- **Tack-Die Simulation** – This dynamic simulation will teach you how to make great decisions even when there is a lot of uncertainty. You will learn why sunk costs do not matter and how to judge the viability of future prospects; “when to hold ‘em and when to fold ‘em.”
- **Assessing Difficulty** – evaluate the probability of success, investment costs and timelines: what does it take to deliver a project? (Lecture and interactive “Photo Finish” case exercise.)
- **Assessing Impact** – Evaluate the economic impact of a delivered project: “the size of the prize.” (Lecture and interactive “Photo Finish” case exercise.)

## Intersession Home Work

- Evaluate your projects using Portfolio Navigator™ software over the Internet
- Review your learnings and questions with Dr. Matheson during a phone or web-meeting
- Post comments, questions and lessons learned to the course web site and review your classmates' postings

## Online Workshop 3 - The “How” of Strategic Portfolio Management: Portfolio Decisions

**Thursday, May 6, Noon-4:00pm ET**

- Review and response to findings from homework postings
- Simulated Project Portfolio - See how your projects fit in the “portfolio” of your classmates' projects and discuss the issues around comparing and prioritizing them. Your project data will be anonymous to assure confidentiality.
- Calibrating the Portfolio - making sure that evaluations are credible and comparable so that people can make and accept decisions. (Lecture and interactive “Photo Finish” case exercise.)
- Decision Making - prioritizing projects, dealing with constraints and refining portfolio strategy. (Lecture and interactive “Photo Finish” case exercise.)
- Implementation - where do you go from here?

## Course Follow-Up - Expanding Your Draft Portfolio

- Review your draft portfolio with your colleagues using Portfolio Navigator™
- Use your free 60-day Portfolio Navigator™ license to improve your portfolio, update project information, and play “what if” games
- Check in with Dr. Matheson by phone during June to review your experience and ask questions about your portfolio



PRESENTS AN **INNOVATIVE AND HIGHLY INTERACTIVE** ONLINE LEARNING PROGRAM



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## Registration Information



Space is limited. Reserve your spot today!  
[www.ManagementRoundtable.com](http://www.ManagementRoundtable.com)  
or call 800-338-2223

### Registration Fee:

The fee for this program is \$2995/group or individual

**NOTE:** This program is strictly limited to 25 participating groups. Register early to ensure your spot.

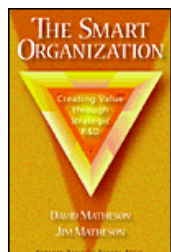
### 100% Satisfaction Guarantee

We are so certain the program will provide you with value far greater than the cost of participation, we guarantee it! If you are dissatisfied for any reason, simply notify us in writing for a full refund

The program fee covers all all online and offline activities, and complimentary one-year FastTrack\* subscription (for post-session audio downloads, summaries and more). The Series subscription is individual -- you will have your own username and password. You may have as many people join you for the sessions as you wish as long as your group listens from one phone, and you may distribute materials with everyone who participates.

### Upon registration, you will receive:

- Confirmation of your registration
- Receipt for charges
- Instructions for participation in online workshop sessions, including dial-in #s and access codes.
- FastTrack membership information



### Free Book Excerpt!

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

Visit our website and download "Chapter 10 - R&D Portfolio Strategy" from the book *The Smart Organization: Creating Value through Strategic R&D*, co-authored by course instructor, David Matheson.

## Key Benefits

### You will learn how to:

- Achieve strategic objectives with limited resources
- Create a balanced risk/reward portfolio
- Refine strategic goals and set project priorities
- Increase portfolio value by killing losing projects faster and cheaper
- Allocate scarce resources to create an achievable portfolio
- Develop the best measures of project value
- Assess and prioritize project uncertainty to better drive the upside and avoid the downside of projects
- Determine the potential economic value of an opportunity
- Make quality decisions with limited information
- Break through organizational politics and accelerate portfolio decisions
- Manage and reconcile competing objectives
- Improve return on R&D and NPD investments



**Bring your team together** to learn how you can create the highest value from your company's investments in new products, innovation and R&D in the convenience of your own office. Advanced technology will bring you together with industry experts and your peers via highly participative case studies and exercises that draw on the best practices of leading companies.