Stage-Gate® Innovation Summit 2015

The Journey to Innovation System Excellence
FEBRUARY 23-25, 2015 • TAMPA, FL

FEATURING UNIQUE PRESENTATIONS DELIVERED BY THESE INNOVATION CHAMPIONS

Dr. Scott Edgett
Co-Founder & Chief Executive Officer
Stage-Gate International

Jack Hamilton
Director – R&D Operations
Bostik Inc.

April Bertram
Innovation Management Director
GOJO Industries

Georgette Belair
VP, NPD of Dental Professional Consumables
KaVo Kerr

Mary Maley
Global Program Director
Kellogg Company

Exclusive Real-Time Benchmarking
Plus receive a copy of Dr. Edgett’s latest benchmarking report

Vaishali Patel
Senior Manager - Future Ventures
Kemira

Travis Young
Process Manager
Lundberg Family Farms

Julie Simonson
Vice-President, Research & Development
The Schwan Food Company

Erin Grossi
Chief Economist
UL

REGISTER TODAY!

www.stage-gate.com
Dear Innovation Colleague:

Welcome to our 9th Stage-Gate® Innovation Summit brochure. We are thrilled to invite you and members of your innovation team to take a deeper look at our upcoming program.

Once again we are looking forward to an event that is filled with powerful “ah ha’s”, collaborative exchanges, unique take aways, cutting-edge ideas and free-flowing discussions with industry’s best and brightest innovation leaders. Start your Summit experience with our innovation celebration dinner and Dr. Scott Edgett’s interactive and live benchmarking session.

Lastly, find out what other practitioners have been doing to elevate innovation performance at their firms. Our jam packed agenda includes presentations from respected innovation leaders and experts from these top-performing companies:

- Bostik Inc.
- GOJO Industries
- KaVo Kerr
- Kellogg Company
- Kemira
- Lundberg Family Farms
- The Schwan Food Company
- UL

Each of our innovation champions has an inspiring, informative and important Stage-Gate story to share. This conference is truly tailored for those who want to achieve immediate results within their organization. Innovation is the future and the future is now! From the entire team at Stage-Gate International, we wish you an inspiring and insightful conference experience!

Best regards,
Michael Phillips
Managing Director,
Global Professional Development

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**7 REASONS TO ATTEND**

1. **Network** with seasoned innovation champions that share a common goal to continuously improve their new product process performance and business results.

   Participate in a real-time benchmarking event as Dr. Scott Edgett shares the latest in innovation benchmarking results while you simultaneously benchmark your organization’s capabilities to 100s of other companies.

2. **Engage and advance your personal subject-matter expertise** through dynamic discussions with Stage-Gate® product innovation experts.

3. Receive **strategic and tactical advice** on global innovation trends from other Stage-Gate Innovation process practitioners.

4. Participate in professionally facilitated, interactive workshops and panel discussions on the topics you said were most critical to you.

5. Learn more about the product innovation software tools that have achieved Stage-Gate Ready Certification and receive personal demonstrations by these industry experts.

6. Discover advanced techniques and cutting-edge ideas to the most challenging aspects of product innovation – return to your organization well-equipped to move forward.

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**INNOVATION CELEBRATION DINNER**

February, 23, 6:00 – 8:30pm

**Benchmarking Your Innovation Capability to Improve Performance**

Dr. Scott Edgett, Co-Founder & Chief Executive Officer, Stage-Gate International

Participate in a real-time benchmarking event as Dr. Scott Edgett shares the latest in innovation benchmarking results while, as a Summit delegate, you simultaneously benchmark your organization’s capabilities to 100s of other companies.

Dr. Edgett will also discuss key findings from his latest study titled, "Innovation Performance: Critical Drivers of Success". He will compare the results from this study to those of delegates attending this truly unique and special event in a live interactive session. Don’t miss out on this interesting and informative session. Additionally, each person will receive a copy of the latest joint SGI and APQC sponsored benchmarking report plus benchmarking data from the event itself.

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www.stage-gate.com
## Day One • Monday, February 23

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<td>5:00 – 6:00</td>
<td>Registration</td>
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<tr>
<td>6:00 – 6:15</td>
<td>Welcome and Introductions</td>
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<tr>
<td>6:15 – 7:30</td>
<td>Innovation Celebration Dinner</td>
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<tr>
<td>7:30 – 8:30</td>
<td>KEYNOTE ADDRESS:</td>
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<tr>
<td></td>
<td>Stage-Gate International</td>
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<td></td>
<td>Dr. Scott J. Edgett, CEO</td>
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<tr>
<td>8:30 pm</td>
<td>End of Day One</td>
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## Day Two • Tuesday, February 24

<table>
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<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 – 8:45</td>
<td>Networking Breakfast</td>
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<tr>
<td>8:45 – 9:00</td>
<td>Welcome and Introductions</td>
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<tr>
<td>9:00 – 9:45</td>
<td>CASE PRESENTATION: UL</td>
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<td>Erin Grossi, Chief Economist</td>
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<td>9:45 – 10:30</td>
<td>CASE PRESENTATION: THE SCHWAN FOOD COMPANY</td>
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<td>Julie Simonson, Vice-President, R&amp;D</td>
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<tr>
<td>10:30 – 11:00</td>
<td>Networking Break</td>
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<tr>
<td>11:00 – 11:45</td>
<td>CASE PRESENTATION: BOSTIK INC.</td>
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<td>Jack Hamilton, Director of R&amp;D Operations</td>
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<tr>
<td>11:45 – 1:00</td>
<td>Networking Lunch</td>
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<tr>
<td>1:00 – 1:45</td>
<td>CASE PRESENTATION: GOJO INDUSTRIES</td>
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<td></td>
<td>April Bertram, Innovation Management Director</td>
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<tr>
<td>1:45 – 2:30</td>
<td>CASE PRESENTATION: KAVO KERR</td>
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<td>Georgette Belair, VP, NPD of Dental Professional Consumables</td>
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<td>2:30 – 3:00</td>
<td>Networking Break</td>
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<tr>
<td>3:00 – 5:00</td>
<td>Meet You at the Summit™ Workshops</td>
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<tr>
<td>5:00 – 5:15</td>
<td>Wrap – up and Close of Day Two</td>
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<tr>
<td>5:15 – 6:30</td>
<td>Networking Reception</td>
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## Day Three • Wednesday, February 25

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<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00 – 8:45</td>
<td>Networking Breakfast</td>
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<tr>
<td>8:45 – 9:00</td>
<td>Overview of Day Two</td>
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<tr>
<td>9:00 – 9:45</td>
<td>CASE PRESENTATION: KELLOGG COMPANY</td>
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<td>Mary Maley, Global Program Director</td>
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<td>9:45 – 10:30</td>
<td>CASE PRESENTATION: KEMIRA</td>
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<td>Vaishali Patel, Senior Manager – Future Ventures</td>
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<tr>
<td>10:30 – 11:00</td>
<td>Networking Break</td>
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<tr>
<td>11:00 – 11:45</td>
<td>CASE PRESENTATION: LUNDBERG FAMILY FARMS</td>
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<td>Travis Young, Process Manager</td>
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<tr>
<td>11:45 – 12:30</td>
<td>Panel Discussion</td>
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<td>12:30 – 1:00</td>
<td>Summit Conclusion</td>
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Complexity and Perception: Critical Hurdles to Establishing a Product Development Process and How to Address...

Jack Hamilton, Director – R&D Operations, Bostik Inc.

Getting things to ‘stick’ is something Bostik does very well. When it came to launching Bostik’s product development process the implementation team was directed to make it stick in a smart way . . . . but stick it did not. After several years of use, and after experiencing a few setbacks along the way, how did Bostik finally ensure that its product development process was established within the firm? Plan to join Jack Hamilton on a very interesting journey as he discusses how both perception and complexity can conspire to undermine the best efforts to roll out a product development process. Explore the biggest hurdles facing those who design, implement and are charged with managing a product development process. Take a deep dive on this topic and become better equipped to identify and address the critical hurdles that can derail the implementation of a product development process.

Attend this presentation if implementing a new product development process or re-igniting an existing design is high on your radar. You will leave:

1. Better prepared to recognize and avoid common hurdles that often condemn a process to failure
2. Equipped to understand how both project management and process management work together to overcome process failure
3. Committed to achieving a true cross-functional perspective as part of establishing a product development process within your company’s culture

Good to Great Innovation: When Being Anything But First Is Just Not An Acceptable Outcome

April Bertram, Innovation Management Director
GOJO Industries

The average life span of an S&P 500 company in 1957 was 75 years. Fast forward to 2027 and the average life span is predicted to be just 15 years. You might ask how this is possible. The fact is, our world is getting more and more complex and the pace of change has accelerated considerably, which can cause disruption in companies not adequately prepared. Companies who find themselves in this position run the risk of quickly losing their relevance. One of the greatest challenges a company can face, when proactively working to elevate their innovation system and prepare for the future, is dealing with the fact that there is no sense of urgency to go from good to great.

Creating and sustaining an innovation framework – from the project, to process and laddering up to the enterprise level, with all parts of the system working fluidly together – is critical to sustainable competitive advantage.

Plan to join April Bertram for her presentation on the interesting work GOJO Industries has been doing to advance its overall innovation system. Explore why this can be a challenging activity for those already enjoying reasonable innovation success. Learn why companies that are doing well with innovation management are not satisfied with just being good, but strive to be great. Find out where GOJO has concentrated its efforts to manage the “surprises” possible in innovation and leave with:

1. An understanding of what GOJO has done to address critical to success Stage-Gate® leadership and governance issues
2. Recommendations on what to do and not do to encourage and nurture innovation in your company’s culture
3. Tools and techniques related to idea-to-launch NPD project management best practices

The 3P’s That Facilitate Stage-Gate® Idea-to-Launch NPD Success

Georgette Belair, VP, NPD of Dental Professional Consumables
KaVo Kerr

While 74% of North American companies report that they use some type of Stage-Gate process many still are not getting the new product development results that they desire. For example, a significant number of companies still struggle to launch new products/services on time and on budget. Eliminating portfolio management issues or a poorly designed idea-to-launch process as the cause of these problems suggests most likely there are failings with one of the 3P’s: project planning, project management and/or project execution. Given the significant challenges faced by product development teams in the course of discharging their work, how can we ensure the 3P’s facilitate achieving NPD success versus avoiding what Peter Drucker observed, “Most of what we call management consists of making it difficult for people to get their work done”?

Plan to attend Georgette Belair’s presentation and deep dive into these 3P’s to learn how they can drive Stage-Gate process success. Georgette was responsible for leading the design and implementation of her first Stage-Gate process in 1998 at Pilkington Glass, followed by other implementations at Johnson & Johnson, Carefusion Corporation, Ossur Orthopaedic and KaVo Kerr. Over the years, the importance of developing structural and personnel competency around the 3P’s became very evident to Georgette. She will define the 3P’s, discuss how they connect and align and will share best practices they use for their development, implementation and execution efforts.

Key takeaways include:

1. Understand the role the 3P’s play in facilitating product development success
2. Learn how to develop the structural and personnel competencies each requires
3. What is recommended to do and what should be avoided when designing, implementing and executing the 3P’s
Innovation: Reframed | Tools, Techniques and Tips to Enable Organization-wide Product Innovation Excellence

Mary Maley, Global Program Director
Kellogg Company

Kellogg Company has been innovating for over 100 years. A recent organizational change at the firm led to a particularly interesting journey for members of the innovation and product development team. The initiative gave the company reason to re-evaluate and modify its famed innovation program. Kellogg Company, through the leadership of its newly created position of Chief Growth Officer, was adamant that great attention be paid to understand how changes to its highly effective and efficient product development process and innovation system might impact the overall global team. Even after exercising extreme caution, executing a textbook evaluation of its innovation system, and being highly inclusive with those most impacted, there were some real surprises that fortunately the implementation team was able to catch, assess, and fix.

Join Mary Maley as she takes delegates through this journey and shares how their Innovation Diamond proved instrumental in providing guidance to the firm and the foundation to underpin their activities. She will share what was changed, why the changes were necessary, and how those most impacted responded. This presentation will be extremely valuable to those entertaining or getting ready to go through an innovation system overhaul and/or who are interested in understanding the role of the Innovation Diamond when undertaking such an assessment.

What attendees should expect to leave with:

1. An understanding of the key areas of the innovation program to evaluate and why
2. How those impacted by change might react and why
3. What was learned along the journey, what is recommended and what to avoid

A Journey Every Company Must Take: Developing and Implementing an Innovation Strategy

Vaishali Patel, Senior Manager – Future Ventures
Kemira

Kemira provides expertise, application know-how and tailored combinations of chemicals for water-intensive industries. In 2013, Kemira re-evaluated its innovation project portfolio based on the core competencies of the company. During this portfolio management review, Kemira realized that its pipeline was filled with many low value non-strategic projects that should be removed. Eliminating these projects left Kemira’s innovation pipeline almost empty. A desire to refill its innovation pipeline with projects that were strategic and had the potential for higher commercial success revealed a weakness in Kemira’s innovation system. The firm was lacking an innovation strategy that those in product development could use as a reference point to ensure projects selected were in fact strategic and this was proving to be highly problematic.

During her presentation, Vaishali will discuss Kemira’s interesting journey to develop an innovation strategy. She will share how Kemira benefited from this process, the challenges that arose along the way and will provide insights and key learnings since the development and implementation of this strategy.

Delegates will leave this presentation with an understanding of:

1. The importance of undertaking the development of an Innovation Strategy
2. How to put together a high energy team to facilitate the development of an Innovation Strategy
3. What was learned, what was tried and/or avoided and what results have been achieved

Small Company, Big Results: Innovating While Implementing

Travis Young, Process Manager
Lundberg Family Farms

Since the company’s inception, Lundberg Family Farms (LFF) has been a pioneer in organic growing practices, producing wholesome, healthful rice products while improving and protecting the environment for generations to come. But in 2011, LFF recognized the need for radical innovation in its consumer products as well, and set about executing on a multi-year plan to design and implement a best-in-class Stage-Gate® idea-to-launch process.

If you are a small to medium-sized enterprise with a vision to take your organization to the highest level, and see innovation and product development as your vehicle to success, this presentation is for you. Join Travis Young as he shares what he and his team have done to research, map out, implement, modify, and evolve a Stage-Gate idea-to-launch process that was both practical and right for their business. Learn what worked, what did not and why Lundberg Family Farms most recently earned top honors for Ag Innovation at the 29th Annual Regional Innovation Awards.

Attendees will leave with an understanding of:

1. The impact of prioritization, project management, and people on performance results
2. Why even for a small-to-mid size enterprise, having a dedicated Stage-Gate process manager is fundamental to success
3. The role VOC and investing in front-end activities has on the outcome of innovation.
"There was a tremendous amount of energy and passion from speakers and delegates around a broad array of topics relating to innovation and product development. It was a very professional and practical environment for discussion and learning."

Matthew Lovell, Vice President, R&D Finance
Advance Medical Optics

Why Implementing a New Idea-to-Launch Process Might be The Greatest Challenge You and Your Company Could Face

Erin Grossi, Chief Economist
UL

The statement ‘Innovate or Die’ has been echoing off boardroom walls for nearly a decade now. Very few would argue against this, yet creating the necessary conditions, adopting the right processes while developing the right capabilities to facilitate innovation continues to be difficult to achieve.

UL’s leadership team deemed innovation as vital to its future. They agreed that adopting, adapting and applying best practices around product development was the key to success. Like other companies, UL experienced many difficulties and challenges when it came time to designing and implementing its new idea-to-launch process. Erin Grossi’s presentation reveals the issues the company had to wrestle with and the path it chose to roll out its new idea-to-launch process.

Erin will discuss why implementing an idea-to-launch process is a major change initiative that can quickly go off track if it is not managed correctly. Plan to attend this presentation to learn how to successfully navigate the white waters of change. See what is needed to ensure those most impacted by the changes involved are kept onboard during and after the roll-out. As research has shown, most of the resources allocated to designing and implementing an idea-to-launch process will be spent on the implementation. Good design is critical and implementation is costly. Both need to be done well to succeed.

Attendees will take away from this presentation:

1. Why knowing the executive perspective from a personal and positional view point is key to success
2. How to best equip your people to ensure their success post implementation
3. What worked and did not work with the implementation and what were some key learning’s

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“What an incredible event. I took away numerous learnings and made many valuable connections. Your entire team is fabulous and did a perfect job in order make it a big success. I plan to be a part of ‘the Stage-Gate family’ for many more years to come.”

Johannes Erler
Vice President Innovation
D. Swarovski & Co.