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MANAGEMENT ROUNDTABLE'S FIRST ANNUAL SUMMIT ON

# Technology Sourcing For Faster Innovation And Business Growth:

## INTEGRATING EXTERNAL IDEAS WITH INTERNAL DEVELOPMENT

October 28-30, 2008 | Boston



*How to successfully go outside for new technologies and ideas — and profitably bring 'outside in'*

- *Opportunity identification and assessment; match market needs with new technologies for differentiated customer value*
- *Technology scouting—resources, deals, tools, intermediaries*
- *Open innovation—partnerships, licenses, business models*
- *Intellectual asset management—valuation and integration*
- *Moving technologies seamlessly into the NPD process*

### SUMMIT CO-CHAIRS



**Dr. Jay Paap**  
President, Paap Associates



**Dr. Paul Germeraad**  
President, Intellectual Assets, Inc.

### KEYNOTES



**Dave Edwards**  
Chief Technology Officer  
Avery Dennison



**William LaFontaine**  
Vice President, Licensing  
and Business Development  
IBM Corporation



**Brad Trucksis**  
Associate Director, External  
Business Development  
Procter & Gamble

### FEATURING CASE EXAMPLES FROM R&D LEADERS:

- Nokia
- Corning
- Reckitt Benckiser
- Johnson & Johnson
- Motorola
- Kraft Foods
- Dow AgroSciences
- BD Diagnostics
- Cadbury
- Kimberly-Clark  
Health Care

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# Technology Sourcing For Faster Innovation And Business Growth: INTEGRATING EXTERNAL IDEAS WITH INTERNAL DEVELOPMENT

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AS THE RACE TO INNOVATE HAS HEATED UP, SO HAS THE RACE TO FIND EXTERNAL technologies and make good deals. While going outside is often key to faster growth, there are many challenges and risks — from identifying differentiated customer needs to qualifying and choosing the right technologies, sources, and partners.

You must know where to look, how to screen, and how to make arrangements that allow you to move swiftly into development. You need to scan the globe for hidden opportunities and technology gems as well as for potential disruptors, competitors, and patent sharks. You should know what IP is worth — both your own and any that you might acquire. Finally, and perhaps most importantly, you must pay attention to *internal* R&D, including team motivation, organizational structure and strategic alignment. You must know how to bring 'outside in.'

To learn how others are handling these sensitive and complex challenges, we invite you to attend Management Roundtable's First Annual **Summit on Technology Sourcing for Faster Innovation and Business Growth** to be held **October 28-30, 2008** in **Boston, MA**.

This Summit will bring together industry leaders to share candid insights, experiences and lessons learned. Practitioners from companies such as **IBM, P&G, Avery Dennison, Nokia, Corning, Dow AgroSciences, Kraft Food, Kimberly-Clark Heath Care, Cadbury, Johnson & Johnson, BD Diagnostics, Reckitt Benckiser, Motorola**, and others will describe how they have implemented technology scouting and open innovation programs; specifically, how they have expanded their innovation networks, discovered and assessed opportunities, leveraged IP (internal, external and joint), enhanced productivity and competitiveness, and shifted organizational culture. They will discuss the risks as well as the rewards and provide you with specific how-to's based on their experience.

Overall this Summit promises to be a rich forum on the strategic integration of external and internal technologies and innovation, enabling you to grow your market, business and overall ROI.

*"Productivity in R&D is in crisis, in part due to the rising cost of technology development in many industries.... Open business models offer solutions to the challenge of rising development costs and shorter product life cycles."*

Henry Chesbrough, author of *Open Innovation*, quoted in *Forbes*

*"The Global Innovation 1000 companies spent \$447 billion on R&D initiatives in 2006, making it increasingly important for these organizations to adopt technologies that accelerate innovation cycles and enable them to identify opportunities faster, while simultaneously minimizing investment risk."*

Booz Allen study

## WHO SHOULD ATTEND

**THIS SESSION WILL BE MOST BENEFICIAL FOR:**

- Chief Technology Officers and Chief Innovation Officers
- VPs, Directors and Managers of: R&D, Product Development, Advanced Technologies, Alliances, Open Innovation, Technology Sourcing & Acquisition, Business Development, Licensing
- Principal Scientists, Project Leaders and others responsible for technology intelligence, scouting, and collaboration for next generation products

**Attendance is limited to 75 executives to facilitate a high level of interaction, action planning and networking.**

# Key Benefits

## BY PARTICIPATING YOU WILL LEARN TO:

### 1 Match new technologies with real and unmet customer needs

- Identify and validate market opportunities and white space as well as product and technology gaps
- Avoid the trap of market-pull vs technology-push; match needs with new technology at the earliest stages
- Ensure differentiated customer value
- Sense, monitor, evaluate, and select technologies with clear competitive advantage

### 2 Implement the most effective technology scouting and open innovation methods

- Determine when to pull in external technologies, when to use your own, when to “push out”
- The nuts-and-bolts of tech scouting, sourcing, choosing and working with intermediaries and/or brokers. Which ones are most effective and trustworthy?
- Qualify externally-developed technologies, assess readiness
- Tap into problem-solving capabilities of world’s best scientists
- Pros and cons of different approaches—“stealth mode,” auctions, brokers, government labs, universities, VC, etc.

### 3 Successfully structure and manage open innovation relationships

- Apply rigor in choosing partners and quality of sources
- Close deals sooner, with more favorable terms
- Align processes, ensure customer needs/quality/timing goals are met, and mutually achieve strategic and financial goals
- Define and *sustain* effective relationships

### 4 Maximize the combined value of internal and external technology assets and capabilities

- Uncover external opportunities to fill gaps in your portfolio
- Use existing IP portfolio to generate new revenue streams
- Assess, measure, and monitor external relationships to ensure mutual gain
- Protect IP—thwart competitors, disruptors, patent sharks

### 5 Lead the organizational transformation necessary for growth

- Explore pros and cons of spinouts, spin-ins, corporate venturing
- Manage the day-to-day realities of technology-based partnerships
- Overcome resistance and not-invented-here mindset
- Establish metrics and incentives to reward your team for new behaviors
- Implement a structured process to facilitate communication among internal and external teams
- Redefine the role of technologists to encourage openness

*“If you’re depending solely on your R&D team to innovate, you’re putting your company at risk.”*

*Harvard Business Review*

*“You had better come up with the next new proprietary thing which creates value that customers will pay for.”*

*Industry Week, April 2008*

*“Organic growth is less risky than acquired growth and more highly valued by investors....”*

*AG Lafley, CEO, Procter & Gamble, in his new book, The Game-Changer*

# Distinguished Faculty

## SUMMIT CO-CHAIRS



**Dr. Jay Paap**  
President, *Paap Associates*

Jay Paap, president of Paap Associates, a management consulting firm assisting major corporations in their business and technology development efforts, serves on the faculty of the Industrial Relations Center at Cal Tech and the Executive Program at The Sloan School (MIT). He is a Fellow of the Society of Competitive Intelligence Professionals (SCIP) and a PDMA-certified new product development professional. For over 30 years he has managed projects worldwide dealing with business and product development, strategic alliances, technology management and competitive intelligence.

Jay received his Ph.D. from MIT's Sloan School of Management with concentrations in technology management and organizational design. He was a faculty member at both Sloan and Indiana University, and has served on the editorial advisory boards of Technology Management and the Competitive Intelligence Review.



**Dr. Paul Germeraad**  
President, *Intellectual Assets, Inc.*

Paul Germeraad is president of Intellectual Assets, Inc., a professional advisory services firm specializing in integrated business, R&D, and IP processes. Dr. Germeraad was previously chief operating officer for Aurigin Systems, Inc., a software start-up company focused on the development of intellectual asset management products for the competitive intelligence, licensing and R&D communities. Prior to joining Aurigin in 1998, Paul served as vice president of corporate research for Avery Dennison, was director of James River Corporation's Flexible Packaging Technical Center, and held a variety of R&D positions at Raychem Corporation.

Paul is past chairman of the Industrial Research Institute and past trustee and vice president of education for the Licensing Executives Society (LES USA-Canada).

Paul is a graduate of the University of California-San Diego, with a B.A. in chemistry. In addition, Paul holds a Ph.D. in chemistry from the University of California-Irvine, and an LL.B degree from La Salle University.

### Testimonials from recent MRT workshop led by Jay Paap and Paul Germeraad:

**"Well worth my time...excellent speakers...great use of examples"**  
Ronald Deis, Vice President of Applications Research and Technical Services,  
Corn Products Specialty Ingredients

**"Very relevant to corporate needs."**  
Noel Anderson, Technical Specialist, John Deere

**"Excellent presentations. This was one of the most useful seminars I've attended as an IP manager."**  
Mohinder King, IPM Coordinator, Procter & Gamble



**Hitesh Anand**  
Senior Manager, Technology Scouting &  
Corporate Business Development  
**Nokia**



**Tim Cusack**  
Principal Scientist, Innovation and  
Technology  
**Reckitt Benckiser**



**Dave Edwards, Ph.D.**  
Chief Technology Officer  
**Avery Dennison**



**Gary D. Fletcher, Ph.D.**  
Advanced Technology Leader,  
Research & Development  
**BD Diagnostics-Preanalytical Systems**



**Casey Hill**  
Senior Director of IPR Strategy and  
Corporate Licensing  
**Motorola**



**William R. LaFontaine, Ph.D.**  
Vice President, Business Development  
**IBM Corporation**



**Crystal Leach, Ph.D.**  
Director, Product & Technology Development  
**Kimberly-Clark Health Care**



**Nanako Mura**  
Assoc. Program Director, Open Innovation  
Research, Development and Quality  
**Kraft Foods, Inc.**



**Clive Norton**  
Principal Scientist  
**Cadbury Plc**



**Daniel Ricoult, Ph.D.**  
Director, Technology Assessment  
**Corning, Inc.**



**James Ruiz, Ph.D.**  
Research Leader and Open Innovation  
Project Leader  
**Dow AgroSciences LLC**



**Kurt Schilling, Ph.D.**  
Vice President, Advanced Technologies  
**Johnson & Johnson**



**Brad Trucksis**  
Associate Director, External Business  
Development  
**The Procter & Gamble Company**

# Agenda

MANAGEMENT ROUNDTABLE'S FIRST ANNUAL SUMMIT ON

**Technology Sourcing For Faster Innovation And Business Growth:**  
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October 28-30, 2008 | Boston

## October 28 | Pre-conference Workshops

7:30 – 8:30	Registration and Continental Breakfast
8:30 – 12:00	A) <i>Technology Scouting—Getting Started</i> – Jay Paap, Paap Associates
OR	B) <i>Strategic Roadmapping and Project Selection: Using IP, Technology Innovation Market Insight to Select Projects</i> – Paul Germeraad, Intellectual Assets, Inc.
12:00	Lunch
1:30 – 5:00	C) <i>Managing Open Innovation Relationships and Networks</i> – Jay Paap, Paap Associates
OR	D) <i>Advanced Scouting and Roadmapping: Using IP and Related Techniques to Find and Evaluate Technology Options</i> – Paul Germeraad, Intellectual Assets, Inc.

## October 29 | Conference Day One

### EXTERNAL INNOVATION—GOING OUTSIDE FOR NEW TECHNOLOGIES

7:00 – 8:15	Registration and Continental Breakfast
8:15	Welcome and Overview
8:30	<b>KEYNOTE/OVERVIEW:</b> <i>Innovation—Matching New Technologies with Real and Unmet Market Needs</i> – Jay Paap
9:30	<b>KEYNOTE:</b> <i>Internal and External Innovation Frameworks: Lessons from the Road</i> – Dave Edwards, <b>Avery Dennison</b>
10:30	Break
10:45	<i>Sustaining Continuous Innovation through External Partners</i> – Tim Cusack, <b>Reckitt Benckiser</b>
11:45	Lunch
12:45	<i>Successfully Bringing ‘Outside In’ at Kraft Foods</i> – Nanako Mura, <b>Kraft Foods, Inc.</b>
1:30	<i>Opportunity Identification and Open Innovation at Corning</i> – Daniel Ricoult, <b>Corning, Inc.</b>
2:15	<i>Searching, Identifying and Validating External Innovations for New Business Opportunities—a VC-Like Approach</i> – Hitesh Anand, <b>Nokia</b>
2:45	Break
3:00	<i>Working with Open Innovation Brokers</i> – James Ruiz, <b>Dow AgroSciences LLC</b>
3:30	<b>PANEL:</b> <i>Comparing Tech Scouting Experiences and Resources</i> Kurt Schilling, <b>Johnson &amp; Johnson</b> ; James Ruiz, <b>Dow AgroSciences LLC</b> ; Hitesh Anand, <b>Nokia</b> ; Daniel Ricoult, <b>Corning, Inc.</b> ; Crystal Leach, <b>Kimberly-Clark Health Care</b>
4:30	<b>KEYNOTE:</b> <i>P&amp;G’s Open Innovation Journey—Lessons from the Frontlines</i> – Brad Trucksis, <b>Procter &amp; Gamble</b>
5:30–7:00	Networking Reception — <i>Meet Intermediaries and Potential Technology Partners</i>

## October 30 | Conference Day Two

### INTEGRATING EXTERNAL AND INTERNAL R&D FOR BUSINESS GROWTH

7:30	Breakfast Session
8:30	<b>KEYNOTE/OVERVIEW:</b> <i>Strategy: Assessing and Maximizing Value of Internal and External Assets</i> – Paul Germeraad
9:30	<b>KEYNOTE:</b> <i>Achieving Strategic Growth and Sustainable Profitability from IP</i> – William LaFontaine, <b>IBM</b>
10:30	Break
11:00	<i>Maximizing ROI through Leadership in Key Technology Areas</i> – Casey Hill, <b>Motorola</b>
12:00	Lunch
1:00	<i>Bringing Externally Developed Technologies into the NPD Process</i> – Clive Norton, <b>Cadbury Plc</b>
2:00	<b>PANEL:</b> <i>Integrating Internal/External Innovation</i> Gary Fletcher, <b>BD Diagnostics</b> ; Casey Hill, <b>Motorola</b> ; Clive Norton, <b>Cadbury Plc</b>
3:00	Summary of Key Learnings
3:30	Program adjourns

Morning Session | 8:30 am – 12:00 noon

Afternoon Session | 1:30 pm –

## **A** *Technology Scouting—Getting Started*

**Dr. Jay Paap**, *President, Paap Associates*

There are a number of reasons firms look outside for technologies developed by others. Some want to jump-start their ideation process, others to solve development problems or to catch up in a hot area they've overlooked. As "open innovation" and "connect and develop" become part of business jargon, it is often easy to jump into new processes without thinking through all it takes to deliver on the hype. While many firms have found success, many also miss some basic steps and fail to realize long-term benefits.

In this special half-day workshop, Dr. Jay Paap will draw on his over 30 years of experience in helping global companies set up technology scouting programs to provide a 'starter kit' for those thinking of complementing their internal developments with technology developed by others. Real world examples will provide a clear understanding of when it makes sense to scout, and how to do so successfully.

### WORKSHOP PARTICIPANTS WILL LEARN:

- What technology scouting is and how it can provide value
- How to apply a three-step scouting process to target technologies of interest
- How to know whether you are ready for scouting
- Ways to overcome 'not invented here' on the part of internal technologists
- How to rethink problems in ways that facilitate searches in other industries
- Steps that can be taken to integrate scouting into existing practices

## **B** *Strategic Roadmapping and Project Selection: Using IP, Technology and Market Insight to Select Projects*

**Dr. Paul Germeraad**, *President, Intellectual Assets, Inc.*

Companies today are using strategic planning and product roadmaps with varying degrees of success. This workshop is designed to improve the utility of such methods by vividly demonstrating how IP can supplement other types of information to expand R&D investment options and mitigate freedom-to-practice limitations early in the planning process. These capabilities are becoming increasingly important to incorporate as shortened product development cycles and open innovation opportunities offer all competitors greater opportunity and less room for mistakes. Dr. Paul Germeraad will draw on his Fortune 500 company background and professional society benchmarking findings to provide attendees with a solid foundation to improve corporate planning methods.

### WORKSHOP PARTICIPANTS WILL LEARN:

- How overall strategy and roadmap direction relates to business cycles
- How a roadmap process fits into business strategy
- How market, technology and IP patterns affect project strategic options
- Why project posture should be based on market share, growth rate and IP density
- How project assessment matrix elements are determined and used in strategic and roadmap planning
- How IP is used along with market and technical information to select the best projects for inclusion into roadmaps

## **C** *Managing Open Innovation Relationships and Networks*

**Dr. Jay Paap**, *President, Paap Associates*

Deciding to pursue a strategy of 'open innovation' is the easy part of going outside to work with others. Making it happen in ways that support your objectives without draining your managers' time and energies is the challenge. Too often deals that looked good on paper fail in practice. Nonetheless, OI relationships offer great rewards if approached the right way. There are numerous success stories spanning the last few decades of firms who have successfully built external relationships and networks. This session will tell you how these firms set up their partnering programs, chose the right partners, and managed the relationship from initial meetings through dissolution. Several examples of failed relationships will also be used to illustrate the mistakes to avoid.

### WORKSHOP PARTICIPANTS WILL LEARN:

- When it makes sense to work with others
- How to use a four-step partnering process to maximize the chance for success
- What internal steps must be taken before beginning the search process
- How to assess potential partners using both soft and hard factors
- How to create effective teams that cut across companies and geographies
- When it is time to end the relationship and how to do so gracefully

*"Excellent job of [providing] insights on how a technology scout can contribute."*

Tom Mildenhall, Technology Scout  
Kimberly-Clark

5:00 pm

## **D** *Advanced Scouting and Roadmapping: Using IP and Related Techniques to Find and Evaluate Technology Options*

**Dr. Paul Germeraad**, *President, Intellectual Assets, Inc.*

Once an overall technology roadmap has been created, the nitty-gritty work begins. Project needs must be assessed in light of globally available technology. This can only be done by searching market, business, technology and IP databases and networks. Benchmarking of R&D and Licensing professionals has shown that the IP databases are not fully utilized in this process. With the growing popularity of open innovation initiatives all sources of opportunity should be explored before proceeding with a project. This workshop will provide real company examples and detailed insight on how to proceed—including pitfalls to avoid.

### **WORKSHOP PARTICIPANTS WILL LEARN:**

- Why thoughtful application of resources is required
- How the six steps of finding and integrating external technology increases the quality of project evaluations and decreases evaluation time
- How each of the fifteen key questions of external sourcing of technology can be visualized and how to decipher the pattern for appropriate R&D decisions
- How IP velocity tells you when to look outside versus inside
- How past R&D investments in basic technology and applications point to the right external company to work with
- How the geographic distribution of IP tells you where to develop and first commercialize new products
- How decision quality of gate reviews is increased by including consideration of IP

## **EXTERNAL INNOVATION—GOING OUTSIDE FOR NEW TECHNOLOGIES**

### **KEYNOTE/OVERVIEW**

#### ***Innovation—Matching New Technologies with Real and Unmet Market Needs***

**Dr. Jay Paap**, *President, Paap Associates*

The challenge of innovation is fundamentally simple: all you have to do is anticipate future customer needs, identify the best technologies to address those needs, and convince your organization to make significant investments to bring that vision to the market—and do so before there are hard market numbers or the technology has been proven!

The challenge is overwhelming if firms attempt to do everything themselves: the costs and risks are just too great. However, by selectively working with others, it is possible to overcome many of the organizational and individual barriers. Building on the MIT Model of Innovation developed almost 40 years ago, Dr. Jay Paap will identify classic challenges to innovation—from anticipating needs through pursuing long-term projects, and show how companies can use external sourcing to overcome many of the most daunting obstacles to innovation.

*Jay Paap is president of Paap Associates, a management consulting firm assisting major corporations in their business and technology development efforts, serves on the faculty of the Industrial Relations Center at Cal Tech and the Executive Program at The Sloan School (MIT), is a Fellow of the Society of Competitive Intelligence Professionals (SCIP), and a PDMA-certified new product development professional. See page 4 for full biography.*

### **KEYNOTE**

#### ***Internal and External Innovation Frameworks: Lessons from the Road***

**Dave Edwards**, *Chief Technology Officer, Avery Dennison*

Avery Dennison in recent years has explored a number of different growth and innovation processes and learned a great deal about what works—and what does not. As the company acts and learns they continue to upgrade processes to make innovation sustainable and repeatable. Today they are still moving down this long road: this presentation will discuss key learnings, including detours to avoid and a few that may be worth exploring.

*Dave Edwards is Chief Technology Officer at Avery Dennison where innovation is a core value and integral part of company culture. Dr. Edward's leadership includes both external and internal innovation—going outside for new technologies and customer insight while simultaneously fostering creativity inside. He joined Avery Dennison in 1999 as New Business Development Director and became CTO in 2005. Dr. Edwards was educated at Cambridge University, England, and graduated with a Ph.D. in chemical engineering in 1984.*

## Sustaining Continuous Innovation through External Partners

**Tim Cusack**, Principal Scientist, **Reckitt Benckiser**

Companies in the fast moving consumer goods (FMCG) sector are constantly seeking ways to differentiate their products from competition. Reckitt Benckiser is one of the world's leading FMCG manufacturers, with a strong track record for innovation. Net revenue growth has outpaced much of the industry, and the company's "powerbrands" have achieved number one or two positions in most markets. In order to deliver a pipeline of continuous innovation for these brands the organization has routinely relied upon externally sourced technology. Delivery of profitable new products from these partnerships not only involves providing what consumers want, but also requires a shared vision of success in the marketplace.

In this presentation, Tim Cusack will discuss Reckitt Benckiser's approach to Technology Sourcing including elements of:

- Translation of consumer wants into technology needs
- Best practice for scouting
- Choosing the right partner
- Ensuring clarity in co-development programs

*Tim Cusack is a principal scientist overseeing the innovation and technology efforts for the Surface Care and Germ Protection category of Reckitt Benckiser.*

## Successfully Bringing 'Outside In' at Kraft Foods

**Nanako Mura**, Associate Program Director, Open Innovation Research, Development and Quality, **Kraft Foods, Inc.**

Leveraging external technologies and innovation is not necessarily new. What's different is that in the past, it was considered a business Opportunity, and today it is a business Imperative. But doing Open Innovation is challenging for companies with resources, processes and a mindset that have traditionally focused on internal innovation. This presentation focuses on how Kraft Foods is approaching some of these challenges:

- Creating a situation where technologies have business unit and consumer pull vs push
- Creating processes and avenues for external technologies to come in
- Changing the "not invented here" culture

*Nanako Mura provides leadership and helps develop strategies to effectively identify and bring in new technologies, capabilities and ideas to deliver innovative, breakthrough new opportunities to accelerate growth for Kraft Foods.*

## Opportunity Identification and Open Innovation at Corning

**Daniel Ricoult**, Ph.D., Director, Technology Assessment, **Corning, Inc.**

Corning is dedicating part of its R&D organization to the front-end of innovation and identification of possible future opportunities for the company. To this end, a rigorous process has now been in place for several years and includes a variety of tools based on assessment of such opportunities by a joint team of market and technology professionals. Open innovation on a global basis is part of this strategy. The presentation will describe how the various elements of this approach are articulated and put in practice.

*Daniel Ricoult is Director, Technology Assessment in Corning Inc.'s Strategic Growth Division, where he contributes to identifying new opportunities for the company.*

## Searching, Identifying and Validating External Innovations for New Business Opportunities—A VC-Like Approach

**Hitesh Anand**, Senior Manager, Technology Scouting & Corporate Business Development, **Nokia**

How to find new business opportunities/technologies in 'stealth mode,' through VC, investment bankers, IP lawyers and other sources. before competitors. How to determine which technologies and applications are best for creating new revenue streams. How Nokia set up its tech scouting program—the rationale, structure, criteria—and results so far.

*Hitesh Anand searches, identifies and validates external innovations in North America, using an "outside-in" venture capital approach, to help create new business opportunities for Nokia.*

## Working with Open Innovation Brokers

**James Ruiz**, Ph.D., Research Leader and Open Innovation Project Leader, **Dow AgroSciences LLC**

Dow AgroSciences uses several open innovation brokers to tap external expertise and ideas to accelerate R&D product development. These ideas can be good complements to the company's internal research and are most valuable when they can be obtained quickly and easily by R&D project teams. This presentation will describe several changes Dow AgroSciences has made to integrate and simplify the process that project teams use with one open innovation broker, InnoCentive, to get external ideas for problem solving. The changes have resulted in a 50% decrease in the time to submit problems and an increase in the number of submissions.

*James Ruiz is a research leader and open innovation project leader for Dow AgroSciences. His role is to improve current processes and explore new ways to achieve sustainable, scalable, open innovation models in R&D.*

*“Session provided key elements of tech scouting and outsourcing needed in our R&D program.”*

Mike Goettel, Engineering Manager, Blount Inc.

## PANEL

### Comparing Tech Scouting Experiences and Resources

Industry practitioners discuss their experiences with opportunity hunting, tech scouting tools & processes, brokers and intermediaries, technology assessment, deal-making and more. This candid exchange between panelists and audience is designed to both answer questions and offer recommendations.

**MODERATOR: Dr. Jay Paap** (see page 4)

**Kurt Schilling** is currently VP of Advanced Technologies, **Johnson & Johnson**, part of the RD&E group that supports Consumer & Personal Products Worldwide. In this role, he leads a team responsible for development of disruptive innovations that either redefine current franchises or create whole new businesses. Recently Advanced Technologies has been incorporated into an expanded “Big I” Incubator, partnering with a new “Big I” business team.

**Crystal Leach** is a Director of Product & Technology Development for **Kimberly-Clark**'s global health care business. She leads a team with responsibility for identifying new product opportunities that drive growth in key medical device platforms. Her scope includes customer-driven front-end concept development, technology scouting, and adoption of innovation best-practices across health care.

**James Ruiz**, **Dow AgroSciences LLC** (see page 8)

**Hitesh Anand**, **Nokia** (see page 8)

**Daniel Ricoult**, **Corning, Inc.** (see page 8)

## KEYNOTE

### P&G's Open Innovation Journey—Lessons from the Frontlines

**Brad Trucksis**, Associate Director, External Business Development, **Procter & Gamble**

Procter & Gamble is often cited as the leader in open innovation and “going outside” for new ideas and technologies. Brad Trucksis will present an update on P&G's open innovation program, called Connect + Develop. He will share case studies and lessons learned, including:

- Key success factors for technology-based partnerships, i.e., what contributes to the best outcome in terms of achieving mutual goals
- What processes are used to screen and evaluate ideas and opportunities
- How open innovation has enabled business growth and market leadership
- Going beyond technology—an overview of where P&G is headed on its innovation journey.

*Brad Trucksis is Associate Director of P&G's External Business Development, Procter & Gamble. In 1999 he joined P&G's External Business Development organization where he focuses on creating value for P&G's Beauty categories and their external partners.*

# Day 2

## INTEGRATING EXTERNAL AND INTERNAL R&D FOR BUSINESS GROWTH

### KEYNOTE/OVERVIEW

### Assessing and Maximizing Value of Internal and External Assets

**Dr. Paul Germeraad**, President, **Intellectual Assets, Inc.**

Companies continue to look for engaging and insightful ways to assess the value of internal technology assets and capabilities. Once they have such a picture they subsequently need motivating and vivid ways to find, evaluate and integrate externally developed IP into their NBD/R&D pipeline—consistent with business strategy and product/technology roadmaps.

In this presentation, expert Paul Germeraad will give an overview of the techniques benchmarked companies are using to meet these objectives and obtain a solid ROI on their efforts. He will discuss:

- How to assess the value of internal technology assets and capabilities
  - Business S-curve guides, use map, value map
- Evaluate externally developed IP in the context of strategy/ business model, pipeline/portfolio, future product roadmap, and overall ROI
  - Internal and external value of IP varies by industry segment
  - How strategy and business models are derived from industry needs
  - Likely sources of technology and IP
- Integrate externally developed IP in the context of strategy/ business model, pipeline/portfolio, future product roadmap, and overall ROI
  - Maintain technology and IP investments to keep velocity constant
  - Ward off IP sharks, thwart competitors strategies
  - Develop business and technology where IP is open

*Paul Germeraad is president of Intellectual Assets, Inc., a professional advisory services firm specializing in integrated business, R&D, and IP processes. See page 4 for full biography.*

*“Best [workshop] I've been to in years.”*

Rich Marando, Director Technology and Innovation, Dana Corporation Structural Solutions Group

## KEYNOTE

### Achieving Strategic Growth and Sustainable Profitability from IP

Dr. William LaFontaine, Vice President of Licensing, **IBM**

IBM is well known for its ambitious growth strategy and R&D investment. In this keynote talk, Dr. LaFontaine will share how IBM evaluates IP, both internally-created and externally-acquired, to achieve maximum growth and profitability. He will discuss criteria and success factors for “going outside,” forming joint development alliances, and licensing—including global expansion.

*Dr. LaFontaine is currently Vice President of Licensing and Business Development for IBM's Intellectual Property Business. Dr. LaFontaine has the worldwide responsibility for licensing IBM's patent, trademark and domain name portfolio. In addition, Dr. LaFontaine's team plays a critical role in the creation of technology-based strategic alliances with partners around the world.*

*“Intangible intellectual assets are difficult to create, protect and monetize, with trillions wasted every year. How can you optimize your portfolio for profit?”*

*William LaFontaine, IBM*

### Maximizing ROI through Leadership in Key Technology Areas

Casey Hill, Senior Director of IPR Strategy and Corporate Licensing, **Motorola**

Casey Hill will discuss Motorola's innovation model, organization and governance used to create, manage and leverage its intellectual property. He will discuss methods used to integrate internal and external innovation for highest return on investment. In addition, Casey will discuss how intellectual property is used for product differentiation (such as the RAZR) to create high market share, high margin businesses. He will discuss how IP can be used to lead the market toward value-added products and systems, and he will discuss how a company must be willing to invest in a focused manner in order to do so. Finally, he will share insights into Motorola's 3-legged stool model [IP strategy, Technology strategy and Business strategy], and his experiences in IP gap analysis leading to organic vs inorganic growth.

*Casey Hill is currently Senior Director of IPR Strategy and Corporate Licensing in Motorola's law department. He has contributed to a broad range of Motorola business units in Georgia, Florida, Texas and Illinois, and he has led several start-up ventures within Motorola.*

### Bringing Externally Developed Technologies into the NPD Process

Clive Norton, Principal Scientist, **Cadbury Plc**

Clive Norton will describe the organizational structure and stage-gate process used at Cadbury, including the roles, responsibilities and rewards—from concept into development. He will discuss:

- How Cadbury's team of open innovation transfer managers interface with R&D teams to identify market needs of each region and segment (gum, chocolate, sugar confectionery); how they then integrate with the externally faced OI searching teams responsible for identifying solutions, bringing technologies in-house, and arranging and/or executing collaborative research.
- How project managers using OI thrive and are rewarded
- How open innovation balances against internal development in terms of cost and time
- How technologists manage external partnerships
- How projects move into the stage-gate process

*Clive Norton is Principal Scientist at Cadbury Plc and has been involved with R&D in the food industry for fourteen years. His role at Cadbury includes overseeing liaisons with project managers globally and compiling problems/needs/opportunities from within the corporation to be addressed by external technology, solutions or expertise.*

## PANEL

### Integrating Internal/External Innovation

This culminating session is designed to bring together all the lessons learned and experiences shared—and will be an opportunity to ask questions about your own challenges.

The focus will be on how to successfully combine external technologies with internally developed IP—including cultural/organizational/staffing considerations, rewards/incentives, metrics, stage-gate and development processes, and financial/strategic objectives.

**MODERATOR: Dr. Paul Germeraad** (see page 4)

**Gary Fletcher**, Technology Leader in the Advanced Technology R&D Group of **BD Preanalytical Systems**, develops technology and innovation strategy and leads the technology intelligence and scouting activities critical to the future growth of the BD Diagnostics business.

**Casey Hill**, **Motorola** (see bio at left)

**Clive Norton**, **Cadbury Plc** (see above)

# Special Features

## Early Bird Savings

Sign up by August 29th and save \$200! No risk—you may cancel up to 5 days prior to event without penalty.

## Team Discounts

Sign up with 2 of your colleagues (teams of 3 or more) and save an additional \$100 each. Groups of 5-10 may deduct 15%, groups of 11+ may deduct 20%. For further group arrangements, call 781-891-8080. Teams may include customers and/or partners, as long as all members register at the same time.

## Special Half-Day Pre-Conference Workshops

Receive guidelines and how-to's—from beginner to advanced—on technology scouting, roadmapping, IP leverage, and relationship management. See pages 6-7 for descriptions.

## Dynamic Industry Keynote Sessions

Gain insight and inspiration from chief technology officers and external business development leaders at **P&G**, **IBM**, and **Avery Dennison**.

## Conference Chaired by Two Foremost Experts

Receive immediately-usable overviews, syntheses and recommendations from **Dr. Jay Paap** and **Dr. Paul Germeraad**—two of the most respected and experienced experts in the field.

## Two Interactive Panel Sessions

Hear what other practitioners are doing and what's working. Compare notes about tech scouting, opportunity identification, partnering/licensing, integrating external ideas, aligning processes, managing change and more. Get candid answers to your most pressing questions.

## Networking

Reception, breaks, luncheons and interactive format are designed to introduce you to others and provide opportunity for informal discussion. Limited attendance ensures individual attention from faculty.

## Open Innovation Resource Guide

An up-to-date directory with contact information to help you find brokers, intermediaries, technology sources, intellectual property services, and more.

## Conference Materials

Complete binder with case examples, matrices, charts and action steps serve as permanent reference which may be shared with others from your organization. Special follow-up package sent electronically to all participants with conference summary, downloadable files, and further notes.

# Registration Information

## DATES:

The **Technology Sourcing Summit** will be held October 28-30, 2008. Registration/continental breakfast begins at 7:15 am and sessions begin at 8:15 am on Tuesday, 10/29 and conclude at 3:30 pm on Wednesday 10/30. Pre-conference workshops offered Monday, 10/28 from 8:30-12:00 and 1:30-5:00; registration/breakfast begins at 7:30 am.

## VENUE & HOTEL ACCOMMODATIONS:

The conference will be held at the **Hyatt Harborside**, 101 Harborside Drive Boston, MA 02128. Please call **617-568-1234** or **800-233-1234** to make room reservations; mention Management Roundtable to receive group rate of \$219/night. (please reserve early to ensure availability).

## PROGRAM FEES:

Fees include materials binder, breakfast, lunch, breaks, networking reception, follow-on materials.

**EARLY BIRD: Reserve by August 29 and save an additional \$200.** See price chart below.

	By 8/29/08	After 8/29/08
2-day Conference	\$1795	\$1995
Conference + 1 Half-day Workshop	\$2340	\$2540
Conference + 2 Half-day Workshops	\$2885	\$3085
1 Half-day Workshop	\$745	
2 Half-day Workshops	\$1490	

**TEAM DISCOUNTS:** Groups of 3-4 may deduct \$100 per person. Groups of 5-10 may deduct 15%, groups of 11+ may deduct 20%. For further group arrangements, call 781-891-8080.

## NO-RISK GUARANTEE:

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

## 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.

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**Call:** 1-800-338-2223 or 781-891-8080  
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**Fax to:** 781-398-1889

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

**Mail to:** Technology Sourcing Summit  
c/o Management Roundtable  
92 Crescent Street, Waltham, MA 02453

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

(PLEASE CHECK THE SESSIONS YOU PLAN TO ATTEND. USE PHOTOCOPIES FOR ADDITIONAL PEOPLE.)

#### PRE-CONFERENCE WORKSHOP(S) *(See pages 6-7)*

MORNING SESSIONS *(choose one)*

- A: Technology Scouting—Getting Started**  
 **B: Strategic Roadmapping & Project Selection**

AFTERNOON SESSIONS *(choose one)*

- C: Managing Open Innovation Relationships & Networks**  
 **D: Advanced Scouting & Roadmapping**  
 **CONFERENCE**

Total fee \$ \_\_\_\_\_

*See page 11 for fees and registration information.*

Name: Mr./ Ms \_\_\_\_\_

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I cannot attend, please send me \_\_\_\_\_ conference handbooks with case studies, data, all handouts and more at \$398/each (to be shipped within 3 weeks after the event).

### Payment Information *(Amount \$\_\_\_\_\_)*

- Check enclosed, payable in US funds to *Management Roundtable*.  
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### LEARN:

- *Where to look—globally—for opportunities and hidden technology gems*
- *What to screen for; how to qualify*
- *How to make better deals sooner*
- *How to value IP—both external and internal*
- *How to successfully bring 'outside in'*

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