

IRI 2026

INNOVATORS SUMMIT

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Getting the Right Mix of Projects – and Measuring It

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SMARTORG[®]

IRI 2026

**INNOVATORS
SUMMIT**



SmartOrg: 25+ years in strategic portfolio and innovation management

Pharmaceuticals

- Teva Pharmaceuticals
- Inspire Pharmaceuticals
- KV Pharmaceuticals
- Jazz Pharmaceuticals
- Catalent



Medical Device

- Stryker Neurovascular
- Philips (Respironics)
- Varathon
- Zimmer
- Medtronic



Agriculture

- Bayer Crop Science
- Pioneer Seeds
- DuPont Crop Protection
- Corteva Agriscience
- Christensen Farms



Materials

- Rogers Corporation
- DuPont
- Hexion
- GAF



Semiconductor

- Intel
- SanDisk
- Applied Materials
- Orbotech
- Texas Instruments



Equipment

- Ingersoll-Rand
- Eaton
- Scholle Packaging



Energy

- ExxonMobil
- Chevron



Consumer Products

- SaraLee
- VF
- Kimberly Clark



Communications

- Sprint
- T-Mobile
- Cisco
- Smiths Interconnect



IT

- Apple
- Google
- Microsoft
- HP



Other

- Boeing
- Sony Pictures
- The Nature Conservancy



Find, Fuel and Fund your best opportunities with SmartOrg's Decision Intelligence software

Innovation Navigator®

Accelerate the path from risk to upside

- Work on what matters
- Build the business case
- Win over stakeholders
- Manage inflection points



Portfolio Navigator®

Where and how much to invest

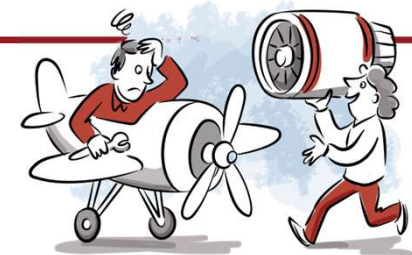
- Evaluate and compare opportunities
- Cut through the clutter
- Find hidden upside
- Make more objective decisions



Services

Partners propelling progress

- Consulting
- Training
- Implementation



How do you explore the upside and minimize the downside risk in your innovation opportunities?

Typical innovation process



Problems/
opportunities

Actionable
ideas

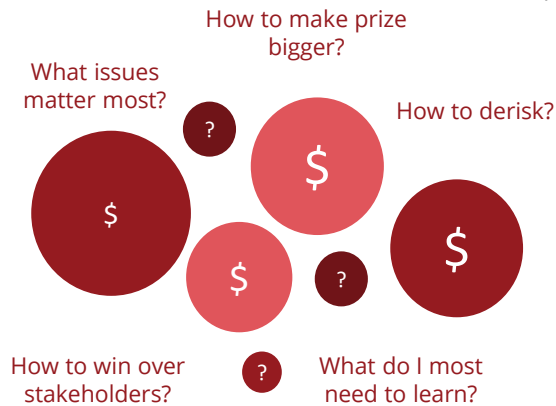
Big, low-risk
opportunities

Implemented
innovations



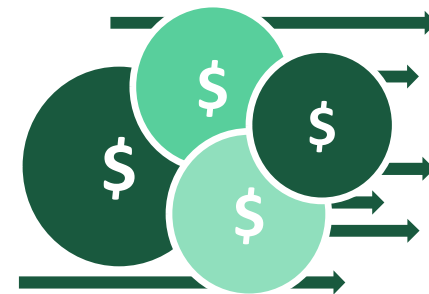
SCOUTING NEW AREAS

Find ideas worth seriously considering



NAVIGATING TRICKY TERRAIN

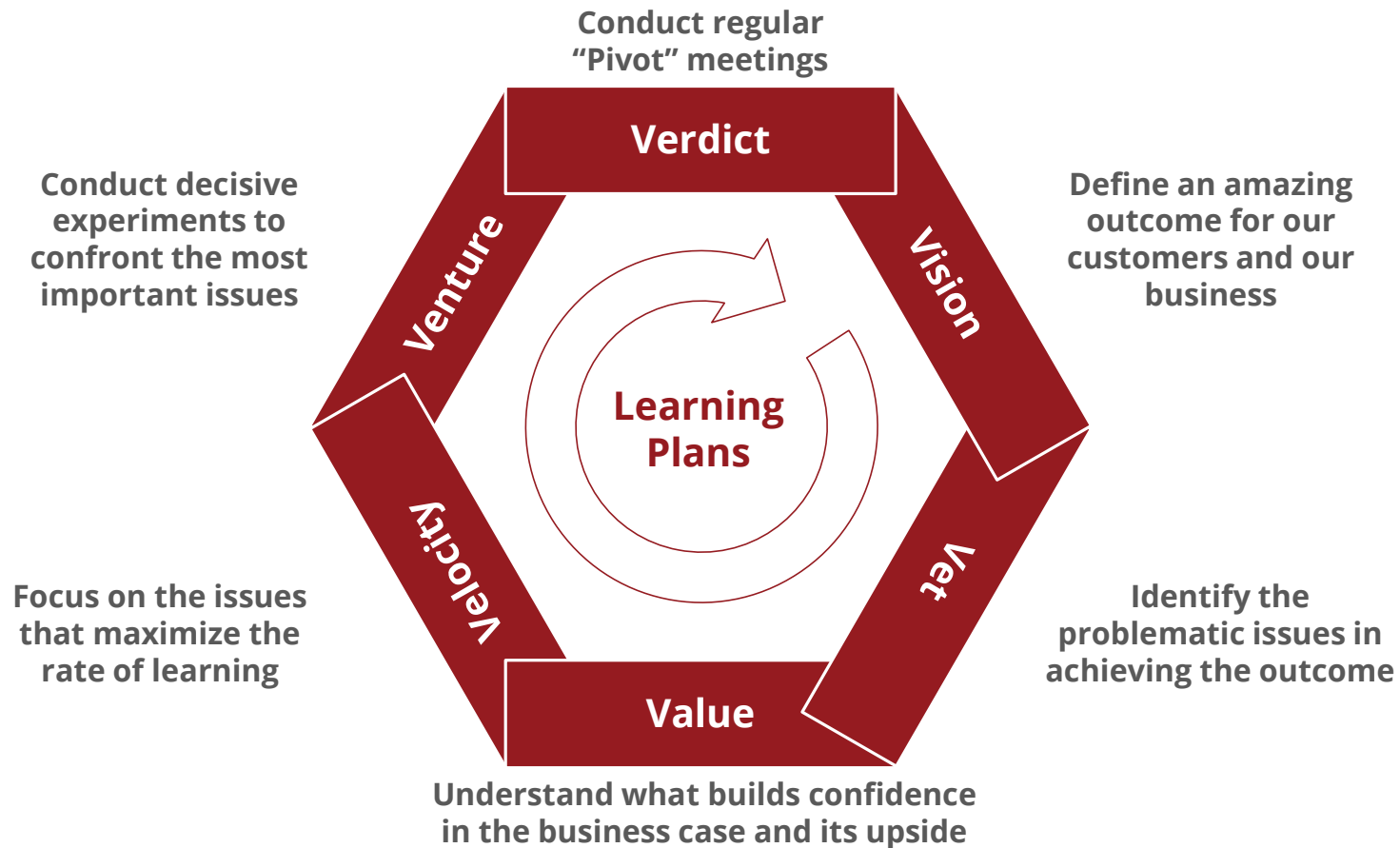
Drive upside, reduce downside, build confidence



PURSUING A CLEAR PATH

Execute through stages, phases, gates, approvals, etc.

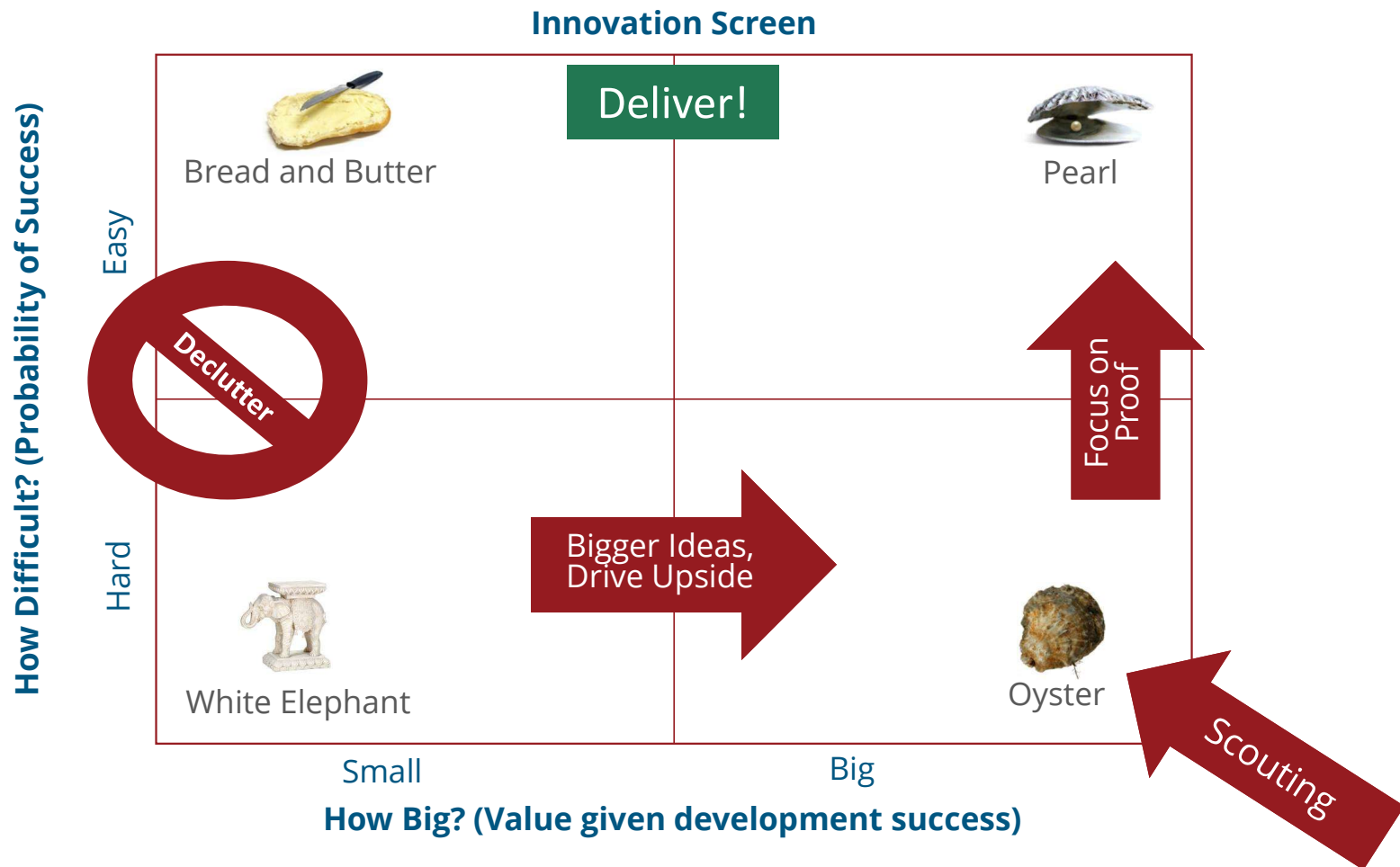
Make Learning Plans the center of Incubation



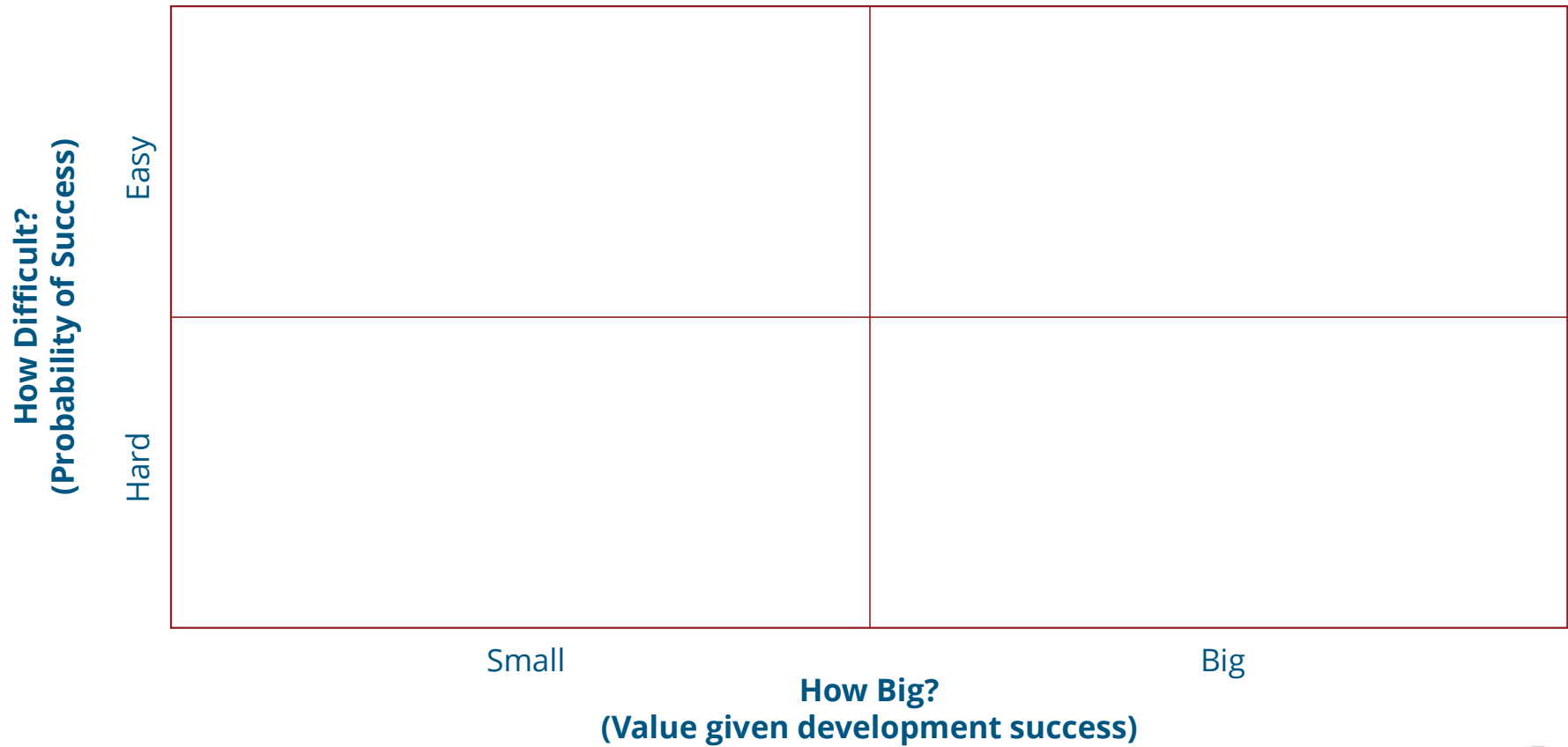
Workshop objectives

- **Advance our collective knowledge on managing an innovation portfolio**
- **Have an “a-ha!” moment to upgrade your approach**
- **Make connections and build community**

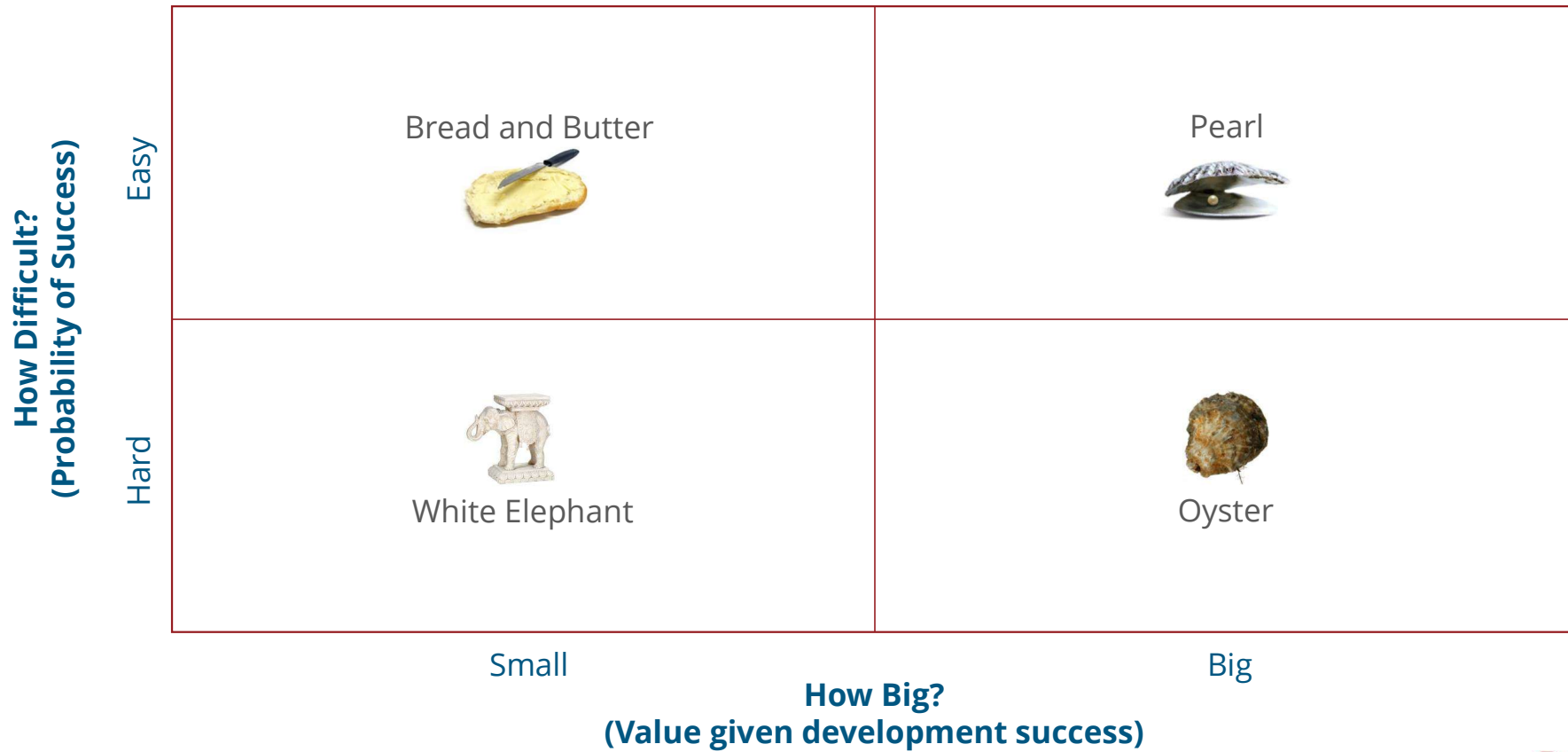
Four approaches to improving your portfolio



Introducing: The Innovation Screen

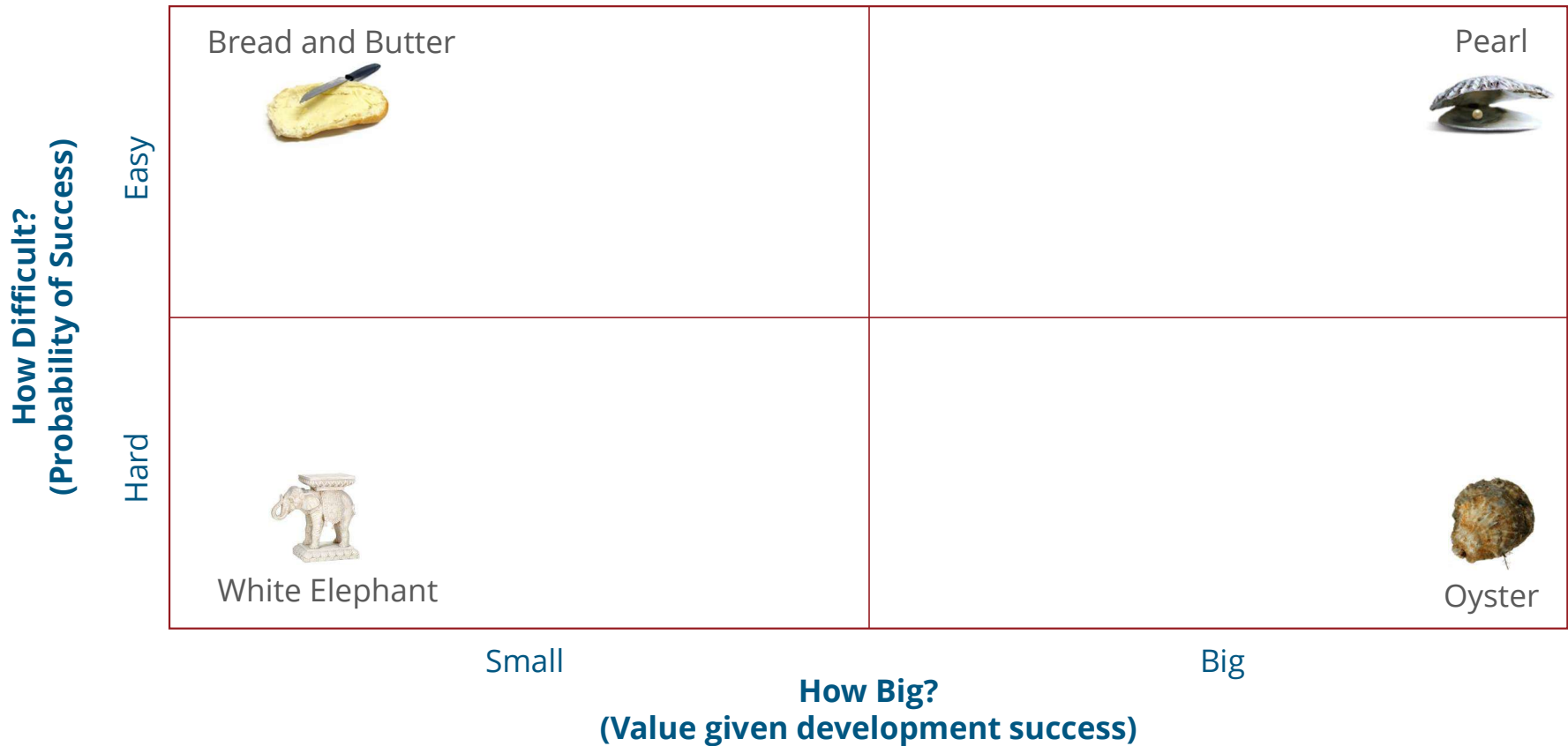


Introducing: The Innovation Screen



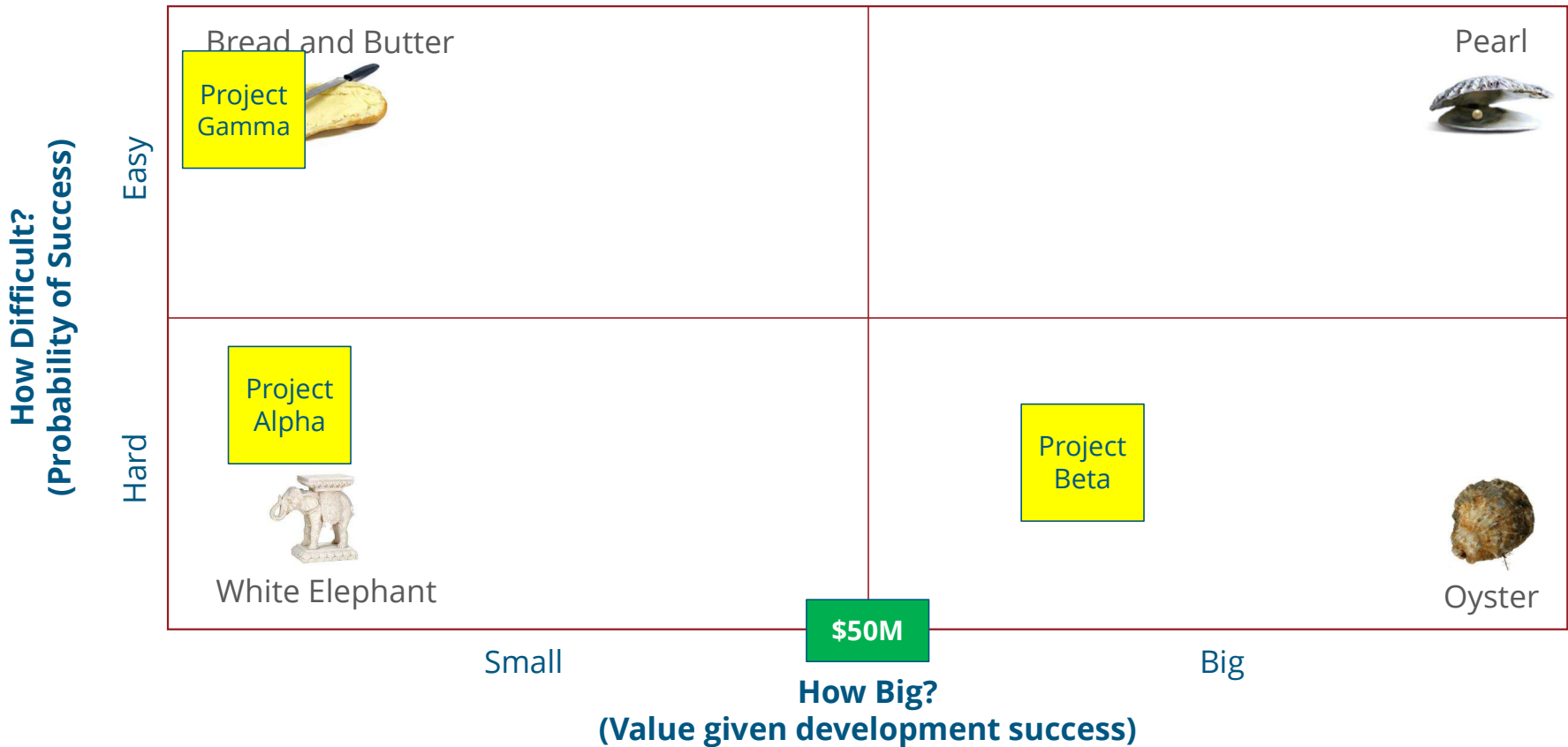
Step 1: Define “big” for your organization

Step 2: Place 1-2 projects on the Innovation Screen



Step 1: Define “big” for your organization

Step 2: Place a few projects on your Innovation Screen



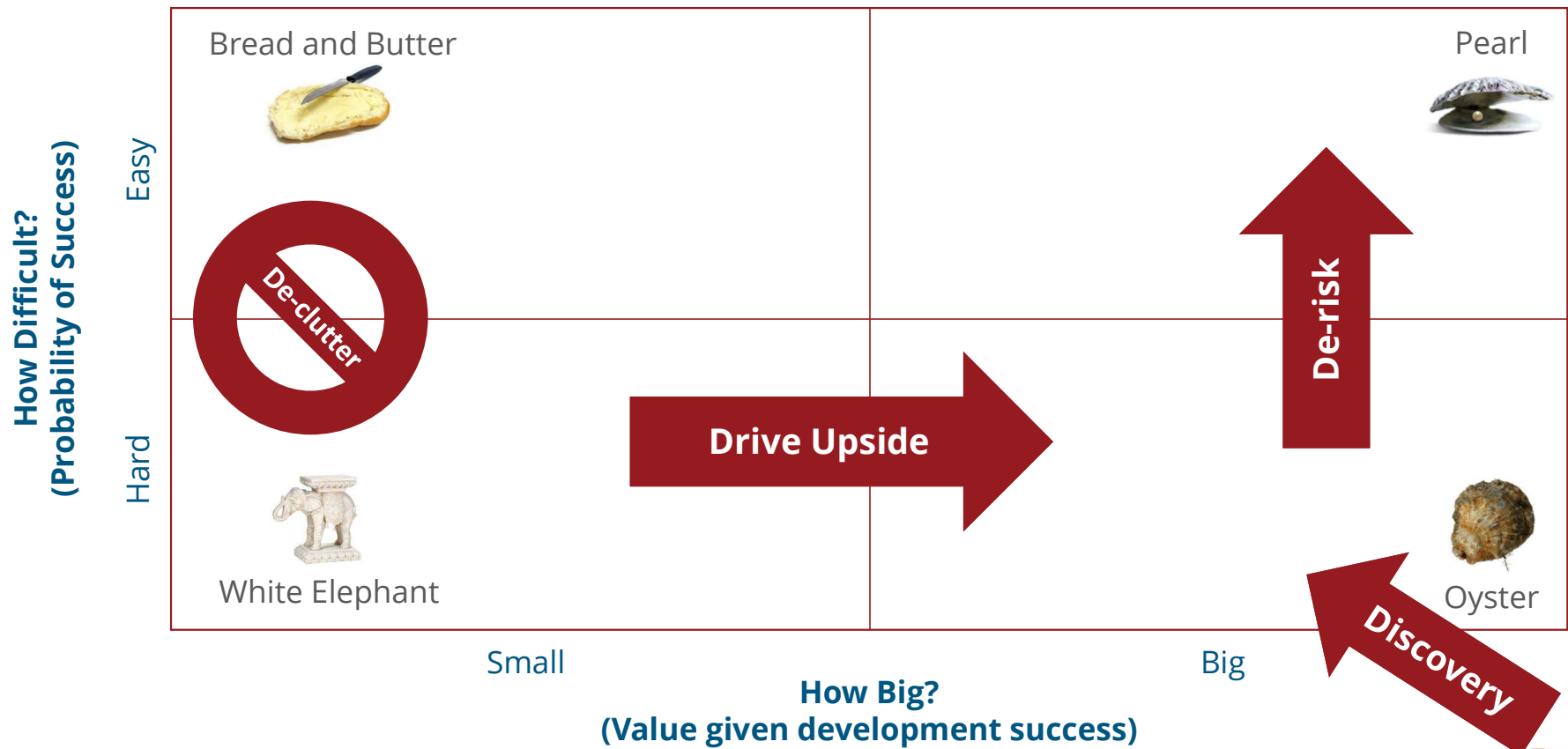
Let's build a common portfolio

- 1. Grab a stickie note for one of your projects and give it a name**
 - A. Favorite sports team, celebrity, band, animal, etc.**
- 2. Place it on the common portfolio in the same relative position on your portfolio**

How would you improve this portfolio?



Four approaches to improving your portfolio



Today we'll focus on the existing "hard" projects

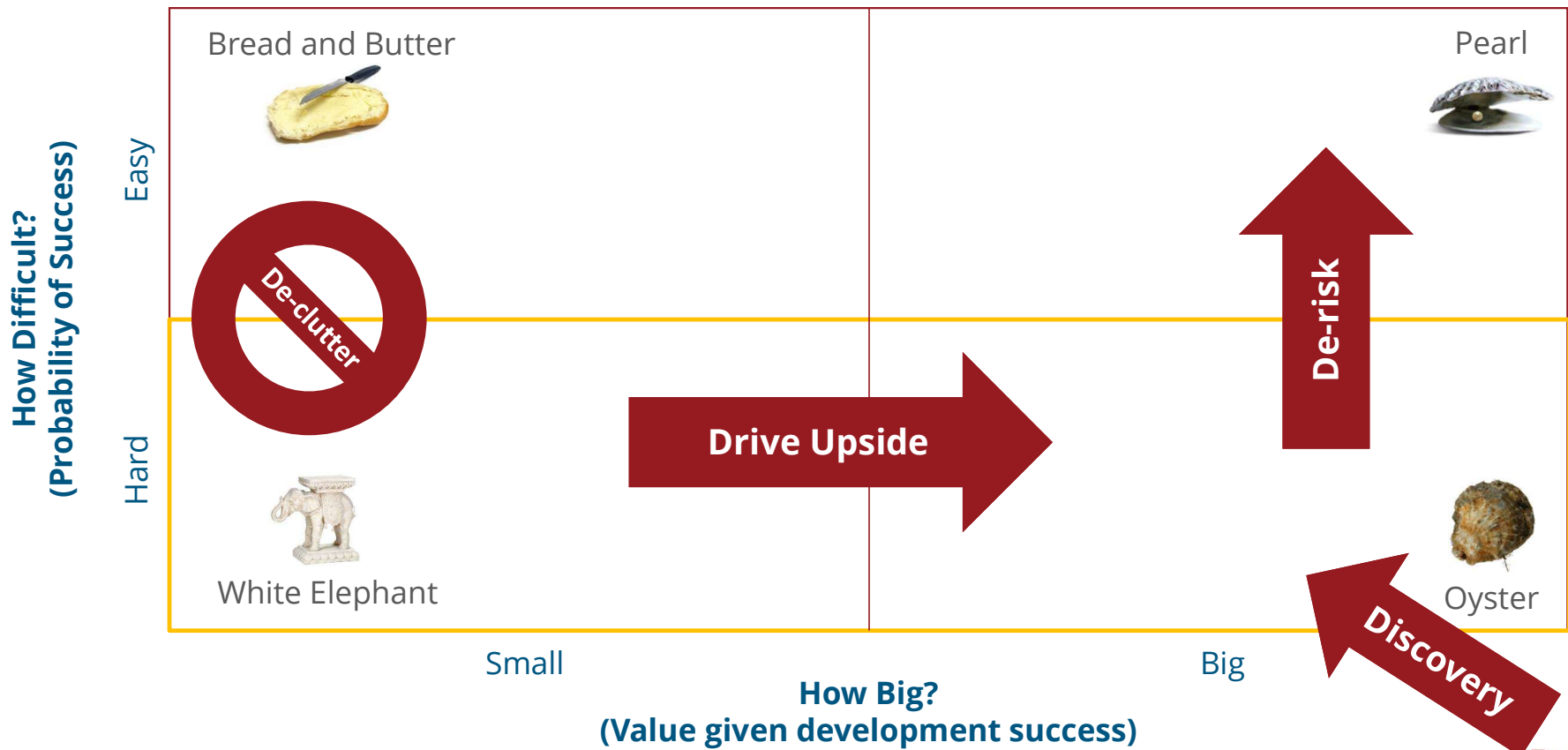


Table exercise: For assigned topic (White Elephants or Oysters), discuss:

- 1. What's challenging about managing these projects?**
- 2. What goes wrong when you manage them like delivery projects?**
- 3. What management approaches are needed?**
- 4. What metrics should be used?**
 - A. Project-level?
 - B. Portfolio-level?

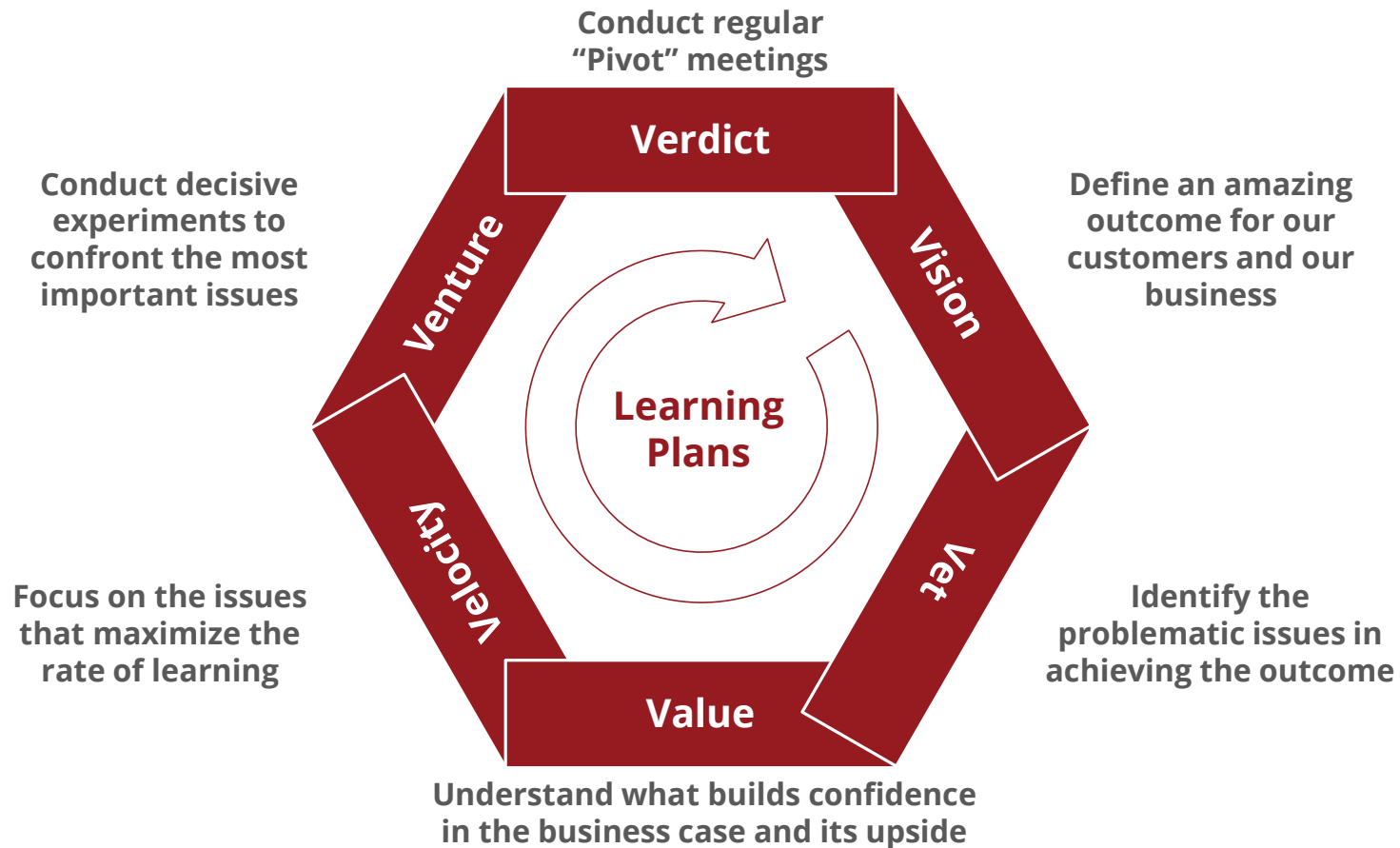
Read-out: Share a unique key insight

- A. Challenges?
- B. What goes wrong when managing like delivery?
- C. Management approaches?
- D. Metrics? (Project/Portfolio)

Key takeaways

What have you heard here today that, if adopted, would improve your portfolio?

Make Learning Plans the center of Incubation



Join us for a demo of Innovation Navigator

Register:

<https://bit.ly/4sLjzwx>



Thank you!

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