P&PL '01

FOURTH ANNUAL

Product & Process Leadership Conference

April 4-6, 2001
Cambridge, Massachusetts

How to achieve tangible, profitable, and repeatable results in a virtual and unpredictable world

Featuring:

Dr. Robert Kaplan
Harvard Business School professor and author of *The Strategy-Focused Organization: How Balanced Scorecard Companies Thrive in the New Business Environment*

Frank Hauck
Executive Vice President of Products and Offerings, EMC Corporation

Adrian Slywotzky
Vice President, Mercer Management Consulting, and author of *Value Migration*, *How Digital Is Your Business?* and *The Profit Zone*

Catch the next wave

presented by

The MANAGEMENT ROUNDTABLE

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Chart your course

with the best of the

How do you stay on track, yet ready for the Next Big Thing?

How do you establish repeatable processes to create leadership products year after year?

What changes must you make to thrive in the networked economy?

At P&PL '01, you will discover the latest strategies, tools and techniques for sustainable, tangible outcomes in an increasingly intangible, virtual world.

You will meet the leaders in the field, old economy and new, large companies and small, well-known and beneath the radar … key people to network and share ideas with, perhaps even to collaborate with.

P&PL is the premiere conference for product developers — it's the one to attend if you can only attend one this year.

P&PL

best in product development

Learn to achieve and sustain:

Strategic Leadership

- Use strategy maps and scorecards to link products and processes to revenue and profits
- Innovate and know when to change direction
- Create value; determine what value is to your customers
- Anticipate shifts, make tradeoff decisions

Technology and Product Leadership

- Assess costs, risks and rewards of including new technology in products
- Balance the technology portfolio
- Architect a product family
- Manage technology roadmaps
- Design for mass customization and rapid reconfiguration
- Anticipate and manage the threat of disruptive technologies
- Rejuvenate and differentiate maturing product lines

Process, People and Collaboration Leadership

- "Operationalize" and repeat success
- Find and work with the best — internally and externally
- Re-engineer for geographically dispersed team work
- Collaborate over the web
- Use knowledge management approaches for competitive advantage
- Accelerate results, manage complexity and uncertainty

'01

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Registration

Dates

The conference will begin at 7:30am (registration/continental breakfast) on Thursday, April 5, 2001 and will adjourn at 2:30pm on Friday, April 6, 2001. Optional pre-conference workshops are offered on Wednesday, April 4, 2001.

Location & Hotel Accommodations

The conference will be held at the Hyatt Regency Cambridge, 575 Memorial Drive, Cambridge, MA 02139. Call the hotel directly at 617-492-1234 for room reservations. Please mention Management Roundtable to receive the special rate (we have a block of rooms on a space-available basis through March 19, 2001).

Program Fees

Two-Day Conference $1495
Conference plus 1 half-day workshop $1890
Conference plus 2 half-day workshops $2285
1 half-day workshop only . . . . $ 595
2 half-day workshops only . . . . $ 995

Fee includes binder, program materials, luncheons, reception, continental breakfasts, and refreshment breaks.

Team Discount

Groups of 3 or more may deduct $100 per person. Groups of 6 or more please call 800/338-2223 for special pricing.

No-Risk Guarantee

Your satisfaction is 100% guaranteed — money-back or credit.

About the Management Roundtable

The Management Roundtable is the leading knowledge and networking resource for product developers. Practitioner-oriented and unbiased, our focus is on providing actionable information about new innovations, processes, tools, and technologies that enable faster time to market, increased profitability, and overall competitive advantage.

Founded in 1980, Management Roundtable publishes the PEER-award-winning *Product Development Best Practices Report*, offers an online database of PD Best Practices, hosts a variety of specialized conferences and workshops, and conducts customized research, onsite training and expert referrals.

Four ways to register:

Call:	**1-800-338-2223 or 781/891-8080** (weekdays, 9:00am–5:30pm EST)
Fax to:	**781/398-1889**
Internet:	**www.ManagementRoundtable.com** or **info@roundtable.com**
Mail to:	**Management Roundtable** 92 Crescent Street, Waltham, MA 02453

Please accept the following registration(s): (please use photo-copies for additional people)

☐ **Conference**
☐ **Morning Workshop A____ D____**
☐ **Afternoon Workshop B____ C____**

Name: Mr./ Ms _____

Title_____

Company _____

Address_____

City/State/Zip _____

Phone _____

Fax_____

Email_____

☐ Spouse/family activity for _____ (number of) people on Thursday, April 5 ($65 per person).

☐ Extracurricular activities — please send me more details.

☐ Please send me information about sponsorship opportunities.

Payment Information

(Total Amount $_____)

☐ Check enclosed, payable in US funds to *Management Roundtable, Inc.*

☐ Please bill my ☐ Visa ☐ Mastercard
 ☐ AMEX ☐ Diner's Club

Account No._____

Exp. Date _____

Signature _____

☐ Please bill my company. PO#_____.

P&PL Special Features

3 dynamic keynotes with staying power — Management approaches come and go, but the leadership principles of Bob Kaplan, Adrian Slywotzky, and EMC Corporation endure and evolve — with proven results. **Extended Q&A time** for you to ask questions, receive advice from these foremost experts.

Over 16 pre-screened case studies — In 2 concurrent tracks, chosen from the top-rated presentations of the year plus brand new, cutting-edge material. How to manage processes, people, innovation and technology from: **Acterna, Analog Devices, The Bell Group, Boeing, Casio, Celestica, Corning, Covisint, Design Continuum, Hutchison3g, MIT, Raindrop Geomagic, Sun Microsystems, Steag-Hamatech, Teradyne, Xerox**, and more. Agenda designed to allow you to move freely between talks.

4 in-depth pre-conference workshops

Printed, bound conference proceedings — Plus on-line presentations and follow-up materials to share back at the office.

Networking and idea exchange opportunities — Reception roundtables, luncheon discussion groups, participant e-mail list, and optional evening activities give you the chance to meet and talk informally with colleagues

Books, articles, resources, giveaways — Availability of reprints and pre-prints of keynote speakers' materials, free 3-month subscription to the PEER award-winning *Product Development Best Practices Report,* books-for-sale and books for free, including raffle of Kaplan's "Strategy Focused Organization."

> *Special thanks for the support of Harvard Business School Publishing*
> HARVARD BUSINESS SCHOOL PUBLISHING

Team benefits — P&PL is ideal for motivating and joint planning, whether your team is co-located, virtual or includes external partners. Special discount pricing is available — please see the registration page.

Extracurricular activities — Join others at a local Cambridge restaurant, hang out in Harvard Square, stick around for Red Sox Opening Weekend at Fenway, or just relax. Visits to local companies may be arranged upon request. Check off the Extracurricular box on the registration form if you'd like more details.

Spouse/partner/family activity — While you're in session on Thursday, April 5, your spouse, friend and/or kids can enjoy a private cruise along the scenic Charles River. Boats are enclosed and heated, lunch is included, and boarding is right across the street from the conference site. Then they can join you at the evening reception. Fee for the cruise, lunch and reception is $65/person. (To reserve, please sign up on the conference registration form. A minimum number is required to hold the cruise.)

Management Roundtable's legendary knowledge-based service — Our 20-year focus on engineering and product development gets you more than just a well-run meeting. Need referrals, leads or research? Just ask — we go out of our way to make sure your information needs are met.

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AGENDA AT A GLANCE

Wednesday, April 4 Pre-Conference Workshops

7:30–8:30
Registration and Continental Breakfast

8:30–12:00
A *"Advancing Organization Skills: Developing a Skills Matrix"*
Wayne Mackey, PDC Inc.
D *"Best Practices for Market Segmentation"*
Tony Ulwick, Strategyn

12:00–1:00
Lunch

1:00–4:30
B *"Competitive Intelligence and Technology Forecasting"*
Jay Paap, Paap Associates
C *"Using Web-Based Tools for Global Product Definition"*
Sheila Mello, PDC Inc.

Thursday, April 5 Conference Day 1

7:30 – 8:30
Registration and Continental Breakfast

ATTAINING LEADERSHIP—LINKING PD STRATEGY TO CORPORATE

8:30–10:00
Plenary Keynote: Robert Kaplan, Harvard Business School
"Using Strategy Maps and the Balanced Scorecard to Align Product Development with Business Objectives"

10:00–12:15

Technology/Product Leadership Case Studies	Process/People Leadership Case Studies

12:15–1:30
Lunch

SUSTAINING LEADERSHIP OVER TIME

1:30–2:45
Plenary Keynote: Frank Hauck, EMC
"Staying in the Growth Phase"

2:45–5:00

Technology/Product Leadership Case Studies	Process/People Leadership Case Studies

5:00–6:30
Roundtable Reception

Friday, April 6 Conference Day 2

7:00–8:00
Continental Breakfast

BREAKTHROUGHS AND TRANSFORMATIONS

8:00–11:45

Innovation/Transformation Leadership Case Studies	Collaboration Case Studies

11:45–1:00
Lunch/Breakout Discussions

1:00–2:30
Concluding Keynote: Adrian Slywotzky, Mercer Management
"Staying Ahead of the Curve: Taking Advantage of Value Shifts"

2:30–5:00
Extracurricular activities and tours

P&PL '01

Strategic Leadership Keynotes

Attaining Leadership

Using Strategy Maps and the Balanced Scorecard to Align Product Development with Business Objectives

Robert S. Kaplan, Harvard Business School

Strategy maps of cause-and-effect relationships show how knowledge-based assets become transformed into shareholder value. The value of intangible assets, such as product and process capabilities, depends on organizational context and strategy. The Balanced Scorecard strategy map of cause-and-effect linkages describes how product characteristics and process enhancements are critical elements to deliver desired customer value propositions that, in turn, become converted into tangible outcomes of customer retention, revenues from new products and services, and profits. This presentation will illustrate how strategy maps and scorecards must be customized to organizations' specific strategies and strategic objectives.

Robert S. Kaplan is the Marvin Bower Professor of Leadership Development at Harvard Business School. Kaplan's research, teaching, and consulting focus on linking cost and performance measurement systems to strategy implementation and operational excellence. His books include *The Balanced Scorecard, The Strategy Focused Organization* (HBS Press, 2001) and *The Balanced Scorecard: Translating Strategy into Action* (HBS Press, 1996), both with David P. Norton, and *Cost and Effect: Using Integrated Cost Systems to Drive Profitability and Performance* (HBS Press, 1998).

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Sustaining Leadership

Staying in the Growth Phase

Frank Hauck, Executive Vice President, Products & Offerings, EMC Corporation

"While countless high-tech companies have soared and then crashed in recent years, EMC has successfully anticipated one new technology after another."

– *Harvard Business Review,* January 2001

"Staying in the growth phase requires both timing and speed…as one product peaks, the next one in the pipeline is poised to cross the chasm. One sign of our own success is that, in recent years, as much as 80% of our annual revenue has come from products introduced during the year."

– Michael Ruettgers, CEO of EMC, quoted in *Harvard Business Review*

How do you stay in the "growth phase," even after ten years? In this keynote presentation, you will hear how EMC sustains product leadership in a constantly shifting industry. Frank Hauck will discuss the tradeoffs between quality and time-to-market, between a broadly balanced product line and a focus on core competencies. He will share the experience of EMC Corporation, and its recent acquisition of Data General, in the rapidly expanding market for networked information infrastructure.

Frank M. Hauck is the Executive Vice President of Products and Offerings at EMC Corporation, a Fortune 500 company and leading provider of enterprise storage systems, networks, software and services. In this capacity, Frank is responsible for all enterprise storage research and development activities, worldwide manufacturing operations, corporate quality, product management and strategic marketing functions.

Transforming Leadership

Staying Ahead of the Curve: Taking Advantage of Value Shifts

Adrian Slywotzky, Vice President, Mercer Management Consulting

Product innovation is never ending, your next competitor can spring up from nowhere, customers expect more and more personalized offerings, and traditional measures of financial health no longer apply. How do you continuously transform your business to stay ahead?

In a dynamic and synthesizing conclusion to the conference, acclaimed author Adrian Slywotzky, a Vice President of Mercer Management Consulting, will tell you how to create and renew customer and shareholder value through product strategy and business design innovation. He will discuss how shifting to a digital business design changes your strategic options, how mass customization and "choiceboards" can revolutionize the way

products are made, and how to take advantage of shifting profit opportunities.

Adrian J. Slywotzky is a vice president at Mercer Management Consulting whose expertise is growth strategies in constantly changing markets. Having worked extensively at the CEO level on issues relating to new business development and value growth, Mr. Slywotzky is also co-author of *How Digital Is Your Business? Profit Patterns,* and *The Profit Zone* and author of *Value Migration: How to Think Several Moves Ahead of the Competition.* In addition, his viewpoints were featured in *Business Week's* special issue on the on the 21st Century Corporation (8/21/00).

Case Studies

Technology & Product Leadership

Architecting Product Platforms

Kevin Otto, Associate Professor, Center for Innovation in Product Development, *MIT*, and author of "Product Design"

> The latest methods for architecting a product family—products with possibly shared systems. Find out how to determine the profit maximizing number of levels to offer on any product family attribute—whether core platform, derivative modules, or open swappable modules for rapid customer reconfiguration.

Managing Technology Roadmaps

Jonathan Propp, Manager, Strategic Decisions, *Sun Microsystems*

> How to manage technology roadmaps and feed the appropriate technologies into the product pipeline.

Solving the Innovator's Dilemma*

Dan Proskauer, Software Engineering Manager, Integra Test Division, *Teradyne, Inc.*

> How to spot and exploit potential new "disruptive" technologies. How Teradyne's Integra Test Division achieved its most successful new product ramp ever despite an initial development cost that was a fraction of what is traditionally incurred. (*refers to Clayton Christensen's book of the same title)

Moving Towards Mass Customization

Ping Fu, Chief Technology Officer, *Raindrop Geomagic, Inc.*

> How to use the latest 3D photography technology to achieve a high degree of product/service flexibility, reduced inventory risk and competitive edge in the marketplace.

Process & People Leadership

Using the Balanced Scorecard with Theory of Constraints to Sharpen Strategic Focus

Andrea Hill, Director, *The Bell Group* (TBG)

> How to combine the measurement system of the Balanced Scorecard (BSC) with the Theory of Constraints (TOC) to sharpen strategic focus and drive business results (TBG doubled its bottom line). How to tie compensation and business-wide strategic goals for a crucial motivational link.

Using Knowledge Management Processes to Sustain Product Development Leadership

Ken Bruss, Process Engineering, *Analog Devices*

> How Knowledge Management methods can be successfully integrated into the New Product Development process. The role of technology in Knowledge Management, benefits to be gained from low tech solutions.

Technology Development at Corning

Bruce Kirk, Corporate Process Owner, *Corning*

> How an organization which is widely recognized for its continuous innovations and inventions manages the process.

Virtual Collaboration, Community & Culture

Andrew McGrath, Head of Interaction Design, *Hutchison3g*

> 'all that is solid melts into software' … How an on-line collaborative working environment can allow people who *should* meet each other to do so easily and naturally. How to scope a system where the power, ease and familiarity of co-located interaction may be (at least partially) subsumed into collaborative software environments.

Innovation/Transformation Leadership

Market Leadership Needs Design Leadership: Rejuvenating Master Lock

Harry West, PhD, Director, Research & Innovation, *Design Continuum*

> What to do when market share begins to decline and lower priced "knock-offs" gain ground. The challenges of bringing innovation to a product that sells for less than $10, and the impact of the new product leadership strategy on Master Lock.

Staying Relevant in the Internet Age

Elissa Lee, Research and Innovation, *Casio US R&D*, and **Dev Patniak,** *Jump Associates*

> How to redefine products in a newly connected environment. Hear about the journey Casio has taken to ensure its watches and keyboards are still relevant in an era of Palm Pilots and MP3 players.

From Recovery to Repeatability—A Turnaround Plan

Ron West, Engineering Director, *Acterna*

> Following two mergers, the attrition rate among engineers rose dangerously high while time to market sunk dangerously low. Find out how one division retooled and rethought its processes and management behavior — from recovery, to stability, to predictability, to repeatability.

Implementing CHAOS for Rapid Results

Kerem Durdag, Engineering Manager, *Steag-Hamatech, Inc.*

> How to deal with uncertainty. CHAOS is a **c**omplex **h**ighly **a**ssociated and **o**rdered **s**ystem for accommodating the "unknown." Find out what kind of environment CHAOS is suited to and how to achieve quick results.

Collaboration Leadership

Innovative Management of Cross-Company Virtual Teams

Dr. Robert Carman, Program Manager, *Boeing Canoga Park*

> How to collaborate with the best, including competitors, in real-time. How to create an entirely new paradigm for concurrent (synchronous & asynchronous) teamwork.

Partnering for Design Services: Achieving Fast Time-to-Market

Jenny Ryan, Vice President Global Design, *Celestica Chelmsford Design Center*

> Take advantage of the technology, talent and repeatable processes a design services partner can offer. What to look for in selecting partners, what processes to set up at the outset of the relationship, and what technology and communication methods to consider.

Strategic Sourcing of Product Development Services—A Decision Making Framework

Neil Dempsey, Engineering Manager, *Xerox*

> How to execute an extended enterprise sourcing model for product development. A four-step framework to assist in making effective sourcing decisions. (Note: based on applied research conducted in the new executive master's program in product development at the Rochester Institute of Technology.)

B2B Product Development in the Automotive Industry: Collaboration at Covisint

Dave Dickson, Leader, Product Development e-Magineering Team, *Covisint,* and **Duane Neidert**, Principal, *PRTM*

> Receive a roadmap for Internet-enabled collaboration within and across product development projects, with specific suggestions for the automotive industry.

Pre-Conference Workshops   Wednesday, April 4, 2001

Four half-day pre-conference workshops offer you an opportunity to focus on developing your staff, managing technology, segmenting your markets, and defining new products. You may choose one or two workshops – workshops A and D will be held from 8:30am–12:00noon, B and C will be held from 1:00pm–4:30pm. Lunch is included for all workshop participants.

A Advancing Organization Skills: Developing a Skills Matrix

How do you get your support, procurement and manufacturing organizations to stop acting like clerks and become proactive team members? Likewise, how do you motivate highly skilled engineering professionals with a clear upward career path?

In this highly interactive workshop, you will:

- Review a case study step by step of one organization's journey to better organization skills
- Develop a set of simple Excel-based "skills matrices" for each major job function
- Learn how to distribute the matrixes via email and combine the returned data simply and efficiently
- Use the combined data to define group training needs, individual development actions and outside hiring requirements

Wayne Mackey's expertise is grounded in over twenty years of hands-on management of large engineering, manufacturing, and procurement organizations. Mr. Mackey has been a principal with Product Development Consulting, Inc. since 1997. Prior to joining PDC, he worked with GM Hughes Electronics.

B Competitive Intelligence and Technology Forecasting: Keys to Technology Leadership

Technology leadership is a moving target requiring constant vigilance—especially if you intend to use technical excellence to achieve new product dominance. The bar is constantly being raised—key technologies mature and are replaced, unarticulated needs emerge, disruptive technologies threaten, the rate of change accelerates, and the costs of mistakes increase.

Learn how Competitive Intelligence and Technology Forecasting can support your technical and product development decisions. Receive proven tools and techniques to help you:

- Plan for technological change and substitution
- Develop intelligence gathering efforts
- Assess competitors' capabilities, actions, and intentions
- Forecast technological disruptions resulting from shifts in needs or maturing of core technologies
- Apply insights to drive innovation and technology strategy

Jay Paap is president of Paap Associates, a management consulting firm assisting major corporations in a broad range of business and technology development efforts. For over 20 years he has managed projects worldwide dealing with business development, strategic alliances, technology management and competitive intelligence.

C Using Web-Based Tools for Global Product Definition

How do you identify the unique needs of individuals and businesses in Europe, Asia, South America, etc., if you're in Detroit? How do you communicate market segment differences within France if your European sales team is in Germany, your engineers and R&D are in California, and your marketing team is in Boston?

This interactive workshop highlights web-based approaches and processes you can use with virtual teams to develop highly differentiated global products. You will learn:

- Field-tested, proven techniques used by leading firms, such as Compaq, Agilent, Avaya, Abbott Labs, and Kimberly-Clark
- How to develop an image of your customer's environment and how to use that image to foster a common vision of market values
- How to identify and prioritize key customer values and requirements using the web
- How to develop metrics to ensure that identified requirements are met
- Survey techniques to enhance knowledge about market segments and take advantage of regional differences for product design and marketing

Sheila Mello is the managing partner of Product Development Consulting, Inc. Sheila is a well-known and highly respected expert in product development with over thirty years of executive and hands-on experience in product development, hardware engineering, software development, manufacturing, marketing, sales, service, and quality.

D Best Practices for Market Segmentation

Many companies use traditional classification schemes to segment their markets as they are unaware of alternatives and the inherent flaws of such an approach. Market segments defined in terms of industry, SIC code, price point, business size, geography, age or other convenient statistical classifications, assume that individuals within each category have a common set of needs or values. This would be ideal, but it is seldom the case, and making this assumption leads to missed opportunities, product failures and confusion. This workshop delivers new best practices for segmenting markets, showing companies how to discover the market's natural order of segmentation—and segments of opportunity that drive innovation.

This workshop will teach field-proven techniques for creating segment specific products and introduce metric-based tools to manage innovation. You will learn:

- How to discover new markets
- How to uncover segments of opportunity
- How to formulate breakthrough solutions to satisfy segment specific needs
- How to find market entry points for new and disruptive technologies

Tony Ulwick is CEO of Strategyn. He began his business career at IBM in 1980 as a design engineer. After witnessing the failure of such products as the PCjr and OS2 , he vowed to find or create a more certain approach to managing innovation. Between 1985 and 1990 he pioneered new techniques for delivering customer value that are now well-proven and which form the foundation of this workshop.