Featuring Unique Presentations Delivered
By These Innovation Champions:

- Monica Alderson
  Business Services
  Director for Consumer Solutions
  Hallmark Cards

- Frances Mayfield
  Global Innovation Exploration Leader
  Kimberly-Clark

- Mike Francis
  Director - Corporate Product Management
  National Oilwell Varco

- Jennifer McGill
  Group Marketing Director
  Royal Building Products

- Frank Pogue
  Vice President of Marketing and Innovation
  StarKist Co.

- Agnes Lauwagie
  VP of Product Development
  Tervis

- Fred Pottschmidt
  Retired - Director of Portfolio and Program Management
  Procter and Gamble and Kellogg's

The Journey to Innovation System Excellence

FEBRUARY 25-27, 2014
TAMPA, FL

Discover new ways to get better innovation results

Keynote Address by
Robert G. Cooper,
Father of Stage-Gate®
and World-Renowned Innovation Expert

Best Practices Unveiled by
Scott J. Edgett,
CEO and Co-founder of Stage-Gate International

2014 Gold Sponsors

Planview
Where innovation means business™

Sopheon
Dear Innovation Colleague:

Welcome to our 7th 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. Robert Cooper’s keynote presentation. Kick off Day 2 with Dr. Scott Edgett as he shares insights from new research he and his team have been undertaking. 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:

- Hallmark Cards
- Kimberly-Clark
- National Oilwell Varco
- Procter and Gamble, Kellogg’s
- Royal Building Products
- StarKist Co.
- Tervis

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

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

2. Create a competitive advantage for your company with benchmarks and comparative data about product success rates – study results presented by Scott J. Edgett.

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

4. Receive strategic and tactical advice on global innovation trends from the world’s top innovation expert and father of the Stage-Gate process, Robert G. Cooper.

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

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

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

“[Stage-Gate Summit] was one of the best conferences I have ever attended. Dr. Cooper did a great job of facilitating the discussions and connecting the speaker’s presentations.”

David Watson, Pepperidge Farm Inc.
# SUMMIT AGENDA

## DAY ONE – TUESDAY, FEBRUARY 25

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>5:00 – 6:00pm</td>
<td>Registration</td>
</tr>
<tr>
<td>6:00 – 6:15pm</td>
<td>Welcome and Introductions</td>
</tr>
<tr>
<td>6:15 – 7:30pm</td>
<td>Innovation Celebration Dinner</td>
</tr>
<tr>
<td>7:30 – 8:15pm</td>
<td>Keynote Address</td>
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<tr>
<td></td>
<td>Dr. Robert G. Cooper, Creator of Stage-Gate®</td>
</tr>
<tr>
<td>8:15 – 8:30pm</td>
<td>Close of Evening</td>
</tr>
<tr>
<td>8:30pm</td>
<td>End Day One</td>
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## DAY TWO – WEDNESDAY, FEBRUARY 26

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 – 8:15am</td>
<td>Networking Breakfast</td>
</tr>
<tr>
<td>8:15 – 8:30am</td>
<td>Welcome and Introductions</td>
</tr>
<tr>
<td>8:30 – 9:15am</td>
<td>Keynote Address</td>
</tr>
<tr>
<td></td>
<td>Dr. Scott J. Edgett, CEO, Stage-Gate International</td>
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<tr>
<td>9:15 – 10:00am</td>
<td>Case Presentation</td>
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<tr>
<td>10:00 – 10:30am</td>
<td>Networking Break</td>
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<tr>
<td>10:30 – 11:15am</td>
<td>Case Presentation</td>
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<tr>
<td>11:15 – 12:00pm</td>
<td>Case Presentation</td>
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<tr>
<td>12:00 – 1:00pm</td>
<td>Networking Lunch</td>
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<tr>
<td>1:00 – 1:45pm</td>
<td>Case Presentation</td>
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<tr>
<td>1:45 – 2:30pm</td>
<td>Case Presentation</td>
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<tr>
<td>2:30 – 3:00pm</td>
<td>Networking Break</td>
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<tr>
<td>3:00 – 4:00pm</td>
<td>Meet You at the Summit™ Workshops</td>
</tr>
<tr>
<td>4:00 – 4:15pm</td>
<td>Wrap-up and Close of Day Two Sessions</td>
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<tr>
<td>4:30 – 6:00pm</td>
<td>Networking Reception</td>
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## DAY THREE – THURSDAY, FEBRUARY 27

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 – 8:15am</td>
<td>Networking Breakfast</td>
</tr>
<tr>
<td>8:15 – 8:30am</td>
<td>Welcome and Overview of Day One and Two</td>
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<tr>
<td>8:30 – 9:15am</td>
<td>Case Presentation</td>
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<tr>
<td>9:15 – 10:00am</td>
<td>Case Presentation</td>
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<td>10:00 – 10:30am</td>
<td>Networking Break</td>
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<tr>
<td>10:30 – 11:15am</td>
<td>Case Presentation</td>
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<tr>
<td>11:15 – 12:00pm</td>
<td>Panel Discussion on Innovation Leadership</td>
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<tr>
<td>12:00 - 1:00pm</td>
<td>Networking Lunch</td>
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<tr>
<td>1:00 – 1:30pm</td>
<td>Summit 2014!</td>
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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/community' for many more years to come."

**Johannes Erler, Vice President Innovation D. Swarovski & Co."
Traditional product development is depleted. Doing more of the same old product improvements, extensions and modifications – product renovation – won't deliver the sales and profit impact needed to grow the business.

The answer is product and service innovation, but a different type of development than most companies do. The need is for bigger, bolder, better new products – bold innovation – not just traditional product development. Dr. Cooper highlights the five vectors that must be in place for bold innovation, starting with your business’s product innovation strategy – a strategy that focuses your R&D efforts on the engines of growth for the future. It means people working in the right climate that fosters innovation, and a culture with an appetite to invest more boldly. Also vital is creating big ideas that lead to big concepts and big solutions, and driving these ideas to market with the right system – a rapid, flexible, adaptive and agile gating system.

Accessing where your company is in its innovation journey is a critical first step towards executing an innovation framework continuous improvement strategy. Insights and outputs from such management activities will help your organization and its leaders quickly decide what improvements are needed to sustain and improve the firm’s overall innovation capabilities. As part of this discussion, Dr. Edgett will introduce a maturity model analysis tool for the Innovation Framework complete with benchmarks on how best and worst performers are scoring. This will include a scoring approach to measure your own organization along with a guideline on how to interpret your scores. A variety of company examples will also be shared to illustrate how organizations are trying to “raise the bar” within their own companies. Achieving an immediate impact requires tools and techniques that leaders can quickly employ and act upon. Score you firm, assess the results and make decisions to achieve the outcome needed to take innovation at your firm to the next level.
INNOVATION ISN’T JUST ABOUT PRODUCT DEVELOPMENT, IT’S ALSO ABOUT HOW WE INNOVATE

Monica Alderson, Business Services Director for Consumer Solutions - Hallmark Cards

Creativity is at the heart of Hallmark’s business and has remained unchanged over the 100+ year existence of this global greeting card leader. While creativity has contributed to the generation of 19,000 new cards and products per year, this could not overcome one important fact – people are opting to send fewer cards and connect in other ways. For a business where greeting cards continue to be very important, changes were necessary.

Innovating new concepts became an added dimension at Hallmark to address this market reality. The need to generate new high quality product ideas, screen and process them efficiently and effectively to launch potential winners became vital to the company. Hallmark faced this challenge head on by ensuring Consumer Insights, Stage-Gate® best practices, and supporting tools were fully aligned and in synch.

Join Monica Alderson and learn how embarking on a new approach to product development has allowed Hallmark to build a market-friendly and robust innovation pipeline. Experience first hand what Hallmark has learned along the way and what they recommend to others whose markets are being changed forever by major disruptions.

THE IMPACT OF VOICE-OF-CUSTOMER RESEARCH ON ELEVATING INNOVATION PERFORMANCE & EFFECTIVENESS AT KIMBERLY-CLARK

Frances Mayfield, Global Innovation Exploration Leader - Kimberly-Clark

When your customers have come to expect great innovations and your company is demanding game changing new products be developed and launched, incrementalism just will not do. For decades Kimberly-Clark has been viewed as the company that “could and did” and leadership was keen to sustain and lever this reputation through increasing the share of revenue coming from its innovations. Same old, same old would not cut it as management not only wanted to increase revenue from innovation but also the number of “New to World” and “New to Kimberly-Clark” products being launched. Taking a step back the firm's product development team gave great thought to how best to meet this challenge and came to the conclusion that they needed to become experts executing and managing a comprehensive voice–of-customer (VOC) centric front-end of innovation strategy. What has resulted from this journey towards VOC excellence is nothing short of fantastic with a large number of ideas emerging from this program and the prioritized ideas put into Kimberly-Clark's comprehensive Stage-Gate process. Of these ideas, several are New to World or New to Kimberly Clark Product Innovations.

Make sure you are front and center at Stage-Gate Innovation Summit 2014 to spend time with Frances Mayfield as she tells the story about how Kimberly-Clark Corporation undertook a journey to develop its VOC capability, what was tried, what worked and did not, and what was learned during the journey. Frances will also be joining our speaker's panel so there will be plenty of time to explore this critical area with Frances and the panel.

“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 Advanced Medical Optics
How a Need for Ideas Lead to A Complete New Approach to Managing and Executing Innovation and ... Why

Mike Francis, Director - Corporate Product Management - National Oilwell Varco

An idea about idea generation embarked National Oilwell Varco on a journey that has now completely changed the way NOV innovates and launches new products. The results four years into this project speak for themselves. What started out as a mission to increase the number and quality of ideas entering the NPD pipeline has lead to the creation of a global wide Stage-Gate idea-to-launch process, portfolio management system and culture passionate about achieving innovation excellence.

In the past, less than 10% of ideas were killed prior to launch now over 70% are evaluated and removed from the portfolio well before entering the costly development stages. With a pipeline now brimming with over 2000 ideas at any one time, elevating the innovation capability of thousands of employees became paramount to ensure the right work was being undertaken, in the right way, at the right time. This has allowed Project Teams and Decision Makers to achieve a much higher level of confidence with each other and is ensuring the best ideas can win and be advanced as far as their merits will allow. The journey has not been easy for those involved but the learning's along the way have been priceless and have positioned NOV to truly leverage its global strengths and internal competencies.

Learn how NOV was able to successfully implement a Stage-Gate process within 13 different business units and change the innovation culture within the company. See first hand how Mike Francis was able to skillfully integrate automation with NOV's innovation system to create at all critical junctions: idea generation, idea-to-launch, innovation strategy and portfolio management, a process that really works. Hear what was tried, what worked, what was learned, and what is recommended.

Pragmatic Approach to Adapt, Adopt and Apply to Achieve and Sustain Stage-Gate® Idea-to-Launch Success

Fred Pottschmidt, Retired - Director of Portfolio and Program Management - Procter and Gamble and Kellogg’s

Twenty plus years of Stage-Gate Idea-to-Launch and Innovation Diamond Management experience has taught Fred Pottschmidt that while many paths can get you to the same place, finding the fastest and most efficient can be a real challenge. In a world that is demanding more and more from product developers, is increasingly fickle when it comes to brand loyalty, and is far less forgiving of innovation mistakes, seamless cross functional execution is proving to be key for achieving and sustaining success. From being part of a team that first introduced Stage-Gate and Innovation Diamond Management to business units within Procter & Gamble, to most recently transitioning Pringles from P&G to the Kellogg Company, these experiences have proven just how important mastering the 3A’s – Adapt, Adopt and Apply – of innovation excellence are to sustaining idea-to-launch success. But what exactly should you be adapting, adopting and applying and why? Attend this presentation to learn the answer to this question and leave with a wealth of pragmatic approaches to master the 3A’s of innovation excellence. See first hand how Fred Pottschmidt's 20 + years of experience developing and managing Stage-Gate Idea-to-Launch and Innovation Diamond Management Systems has evolved with time and more importantly learn why.

The Profound Impact Implementing Stage-Gate & Portfolio Management Has Had on Innovation Performance at Royal Building Products

Jennifer McGill, Group Marketing Director - Royal Building Products

Since the founding of the company in 1971, Royal Building Products (RBP) has been recognized as a leader in developing high quality innovative building products. Great new ideas that were game changers in the building products market typically came out of a RBP plant. However, being first to market did not seem to garner all the immediate and long term rewards. In 2009 new management took over, they looked for ways
to leverage RBP’s reputation and experience in new product development and enhance success in the marketplace. Not wanting to lose its entrepreneurial edge, but keen to leverage its innovation competitive advantage, RBP embarked on a major project to design and implement a Stage-Gate® Idea-to-Launch and Portfolio Management process. Business results since beginning this journey in 2009 have been nothing short of impressive. Since 2009, RBP launched 29 highly impactful products and new product sales have grown from 1% of total sales in 2009 to 13% in 2013.

Jennifer McGill will walk you through the steps needed to achieve both a transplantable platform and sustainable innovation model. In her presentation, Jennifer will describe how RBP went about designing, implementing and sustaining a state-of-art Stage-Gate Idea-to-Launch and Portfolio Management processes. This implementation not only dramatically impacted the processes, project and business metrics results but has enabled the firm to stay true to its entrepreneurial roots. Today RBP staff speak a common language of innovation that has led to truly innovative products and laid the seeds for what should be an impressive and sustainable future.

**FISHING WHERE THE FISH ARE**

*Frank Pogue, Vice President of Marketing and Innovation - StarKist Co.*

Just like StarKist wants tuna that tastes good, they also want innovation that builds the business. Over the past number of years however, getting a winning product to market was proving as elusive as Charlie the Tuna getting hooked. Three years of missed project commitments and failed launches required a change in StarKist’s innovation mindset, processes, and organizational structure.

With a revamped Stage-Gate process forming the core, StarKist got back to basics and built an innovation model that is once again growing the business and delighting consumers. Initial results post-implementation suggest competitors are going to find it even harder to catch Charlie and the StarKist team.

Attend this presentation to learn what was missing with innovation at StarKist and hear directly from the firm’s innovation and product development executive on what he and his team did to turn the ship around.

**LESSONS LEARNED ON WHAT NOT TO DO WHEN DESIGNING AND IMPLEMENTING A STAGE-GATE SYSTEM**

*Agnes Lauwagie, VP of Product Development - Tervis*

Several years ago, Tervis undertook an aggressive initiative to implement a Stage-Gate Innovation System to meet the need of this fast-growing company to develop and launch new and innovative products. As the company grew, its leaders recognized the value of adopting a more structured product development approach and process to help sustain and facilitate growth. Embarking on this major journey what Tervis learned quickly was that a ‘one size generic process’ does not fit all. The implementation, in short, was a failure.

Unfortunately, the highway to innovation excellence is littered with the wrecks of idea-to-launch processes that have been battered and abandoned after failing to deliver upon their promises. In the case of Tervis, it was apparent that the designed and installed process was not compatible with the product development needs and realities of the firm or industry itself and was clearly an impediment to success. Taking a step back, Tervis re-evaluated the project and recognized it needed to make some significant changes. Enter Agnes Lauwagie a 10 year Tupperware product development veteran and experienced Stage-Gate practitioner. Agnes joined Tervis with a mandate to fix and re-launch its idea-to-launch process and to put Tervis on a path towards achieving overall innovation system excellence. Re-implementations are never easy, and for Tervis it was no different. Agnes will share her experience and insights as the team she put together rolled up its sleeves to re-design the process, break down barriers to re-gain support, and then re-implement. Learn why the first implementation failed, to avoid making the same costly mistakes, and then learn what Agnes and her team did to ensure the re-implementation would be successful, so your Stage-Gate implementation will also be a huge success!

“You cannot manage what you do not measure and what gets measured gets done.”

*Dr. Robert Cooper and Dr. Scott Edgett, Founders of Stage-Gate International*
Stage-Gate®
Innovation Summit 2014
FEBRUARY 25-27, 2014 - TAMPA, FL

Register today! • +1-905-304-8797 • www.stage-gate.com

Location and Accommodations:
The Summit will be held at the Renaissance Tampa International Plaza Hotel in Tampa, FL. Reservations can be made by calling +1-800-228-9290 or +1-813-877-9200; mention the Stage-Gate Summit for preferred room rate. Please make your reservations early as this rate is only available for a limited time.

Program Fee: $2695 US/person.
Registration includes attendance to the Summit beginning Tuesday, February 25, 2014 at 5:00pm until the conclusion on Thursday, February 27 at 1:30pm. Also included in the fee are the Summit manual and toolkit, Innovation Celebration Dinner on February 25 at 6:00pm, breakfasts, luncheons, refreshment breaks and the Evening Networking Reception on Wednesday, February 26 at 4:30pm.

Send Your Team:
Shared experiences improve productivity and contribute to common goals. Groups of 3 or more may deduct $200 per person.

Reserve Your Team Table:
$9995 per team table provides 5 registrations (a savings of $3480), plus premium table location and reserved table marker to enhance your experience.

No Risk Guarantee:
Your satisfaction is guaranteed or your money back!

Cancellations/Substitutions:
Written cancellation will be accepted up to 10 business days prior to the event. For complete details visit: www.stage-gate.com/Summit_2014/.

FebruAry 25-27, 2014 - TAMPA, FL

ABOUT STAGE-GATE INTERNATIONAL
Stage-Gate International is the world’s leading full-service provider of solutions which enable organizations to improve their Product Innovation and Portfolio Management capabilities. A globally recognized and trusted brand, Stage-Gate International accelerates client success with strategic advisory and transformation services, leading-edge products, best-selling publications, first-rate seminars and Stage-Gate® Certification. Clients include more than 5000 organizations of all sizes across all industries.