

An in-depth hands-on experience

New Product Development Knowledge and Experience Sharing

# Product Development Workshop and Lab

---

# Portfolio Analytics

---

## Data Analysis and Reporting for Superior NPD Portfolio Management Decisions

### KEY LEARNING BENEFITS AND SHARED TRICKS OF THE TRADE:

- ◆ Learn how to analyze what is really happening within a portfolio
- ◆ Learn how to create reports that lead to better portfolio management decisions
- ◆ Learn how to address the challenges of inadequate and unavailable data
- ◆ Learn how to pull data together, transform it, manipulate it and ramp up its quality
- ◆ Learn how to create portfolio views and reports that truly communicate
- ◆ Learn how to improve capabilities through specific software tools and practices
- ◆ Learn how to set up dashboards for guiding analytics and reporting
- ◆ Learn how to evaluate the functionality of twenty-five different software tools

See Our Website For Dates and Locations:

<http://www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm>



## Dear Product Development Professional,

Every organization wants to get the most out of its new product development efforts. That is the mission of Portfolio Management. Yet good Portfolio Management and good portfolio decisions require a strong understanding of how to analyze and how to report on a portfolio. All too often, though, managers are expected to know how to conduct such analyses and create such reports without any training and without the right tools. And, the task is made all the more difficult by the fact that all organizations are data-challenged to one degree or another.

***You do not need a degree in mathematics to analyze and report on a portfolio...  
Indeed, a pure mathematical approach can cause serious and costly problems.***

### Join Us To Learn

The purpose of this interactive workshop and lab is to build the needed skills and capabilities of those who are asked to prepare portfolio management reports and to recommend portfolio changes. This learning experience combines knowledge and experience sharing with hands-on laboratory work. Post-session, all attendees will also receive one-on-one, WebEx enabled guidance. Attendees will build the needed skills and support to drive immediate value to their to organization's NPD Portfolio Management capabilities. Teams of two to three people are encouraged to attend.

***Most system vendors and software integrators simply do not know how to analyze and report on a portfolio of NPD projects. They expect the client to know this.***

This workshop is for you whether your organization has implemented a fully integrated software system in support of portfolio analytics, is currently using a set of Excel worksheets, or simply maintains a basic list of projects.

Throughout the two-day learning experience, we will emphasize practicality and reality: *how to conduct good portfolio analysis and deliver strong reporting in the real-life settings of different organizations.*

Please call with any questions. I look forward to seeing your organization represented at the workshop.



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

My Best Regards,

***Paul O'Connor, NPDP***

Managing Director,  
The Adept Group Limited, Inc.  
904-273-5319  
paul.oconnor@adept-plm.com

To Register:

call **1-904-273-5319** email: [workshop@adept-plm.com](mailto:workshop@adept-plm.com) web: [www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm](http://www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm)

*"Data is not information, information is not knowledge, knowledge is not understanding, understanding is not wisdom."*

- Clifford Stoll, Astronomer

## DAY ONE

### ◆ Foundational Understanding of Product Development and Portfolio Management

Before analysis of a portfolio can occur, analyst need an understanding of the art and science of product development, project management and portfolio management. In this session, we share these basics and provide a foundation to further learning.

### ◆ Data: The Good The Bad and The Ugly

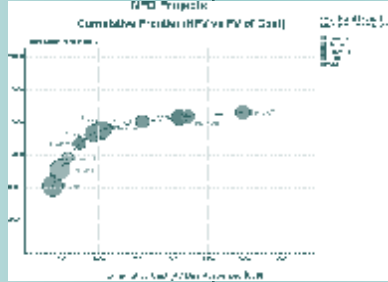
In portfolio management, seldom is a data set very good and never is it perfect. The challenge is to first understand what you have, and then to transform, manipulate and improve it. Our focus here will be on discovering the "low hanging fruit" of data improvement, while recognizing and planning the longer term advancement of data quality.

### ◆ Analysis Techniques and Tricks

Understanding data variables and their relationship to projects, process, the portfolio and to the organizations and its strategy is crucial in portfolio analytics. Participants will work, with assistance from the instructor, to analyze a new product development data sets, and to manipulate and transform the data for greater impacts.

### ◆ Exploring and Visualizing the Portfolio

Managers have many choices for exploring and assessing their portfolios. We will examine techniques for exploring portfolio data and several portfolio views critical to portfolio decision making. Most importantly, we will address the practicality of what to do, when and why... following the progression of data characterization to data transformation



to data visualization. Critical views will be deconstructed, including "the cumulative frontier," "mix targeting," "products-in-development vectors," "risk-reward balance," and "project prioritization placement."

### ◆ Uncertainty and Risk in Portfolios

Numerous factors encumber NPD projects and portfolios with much uncertainty and risk. In this session, we will explore project, process and portfolio management techniques for addressing uncertainty, capturing risk variables in order to maximize portfolio value. Particular emphasis will be placed on understanding, capturing and reporting systemic risk across the portfolio.

## DAY TWO

### ◆ Analytics and View Creation Laboratory

The knowledge shared through this workshop will be reinforced with this hands-on laboratory. Before the event all attendees will receive a "download package" with software and data sets. Attendees are encouraged to bring to the workshop these download on a portable computer (Microsoft operating system).

During this laboratory session, attendees will explore and visualize their own data (camouflaged for confidentiality) or data which are provided. The course leader will facilitate and guide each participant in addressing the data and creating important views.

### ◆ Reporting for Improved Portfolio Decisions

The goal of portfolio management is to improve the value of the set of project that are underway and under consideration. To do this, Senior Managers must make certain decisions based on what they understand as the truth about their portfolios. Recognizing what decisions need to be made is critical to data preparation and analysis and to view creation and reporting. This session explore portfolio decision making from the vantage point of portfolio analytics. Particular emphasis will be placed on linking specific portfolio views to specific portfolio decisions and choices.

To Register:

call **1-904-273-5319** email: [workshop@adept-plm.com](mailto:workshop@adept-plm.com) web: [www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm](http://www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm)

## ◆ Portfolio Management Systems, Point Solutions and Analytic Tools

The tools that enable portfolio analytics need to fit both the systems, capability levels and the budget of the organization. In this session we will explore approximately 25 different tools, from full systems, to portfolio management point solutions and to analytic tools that can add value to portfolio management. We will also examine tool costs, and provide approaches to evaluate fit to your organization.

## ◆ Tool Review and Demos

Over 25 tools will be reviewed and a selection will be demo'd, enabling participants to learn and see available functionality

## ◆ Understanding Dashboards for day to day use

Seeing the portfolio through a dashboard on a day-to-day basis can be very helpful. Who should see what data is the primary concern of dashboard use. In this session we will explore the use of dashboards, their pros and cons across organizational roles.

## ◆ Process Management and Portfolio Optimization

Knowing what to do to achieve a more optimal portfolio is very much different than getting all needed contributors across an organization to do it. This session addresses organizational and people behaviors related to improving portfolio data and making portfolio decisions. Participants will learn to recognize and understand the fundamentals of change management needed to set in motion those activities that will create substantial improvements in portfolio analytics and reporting.

## ◆ Engaging Management: Presenting The Full Report and Recommendation

Participants are encouraged to bring with them their portfolio data in Excel format, disguised or camouflaged

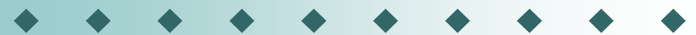
to avoid revealing confidential information. In this laboratory session, each participant will use software on their own computers that enables data exploration, analysis and report creation. The session leader will facilitate each individual in set up, analytics and reporting based on the shared learnings.

## ◆ Feedback and Close

In this closing session, participants will provide each other summary thoughts on portfolio analytics and reporting, what they learned, what their challenges are, and what their specific recourse to these challenges will be. Emphasis in this session will be place on sharing how each individual, in the realities of their organizational

setting, may adapt and adopt the key learnings and new knowledge they accrued from the workshop.

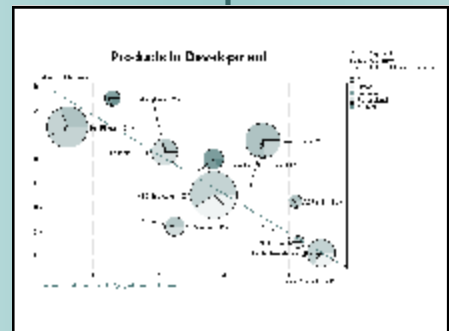
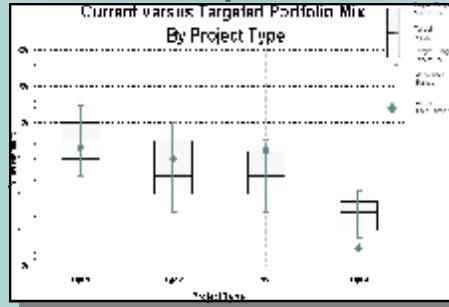
Electronic copy of all course material (copyrighted) will be provided to all attendees.



## Follow up

Following this Learning Workshop and Laboratory, The Adept Group will meaningful follow up support. We understand that when participants get back to their organizations, reality can set in and the real data and the real reporting capabilities can make employing the new knowledge look different than in the workshop.

At the participant's discretion, The Adept Group will conduct one-on-one follow-up telephone and WebEx sessions to support implementing the new portfolio analytics and reporting new knowledge. Our goal is to drive value to your organization as quickly as possible.



To Register:

call 1-904-273-5319 email: [workshop@adept-plm.com](mailto:workshop@adept-plm.com) web: [www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm](http://www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm)

## Key Learnings

### You will learn:

- How to analyze a portfolio and understand what is really happening: both cause and effect
- How to address data inadequacies when needing to deliver a report
- How to show the dynamic movement of a portfolio, not just a static snapshot.
- How to combine project management measures with financial metrics, process metrics, project characteristics
- How to capture strategic objectives and reflect them throughout analysis and reporting
- How to gain control over the most significant impacts on the performance of the NPD portfolios
- How to use certain project management techniques to address the cascading effect of task uncertainty across a portfolio
- How to establish the best predictive metrics, risk assessments and project forecasts to match your organization's decision requirements
- What software tools analysts should have in their toolkit for best in class analysis and reporting
- How to convey to management the "Why" of a portfolio, not just the "What"... along with the best corrective actions
- How to deploy practices so as to speed the benefits good portfolio analytics and reporting to your organization
- Which team and organizational behaviors will increase portfolio uncertainty and which will mitigate uncertainty
- How some spreadsheet model techniques actually hurt, while others help drive improved portfolio values
- Which software systems, point solutions and analytics tools make sense for your organization, at different points in time
- How to receive follow up support to assure your improve your portfolio analytics and reporting skills and capabilities

### Some of the companies that have previously attended Adept Group NPD Workshops taught by Mr. O'Connor:

Access Business Group, Affymetrix, AgResearch Ltd, Amway, Appleton, Arch Chemicals, AT&T, BASF, Battelle, Bush Brothers, Cargill, Cerner, Chevron, Coca Cola, Cointstar, Colgate-Palmolive, Dofasco, Dow Chemical, DuPont, EquiStar, ExxonMobil, FedEx, FPL Energy Services, Herman Miller, Hersheys, Hewlett-Packard, Hollister, Honeywell, ICI Chemicals, Intel, Kimberly-Clark, Lubrizol, Leggett and Platt, Lucent, Molex, Motorola, Nova Chemical, Novartis, O.C. Tanner, Owens Corning, Pfizer, Porter-Cable, Porex, Praxair, Procter & Gamble, Rockwell Automation, SAP, Sara Lee, SC Johnson, Smith & Nephew, Sprint, Telefonica del Peru, Swagelok, Tellabs, Timken, Velux, and Wrigley.

## Registration

### Registration Fee\*

The fee for Product Line Roadmapping and Innovation Planning training is \$2,295US for the first person attending from each organization. The fee is \$1,095US for the second person from each organization, and \$895US for each person thereafter. Class size is purposely limited. Teams of 2 or 3 are encouraged to attend.

### Payments

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



Venue: See web for dates and locations

[www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm](http://www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm)

Teams of 2 or 3 are encourage to attend.

All attendees must bring a portable PC with a windows-based operating system.

Classes are limited to just 12 participants.

Registered participants will be contacted via email with workshop logistics.

Start Time is 9:00AM

End Time is 5:00PM

### \*Cancellations

Cancellations must be made at least 30 days in advance of the workshop. Credit will apply toward future workshop. If preferred, full refunds, less a \$450 fee, will be mailed to you via check. No refunds or credits will be made if cancellation is received less than 30 days prior.

Register Online:

[www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm](http://www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm)

**On-site Training:** This workshop and laboratory is offered for on-site training, customized for individual organizations.



## Course Leader

Paul O'Connor is an expert in the field of New Product Development Productivity. He consults 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, update 2004) as well as on "Spiral-Up Implementation of Portfolio and Pipeline Management" in The PDMA ToolBook (2004). Mr. O'Connor is a certified New Product Development Professional and is also a Past-President of PDMA.



To Register:

call 1-904-273-5319 email: [workshop@adept-plm.com](mailto:workshop@adept-plm.com) web: [www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm](http://www.adept-plm.com/Portfolio-Analytics-WSand-Lab.htm)