

An in-depth learning experience

For organizations seeking top performance

New Product Development Portfolio, Pipeline and Platform Management

Seminar and Workshop

KEY LEARNING BENEFITS:

- ◆ Learn how to overcome too many projects coming into an already full pipeline
- ◆ Apply best practices in 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
- ◆ 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 into Portfolio, Pipeline and Platform Management
- ◆ Learn how to identify and leverage Product Platforms for maximum gains

Jan. 18-19, 2005, Ponte Vedra Beach, FL

THE **ADEPT** GROUP

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. But it is a complex process. No one simple 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 and experience 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.

As a valuable addition, all participants will also have the opportunity — before the workshop — to benchmark their organization's current Portfolio, Pipeline and Platform Management capabilities. This information will be used to aid participants in setting the best approach to implementing and improving practices.

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 optimal speed, strategic impact, and resource use efficiency;**
- ◆ **Overcome the high level of uncertainty about task durations and task outcomes in project planning;**
- ◆ **Link pipeline 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 targets for innovation to achieve a high performance portfolio;**
- ◆ **Create the best graphical views for communicating with top management and overcoming organizational barriers;**
- ◆ **Combine systems support with organizational processes 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 your organization represented at the workshop.

Before attending the workshop, participants have the option, free of charge, to benchmark their organization's NPD pipeline, portfolio and platform management practices through an on-line survey.

Best Regards,

Paul O'Connor

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To Register:

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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 how to measure portfolio management proficiency and how portfolio management integrates with a broader set of management and business processes.

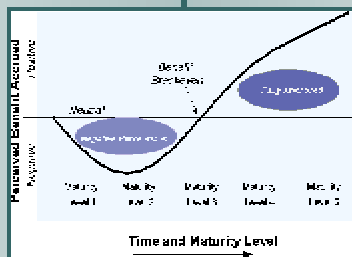
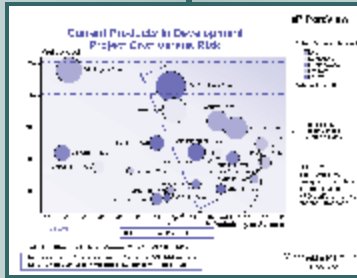
Case Study: Portfolio and Pipeline Triage

This quick, yet insightful, case study enables participants to explore the underpinnings of good portfolio management. Participants will work with colleagues from other companies, along with assistance from the instructor, to try to correct a poor portfolio and help a hypothetical company get back on the path to desirable growth.

◆ Breakout Discussion: The Current State of Practices/Processes & Improvement Implementation Barriers

Before attending the workshop, participants have the option, free of charge, to benchmark their organization's NPD pipeline and portfolio management practices. Response to an online survey provides comparative measures of Portfolio, Pipeline and Platform management proficiency, systems and tools, as well as methods and capabilities within your organization.

During this session, participants will re-view an analysis of their survey input. We will discuss where companies are in their Portfolio, Pipeline and Platform management capabilities. Teachings will focus on key implementation stages, success barriers, as well as the most recent cross-industry benchmarks associated with implementing and conducting NPD portfolio management. *Please note: recent findings call into question the relevancy of some popular research conducted on NPD portfolio management. (We will be emphasizing the latest findings.)*



◆ 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 explain components through descriptions and examples.

DAY TWO

◆ Spiral-Up 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 be involved in an 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 mental models of how implementation works against other organizational

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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.

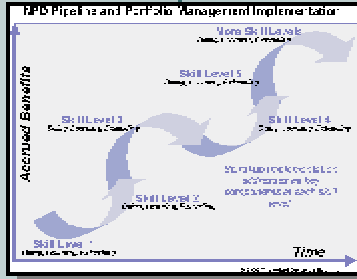
◆ **Alignment to Strategy: How Do You Ensure that De Facto Product Strategy Is Consistent with Top Management's Intended Strategy?**

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.**

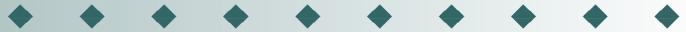
Most experts agree that IT support to NPD and port-

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 20% discount off the purchase of a single PortView™ license within 90 days of the workshop. This is The Adept Group's easy-to-use software for creating views of new product development portfolios.

Current owners of PortView receive a 15% discount off the workshop fee. State your eligibility when registering.

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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 life-cycle 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 workshops on Portfolio, Pipeline and Platform Management

Access Business Group, Affymetrix, AgResearch Ltd, Amway, Appleton, Arch Chemicals, BASF, Battelle, Bush Brothers, Cerner, Cointstar, Dofasco, ExxonMobil, FedEx, FPL Energy Services, Herman Miller, Hewlett-Packard, Hollister, Honeywell, Intel, Kimberly-Clark, Lubrizol, Lucent Technologies, National Starch, NOVA Chemical, O.C. Tanner, Porter-Cable, SAP, Praxair, J&J, Procter & Gamble, Square D, SC Johnson, Smith & Nephew, Sprint, Swagelok, Tellabs, EquiStar, Telefonica del Peru, Timken, Velux, and Wrigley.

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Registration

Registration Fee

The fee is \$1,895 for the first person attending from each organization. The fee is \$1,695 for the second person from each organization, and \$995 for each person thereafter. Class size is limited.

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

→**January 18-19, 2005 Ponte Vedra Beach, FL**

(This is a Tuesday and a Wednesday)

The hotel within each city location will be posted three weeks before the workshop. Registered participants will be contacted via email and phone.

Start Time is 8:00AM, Tuesday Jan. 18th 2005

End Time is 4:00PM Wednesday Jan. 19th 2005

Cancellations

Cancellations must be made at least 14 days in advance of the workshop. Credit will be made toward a future workshop. If you prefer, full refunds, less a \$350 fee, will be mailed to you via check. No refunds or credits will be made if cancellations are received with less than 14 days notice.

Course Leader

Paul O'Connor is an expert in the field of New Product Development Productivity. For over 20 years he has consulted on process implementations and improving NPD performance. His article in the Journal of Product Innovation Management entitle "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 Tool-Book (2004). Mr. O'Connor is a certified New Product Development Professional and a Past-President of PDMA.



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