Product&Technology Roadmapping Fundamentals:

DEVELOPING A BLUEPRINT FOR ORGANIZATIONAL BUY-IN AND LONG-TERM IMPACT

MAY 13–14, 2008
CHICAGO

PRESENTED BY

The MANAGEMENT ROUNDTABLE

An intensive, hands-on two-day workshop to help you master the key action steps to build an effective roadmap, link to strategic decision-making processes and integrate across the enterprise

COURSE INSTRUCTOR

Dr. Irene J. Petrick
Professor of Practice and Director of the Enterprise Informatics & Integration (EI²) Center, Penn State University, and internationally recognized expert on roadmapping

"Dr. Petrick's breadth of exposure to the issues surrounding strategic planning methods and their use in the real world of business are very valuable for any company that depends on innovation. She understands both the methods of strategic planning and, more importantly, the contexts in which these methods are selected and applied."

Jeff Lind, Associate Technical Fellow
Boeing Phantom Works, Enterprise Technology Planning

LEARN TO:

• Assess your company's readiness to undertake roadmapping and identify critical information gaps

• Create a roadmap that links market and technology opportunities into a compelling portfolio plan

• Mitigate common organizational barriers to roadmap creation and adoption

• Develop an effective implementation plan to achieve a sustainable roadmapping practice

• Identify key metrics to gauge road-mapping progress and performance

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Why This Workshop Is Important to You

Roadmapping is a mainstream tool that has been gaining popularity since the 1980s. Yet more than two decades later, companies still struggle with how to get started, and more importantly, how to make roadmapping a sustainable and value-add activity. Typically, roadmapping has been used to drive technology and product strategy around the area of innovation. More recently, companies gaining the greatest benefit from this technique have expanded it to embrace multiple elements of strategy to answer critical questions including:

- What, when and how to invest critical resources in technology
- How to develop collaboration and partnership strategies that leverage R&D and other resources across organizations
- How to expand existing markets and grow into new markets
- How to continue to be successful in the marketplace while migrating from one product base to another
- How to link information and activities in one part of the organization to other areas that face significant challenges

Participants will leave this workshop with a framework to map the strategy canvas and a series of questions and templates to help them determine the best starting point for their roadmapping efforts. In addition, participants will explore common barriers and challenges to roadmapping within an organizational unit, across functional silos and beyond the company to its partners/suppliers.

Who Should Attend

This workshop is designed specifically for technology managers, marketing directors, product portfolio leaders, and others in the organization who are seeking a better way to link market needs and technology evolution. Manufacturers, service providers, suppliers, and others will gain vital tools to help them navigate the complex landscape of product (or service)/technology/market strategy.

Attendees are NOT required to have significant experience with product and technology roadmapping. To bring all attendees to a base level of knowledge in roadmapping fundamentals, *pre-workshop reading, questionnaires and templates* will be provided to help each participant prepare for the session.

ABOUT THE INSTRUCTOR

Dr. Irene J. Petrick is Director of Penn State's Center for Enterprise Informatics and Integration and a Professor of Practice in the College of Information Sciences and Technology. She specializes in technology forecasting, digital roadmapping, product and process development, systems management, and enterprise integration. Her recent research has focused on collaboration across the supply chain. She advises private companies and non-profit agencies on technology planning and strategic roadmapping.

Dr. Petrick has taught graduate courses in advanced technology management, corporate innovation strategies and statistical process control and design of experiments; and undergraduate courses in human factors engineering, concurrent engineering, enterprise integration, and project management. She is author or co-author of more than 85 publications and presentations and has over 25 years of experience in technology planning, management, and product development in both academic and industrial settings.

ABOUT MANAGEMENT ROUNDTABLE

The Management Roundtable (MRT) is the foremost knowledge and networking resource for industry practitioners involved in product, service, technology, and business development. 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 membership offering, the Management Roundtable *FastTrack,* (www.roundtable.com/FT) offers direct, year-round access to leading-practice insights via teleconference and online reports.

The
MANAGEMENT
ROUNDTABLE

AGENDA

Day One *Tuesday, May 13, 2008*

7:00 – 8:00   Registration and Continental Breakfast

8:00 – 8:15   Introductions / Review of Day One Agenda

8:15 – 9:00   **Session 1: What Is the Roadmapping Process and How Is It Used?**

- *Overview of the full roadmapping process:* assessing opportunities and challenges, developing maps, linking them, maintaining them over time, and creating strategic discussion around them.
- *Roadmapping formats:* case examples of how individual companies are using them.
- Subsequent sessions will focus on each of the critical stages, guiding participant learning through detailed questions and templates.

9:00 – 10:15   **Session 2: Where Is Your Company on the Roadmapping Maturity Model?**

- Understanding how roadmapping matures to develop your roadmapping plan; roadmapping can be a stand alone activity in a single department or it can bridge many units in a company or even link with its supply chain.
- Review of the various aspects of each stage of the roadmapping maturity model in terms of the organization's practice and its readiness to go to the next level.
- *EXERCISE: Individual participants will identify which stage their company currently occupies. Participants will consider their company's goals (or their individual goals) for roadmapping, and will discuss how these goals help begin to frame the roadmapping activity.*

10:15 – 10:30   Refreshment Break

10:30 – Noon   **Session 3: What Does It Take to Build a Roadmap and How Should Your Company Get Started?**

- Assessing your company, its goals, and motivations for roadmapping.
- Determining the dominant roadmap for your company. The term "roadmap" is misleading since most companies develop a series of roadmaps to support their efforts. But generally one type of roadmap drives the others and this depends on the type of company you are (product, services) and the position of your company relative to others (OEM, distributor, supplier).
- *EXERCISE: Participants will use a template to assess their company's goals, their own (or their group's) motivation for roadmapping, and their position within the supply chain. From this, participants will identify the dominant roadmap for their organization or group.*
- *EXERCISE: With the dominant roadmap identified, participants will discuss what other related roadmaps might be germane for their company and will then lay out their high-level roadmapping framework via a template provided during the session.*

Noon – 1:00   Lunch

1:00 – 4:30   **Session 4: Case Study of the Roadmapping Process**

The roadmapping process is often initiated with a call to action (a competitive threat, emerging market opportunity or technology challenge) where companies determine that their current position needs to change. This session will involve hands-on practice on how to:

- Map the lay of the land and determine a set of long-term goals;
- Articulate the gaps between where your company wants to go and where it is now;
- Map the gap to identify changes to help in transitioning;
- Select a path of specific activities and ensure that key activities support the goals (using the GOTChA method);
- Develop a plan to monitor key elements on the roadmap using scenarios, key drivers and tipping point logic.

For each phase in this session, Dr. Petrick will give a brief introduction to the challenges and objectives of the phase and participants will work in small groups to practice the techniques and share emerging results and maps.

4:30 – 5:00   Day One Wrap-Up and Q&A

5:30 – 6:30   Networking Reception

Day Two *Wednesday, May 14, 2008*

7:00 – 8:00   Continental Breakfast

8:00 – 9:30   **Session 5: Is the Initial Roadmapping Framework and Dominant Roadmap the Right One?**

- The keys to a successful roadmapping effort: the framework and information content. The framework begins with the dominant roadmap and considers other critical and potentially related themes, and should reflect the key players (organizational units) in the organization.
- *EXERCISE: Returning to the high-level framework created in Day 1, in facilitated round table discussions, participants will determine if changes to this initial framework are warranted. Participants will also work through a questionnaire and template to help them think about what to start first and how to progress.*

9:30 – 9:45   Refreshment Break

9:45 – Noon   **Session 6: Roll Up Your Sleeves and Get Started**

- Different roadmap types often begin and are driven by the same types of questions. They are also expanded by a similar set of questions, thus making it essential to know your starting point and end goals. Participants will discuss common themes, given dominant roadmap preferences, and initiate individual roadmap efforts.
- *EXERCISE: Participants will be regrouped to insure that similar dominant roadmap efforts are underway at each table. Participants will use questionnaires and templates to help them establish long-term goals for their roadmap, identify the gaps between the long term and today, and develop a series of integrated activities, across multiple places in the organization. Participants will end the morning with:*
  - *Preliminary dominant roadmaps—laying the groundwork for future information gathering;*
  - *A set of questions and data needs—necessary to further flush out the roadmap;*
  - *A set of key actors (beyond their group)—individuals that will need to be involved given the topics on the roadmap;*
  - *A set of triggers—useful in tracking the roadmap's viability over time.*

Noon – 1:00   Lunch

1:00 – 2:30   **Session 7: Assess Organizational Barriers and Develop Implementation Plans**

- To yield value, a roadmap(s) must be used across organizational functions and at multiple levels. Learn how to identify champions, agnostics, and detractors in your company and develop implementation plans that can serve to increase buy-in.

2:30 – 2:45   Refreshment Break

2:45 – 3:45   **Session 8: Gauging Success**

- Review of some of the metrics and measures currently being used by over 150 executives and managers who are actively engaged in roadmapping efforts.
- Participants will engage in a facilitated discussion of the viability of these metrics for their individual companies.

3:45 – 4:00   Q&A

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KEY BENEFITS

By participating in this highly practical, hands-on workshop, you will receive:

1 **A roadmapping maturity model** to determine your current and possible future roadmapping interests

2 **A high-level roadmapping process model**, linked to underlying activities, data needs, and participants

3 **A 10-step roadmapping reference guide**

4 **Multiple templates and questionnaires** to guide beginning roadmapping efforts—tailored to your company's goals and target roadmapping efforts

5 **Proven strategies** to break down implementation barriers and overcome roadmapping adoption challenges

6 **Extensive pre-assigned workshop materials (templates, questionnaires, case examples)** in preparation for this highly interactive workshop —excellent tools to aid you in getting roadmapping efforts off the ground and running at your company

7 **A comprehensive follow-up summary** of key discussion learnings from lectures and breakout discussion groups—a useful tool to refer back to and share with colleagues as you build your roadmapping plan

8 **A strong network of like-minded industry contacts** to continue discussions into the future, including electronic discussion forums that are password protected and dedicated to your workshop group

4 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**

Mail to: **Product & Technology Roadmapping**
c/o Management Roundtable
92 Crescent Street, Waltham MA 02453

Please accept the following registration(s):
(Please use photocopies for additional people)

NAME Mr. / Ms. _____

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WORKSHOP FEE: $2395/person. Fee includes pre-workshop materials (readings, templates, questionnaires), program materials (including roadmapping reference guide, roadmapping maturity model and roadmapping process model), luncheons, refreshment breaks, networking reception and post workshop summary of workshop discussion groups and follow-up resource lists.

DATES/SCHEDULE: The workshop will be held May 13–14, 2008. Registration and continental breakfast begins at 7:00am on Tuesday, May 13; the workshop commences at 8:00am and concludes at 4:00pm on Wednesday, May 14.

LOCATION/ACCOMMODATIONS: The Hilton Suites, 198 East Delaware Place, Chicago, IL 60611. Rate: $239 (limited block of rooms available—reserve rooms early). For reservations, please call 312-664-1100 and mention Management Roundtable.

NO-RISK GUARANTEE: Your satisfaction is 100% guaranteed—money back or credit. If you are not satisfied with the quality of this program, let us know in writing and we'll refund your entire registration fee.

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 five business days are subject to a $200 administration fee or the full fee can be credited towards a future purchase. No-shows are liable for the full fee.

CONFERENCE ATTIRE: Business casual.