

New Product Development
Master Learning

Portfolio Management
Workshop & Seminar



16 PDH

KEY LEARNING BENEFITS:

- ◆ Learn how to overcome too many projects entering an already full pipeline
- ◆ Apply best practices for deploying and improving Portfolio, Pipeline and Platform Management
- ◆ Align strategic mix-management with resource throughput-management
- ◆ Learn how to leverage a SpiralUp™ Implementation for fast gains
- ◆ Learn how to engage top management for sustained “buy-in” and participation
- ◆ See the top tools and practices for Portfolio, Pipeline and Platform Management
- ◆ Understand the issues and tremendous opportunities presented by software support systems
- ◆ Gain an understanding of available Portfolio Management software support systems
- ◆ Learn how leading organizations integrate project management and portfolio management into a seamless system
- ◆ Learn how to amplify NPD output by integrating front-end activities with Portfolio, Pipeline and Platform Management
- ◆ Learn how to identify and leverage Product Platforms for maximum gains
- ◆ Learn what “Portfolio Optimization” is and how leading companies do it.

Dear Product Development Professional,

Portfolio, Pipeline and Platform Management create the foundation of New Product Development proficiency and productivity. Companies wanting to improve the output of their innovation efforts have no choice but to build expertise in these approaches. Yet no one tool or method will address all of the issues in portfolio, pipeline and platform management. The purpose of this very important workshop is to share learnings, experience and research about the correct approaches to NPD Portfolio, Pipeline and Platform Management. Participants will gain an understanding that will enable them to move their organizations forward in realizing the enormous benefits of these critical NPD processes.

The NPD Portfolio, Pipeline and Platform Management Seminar drills deep into the topics, with particular emphasis on how organizations get things done and gain benefits. This continually updated workshop offers the most significant learning experience available across NPD Pipeline, Portfolio and Platform Management. It specifically addresses the means by which organizations can greatly improve the strategic impact from and efficiency of their NPD efforts.

By attending this comprehensive workshop you will learn how to:

- ◆ **Analyze your organization's current Portfolio, Pipeline and Platform Management strengths and weaknesses;**
- ◆ **Conduct near-term and long-term project prioritization for improved speed-to-market, strategic impact, and resource use efficiency;**
- ◆ **Overcome the high level of uncertainty about task durations and task outcomes in project planning;**
- ◆ **Link resource use and portfolio management to product strategy, platform management, and the fuzzy front-end;**
- ◆ **Assess and resolve "systemic risks," whether organizational or strategic, that cut across the NPD portfolio;**
- ◆ **Develop and prioritize the right innovation targets to achieve a high performance portfolio;**
- ◆ **Create the best graphical views for communicating with top management and overcoming organizational barriers;**
- ◆ **Combine software systems support with organizational processes so as to enable real-time management of your NPD efforts; and**
- ◆ **Orchestrate implementations and improvements so as to realize benefits quickly (speed-to-benefits).**

The workshop combines best practices in NPD Pipeline, Portfolio and Platform Management with best practices in deployment. Throughout the two-day learning experience, we will emphasize how to speed the accrual of benefits from Pipeline, Portfolio and Platform Management to make notable difference both to your organization and for its shareholders.

Please call with any questions. I look forward to seeing you at the workshop.



This workshop is recognized by PDMA for credit toward NPDP certification renewal. Attendees will earn 16 Product Development Hours.

Best Regards,

Paul O'Connor

To Register:

call: 1-904-273-5319

fax: 904-285-3488

email: workshop@adept-plm.com

web: www.adept-plm.com/ppm_workshop.htm

DAY ONE

◆ Introduction To NPD Portfolio, Pipeline and Platform Management

In this session, you will learn the key sub-processes of portfolio, pipeline and platform management (PPM), how to measure portfolio management proficiency and how portfolio management integrates with a broader set of management and business processes.

This strong foundation enables participants to understand fully the breadth of contribution from an organization required to carry out world-class portfolio, pipeline and platform management.

Emphasis is placed on why and how good PPM enables an organization to realize considerable economic gains.

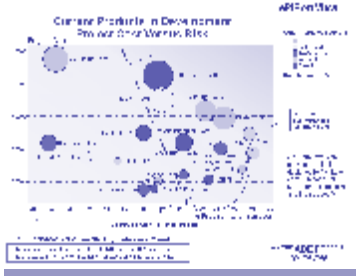
◆ Understanding and Matching Resources To The Product Mix

Often, the crux of NPD and/or R&D portfolio management is determining “who works on which projects, doing which tasks, when.” Participants will explore both issues and the recourse to issues encountered when tackling this challenge.

During this session of the workshop, participants will discuss where companies are in their Portfolio, Pipeline and Platform management capabilities. Teachings will focus on key practices related to prioritization, resource planning and de-bottlenecking, mix optimization and strategy alignment.

◆ Critical Components of NPD Portfolio, Pipeline and Platform management

Six important groups of components make up Portfolio, Pipeline and Platform management . Managers need to understand each group and the components within them. More importantly, they need to understand how components relate to one another to fully exploit the power of Portfolio, Pipeline and Platform management . This section of the workshop will ex-



plain components through descriptions and examples.

◆ Understanding Portfolio and Pipeline Triage

Too many projects with too few resources is perhaps the most common ailment of companies seeking to better manage their portfolios. Straightening out the situation is a short term imperative for many manager.

During this session participants will learn how companies address this challenge to set themselves up for bigger gains in the future.

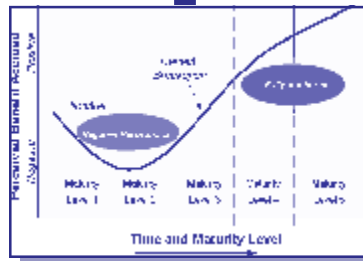
DAY TWO

◆ SpiralUp Implementation of NPD Portfolio Management: Speeding Benefit Accrual to your Organization

How you implement is just as important as what you implement. In this section of the workshop, you will learn how to implement practices and deploy components so as to:

- Keep Portfolio, Pipeline and Platform management on track, and
- Quickly gain the most benefits from Portfolio, Pipeline and Platform management .

This section of the workshop will also lay out key factors that cause implementations to derail and practical approaches to avoiding them. Emphasis throughout this section of the workshop is on gaining and sustaining benefits from Portfolio, Pipeline and Platform management .



◆ Implementation Planning and Spiral-Up Execution

In this session, participants will engage in instructor-lead dialogue focused on potential steps that their organizations may need to take to improve portfolio management proficiency. The dialogue will explore how to make implementation of best practice work. Participants should expect numerous interrelated topics to arise in this dialogue. You will obtain feedback from your peers in other organization and test your

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mental models of how implementation works against other organizational situations.

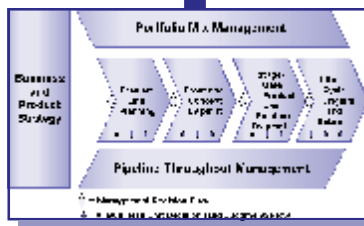
◆ **Platform Leverage, Product Line Planning, and the Fuzzy Front-end.**

Portfolio, Pipeline and Platform management is not just about those projects within an organization's Stage-gate process. During this section of the workshop, participants will learn why and how to include new concept generation and product line planning in Portfolio, Pipeline and Platform management. Through such inclusion, organizations can amplify the output of new product development. Participants will receive an in-depth review of platform and product line planning, as well as new concept generation process. Establishing the critical links between Portfolio, Pipeline and Platform management and front-end practices is crucial to realizing significant benefits.



◆ **Alignment to Strategy: How Do You Ensure that De Facto Product Strategy Is Consistent with Top Management's Intended Strategy?**

Developing new products is the execution of business strategy. Yet, through pipeline and portfolio management it becomes apparent that these two contributors may not be aligned. Such alignment is necessary to assure that investments in product development projects are consistent with where top management wants to take the business. In this session, participants will learn how to align the pipeline resource allocation and the portfolio mix to business strategy and direction.



◆ **Systems, Supports, and Software Tools: From Excel to Enterprise-wide, Integrated Portfolio, Pipeline and Platform management ... and optimization.**

Most experts agree that IT support to NPD and port-

folio management can and will greatly improve NPD productivity. Organizations no longer have a question of whether they will invest in software and systems to support pipeline and portfolio management. Rather, it is a question of when and how. In this session, participants will learn precursors to IT systems and what companies are using in support of Portfolio, Pipeline and Platform management, and how such systems are evolving.

◆ **Feedback and Close**

In this closing session, participants will provide each other their summary thoughts on portfolio, pipeline and platform management their key learnings during the workshop and insights as to how they will employ their new knowledge.



Follow up

Following the in-depth workshop, The Adept Group stands ready to answer questions via email and telephone. We understand that when participants get back to their organizations, reality can set in. Actual organizational dynamics can make Portfolio, Pipeline and Platform management and real-life implementation look different than it did in the workshop. Participants leave with an open invitation to contact The Adept Group for ongoing help and advice.

PortView™

All participants will receive a 10% discount off the purchase of a single PortView™ license within 60 days of the workshop. This is The Adept Group's easy-to-use software for creating views of new product development portfolios.

PortView™ is a trademark of The Adept Group Limited, Inc.

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Portfolio, Pipeline and Platform Management

An In-depth 2-day Master Learning Workshop

What attendees are saying:

"I would like to congratulate and thank you for the really outstanding course you presented in Paris. I learnt an awful lot in a relaxed atmosphere. Most importantly, you were able to give me clear indications where we can improve and showed ways how to tackle the challenges. Many things I felt uncomfortable with became clear; it was an eye opener in many respect! I am very enthusiastic to continue to initiate and push for (even more) change (we just reorganized R&D) in order to make our organization more competitive. I appreciated your clear and interactive teaching/coaching style and your patience."

... **Head of Development, Large Swiss/Global Pharmaceutical Conglomerate**

"Excellent! My colleagues and I learned more about Portfolio Management in two days than we had in the previous year of trying to carry it out." ... **Dir of Technology, Fortune 100 High Tech Company**

"Thanks for the follow up and excellent job on facilitating an outstanding seminar. Learned a lot from you and the group. I'll definitely recommend it to others." ... **Dir of R&D, Specialty Chemicals Company**

"Thank you very much for the information and knowledge you shared during the workshop. For once, instead of feeling ripped off by a conference or seminar, I feel like I underpaid for the knowledge and experience I gained. I look forward to discussing with you how I have taken our Portfolio Management to a new level thanks to your workshop. I will recommend your workshop to everyone in my group, as well as anyone else who might benefit from the experience. As we say at here at (our company)... BRAVO ZULU!! which means JOB WELL DONE!!" ... **Sr. Manager, Overnight Express Company**

"Paul is an expert who truly understand the subject in practical terms."
... **Sr. Director, Chinese Operations of US Chemical Company**

"Paul knows Portfolio Management inside and out. I really enjoyed how he addressed just how we need to implement these practices to get true benefits out of them." ... **Senior Manager, CPG Company**

"I highly recommend this to anyone interested in improving their organization's new product development capabilities. Once I got the understanding of Platform Management and the role of the Front end in Portfolio Management, everything hit home." ...**VP Marketing and Commercial Development**

"We've cut way back over the last several years on going to things like training and workshops. I wish I had done this workshop about two years ago. It would have saved me from loads of stress and helped me communicate everything we need to do to our exec team." ...**Dir. NPD Process Management**

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21 Key Learnings

You will learn how to:

1. Apply best practices to institutionalize PPM benefits;
2. Link top down strategic mix management with bottom-up throughput and resource management;
3. Link pipeline, portfolio and platform management to overall NPD Processes;
4. Link robust pipeline, portfolio and platform management with product strategy, concept generation, product lifecycle management;
5. Deploy a portfolio management process at a pace that matches your organization and its NPD capabilities;
6. Gain control over the most significant impacts on the performance of your organization's NPD portfolio;
7. Establish the best predictive metrics and project forecasts to match your organization and decision requirements;
8. Develop a value proposition and a business case for change;
9. Carry out an implementation so as to speed benefits to your company;
10. Conduct near-term project prioritization and resource allocation for achieving improved time-to-market, strategic impact and resource use efficiency;
11. Overcome the high level of task uncertainty in project planning;
12. Combine systems support with organizational processes to enable real-time management of your NPD portfolio;
13. Develop the right targets for innovation to achieve an optimized portfolio;
14. Lay out the essential components of technology, market, and product line roadmapping (and why these are essential for an optimized NPD pipeline and portfolio);
15. Integrate resource management and allocation across multi-function requirements that are time and task dependent;
16. Recognize and mitigate project risks and portfolio risks;
17. Create the best graphical views for communicating with top management;
18. Extract the benefits of astute pipeline, portfolio and platform management through overall NPD process architecture changes;
19. Provide a focus for information systems that supports intelligent decision-making;
20. Overcome organizational barriers to consistent use;
21. Optimize the use of outside resources to speed the benefits to your organization.

Some of the companies that have previously attended: Affymetrix, Amway, Arch Chemicals, AT&T, BASF, Battelle, Bush Brothers, Cerner, Coca-Cola, Cointstar, Chevron, Church & Dwight, Dofasco, Dupont, Eaton, ExxonMobil, FedEx, FPL Energy Services, Goodrich, Herman Miller, Hewlett-Packard, Hollister, Honeywell, Intel, Kimberly-Clark, Lubrizol, Lucent Technologies, Molex, Motorola, Dade-Behring, Nalco, National Starch, NOVA Chemical, Novartis, O.C. Tanner, Pfizer, Porter-Cable, SAP, State Farm, Praxair, J&J, P&G, Sara Lee, Square D, SC Johnson, Smith & Nephew, SmithKlineGlaxo, Sprint, Standard & Poors, WR Grace, Swagelok, Tellabs, EquiStar, Telefonica del Peru, Timken, Uniqema, Weyerhaeuser, and Wrigley.

Registration

Registration Fee*

The fee is \$2,595US for the first person attending from each organization. The fee is \$2,295US for the second person from each organization, and \$1,995US for each person thereafter. Please add \$375US per participant for European workshops. Class size is limited in order to increase one-on-one questions and answers.

Payments

Payment is due before the workshop. We can accept checks, Visa, MasterCard, and American Express. Make checks payable to "The Adept Group Limited, Inc."

Venues

October 14-15, 2009

Newark, NJ

The hotel location will be posted before the workshop. Registered participants will be contacted via email and phone.

Start Time is 8:30AM (first day)

End Time is 3:30PM (second day)

Cancellations

Cancellations must be made at least 30 days in advance of the workshop. Credit will be made toward a future workshop. If you prefer, full refunds, less a \$450 fee, will be mailed to you via check. No refunds or credits will be made if cancellations are received with less than 30 days notice.

Course Leader



Paul O'Connor is an expert in the field of New Product Development Productivity. For 25 years he has consulted on process implementations and improving NPD performance. His article in the Journal of Product Innovation Management entitled "Implementing a Stage-Gate Process: A

Multi-Company Perspective" has been cited by numerous authors and is used as a teaching aid in several MBA programs. He is a contributing author on "Implementing Product Development Process" in [The Handbook of New Product Development](#) (1996, 2004), as well as on "SpiralUp Implementation of Portfolio and Pipeline Management" in [The PDMA ToolBook](#) (2004). Mr. O'Connor is a certified New Product Development Professional and a Past-President of PDMA.

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