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See page 15

# CoDev 2008

January 21-23, 2008  
Scottsdale, Arizona

## Seventh Annual MRT/PDMA International Congress on Co-Development Open Innovation—Key Levers for Business Growth and ROI

A powerful, unifying event on how to maximize product development partnerships, networks, and other external relationships. Receive strategies, tactics and an implementation roadmap to achieve goals.

### FEATURING

#### TOP EXPERTS:



**Turbo-Charging Growth Executive Session and Driving Real Results Panel Discussion** with

#### **HENRY CHESBROUGH**

acclaimed author of *Open Innovation* and *Open Business Models*



#### **PETER A. GLOOR**

author, *Swarm Creativity*; Center for Collective Intelligence, MIT Sloan School of Management



#### **VERNA ALLEE**

Co-Founder, Value Networks

#### INDUSTRY KEYNOTES:



#### **DR. SCOTT RICKERT**

President and CEO,  
**Nanofilm**



#### **MARK PETERSON**

Director, External Business Development,  
**Procter & Gamble**



#### **DR. WILLIAM HSU**

Vice President and CTO,  
**Kennametal**

#### CASE STUDIES FROM LEADING PRACTITIONERS:

**SC Johnson**

**General Mills**

**Microsoft**

**WD-40**

**Dow Chemical**

**Kraft Foods**

**Johnson & Johnson**

**Motorola**

**Church & Dwight**

**Hawker Beechcraft**

**Kodak**

**Nortel**

**INO Therapeutics**

**GlaxoSmithKline**

**QTG/Pepsico**

**more!**



#### CONFERENCE CHAIR: **CHERYL PERKINS**

President and Founder of **Innovationedge™** and former Chief Innovation Officer, Kimberly-Clark



and



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[www.CoDevPD.org](http://www.CoDevPD.org)

Seventh Annual MRT/PDMA International Congress on Co-Development

## Open Innovation—Key Levers for Business Growth and ROI

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### Why this conference is essential to your company's future

Since 2001, the year that Management Roundtable (MRT) and the Product Development & Management Association (PDMA) began their own 'co-development' on this highly regarded annual conference, much has changed:

- Companies recognize they can no longer go it alone—and many are turning outside for *innovation*, not just efficiency. Co-invention and open innovation have supplanted transactional relationships.
- Companies are engaged in multiple types of arrangements with multiple partners; industry leaders are forming innovation networks.
- Increasingly partnerships are global and/or between different-sized companies with different cultures and practices.
- More intellectual property is being shared.
- CEOs are looking for measurable, tangible payback and increased productivity—the 'long range' is *now!*

These changes mean more complexity and risk—and potentially more reward. The good news is that there is now enough experience among industry leaders to learn from, and ROI is not only possible but significant.

### How can companies gain the benefits and avoid the pitfalls?

From their combined body of knowledge, MRT and PDMA have identified **four key levers of success**. The companies that have grown and prospered have executed well in the following areas, while most failures can be traced to weaknesses in the same:

- 1 **Organizational effectiveness** – the ability to align and motivate multiple players with different cultures and agendas
- 2 **Global expansion and innovation networks** – tapping into skills, brainpower, and markets around the world
- 3 **Intellectual asset management** – extracting value from IP (beyond patents), using IA to find new opportunities
- 4 **Metrics** – having clear indicators and targets to guide actions

MRT and PDMA have assembled the implementation leaders to share their insights and advice at **CoDev 2008: Open Innovation—Key Levers for Business Growth and ROI**, to be held **January 21-23, 2008** in **Scottsdale, Arizona**.

### Who should attend

Highly recommended for anyone involved in or exploring open innovation, including: **Chief Technology Officers; Chief Innovation Officers; VPs, Directors and Managers of R&D, Engineering, Product Development, Business Development, Global Sourcing, Alliance Management, Intellectual Asset Management, Licensing, and Corporate Counsel** from all industries and company sizes. Group discounts offered (please see page 15).

“Regardless of size or industry, any corporation dealing with slow growth and fighting commoditization in this changing global economy will learn new open innovation strategies, processes and tools to infuse innovation into its corporate culture to deliver sustainable growth.”

Cheryl Perkins,  
President and Founder  
of **Innovationedge™**  
and conference chair  
of CoDev 2008

# How CoDev 2008 Meets *Your Objectives*

- **Are you seeking more R&D capacity, technology acquisition, and/or broader market reach?**
- **Is achieving measurable ROI a concern?**
- **Are you working on a single collaborative innovation project with one outside partner or many collaborative efforts with multiple partners?**
- **Are you doing more globally?**
- **Are you from a small to medium-sized organization? Are you from a large organization collaborating with smaller companies?**
- **Is IP protection a major concern? Are you looking to increase the value of intellectual assets?**

*To see which experts and practitioners will address each of these questions, please go to [www.CoDevPD.org](http://www.CoDevPD.org) and click on “Meet Your Objectives.”*

## Deliverables

By participating in CoDev 2008, you will come away with a realistic plan to operationalize open innovation, to manage the complexities and risks, and deliver tangible, measurable results. You will receive:

- **Candid advice, guidance and proven how-to’s from leaders in the field.**
- **Networking and benchmarking opportunities throughout the program (past participants tell us this is where they receive some of the best takeaways).**
- **Direct answers to your specific questions from Henry Chesbrough and advanced industry practitioners at the *Driving Real Results* panel (see page 8).**
- **Recommended resources for follow-up and further exploration.**

# 15 Key Benefits

*By attending, you will learn to apply the levers of open innovation success. You will find out how to:*

- 1 **Increase organizational effectiveness; align internal and external innovation**
- 2 **Structure roles and processes to increase productivity in open innovation (OI) initiatives**
- 3 **Create incentives and foster a culture to combat “not invented here”**
- 4 **Use Value Network Analysis to strengthen your business model and innovation efforts**
- 5 **Engage, extend and cultivate global innovation networks**
- 6 **Overcome the cultural and geographic hurdles of partnering across borders**
- 7 **Avoid relationship problems arising from intellectual property (IP)**
- 8 **Move beyond patents alone to broad, partner-friendly intellectual asset (IA) tools**
- 9 **Leverage IP and market data to identify and assess potential partners**
- 10 **Delineate responsibilities, rights, and action items jointly with partners**
- 11 **Measure the impact of OI and co-development on overall business growth**
- 12 **Expand the vocabulary of ROI to include intangible impact and strategic capability**
- 13 **Relay OI metrics to management to demonstrate performance**
- 14 **Choose the right metrics to fit different types of projects and partners**
- 15 **Choose as well as become your industry’s leading “partner of choice”**

*“I came away with some very valuable nuggets on approaching IP in a co-development environment!”*

David Maltz, Nektar Therapeutics

## January 21, 2008 Pre-Conference Workshops

7:00 – 8:00	Continental Breakfast/Registration
11:00 – 5:00	<b>A. EXECUTIVE SESSION: Turbo Charging Growth with Open Innovation</b> – Henry Chesbrough, UC Berkeley; Haas School of Business, and Kevin Schwartz, PRTM
8:00 – 12:00	<b>B. Accelerating Product Development Through CoDev—Lessons from the Leaders</b> – Gene Slowinski, Rutgers University
8:00 – 12:00	<b>C. Intellectual Assets in Open Innovation: Tools &amp; Methods for Strategy &amp; Management</b> – John Cronin, ipCapital Group, and Bruce A. Story, Dow Chemical
12:00 – 1:00	Lunch
1:00 – 5:00	<b>D. Value Network Tools, Strategies and Practices for Open Innovation</b> – Verna Allee, Value Networks, LLC
1:00 – 5:00	<b>E. Managing and Protecting IP in China</b> – Dr. Alan Paau, Cornell University
5:30 – 7:00	Wine & Cheese Reception

## January 22, 2008 Conference Day One

7:00 – 8:00	Continental Breakfast / Registration	
8:00 – 8:15	Welcome: MRT and PDMA	
8:15 – 8:45	Opening Remarks: Conference Chair, Cheryl Perkins	
8:45 – 9:45	<b>KEYNOTE ADDRESS: Gaining the ROI of Open Innovation: Partnering and “Nano-izing” for Market Growth</b> – Dr. Scott Rickert, President and CEO, <i>Nanofilm</i>	
	<b>TRACK A. Setting the Strategy to Achieve Open Innovation Success</b>	<b>TRACK B. Executing Your Company’s Vision for Open Innovation</b>
	<i>Creating the Right Organizational Design &amp; Value Networks to Foster OI</i>	<i>Selecting and Becoming Partner of Choice – Expanding Globally</i>
10:00 – 10:45	<b>FEATURED PRESENTATION: Visualize, Optimize and Open Innovation Pathways</b> – Verna Allee, <i>Value Networks LLC</i>	<b>CASE STUDY: Becoming OEM of Choice in a Constrained Supplier Base</b> – Thomas Hilpert, <i>Hawker Beechcraft</i>
10:45 – 11:30	<b>CASE STUDY: Operationalizing Open Innovation</b> – Steven Goers, <i>Kraft Foods</i>	<b>PRESENTATION: Dr. Lulin Gao, Honorary President, All China Patent Assoc., and Chairman, East IP, Beijing, P.R. China (invited)</b>
11:30 – 12:15	<b>CASE STUDY: Organizational Design to Accommodate Internal and External Innovation</b> – Kurt Estes, <i>Motorola</i>	<b>CASE STUDY: Building Effective CoDev Alliances—Partnership Selection, Evaluation and Relationship Management</b> – Kim Pugliese, <i>Kodak</i>
12:15 – 1:15	Lunch	
	<i>Corporate Culture: Making the Shift from NIH to Open Innovation</i>	<i>Selecting and Becoming Partner of Choice – Expanding Globally (cont’d)</i>
1:15 – 2:00	<b>CASE STUDY: Reinventing Corporate Growth at GSK Consumer Health</b> – Jo Mohr, <i>GlaxoSmithKline Consumer Health</i>	<b>CASE STUDY: Finding the Right Partners</b> – Meg Srankse, <i>SC Johnson</i>
2:00 – 2:45	<b>CASE STUDY: Developing an Open Innovation Strategy</b> – Richard McArdle, <i>QTG/Pepsico</i>	<b>CASE STUDY: Optimizing Open Innovation Initiatives</b> – Julie Ennis, <i>General Mills</i>
	<i>Intellectual Asset Management: Protect IP and Promote an Open Disclosure Environment</i>	<i>Managing, Monitoring and Building a Culture for Co-Innovation Relationships</i>
3:00 – 3:45	<b>CASE STUDY: Standards and IP: Strategies for Complying with One While Protecting the Other</b> – Michelle C. Lee, <i>Nortel</i>	<b>CASE STUDY: Dr. Robert J. Wills, <i>Johnson &amp; Johnson</i></b>
3:45 – 4:30	<b>CASE STUDY: Open Source Software: Overcoming the Challenge of Developing in a Mixed Open Source and Proprietary Environment</b> – Jim Markwith, <i>Microsoft</i> ; Stephen J. Davidson, <i>Leonard, Street &amp; Deinard</i>	<b>CASE STUDY: <i>Air Products</i></b> (invited)
4:30 – 5:15	<b>PLENARY/INTERACTIVE PANEL SESSION: Driving Real Results with Open Innovation</b> – Moderator: Henry Chesbrough, UC Berkeley; Facilitator: Kevin Schwartz, PRTM; Panelists from WD-40, GlaxoSmithKline, and others	
5:15 – 5:45	<b>SPECIAL PRESENTATION: Open Innovation: How to Avoid Wasting Money and Risking Reputation</b> – Paul Stiros, President and CEO, <i>NineSigma</i>	
5:45 – 7:00	Networking Reception	

## January 23, 2008 Conference Day Two

7:00 – 8:00	Continental Breakfast	
8:00 – 8:15	Day One Learnings and Day Two Overview: Conference Chair, <b>Cheryl Perkins</b>	
8:15 – 9:15	<b>KEYNOTE ADDRESS: Open Innovation and Value Creation at Procter &amp; Gamble: New Business Models</b> – <b>Mark Peterson</b> , Director, External Business Development, <b>Procter &amp; Gamble</b>	
	<b>Track A: Open Innovation Strategies for Small to Medium-sized Companies: How SMB Can Achieve the Big Benefits</b>	<b>Track B: Tools and Services</b>
9:30 – 10:15	<b>CASE STUDY: Focus on the Baby, Not Just the Wedding—10 Factors for Success in Open Innovation/Co-Development</b> – Dr. Alison Lukacsco, <b>Church &amp; Dwight</b>	<b>Leveraging University R&amp;D to Accelerate Open Innovation</b> – Clifford M. Gross, <b>UTEK Corporation</b>
10:15 – 11:00	<b>CASE STUDY: Leveraging CoDev Partnerships When an Unanticipated M&amp;D Impacts Internal Resource Capacity</b> – Frederick J. Montgomery, <b>INO Therapeutics</b>	<b>PRESENTATION: Innocentive</b> (speaker TBA)
11:15 – 12:00	<b>CASE STUDY: From China to Canada, San Diego to Israel—Spanning the Globe for CoDev Partners</b> – Graham Milner, <b>WD-40</b>	<b>PRESENTATION: TBA</b>
12:00 – 1:00	Lunch	
	<b>Collaborative Innovation with Partners and Customers – Next Steps, Future Directions</b>	
1:00 – 2:00	<b>FEATURED PRESENTATION: Swarm Creativity—Competitive Advantage through Collaborative Innovation Networks</b> – <b>Peter Gloor</b> , Center for Collective Intelligence, MIT Sloan School of Management	
2:00 – 3:00	<b>KEYNOTE ADDRESS: Open Innovation and Co-Development—Experience and Learning at Kennametal</b> – <b>Dr. William Hsu</b> , VP & CTO, <b>Kennametal, Inc.</b>	
3:00 – 3:15	Closing Remarks: Conference Chair, <b>Cheryl Perkins</b>	

## Distinguished Faculty

**Verna Allee**  
Co-Founder, **Value Networks™**

**Henry Chesbrough**  
Executive Director, Center for Open Innovation, Haas School of Business, **UC Berkeley**

**John Cronin**  
Managing Director and Chairman, **ipCapital Group**

**Stephen J. Davidson**  
Chairman, Information Technology Practice, **Leonard, Street & Deinard**

**Julie Ennis**  
Senior Manager, Worldwide Innovation Network, **General Mills**

**Kurt Estes**  
Director of Business Development, Early Stage Accelerator, **Motorola**

**Peter A. Gloor**  
Research Scientist, Center for Collective Intelligence, **MIT Sloan School of Management**

**Steven Goers**  
Vice President, Open Innovation, **Kraft Foods**

**Clifford M. Gross**  
CEO, **UTEK Corporation**

**Thomas Hilpert**  
Director, Product Research—New Product Development, **Hawker Beechcraft**

**Dr. William Hsu**  
Vice President and Chief Technology Officer, **Kennametal**

**Michelle C. Lee**  
IP Counsel, **Nortel**

**Alison Lukacsco**  
Vice President, R&D, **Church & Dwight**

**Jim Markwith**  
Licensing Counsel, Intellectual Property and Licensing Group, **Microsoft Corporation**

**Richard McArdle**  
Director Technology Innovation, **QTG/Pepsico**

**Graham P. Milner**  
Executive Vice President, Global Innovation, **WD-40 Company**

**Jo Mohr**  
Senior Director, Open Innovation **GlaxoSmithKline Consumer Health**

**Dr. Frederick J. Montgomery**  
VP Medical Devices, **INO Therapeutics**

**Dr. Alan Paa**  
Vice Provost of Technology Transfer and Economic Development, **Cornell University**

**Mark Peterson**  
Director, External Business Development, **Procter & Gamble**

**Kim Pugliese**  
Director and Vice President of External Alliances, **Kodak**

**Dr. Scott E. Rickert**  
President and CEO, **Nanofilm**

**Kevin J. Schwartz**  
Director, **PRTM**

**Dr. Gene Slowinski**  
Director, Strategic Alliance Research, **Rutgers University**

**Meg Sranske**  
Senior Manager, Global Technology and Acquisition Licensing, **SC Johnson**

**Paul Stiros**  
President and CEO, **NineSigma**

**Bruce A. Story**  
Senior Director, Intellectual Capital, **The Dow Chemical Company**

**Dr. Robert J. Willis**  
Vice President, Alliance Management, **Johnson & Johnson**

### CONFERENCE CHAIR:



**Cheryl Perkins**  
President and Founder of **Innovationedge™** and former Chief Innovation Officer, **Kimberly-Clark**

*Cheryl Perkins is an innovation thought leader and creative catalyst in brand-building initiatives that improve business performance. As President of Innovationedge, she helps companies across many industries build sustainable innovation capabilities and define growth opportunities. Cited by Business Week (5/06) as one of the Top 25 Champions of Innovation, her work involves designing and implementing organizational structures, processes, systems and tools that enable open innovation and growth. Cheryl has more than 23 years experience and most recently served as the Senior Vice President and Chief Innovation Officer for Kimberly-Clark Corporation where she led teams to develop technologies, partnerships, and intellectual assets that transformed into total solutions and new-to-the-world innovations.*

A

11:00 AM - 5:00 PM

## Turbo-Charging Growth with Open Innovation

**Henry Chesbrough**, PhD, Executive Director, UC Berkeley Center for Open Innovation; author, *Open Innovation* (2003) and *Open Business Models* (2006); and **Kevin Schwartz**, Director, PRTM

By now the business transformation enabled by Procter & Gamble's "Connect and Develop" initiative is widely known, and the paradigm shift toward open innovation is more and more apparent across industries. But is there value to be had for your company? How does this new model for innovation fit into an overall corporate growth strategy? And if you do decide to go forward, what are the critical success factors—and more importantly, the potholes to avoid—to ensure that real results are achieved, measured, and communicated to a board of directors or shareholders?

Designed specifically for senior management, this session will explore lessons learned from leading companies that have adopted the open innovation concept to date. Using a case study format, Chesbrough and Schwartz will highlight the potential impact of "opening up" innovation with respect to corporate business and operational strategies, including the tangible effects on top- and bottom-line growth figures.

To promote exchange of ideas, this session is limited to 30 executives. An active networking lunch is included, followed by in-depth discussion of both the potential benefits and the executive "watch outs" that are critical to open innovation-driven growth.

**Through case examples and dialogue, the following questions will be answered:**

- What business strategies are best suited to an open innovation model?
- What are the organizational models for creating a successful transformation from closed to open innovation?
- What does a successful roadmap to "opening up" innovation look like?
- What is the true potential return from the open model and what enables an organization to realize its full potential?

Case studies will span industries and include specific companies such as P&G, Eli Lilly, Cisco Systems, and others. Guest speakers will provide first-hand insights.



**Henry Chesbrough** is Executive Director of the Center for Open Innovation at the Haas School of Business at University of California-Berkeley. He holds a Ph.D. in Business Administration from the UC Berkeley, an MBA from Stanford University, and a BA from Yale University, *summa cum laude*. His research focuses on managing technology and innovation. His book, *Open Innovation* (Harvard Business School Press, 2003), articulates a new paradigm for organizing and managing R&D. His most recent book, *Open Business Models* (Harvard Business School Press, 2006), extends his analysis of innovation to business models, intellectual property management, and markets for innovation.



**Kevin Schwartz** is a principal consultant in the product development practice of PRTM, a leader in helping companies to implement best practices in both product development and operations management. As a consultant and product development practitioner, he has over 15 years of experience in bringing new technologies and innovations to market. Kevin brings a hands-on perspective to this workshop from PRTM's work at both the strategic and operational levels with companies in a wide range of industries, including life sciences, high technology, consumer products, and services. He has been involved with the PDMA/MRT CoDev conference since its inception in 2001 and is currently writing a chapter on co-development strategy for volume III of the PDMA's Product Development Toolbook.

**WHO SHOULD ATTEND:** This session is designed specifically for senior management: chief technology officers, chief innovation officers, vice presidents, and above — from >\$100M companies, all industries. **Limited to 30 executives. Reserve early to ensure your place!**

“Open innovation increases R&D productivity, captures or leverages spillovers in other markets, shortens the time to get to market, and shares the rising R&D costs with others.”

Henry Chesbrough

B

8:00 AM – 12:00 Noon

## Accelerating Product Development Through CoDev—Lessons from the Leaders

**Dr. Gene Slowinski**, *Managing Director, Alliance Management Group, and Director of Strategic Alliance Research, Rutgers University*

Open innovation is transforming the nature of product development. To compete effectively in today's business environment, managers must deal with the complexities of cooperatively developing intellectual assets, linking decision-making structures, and building cross-corporate innovation networks. In this session, Dr. Slowinski will present a set of management tools and metrics (drawn from his 25 years experience with over 300 alliances) to increase the value of individual alliances and alliance portfolios. These include: organization structures; ways to overcome cultural differences; proven financial models; the "Want, Find, Get, Manage" Model<sup>®</sup>; the Alliance Framework<sup>®</sup>; and the Alliance Implementation Program<sup>sm</sup>; and more.



**Gene Slowinski** is the Director of Strategic Alliance Research at the Graduate School of Management, Rutgers University, an Executive Affiliate with PRM, and Managing Partner of the Alliance Management Group, a consulting firm devoted to the formation and management of strategic alliances, mergers and acquisitions. With Matt Sagal he co-wrote the book *The Strongest Link* and authored *Reinventing Corporate Growth*.

C

8:00 AM – 12:00 Noon

## Intellectual Assets in Open Innovation—Tools & Methods for Strategy & Management

**John Cronin**, *Managing Director & Chairman, ipCapital Group*;  
**Bruce A. Story**, *Sr. Director, Intellectual Capital, Dow Chemical Co.*

One of the most critical issues in negotiating agreements with third parties for technology development is ownership or rights to intellectual assets (IA) and intellectual property (IP). Co-management of the IA being generated can allow better protection for all parties. This session will provide frameworks, case studies, exercises, and group discussions. John Cronin will cover IA issues before, during, and after open innovation partnerships, joint ventures, and deals. Bruce Story will share Dow's experiences across these different types of arrangements, and tell you how to: leverage IP and market data to identify and assess potential partners; maximize internal innovation sources prior to seeking external partners; strengthen the deal in your favor by bringing internal IA to the negotiating table; access the brainpower of external experts in facilitated invention sessions; and delineate responsibilities, rights, and action items with partners.



**John Cronin** is Managing Director and Chairman of ipCG. Capitalizing on a lifelong study of creative and inventive thinking processes, business strategy development, and transaction negotiations, John has created the unique ipCapital System<sup>®</sup> methodology, which extracts and documents invention, identifies opportunity and risk,

drives transactions to completion, and creates significant market value from IP. Over the years he has become a respected thought leader among executives.



**Bruce A. Story** is Senior Director, Intellectual Capital Management (ICM), of the Performance Plastics and Chemicals business of The Dow Chemical Company. He has developed and implemented new processes for managing intellectual assets (IA) in the areas of business-focused patent strategy development, opportunity identification, planned inventions, mergers and acquisitions, licensing, venture partner identification, intellectual property litigation support and competitive intelligence.

D

1:00 – 5:00 PM

## Value Network Tools, Strategies and Practices for Open Innovation

**Verna Allee**, *Co-Founder, Value Networks LLC*

From a solid foundation in living systems theory, knowledge economics, intangible asset management and business practice, Verna Allee has forged a new synthesis of tools and processes that drive innovation and value creation. She will share her experience-tested insights and the basics of using a value-creating network. With a gift for making the complex simple and practical, Allee will demonstrate how to:

- Drive innovation at the strategic, tactical and operational levels.
- Expand the vocabulary of ROI to include intangible impact and strategic capability.
- Combine technology, human networks and value network enterprise strategies to create greater value and innovative breakthroughs.
- Enhance the quality of interfaces, workflows and value exchanges across the entire network.



**Verna Allee**, M.A., co-founder of Value Networks LLC, is recognized worldwide as a pioneer in value networks, network-centric business, and intangible assets. She is among the founding members of the Value Network Consortium—the industry group leading standards, adoption, and vitality of vertical value networks and ecosystem. She guest lectures at universities around the world and is the author of *The Future of Knowledge: Increasing Prosperity through Value Networks*.

E

1:00 – 5:00 PM

## Managing and Protecting IP in China

**Dr. Alan Paau**, *Vice Provost for Technology Transfer and Economic Development, Cornell University, and President of the Cornell Research Foundation*

China has been projected to become the world's largest economy by 2030. This means China needs to move up the value chain and increase its innovations. Co-development with foreign entities is highly encouraged and often subsidized with government resources, but co-development is a challenging endeavor to foreign businesses—especially when it comes to managing and protecting valuable intellectual property. Since China opened its door to westerners in the early 1980s, Dr. Alan Paau has been interacting with the various sectors, both public and private, of this fast-changing society. In this session, Dr. Paau will share his experience and insights on:

- Rationale for co-development in China
- China's State Intellectual Property Office
- Trends in IP development and enforcement
- East-west co-development—an historical perspective
- The cultural puzzle
- Looking into the future



**Dr. Alan Paau** is responsible for the strategic management of all technologies and intellectual property that arise from the research activities at Cornell University—both at the Weill Medical College in New York City and at the main campus in Ithaca, NY. Dr. Paau is also president of the Cornell Research Foundation, Inc., an affiliate organization which holds titles to technologies that result from Cornell's research activities. Prior to joining Cornell in January 2007, Dr. Paau was Director and Assistant Vice Chancellor for Technology Transfer and Intellectual Property Services at the University of California, San Diego.

# Featured Sessions

## INTERACTIVE PANEL Driving Real Results from Open Innovation



**MODERATOR:**  
**Henry Chesbrough**  
PhD, Executive Director,  
UC Berkeley Center for  
Open Innovation

### PANELISTS:

**Jo Mohr**, Senior Director, Open Innovation  
GlaxoSmithKline Consumer Health  
**Graham Milner**, Executive Vice President,  
Global Innovation, WD-40

**Q&A FACILITATOR:** **Kevin Schwartz**,  
Director, PRTM Management Consultants

How do you ensure measurable improvements in innovation and overall business performance from your OI efforts? In this dynamic session, Dr. Henry Chesbrough will lead a candid discussion of how open innovation has irrevocably changed the way companies do business—and what the impact has been.

Dr. Chesbrough will open the session by providing his thoughts on how the open innovation concept has evolved since his original book on the topic was published in 2003. He will then tee up a series of discussion questions for the panelists to explore: why each of their companies pursued an open innovation agenda, what challenges they struggled to overcome, and what real, quantifiable business performance improvements they have seen as a result.

The session will conclude with a 20-minute Q&A period, allowing the audience to pose questions directly to Dr. Chesbrough and the panelists.

## Swarm Creativity— Competitive Advantage through Collaborative Innovation Networks



**Peter A. Gloor**  
Research Scientist,  
Center for Collective  
Intelligence, MIT Sloan  
School of Management

In every large company, groups of creative individuals self-organize to explore and develop ideas that they care deeply about. These collaborative networks often include customers and others outside the company's boundaries. Now collaborative and open innovation are being extended from the realm of idea generation and product development to the very essence of doing business. In fact, some companies have based their entire business models on collaborative networks—a phenomenon that Peter Gloor calls “swarm business,” the classic example being Wikipedia, the free online encyclopedia. As companies like BMW, IBM, Novartis and others are discovering, swarm businesses require a completely new corporate mindset. Specifically, to reap the benefits of swarm innovation, companies must (1) gain power by giving it away, (2) share with the swarm, and (3) concentrate on the swarm, not on making money. Although these principles differ from the traditional ways of doing business in a number of fundamental ways, they are crucial for companies to succeed in this emerging era of increased collaboration among innovators both inside and outside the organization. Peter Gloor will discuss how to use “swarm business” approaches and collaborative networks for competitive advantage.

**Peter A. Gloor** author of *Coolhunting—Chasing Down the Next Big Thing* and *Swarm Creativity—Competitive Advantage through Collaborative Innovation Networks*, is a research scientist at the Center for Collective Intelligence at MIT's Sloan School of Management where he leads a project exploring collaborative innovation networks ([www.ickn.org](http://www.ickn.org)).

## Visualize, Optimize and Open Innovation Pathways



**Verna Allee**  
Co-Founder,  
Value Networks, LLC

Need open innovation to master changing markets and discover new opportunities? Eager to achieve fundamental advancements in open innovation networks? Want an agile, responsive, open organization with deep innovation capabilities?

It has been estimated that 80% or more of the economy is based on intangibles. Yet business innovation strategies and tactics are still stuck in the industrial age mindset of hard assets, scarce resources, and classic R&D. In this presentation, Verna Allee, a recognized leader and senior advisor in value network strategies and network-centric business thinking, will provide guidelines to enable your organization to break free from this mindset.

### Key take-aways:

- How visualizing, analyzing, and optimizing intangibles and value flows can accelerate agility and innovation.
- How innovation networks are creating value across Europe.
- How value network analysis led to a six-fold productivity increase in Boeing's flight test operations for the 787 Dreamliner.
- Specific case examples from companies such as Cisco, Telenor, SAP, Mayo Clinic, and Kimberly-Clark.

**Verna Allee**, M.A., co-founder of Value Networks LLC, is recognized worldwide as a pioneer in value networks, network-centric business, and intangible assets. She is among the founding members of the Value Network Consortium—the industry group leading standards, adoption, and vitality of vertical value networks and ecosystem. She guest lectures at universities around the world and wrote *The Future of Knowledge: Increasing Prosperity* through Value Networks.

## Gaining the ROI of Open Innovation: Partnering and “Nano-izing” for Market Growth



**Dr. Scott E. Rickert**  
President and Chief  
Executive Officer,  
Nanofilm

As a pioneer in an emerging technology, Nanofilm invested early in building strong partnerships—a precursor to open innovation. As the full potential of nanotechnology became apparent to mainline technology and manufacturing companies, Nanofilm moved aggressively to explore opportunities and develop market-ready products. The company’s open innovation practices evolved further, providing the framework for achieving Nanofilm’s goal—to “nano-ize” consumer products of all kinds. The company has since infused these practices throughout the organization, creating a corporate culture in which R&D and business development are outwardly focused (their mantra is “No partnership, no product”). Alliances extend across the full supply chain to meet consumer needs. The result is a rich incubator for ideas and a nimble, flexible organization for go-to-market planning and execution.

### Key take-aways:

- How to develop working relationships and cross-functional teams that take ownership of an innovation and move it to fruition.
- Nanofilm’s method for measuring the ROI of open innovation—traditional financial measures and approaches to assess long-term investment in projects and partners.
- How open innovation enabled Nanofilm to extract more value from development.
- Nanofilm’s approach to balancing IP rights with information-sharing—risks and advantages.

**Dr. Scott E. Rickert** is President and CEO of Nanofilm, one of the oldest and largest privately-held nanotechnology companies in the U.S. He co-founded the Valley View, Ohio-based company in 1986 with the goal of “nano-izing” consumer products—adding features and functionality by incorporating nanotechnology. Today Nanofilm’s technology reaches into electronics, sports, architecture, transportation, energy and home products, and Dr. Rickert continues to set the company’s R&D vision.

## Open Innovation and Value Creation at Procter & Gamble: New Business Models



**Mark Peterson**  
Director External  
Business Development,  
Procter & Gamble

Open innovation has been an integral part of P&G’s strategy ever since AG Lafley established the challenge for P&G to find “...50% of its innovation from outside the company.” Yet despite nearly a decade’s efforts, P&G remains on the learning curve, still exploring and experimenting with new models to maximize returns.

P&G does not view open innovation as a one-time fix; the company is continuously improving its approach and External Business Development (EBD) has made open innovation its top priority. This has meant developing both internal and external strategies to identify and procure opportunities from multiple arenas and ensure that submitters have a positive experience no matter what the outcome. The goal is to be the company that outside parties want to contact first.

ROI can be measured in many ways—from actual dollar sales to number of successful opportunities adopted by the company. EBD tracks NPVs of open innovation opportunities, and ultimately incremental dollar sales in market. EBD also tracks the number of submissions received and outcomes as a productivity measure. This process ties efforts to the business units’ strategies and helps make contributions tangible.

**Mark Peterson** is a director in Procter & Gamble’s External Business Development organization and has responsibility for technology transfer (in and out) for Baby Care, Beverage, Family Care, Household Care, Oral Care, Pet Care and Snacks Business Units, as well as the Glad JV. His team leads P&G’s commercial open innovation effort and has responsibility to explore new business models that maximize value creation for P&G and its partners.

## Open Innovation and Co-Development— Experience and Learning from Different Types of Partnerships



**Dr. William Hsu**  
Vice President and  
Chief Technical Officer,  
Kennametal

Given increasing demand for new solutions and the shortening of lead times, open innovation and co-development arrangements have become a necessity for Kennametal. The company actively engages customers, third-party solution providers and academic institutions in alliances or joint-development partnerships. In this keynote, Dr. Hsu will share the ins and outs of these efforts, including corporate culture, organization design, intellectual asset management, metrics, and funding/co-funding of initiatives with commercial and academic partners.

### Key take-aways:

- To be successful, open innovation and co-development need to be part of the R&D strategic plan, with leadership allocating resources.
- Metrics must take into account the differences in project emphasis between commercial partners and academic partners.
- Ownership of IP that is generated from the collaboration can make or break the partnership and must be addressed upfront.

**Dr. William Y. Hsu** is Vice President and Chief Technical Officer of Kennametal Inc. In this position, he oversees the worldwide research, development and engineering functions of the company. Dr. Hsu joined Kennametal in April 2004. Prior to joining Kennametal, Dr. Hsu served over 26 years with DuPont Company in various technology and business leadership roles. Dr. Hsu received his doctor of philosophy degree in physics from the University of California at Berkeley, and his bachelor of science degree from the Chinese University of Hong Kong.

# Case Studies

## Track A Setting the Strategy to Achieve Open Innovation Success

### Creating the Right Organizational Design and Value Networks to Foster OI

#### Operationalizing Open Innovation

**Steven Goers**, Vice President, Open Innovation, **Kraft Foods**

Making the case for open innovation is clear and has been well articulated across industries: rapid pace and cost of innovation, majority of innovation from smaller companies/entrepreneurs, and the realities of constrained R&D budgets.

What's not as clear is how to build the organizational structure and framework to successfully operationalize open innovation. How do you embrace entrepreneurial behavior so important for open innovation yet stay focused on key business needs? How do you ensure open innovation is not an isolated activity but is embedded in everything you do? How do you balance longer-term, bigger growth opportunities with the reality of "putting runs on the board" quickly? Should open innovation be centrally led or in individual business units?

This presentation will cover the approaches Kraft has employed to define the "what" and drive the "how" of open innovation. Organizational design, key success factors, examples of innovation in-bounding, and lessons learned will be discussed.

#### Organizational Design to Accommodate Both Internal and External Innovation

**Kurt Estes**, Director of Business Development, Early Stage Accelerator, **Motorola**

In today's fast-paced market, companies are rewarded for being able to deliver innovative products faster than their competitors. As the need for shorter cycle times increases, it is becoming more important for companies to develop ways to both decrease cycle time inside their organizations and to look outside for technology to create new and compelling products and services. As a result, companies are creating groups within their organization specializing in driving innovative products to market. Further, companies are beginning to embrace all aspects of open innovation.

Motorola has groups focused on both internal and external innovation. This presentation will give a high-level overview of Motorola's activities, including success factors, organizational structure, and key learnings.

## Track A

### Corporate Culture: Making the Shift from NIH to Open Innovation

#### Reinventing Corporate Growth at GSK Consumer Health

**Jo Mohr**, Senior Director, Open Innovation, **GlaxoSmithKline Consumer Health**

Can open innovation take you from a 3% growth rate to a 13% growth rate in 3 years? Yes, it can, and GSK Consumer Health's experience proves it. Join Jo Mohr as she describes how GSK combined a HUB office structure with the "Want, Find, Get, Manage" Model® to change corporate culture. She will share how the "not invented here" syndrome was replaced with a totally new way to drive innovation through the 'fusion' of internal colleagues with the outside world. Revenue growth is only one measure of success. GSK's metrics on time-to-decision, perceived responsiveness to market, productivity, and inclusion of staff in decision-making tell a compelling tale. While the transition from being internally focused to externally focused was not easy, the rewards are real.

#### Developing an Open Innovation Strategy

**Richard McArdle**, PhD, Director, Open Innovation, **QTG/Pepsico**

Open innovation expands the focus from narrow internal solutions to those offered by the growing external marketplace of ideas. However, taking advantage of these new and numerous opportunities requires a change in both strategy and structure. QTG/Pepsico R&D has begun this journey of change. Key challenges have been: the development of organizational structures and culture to actively in-source ideas and technology; managing multiple, simultaneous idea evaluations; and balancing the sourcing of strategic needs with unexpected opportunities.

As QTG seeks to become known as the preferred alliance partner for both small companies/entrepreneurs and large/current suppliers, it is evolving its strategy and collaboration methods to create the highest reciprocal value for both.

*"The conference gave me a fantastic inspiration and input in the process of making a strategy and vision for open innovation at Coloplast."*

Lars Seier-Peterson, Coloplast

*"Excellent networking opportunity... I will certainly recommend this conference to others within my company."*

Jennifer Azggen, Nestle

## Track A Intellectual Asset Management: Protect IP and Promote an Open Disclosure Environment

### Standards and IP: Strategies for Complying with One While Protecting the Other

**Michelle C. Lee**, IP Counsel, **Nortel**

Standards are increasingly important in today's global economy. Many government procurement guidelines require compliance with certain standards, and participating in standards setting activities can be critical to a successful product strategy. However, the intellectual property terms associated with contributing to a standardization effort can have far-reaching results. It is important that executive management understands when standards are important and how to protect their company's valuable IP while participating in standards related activities.

During this interactive presentation, Michelle Lee will cover the following topics, and answer questions related to your specific standards related issues:

- What are standards?
- Open standards v. open source
- Standardization strategies
- Standards and the development process
- Protecting IP during standards setting activities

### Open Source Software: Overcoming the Challenge of Developing in a Mixed Open Source and Proprietary Environment

**Jim Markwith**, Licensing Counsel, IP, **Microsoft**; and **Stephen J. Davidson**, Chairman, Information Technology Practice, **Leonard, Street & Deinard**

The use of open source software in the IT environment and in software in general is becoming increasingly widespread. Open source software is not just used in desktop applications, but is embedded in a wide array of consumer products, from refrigerators to cell phones. Executive management must understand the basics of open source software, including when the use or distribution of such materials or products could affect their company's patent portfolio or other IP.

This presentation will cover the must-know aspects of open source software, including:

- Why you should care about open source issues
- Managing the use of open source tools and materials in the development of products to be distributed under non-open source licenses
- Managing the development of non-open source products for open source platforms
- Managing developer exposure to open source code
- Bridging the gap—working in mixed open source and proprietary environments, and
- Summary of the GPLv3

## Track B Executing Your Company's Vision for Open Innovation

### Selecting and Becoming Partner of Choice—Expanding Globally

### Becoming OEM of Choice in a Constrained Supplier Base

**Thomas Hilpert**, Director, Product Research—New Product Development, **Hawker Beechcraft**

Commercial, business and general aviation manufacturers are experiencing unprecedented growth. Most OEMs realize that the traditional model of vertically integrating the supply chain isn't cost effective, and at the same time, competition for talent is increasing. This has resulted in strategic outsourcing and in partnering for design services as well as manufacturing. As the major tier 1 and 2 suppliers have consolidated to meet the growing demands of a select few OEMs, the competition for suppliers/partners has become fierce.

Hawker Beechcraft (HBC) set out to become the "OEM of choice" within the tier 1 and 2 supplier community by using collaborative product development within an alliance framework. As an OEM accustomed to working on its own, it was necessary to:

- Define "What" the expectations were, to ensure alignment between internal functions
- "Find" the tier 1 and 2 suppliers with the right capability and capacity
- "Get" the selected partner secured for a long-term relationship
- "Manage" the relationship using a documented framework to focus decision-making and execution on end-customer value

By following this framework HBC was able to minimize the investment of the suppliers and gain advantage for future opportunities.

### Building Effective CoDev Alliances—Partnership Selection, Evaluation and Relationship Management

**Kim Pugliese**, Director and Vice President, External Alliances, **Kodak**

Traditional approaches alone—i.e., growing companies either by internal product development and/or through acquisitions—are no longer adequate in today's environment. Open innovation practices and the formation of powerful relationships with external entities are now key to generating revenue growth. Accessing technology and business models early while creating options and flexibility for the future can also provide significant competitive advantage.

Over the past few years, Kodak has undergone a monumental transformation from analog (film) technologies to a digital world—one of complete internal vertical integration to a world where the boundaries between the numerous players are not always crisply defined. Hence, the ability to efficiently and effectively build strong alliances is critical.

So how does one go about building effective alliances? How are the right partners selected and evaluated? How should one measure success along the way? How does an entire culture become more open and externally focused? What are some examples of success? These and many additional questions relating to building external alliances will be addressed.

### Track B **Selecting and Becoming Partner of Choice—Expanding Globally** (continued)

#### **Finding the Right Partners**

**Meg Sranske**, Senior Manager, Global Technology Acquisition and Licensing, **SC Johnson**

Partnering for co-development can dramatically grow the capability of your organization to quickly deliver profitable innovation. It can also increase the opportunities for breakthrough leaps in leveraging technology to meet customer needs and wants. Partnering can even open the door for expansive new business models—including new classes-of-trade, aisles and consumers—that you wouldn't be able to do otherwise. However, finding the right partner is a journey in and of itself—creating questions, uncertainties and challenges within your new product development process.

This presentation will address what it takes to get the right partner, including:

- Strategy assessment (knowing your end-goal, defining your needs, ensuring that your organization is a 'partner of choice')
- Nuts-and-bolts process of getting the partner (setting criteria for selection, identifying issues, creating 'win/wins,' structuring the relationship, creating shared ownership and accountability)
- Setting up for operational success (getting projects off on the right foot, establishing trust, creating venues for strong communication, defining metrics and driving performance)

#### **Optimizing Open Innovation Initiatives**

**Julie Ennis**, Senior Manager, Worldwide Innovation Network, **General Mills**

Through its Worldwide Innovation Network (G-WIN), General Mills is building relationships that are enhancing, complementing, and accelerating existing innovation programs. While external partnerships are not new to General Mills, establishing a formalized program has taken the external initiative to new levels and has created unique business opportunities for the company.

This presentation will address the ways in which the G-WIN team has evolved and optimized its approach to open innovation over the past few years. Ms. Ennis will cover lessons learned—from both project successes and project challenges—in the areas of:

- Organizational structure: building stronger internal alignment and relationships to improve the odds of success of external partnerships
- Corporate culture: creating a portfolio of external tools and resources to support a broad range of business needs and opportunities across the organization
- Partnership selection: evaluating partnership opportunities for the strongest fit and best potential to create unique business relationships that benefit both General Mills and its partners

### **SPECIAL PRESENTATION** (plenary) **Open Innovation: How to Avoid Wasting Money and Risking Reputation**

**Paul Stiros**, President and CEO, **NineSigma**

By now it is widely known that leveraging innovation from the global marketplace is not an option—it is a critical success factor in today's highly competitive environment. One might be tempted to jump feet first into new co-development and co-innovation partnerships, but be aware that a few important factors can make the difference between celebrated success and recognized failure. In this session, Paul Stiros, president and CEO of NineSigma, a market leader in open innovation solutions to global brands, will outline the three fundamental steps to effectively leverage external innovation. Under Mr. Stiros' leadership, NineSigma has successfully implemented more than 900 projects for customers worldwide. In his presentation Mr. Stiros will share case studies from companies who are getting top-line results from their open innovation programs as well as companies who are left wondering "Where did we go wrong?"



**Paul Stiros** joined NineSigma as President and CEO in September 2004. Stiros came to NineSigma from Procter & Gamble where he spent his career and held a number of positions of increasing responsibility in Research and Development in the Fabric and Home Care division.

**“A lot of great examples and models for reapplication. Great source of contacts for benchmarking. I feel confident we know where we need to start and have knowledge of how to get there.”**

Michele Cerminaro, GOJO Industries

**“Well worth my time. Next time I am bringing engineering directors—alliances all too often are perceived as the business person's problem.”**

Kathy Miller, HP

## Track A Open Innovation Strategies for Small to Medium-sized Companies: How SMB Can Achieve the Big Benefits

### Focus on the Baby, Not Just the Wedding: 10 Factors for Success in Open Innovation/Co-Development

**Dr. Alison Lukacsko**, Vice President, R&D, **Church & Dwight**

Drawing on her experience in negotiating and managing a range of co-development and open innovation initiatives at Church & Dwight, Dr. Lukacsko will share key lessons learned. In addition to presenting ten critical success factors, she will also examine the areas that small to medium-sized businesses must consider before embarking on external innovation—including boundaries, alignment, and due diligence. Dr. Lukacsko will also highlight tools to help you manage co-development decisions and relationships effectively.

### Leveraging CoDev Partnerships When an Unanticipated M&A Impacts Internal Resource Capacity

**Dr. Frederick J. Montgomery, PhD**, Vice President, Medical Devices, **INO Therapeutics**

For a small (300-employee) specialty pharmaceutical company to develop a medical device capability that controls the direction of its delivery needs, it looks to development partners for the detail design and manufacturing.

When an unexpected M&A left just a few key design architects of the product, the new company had to leverage partners' resources to develop multiple products in a short period of time. Mr. Montgomery will discuss the process of how the strategy evolved, the key decision points made, and the lessons learned through the co-development process. Specifically, he will outline:

- Device strategy/start-up
- Selecting a design partner
- Product definition
- Detail design and the split of responsibilities
- Selecting a manufacturing partner
- FDA approval and product launch
- Lessons learned

*“CoDev 2007 provided efficient communication of concepts and processes that can help kick-start or refine a company’s business strategy around Innovation. Not only did the presenters provide insight, but the opportunities to discuss real-life examples of how other companies have set up their processes is invaluable.”*

Peter Sigmon, Shaw Industries

## From China to Canada, San Diego to Israel—Spanning the Globe for CoDev Partners

**Graham Milner**, Executive Vice President, Global Innovation, **WD-40**

A story of two new products set to launch in 2008...involving global partners that include: an industrial design firm, based in Toronto, working with WD-40 in San Diego; an Irish-owned, Shenzhen, China-based manufacturer; a Boulder, Colorado partner; a USA company owned by a Croatian; and finally, another Chinese manufacturer.

It's not a spy novel, not a movie...but for innovators maybe more fun!

Two new product paths, from very different sources—for WD-40, a potential partners' location is secondary to it having the right attitude. As Milner puts it, “We see one market...it is global. We see one source of supply...it is global. We see one partner pool...it is global,” and “while we will never be the biggest client, we can aim to be the best.”

Learn how a small company leverages world-class partners. The keys to successful co-development efforts lie in selecting the right partner for the job, setting clear expectations, and managing the inevitable delays and hiccups.

Mr. Milner will discuss lessons learned from WD-40's journey down the co-development trail with multiple global partners.

## Track B Tools & Services

### Leveraging University R&D to Accelerate Open Innovation

**Clifford M. Gross, PhD**, CEO, **UTEK Corporation**

Universities represent a significant amount of research and development expenditures worldwide each year. Maintaining a large university network and then, when appropriate, using technology transfer to access basic research should be a component of every organization's open innovation effort. In this session, Dr. Gross, CEO of UTEK Corporation will detail the company's experience with sourcing university technologies to meet corporate open innovation needs. Having conducted more than 99 successful technology transfers with research centers from around the globe, Dr. Gross will help attendees better understand licensing university technologies, and then lay the groundwork for implementing a successful university technology in-licensing effort that can drive corporate innovation.

# Sponsorship Opportunities

## A Great Place to Meet Your Market!

The optimal conference experience includes learning about available resources, products and services that enable successful implementation of the concepts presented. CoDev traditionally attracts 200+ senior and mid-level executives from large and growing multinational firms across all industries. Sessions, exhibits, and networking activities are closely intertwined and all sponsors are highly visible. Take advantage of this opportunity to meet key decision-makers in a setting conducive to shared learning and relationship-building.

For more information on how to position your firm as a sponsor or exhibitor, contact **Beth Schragar** at **978-263-9931** or **bschragar@comcast.net**.

## About the Management Roundtable (MRT)



The Management Roundtable, Inc. (MRT) is the leading knowledge and networking resource for product developers. 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 offering, FastTrack (<http://fasttrack.roundtable.com>), offers ongoing access to leading-practice insights via online reports and audiosessions.

## About the Product Development & Management Association (PDMA)



Founded in 1976, the Product Development and Management Association (PDMA) is the premier global advocate for product development and management professionals. Our mission is to improve the effectiveness of individuals

and organizations in product development and management. This is accomplished by providing resources for professional development, information, collaboration and promotion of new product development and management.

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Whirlpool Corporation

## STEERING COMMITTEE

*MRT and PDMA would like to thank the following individuals who helped shape CoDev 2008:*

**Henry Chesbrough**  
Executive Director, Center for Open Innovation, Haas School of Business, **UC Berkeley**

**John Cronin**  
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**Casey Hill**  
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**Dean Hovey**  
President, **Comprendo LLC**

**Jim Markwith**  
Licensing Counsel, Intellectual Property and Licensing Group, **Microsoft Corp.**

**Cheryl Perkins**  
President and Founder, **Innovationedge™**

# Special Features

## Two Exclusive Opportunities to Learn Directly from Henry Chesbrough

Meet and learn from Henry Chesbrough, acclaimed author of *Open Innovation* and *Open Business Models*, and top industry executives who have successfully implemented his model:

- **Interactive Panel: *Driving Real Results from Open Innovation*:** Plenary session, open to all participants, on how to make OI work (see page 8).
- **Executive Session: *Turbo-Charging Growth with Open Innovation*:** Attendance limited to 30 executives, VP level or above from >\$100M companies (see page 6).

## Guidance from Strategy to Execution

Dynamic industry keynotes offer senior management perspective, featured presenters offer visionary ideas for getting ahead, and practitioner case studies and workshops tell you how to implement. In all, CoDev 2008 is designed to bring together teams and senior executives for joint learning, planning, network-building and alignment.

## Choice of 5 In-depth Pre-Conference Workshops

Different sessions geared to different needs—ranging from strategic planning to the basics of implementation: **Turbo-Charging Growth (Executive Session); CoDev Lessons from Leaders; Intellectual Asset Management; Value Network Tools; and IP in China** (see pages 6-7).

## Social Networking Activities Before, During and After the Conference

CoDev 2008 will provide special activities to introduce you to other participants for ongoing dialogue and potential collaboration. Receptions, lunches, breakfast, breaks—as well as the option of nearby golf—are further informal opportunities to make new contacts and exchange ideas.

## Small-to-Medium Business Track

Open innovation is a two-way street, with smaller companies playing an increasingly important role. This session focuses on the unique cultural dynamics and operational how-to's.

## Tools and Services Track

Resources you can use to accelerate OI results: intermediaries, Web-based collaboration, innovation tools, and more.

## Comprehensive Reference Materials

Case examples, presentation slides, and charts serve as a permanent reference to share with others at your organization. A special follow-up package is sent electronically to all participants.

## Early-Bird Discount

Reserve by November 30 and save \$200 per person.

## Team Discounts

Attendance with others—including external partners—is an excellent way to improve strategic and process alignment. See pricing information on this page.

# Program Information

## DATES

**CoDev2008** will be held January 22-23. Registration and continental breakfast begins at 7:00 am. Sessions begin at 8:00 am on Tuesday, January 22, and conclude at 3:15 pm on Wednesday, January 23. Pre-conference workshops offered Monday, January 21, from 8:00–12:00 and 1:00–5:00; Executive Session runs 11:00–5:00; registration/breakfast begins at 7:00 am.

## VENUE & HOTEL ACCOMMODATIONS

The conference will be held at the DoubleTree Paradise Valley Resort, 5401 North Scottsdale Road, Scottsdale, Arizona, 85250. Please call **877-445-6677** directly for room reservations; a limited block of rooms are offered at \$229/person. Mention the *Co-Development Conference* to receive the special rate. (Please reserve early to ensure availability.)

The luxurious **Doubletree Paradise Valley Resort-Scottsdale** offers breathtaking desert views and numerous amenities including two outdoor heated pools, full health club/spa, racquetball, tennis, 9-hole putting green, and wireless Internet. Located 12 miles from the Phoenix Airport, it is just minutes to restaurants, shops, hiking/biking trails, and world-class golf (the concierge will be happy to arrange tee times at nearby championship greens). Extend your stay and/or bring your family!

## PROGRAM FEES

Note that **CoDev alumni, MRT FastTrack members and PDMA members** receive the Member rate—\$200 less per person than the non-member rate. Fees include materials binder, breakfast, lunch, breaks, networking receptions, follow-on materials.

**EARLY BIRD: Reserve by November 30, 2007 and save \$200**—See price chart below.

	BY NOV. 30, 2007		AFTER NOV. 30, 2007	
	MEMBER	NON-MEMBER	MEMBER	NON-MEMBER
<b>2-day Conference</b>	<b>\$1695</b>	<b>\$1895</b>	<b>\$1895</b>	<b>\$2095</b>
<b>Conference + Executive Workshop</b>	<b>\$3090</b>	<b>\$3290</b>	<b>\$3290</b>	<b>\$3490</b>
<b>Conference + One Half-Day Workshop</b>	<b>\$2240</b>	<b>\$2440</b>	<b>\$2440</b>	<b>\$2640</b>
<b>Conference + Two Half-Day Workshops</b>	<b>\$2785</b>	<b>\$2985</b>	<b>\$2985</b>	<b>\$3185</b>

The pre-conference workshops may be attended without registering for the 2-day conference. Please call for pricing.

## TEAM DISCOUNT

Groups of 3-4 may deduct \$100 per person. Groups of 5-10 may deduct 15%. Groups of 11 or more may deduct 20%. For further group arrangements, call Tracey Kimball at 781-891-8080, ext 214.

## 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 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 are subject to a \$200 cancellation fee. *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 before the conference.

# CoDev 2008

January 21-23, 2008  
Scottsdale, Arizona

Seventh Annual MRT/PDMA International Congress on Co-Development

## Open Innovation – Key Levers for Business Growth and ROI

### FOUR WAYS TO REGISTER:

**Call:** **1-800-338-2223** or **781-891-8080**  
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c/o Management Roundtable  
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**Please accept the following registration(s):**

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Please check the event(s) you plan to attend. See page 15 for pricing.

- Pre-Conference Workshops (Jan. 21, 2008)** See inside.
  - A. Executive Session: Turbo-Charging Growth** (11am–5pm)
  - B. Accelerating Product Development Through CoDev** (MORNING SESSION)
  - C. Intellectual Assets in Open Innovation** (MORNING SESSION)
  - D. Value Network Tools, Strategies and Practices for Open Innovation** (AFTERNOON SESSION)
  - E. Managing and Protecting IP in China** (AFTERNOON SESSION)
- Conference (Jan. 22-23, 2008)**

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Card No. \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Name as it appears on card: \_\_\_\_\_

Signature \_\_\_\_\_

Please bill my company. PO# \_\_\_\_\_

Name **Mr. / Ms.** \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Division/Dept. \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_ Country \_\_\_\_\_

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**Receive the 4 key levers to ensure open innovation success and payback:**

- 1 Organizational Effectiveness**  
Streamline roles and processes; bring together multiple diverse groups
- 2 Global Expansion and Innovation Networks** Tap into markets and resources around the world
- 3 Intellectual Asset Management**  
Leverage IP, secure your firm's position as partner of choice while protecting competitive advantage
- 4 Metrics** Assess opportunities and monitor performance

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