

Product & Technology Roadmapping for Competitive Advantage:

IMPLEMENTATION, STRATEGIES & TECHNIQUES

*How to advance your
implementation across the
extended enterprise for
accelerated innovation and
future market leadership*

August 20-21, 2007
Cambridge, MA

Course Instructor



Dr. Irene J. Petrick

*Professor of Practice and
Director of the Enterprise
Informatics & Integration
Center, Penn State University*

"Dr. Petrick's breadth of exposure to the issues surrounding strategic planning methods and their use in the real world of business are very valuable for any company that depends on innovation. She understands both the methods of strategic planning and, more importantly, the contexts in which these methods are selected and applied."

Jeff Lind, Associate Technical Fellow
Boeing Phantom Works, Enterprise Technology Planning

Learn to:

- Develop an effective roadmapping plan for your company — find out where your company is on the roadmapping maturity model and learn to move forward
- Expand your application of roadmapping throughout the organization and to partners and suppliers
- Identify and mitigate common organizational barriers to roadmap adoption
- Link roadmapping to strategy development, R&D project planning and portfolio management
- Identify key metrics to gauge roadmapping progress and performance

PRESENTED BY



*Attendance
Limited
to 35
Participants*

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Why This Workshop Is Important to You

Product and Technology Roadmapping is a mainstream tool that has been used by industry sectors, companies, and non-profit agencies alike for over 25 years. Now, with today's corporate focus on innovation, roadmapping has taken on a new level of importance. Leading practitioners use roadmaps to not only articulate product evolution with emerging technology and market trends, but to guide R&D investment and partnering/open innovation decisions as well. Because the ability to develop and implement roadmaps is an increasingly critical skill, Management Roundtable is pleased to once again offer this top-rated workshop.

Specifically, this highly practical and interactive two-day session will provide multiple case examples, templates and methodologies that will enable you to turn your roadmapping activities into a highly successful practice. Designed specifically for those with some experience in developing and implementing roadmaps, it involves hands-on problem solving, scenario development and decision-making to supercharge your efforts and expand adoption throughout the enterprise.

Who Should Attend

This seminar is designed for managers and technical leaders that are actively engaged in roadmapping activities within their organizations; specifically, **VPs, Directors and Managers of Technology Planning & Strategy, Engineering, R&D, Product Development, Product Innovation, Portfolio Management, Marketing, and Advanced Development.**

About the Instructor



Dr. Irene J. Petrick is Director of Penn State's Center for Enterprise Informatics and Integration and an Professor in the College of Information Sciences and Technology. She specializes in technology forecasting, digital roadmapping, product and process development, systems management, and enterprise integration. Recent research has focused on collaboration across the supply chain. She advises private companies and non-profit agencies on technology planning and strategic roadmapping and in 2005 was a Boeing Welliver Fellow where she focused on technology strategy, collaborative R&D and new product development.

Dr. Petrick has taught graduate courses in advanced technology management, corporate innovation strategies and statistical process control and design of experiments; and undergraduate courses in human factors engineering, concurrent engineering, enterprise integration, and project management. She is author or co-author of over 70 publications and presentations, and has over 25 years of experience in technology planning, management, and product development in both academic and industrial settings.

About Management Roundtable

The Management Roundtable (MRT) is the foremost knowledge and networking resource for industry practitioners involved in product, service, technology, and business development. Practitioner-oriented and unbiased, MRT's focus is on strategies and processes that enable speed, innovation, profitability, and overall competitive advantage. Through its highly regarded conferences and publications, MRT has helped companies achieve their objectives since 1980. Its newest membership offering, the Management Roundtable *FastTrack*, (<http://fasttrack.roundtable.com>) offers direct, year-round access to leading-practice insights via teleconference and online reports.



Agenda

Day One Monday, August 20, 2007

7:00 – 8:00 Registration and Continental Breakfast

8:00 – 8:30 Introductions

8:30 – 10:00 **Session I: Where Is Your Company on the Roadmapping Maturity Model?**

Roadmapping can be a stand alone activity in a single department; it can bridge many units in your company or even link with your supply chain. Understanding how roadmapping matures is the first step to developing a roadmapping plan. In this session, participants will examine Dr. Petrick's roadmapping maturity model and the implications of the various stages.

EXERCISE: *Individual participant identification of which stage his/or her company currently occupies. Participant brainstorming about challenges of moving to the next level.*

10:00 – 10:45 **Session II: What Does It Mean to Go Beyond the Basics in Roadmapping?**

Articulating product evolution with technology evolution and market trends is a critical first step in roadmapping—and a major first benefit. Since roadmapping changes the way that organizations communicate, it can add substantial value to the decision-making process.

EXERCISE: *Introduction to the basics of roadmapping, a refresher. Presentation of the extended enterprise and what it means for roadmapping to support it. Group discussion on enterprise integration challenges and decision-making processes.*

10:45 – 11:15 BREAK

11:15 – 12:30 **Session III: From Roadmapping to R&D Project Planning**

A key dimension of roadmapping value is its ability to support project planning and portfolio management. The GOTChA Method (Goals, Opportunities, Technical Challenges and Approaches) helps distill product goals into more discrete technology projects, ensuring that the multiple needs of current and future products are supported.

EXERCISE: *Mini-case analysis—participants will explore the GOTChA method to decompose a series of project goals into technology projects and then reconfigure these technology projects elements to match the goals.*

12:30 – 1:30 LUNCH

1:30 – 2:30 **Session IV: Successful Roadmapping Begins with Good Data**

The GIGO (garbage in garbage out) philosophy of information systems management also applies to roadmapping. Learn to successfully ask questions of your roadmaps and play scenario games with alternative options to make sure that the data underlying the roadmapping elements is robust.

EXERCISES: *Presentation of information flows to support roadmapping. Small-group discussion and report-out of key data elements needed to accomplish different types of decision-making.*

2:30 – 3:15 **Session V: Devising Multiple Views of the Roadmap**

Depending on the focus, a roadmap can look different. For roadmaps targeted to new product development in an emerging market, the market drivers might be emphasized. Conversely, for roadmaps targeted to new product development based on technology, R&D projects might be more visible. The format of the roadmap must reflect the emphasis.

EXERCISES: *A mini-case example to enable small group preparation of roadmaps that have different emphases. Small group report-out of approach, emphasis, and design/presentation trade-offs.*

3:15 – 3:45 BREAK

3:45 – 5:00 **Session VI: Supplier Roadmapping—Driving the Extended Enterprise**

With the complexity of today's products, few companies have the ability to control all aspects of the design, development, production and distribution process. How can individual companies combine their knowledge to create situational awareness for the entire supply chain?

EXERCISES: *Presentation of supplier roles in developing situational awareness, including emerging data from national studies. Large-group discussion of the roles that suppliers might play in roadmapping. Small-group discussions—segmented by company position in the supply chain—of unique challenges for companies at different positions in the supply chain.*

5:30 – 6:30 Networking Reception

Day Two Tuesday, August 21, 2007

7:30 – 8:00 Continental Breakfast

8:00 – 9:30 **Session VI (cont'd): Group Discussions**

9:30 – 10:30 **Session VII: Using Roadmapping to Support Strategic Initiatives**

Roadmapping offers a picture of the here-and-now and a glimpse into the future. What lies in between is generally a gap where the specific activities to support the future are unknown. Roadmapping helps define activities to bridge this gap, including technology investments, capability building, and channel development.

EXERCISE: *Small-group brainstorming and report-out of the path forward for a mini-case example. Large group assessment of the best ways to develop and enhance "gap management" with roadmaps.*

10:30 – 10:45 BREAK

10:45 – 12:00 **Session VIII: Maturing the Roadmapping Process**

Building on the roadmapping future state goals that participants identified on Day One, this session will allow participants to consider additional goals. Dr. Petrick will examine typical challenges to achieving these goals, the importance of phased implementation as well as how to reach the champions, agnostics and detractors in your company or organization.

EXERCISE: *Presentation of approaches to phased launch, linking the organization's current processes to the maturity model. Introduction of a model to identify individual interest in and support of roadmapping activities with the organization.*

Noon – 1:00 LUNCH

1:00 – 2:00 **Session IX: Gaining Buy-in and Participation**

Getting buy-in for roadmapping is the first step in maturing your company's roadmapping practices. In this session, participants will consider ways that their organization can expand roadmapping activities to improve decision-making at multiple levels.

2:00 – 2:30 BREAK

2:30 – 4:00 **Session X: Roadmap Planning and Reflection—How Do I Know When My Company Is Successfully Roadmapping?**

So how do we put this all together? Review of the templates provided throughout the workshop and discussion about how and when to use each of them.

EXERCISE: *Presentation of metrics used to gauge roadmapping progress. Brainstorming about when the metrics might be used.*

4:00 Closing Remarks and Q&A

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Key Benefits

By attending this highly practical workshop, you will receive:

- 1** A check sheet to assess your company's roadmapping maturity level and a roadmapping action plan to achieve your future state roadmapping goals
- 2** Case examples, matrices, data flow and GOTChA templates to apply right away
- 3** Tools and methods to link roadmapping with strategic initiatives; enhance and/or rejuvenate your company's roadmapping efforts
- 4** A set of key metrics to assess roadmapping progress and performance level
- 5** Strategies to overcome roadmapping adoption challenges
- 6** Specific answers to your individual questions (Day 2 activities will be augmented with presentations targeted to the questions raised in Day 1)
- 7** Methods emphasized in a "train the trainer" approach. Come away with a set of materials to help educate others in your company
- 8** Follow-up summary of key discussion learnings from breakout discussion groups
- 9** A strong network of like-minded industrial contacts to continue discussion into the future

WAYS TO REGISTER:

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

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WORKSHOP FEE: \$1995/person. Fee includes program materials, luncheons, continental breakfasts, networking reception and refreshment breaks.

WORKSHOP SCHEDULE: Two-day workshop format. The workshop will be held August 20-21, 2007. Registration/continental breakfast begins at 7:00 a.m. on day one; session begins at 8:00 a.m. and concludes at 4:00 p.m. on day two.

LOCATION & HOTEL ACCOMMODATIONS: Royal Sonesta Hotel, 40 Edwin Land Boulevard, Cambridge, MA 02142. For room reservations, please call 1-617-806-4200 and mention that you will be attending "Management Roundtable's Roadmapping Workshop." A limited block of rooms is available (please reserve early) at our group rate until July 20, 2007.

NO-RISK GUARANTEE: Your satisfaction is 100% guaranteed—money-back credit. If you are not satisfied with the quality of this program, let us know in writing and we'll refund your registration fee.

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 five business days are subject to a \$200 administration fee or the full fee can be credited towards a future purchase. No shows are liable for the full fee.

CONFERENCE ATTIRE: Business casual.