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Attendee Resource Packet

May 2, 2024

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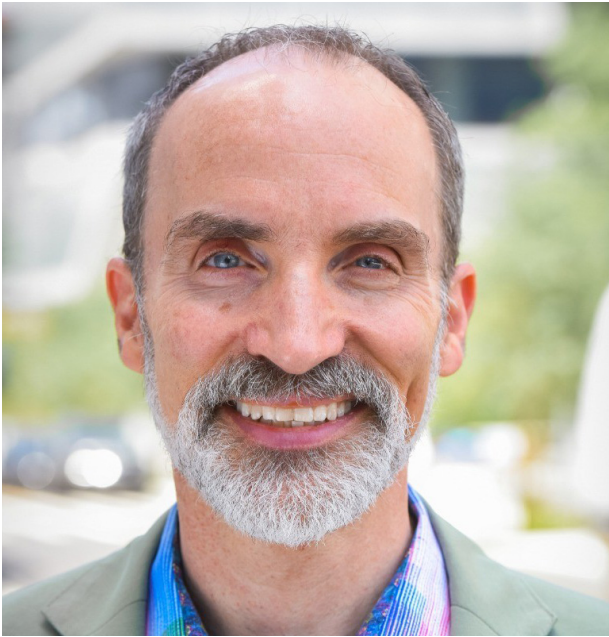


The 3rd annual Wisconsin Digital Symposium is your gateway to mastering digital transformation and product-led success in the face of new challenges and opportunities. Thanks for being with us.

This resource packet will provide some introductory content for our time together and give you a better sense of who will be in the room with you. Please read on. Our work matters because you matter. Unlocking the potential of our organizations with digital innovation requires your skills and focus. We are glad you are with us. Together, we can meet the future more ready and confident.

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David Rogers is the world's leading expert on digital transformation, faculty at Columbia Business School, and bestselling author. He helps companies around the world transform for the digital age, advising Microsoft, Google, Citigroup, Toyota, Merck, Cartier, NC Bank Saudi, and more. And he is our opening keynote.

David has provided the link below for our attendees. This link will subscribe you to his newsletter, where he writes weekly articles on digital transformation and strategy topics.

[Learn more and subscribe](#)

"Free" subscribers receive a downloadable chapter of his new book *The Digital Transformation Roadmap: Rebuild Your Organization for Continuous Change* (Note: if you will be with us in person, you will receive a copy of the book. This link is especially useful for online attendees.)

"Paid" subscribers (with 30-day free trial) get two book chapters and 24 downloadable tools from David's last two books!

The DX Roadmap: A Brief Introduction

by David Rogers | August 22, 2023

In the seven years since publishing [my last book](#), I have focused my work on understanding the differences between the large majority of businesses that are struggling and losing ground in their efforts at digital transformation vs. those established businesses that are driving real transformative growth and change through their digital efforts.

The good news is that we now have many examples to learn from in terms of digital transformation (DX) success: Disney, Walmart, Air Liquide, Mastercard, Acuity Insurance, the New York Times Company, National Commercial Bank Saudi, and many others.

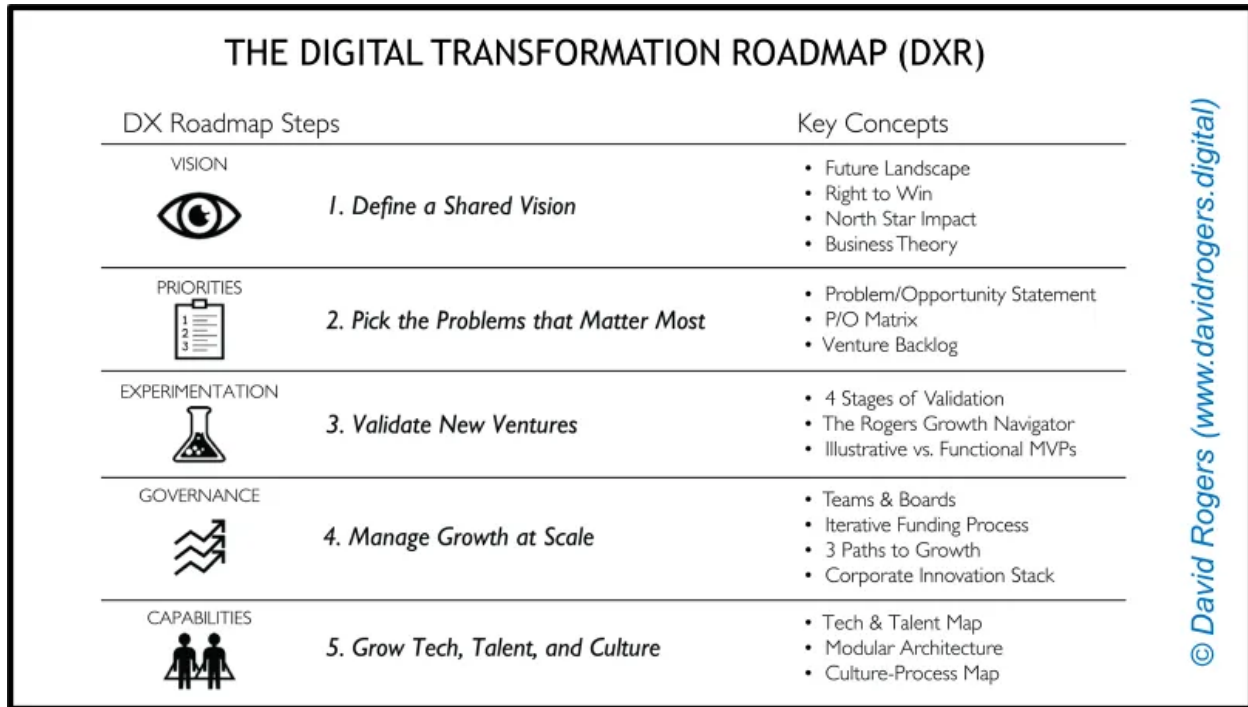
In my new book, [The Digital Transformation Roadmap](#), I introduce a practical roadmap for any leader attempting to transform their organization for the digital era.

The **DX Roadmap** is a framework of five iterative steps to navigate your own path to DX success for your business.

I developed the DX Roadmap based on my experience advising CEOs and Chief Digital Officers at companies in varying industries and locations and with different sizes and ownership structures, as well as the experience of scores of other companies that I have followed in my research.

The Five Steps

Each of the five steps of the DX Roadmap relates to one of the key barriers to effective digital transformation which I described last week: *vision, priorities, experimentation, governance, and capabilities*.



It is important to understand that the steps of the DX Roadmap are not like steps on a ladder that you climb once and leave behind. Although there is a sequence to starting them (*begin Step 1, then begin Step 2...*), the work of each step continues as you advance to the others.

DX is not a finite project. Its change will be iterative and cumulative as you deepen and broaden the transformation of your organization over time.

With that said, let's take a look at the five steps.

Step 1. VISION: Define a Shared Vision

In the first step of the DX Roadmap, your goal is to define a shared vision of the digital future for your organization.

This starts with describing the future landscape of your industry, shaped by digital forces. It includes defining the unique advantages that give you a right to win in this digital future. It means choosing a North Star goal for the impact your work will have on customers and others. And it means spelling out a business theory of how you will capture value and earn a return on your digital investments.

When done right, this step will enable your business to lead proactively rather than react to external trends, to invest only in digital initiatives where you have a competitive advantage, to clearly define the business impact of digital investments, and to win the backing of investors as well as the employees who will drive your digital agenda forward.

Step 2. PRIORITIES: Pick the Problems That Matter Most

In the second step of the DX Roadmap, your goal is to define the strategic priorities that will guide your digital growth agenda.

This starts with looking at strategy through the twin lenses of problems to solve and opportunities to pursue. This step uses a variety of tools (such as customer journey mapping and interviews) to identify the most valuable problems and opportunities for your business. And it uses problem/opportunity statements to define strategy and spark ideas for digital innovation at every level of your enterprise.

Done right, this step will enable you to provide direction to teams across your organization, focus digital on solving problems and not adopting technologies, ensure digital delivers growth, and accelerate change with new ventures at every level and in every department.

Step 3. EXPERIMENTATION: Validate New Ventures

In the third step of the DX Roadmap, your goal is to rapidly test new digital ventures in order to validate which ones will create value for your customers and the firm.

The step starts with thinking like a scientist: defining your hypotheses and designing experiments to test your business assumptions. It uses iterative metrics to gather data directly from customers. It uses iterative prototypes and minimum viable products (MVPs), each designed to answer a specific question. And it uses a new model, the Four Stages of Validation, to sequence learning and guide any venture on its path from new idea to business at scale.

When done right, this step will enable your business to test many new ideas and learn which work best, make decisions based on data from customers, keep your failures cheap and your bias toward risk taking, and iterate quickly to build innovations with value at scale.

Step 4. GOVERNANCE: Manage Growth at Scale

In the fourth step of the DX Roadmap, your goal is to design governance models to scale digital growth across the enterprise.

This means defining rules and decision rights for small, multifunctional teams; creating structures (like labs, hackathons, and venture funds) that provide flexible pools of resources; establishing boards that green-light new ventures and oversee iterative funding; and managing three paths to growth—inside the core, partnered with the core, and outside the core—with the right rules and governance for each.

When done right, this step will enable you to empower teams to drive growth, allocate resources flexibly, quickly shut down ventures that are not working, and manage a steady pipeline of digital innovations both in your core and beyond it.

Step 5. CAPABILITIES: Grow Tech, Talent, and Culture

In the last step of the Roadmap, your goal is to invest in the technology, talent, and culture that will be critical to your digital future.

This includes investing in technology with a modular architecture, data assets, and effective governance. It means growing your digital skills by managing the talent lifecycle from hiring to training, retaining, and exiting. It means defining the culture—shared mindsets and behavior—that will support your strategy; communicating that culture with stories and symbols; and enabling that culture through everyday processes.

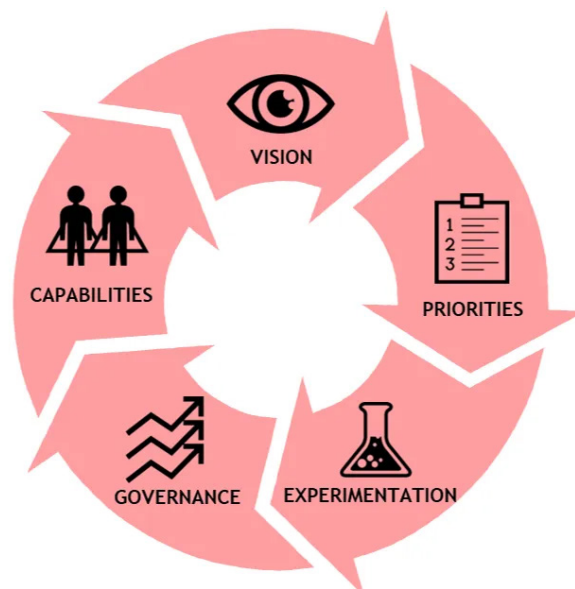
When done right, this step will enable your business to integrate tech across silos and partners, use data to provide a single source of truth to managers, give teams the skills to build their own digital solutions, and empower employees at every level to drive bottom-up change.

Putting the Roadmap to Work

Because digital transformation must happen at every level of the organization, the DX Roadmap is *designed to zoom in or zoom out*. Each step is applicable whatever your role—whether you are CEO, CDO, directing digital for a business unit, leading a functional team like human resources, or designing a new digital product.

Lastly, the DX Roadmap is *designed to be started quickly* so that you can learn by doing and see immediate results.

THE DIGITAL TRANSFORMATION ROADMAP



Remember, real DX is iterative in nature. Once started, the five steps will repeat, overlap, and support one another. As you progress, your transformation will both deepen and broaden in scope. The main point is to get started and to learn by doing. Don't wait for a five year plan; start *something* in ninety days!

DX is not about spending months planning a multiyear process and then faithfully carrying it out. It is about starting the first steps now and learning as you go.

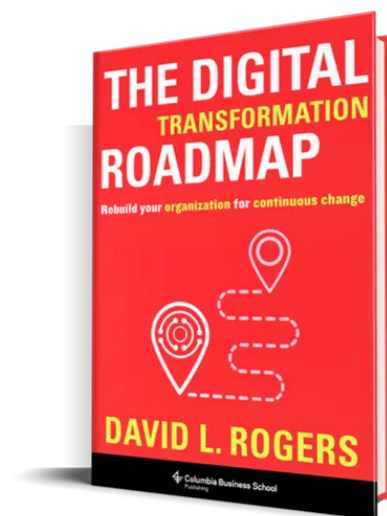
In future issues of this newsletter, I will dig into more of the specifics of the five steps of the DX Roadmap. In the book, each step is explored in great detail and illustrated with real-world case studies from a range of industries: banking, insurance, retail, consumer goods, media, telecom, technology, automotive, energy, health care, nonprofit, industrial manufacturing, and even container shipping.

Keep in touch

I'd love to hear your thoughts on what you have seen that had the most impact in a truly successful digital transformation that you have experienced.

[You can subscribe to David's newsletter here.](#)

[Learn more about his book *The Digital Transformation Roadmap* here.](#)



Note: All onsite attendees of this year's Wisconsin Digital Symposium will receive a free copy of this book!



Martina Lauchengco loves working with early-stage startups, which is why she is a partner at Costanoa Ventures, where she works with startups every day. She also loves sharing the lessons learned from 30 years in tech. It all started at Microsoft—as a product manager on Word and Office—before working at Netscape and watching both companies transform the industry. Martina teaches what she’s learned as a partner at Silicon Valley Product Group and at UC Berkeley’s Graduate School of Engineering, where she is a long-time Lecturer. Her first book, *LOVED: How to Rethink Product Marketing*, is currently a #1 New Release on Amazon.

LOVED: How to Rethink Marketing for Tech Products explains the four fundamentals of product marketing and how to do each better. Filled with stories from the front-lines of early startups and the world’s top tech companies—including Adobe, Apple, Dropbox, Microsoft, Netflix, Salesforce—*LOVED* gives you concrete tools and techniques to improve marketing by starting with stronger product marketing.

Read *LOVED*’s Introduction below to get a taste of the book. *Note: All onsite attendees of this year’s Wisconsin Digital Symposium will receive a free copy of this book!*

Introduction: My Story

Excerpt from *LOVED: How to Rethink Marketing for Tech Products*
by Martina Lauchengco

Getting Flamed by Bill Gates

When Blue walked through my door, I knew it couldn’t be good. The only other time the Word Business Unit manager sat down in my office was back when he was doing his whistle-stop get-to-know-you tour. He got right to the point.

“I just got an email from Bill Gates. It said, ‘Word for Mac is depressing Microsoft’s stock price. Fix it.’ So, I’m here to ask, what are we doing?”

I was a young product manager for Word for the Mac, and it was the first time I’d been trusted with a major product. A few months earlier, the newest version of Word for Windows released, delivering against a strategic plan that was years in the making. Up to that point, the Windows and Mac versions had different code bases, features, and release cycles. This new version used a single code base for both, meaning for the first time, the two would have the same features and ship simultaneously.

But the Mac version was late – very late. Each day it slipped past the Windows release was viewed as a public failure. We rushed to get the product done, deciding its new features were worth a hit in the product’s performance.

Mac users HATED it. It was so slow, in their eyes, it felt barely usable. And they missed their more Mac-centric features.

Back then, Word and Excel were the most significant productivity products on the Mac. Apple was a beleaguered company, and if Word didn’t work well, there was real fear in the Mac community that it could be the death knell of Apple.

Newsgroups spewed vitriolic hate at Microsoft. When I posted to earnestly defend our decisions, they directed that hatefulness at me. I would sometimes end my days in tears, wondering, “Don’t people realize I’m a person?”

The only way to “fix it” was to improve performance and the features Mac users cared about most. We released a significant update along with a discount voucher and a letter from me apologizing to every registered Mac user.

It was a humbling experience. But it taught me an important lesson: the market determines the value of a strategy. And even at a company as good at strategy as Microsoft, things can still go really wrong when a product goes to market.

Start with the End in Mind

Although it didn’t get everything right all the time, Microsoft did do a lot of things right much of the time. Working there was like going to the university of software because you got to see so many products succeed and fail in so many different markets. In every case, Microsoft lived by the disciplined application of objectives, strategy and tactics, always starting with the end in mind. Beginning my career there deeply shaped me.

Every move, even small ones, mapped to Microsoft’s strategic objectives. I arrived at Microsoft just as it was preparing to launch the first integrated version of the now ubiquitous Microsoft Office suite. In all our product collateral, we removed mentions of “desktop productivity applications” – the old category name – and instead used “integrated office suites.” Ever playing the long game, it was part of shifting the category, reinforcing the notion that Office was the standard-bearer.

I watched how a systematic approach of combining great products with equally great market strategy killed our two biggest competitors at the time: WordPerfect for word processing and Lotus 1–2–3 for spreadsheets. Just a few years prior, these best-of-breed competitors seemed untouchable. Their failure lay in focusing on features versus building and marketing a bigger vision.

I was a product manager on the Office team when a small pocket of the industry was starting to focus on a relatively new thing called the World Wide Web.

The company that was changing the game, however, wasn't Microsoft. It was Netscape, the originator of the commercial Internet browser. Its threat was so significant, Bill Gates sent an email to the entire company saying no other competitors mattered right now.

That email came just after I had accepted a job as a product manager at Netscape. Understandably, I was asked to pack up and leave the Microsoft campus immediately.

The Barefoot Guy on the Cover of Time

My parents could not comprehend why I would leave the storied Microsoft to join a company whose founder, Marc Andreessen, was featured on the cover of Time magazine barefoot, sitting on a gold-gilded throne.

I arrived expecting an equally strategic adversary to Microsoft, one playing chess a few moves ahead. But if Microsoft was the command-and-control-style dad, then Netscape was the laissez-faire, chain-smoking uncle. New products or programs were cooked up overnight and announced in a press release. Teams scrambled to make them a reality. There was no formal launch process or standard way of doing anything. It was complete and total culture shock.

But it was where I first experienced the foundation of how modern product teams operate. I bounced back and forth between leading product management and product marketing teams. It let me work with many different empowered engineers who were allowed to experiment and innovate.

Traditional go-to-market was bypassed, distributing over the Internet directly to customers – a completely novel concept at the time. “Products” had public, not closed betas – again, a totally new idea back then – and were released with minimum functionality that met just enough market demand to create early evangelism as much as they crowd-sourced quality.

Despite all I knew about the value of strategy, Netscape was where I learned that free-range discovery could inspire innovation no one could foresee, at equally unforeseen market velocity. It was a much more dynamic model of company building with higher highs and lower lows.

It was also where I saw how innovative ideas can give birth to new startups.

Markets Shape Success

Ben Horowitz was the most revered executive at Netscape when he chose to co-found a then-new startup called Loudcloud (later Opsware) with Marc Andreessen, Tim Howes, and Insik Rhee. It was the world's first Internet infrastructure-as-a-service company long before the world had a framework to understand it.

Back in 1999, it was a radically new idea and not at all clear that by 2021 95% of Internet data center load would be for cloud traffic.[1] While the vision was there, the services required and architecture of Internet infrastructure at the time – no matter how much our software automated – was too expensive to deliver in a cost-effective way.

I got schooled on the limits of company and category creation while leading marketing and being Ben's chief of staff. I learned my own professional limitations, facing the pain of what felt like failure (more on that later). I also learned that the greatest minds, vision, and plans aren't enough if all the right market elements aren't in place.

How to Use This Book

In my post-Loudcloud years, I started doing product marketing advising. I taught workshops for companies like Google and Atlassian and created a class on marketing and product management for engineering grad students at UC Berkeley. I practiced product marketing daily with early-stage startups at Costanoa Ventures and watched startups get acquired and IPO. I observed product marketing in action across hundreds of companies.

Through it all, I learned this: There is a stark contrast between how most companies do product marketing and how the best companies do it. It's largely because product marketing is misunderstood; it is the most foundational work required to market any tech product.

That's right: what you want most from marketing – a bigger pipeline, a loved brand – isn't just about doing more marketing, it's about doing better product marketing.

This book is an invitation to rethink tech marketing by understanding how much product marketing shapes the foundation on which the rest of marketing builds.

You'll need great people to do the job eventually, but strong product marketing can actually be done by whomever has the capability and mindset. It's why I wrote this book for anyone with product or marketing in their purview regardless of title.

In Part 1, you'll learn how a Midwestern code slinger beat a Silicon Valley icon by applying the fundamentals of product marketing. You'll then see each in action as I explain them in depth.

Part 2 explores the people and process parts. You'll learn the ideal profile for product marketers and how they partner best with other functions. I'll also cover crucial tasks and techniques – like how to discover market fit – important to succeed in the job.

Parts 3 and 4 go in-depth on the strategy and positioning work that's so critical and hard to do well. The tools I introduce in those sections have been used with every size and stage company, and they consistently provide a framework for improvement.

Part 5 focuses on the leadership and organizational challenges of product marketing: how to lead it, hire it, guide it, and adjust its purpose at different company stages and business inflection points.

There is one big assumption in everything I write: you can't succeed in go-to-market without a strong product. If you're not yet there, please read Marty Cagan's *INSPIRED*. It focuses on how to build products people love.

Then, when you're ready for your product to be loved by your market, [read on.](#)



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Agenda

The program will take place on Thursday, May 2, 2024. All times are listed in CST.

8:00 am: *Breakfast and Networking*

8:30 am: Welcome – Doug Barton

8:35 am: Keynote – Digital Transformation Roadmap – **David Rogers**

9:25 am: *Strategic Briefing*

9:35 am: Keynote – The Three Myths of Product – **Martina Lauchengco**

10:15 am: *Strategic Briefing*

10:25 am: *Break and Poster Gallery*

10:40 am: Distinguished Executives Panel

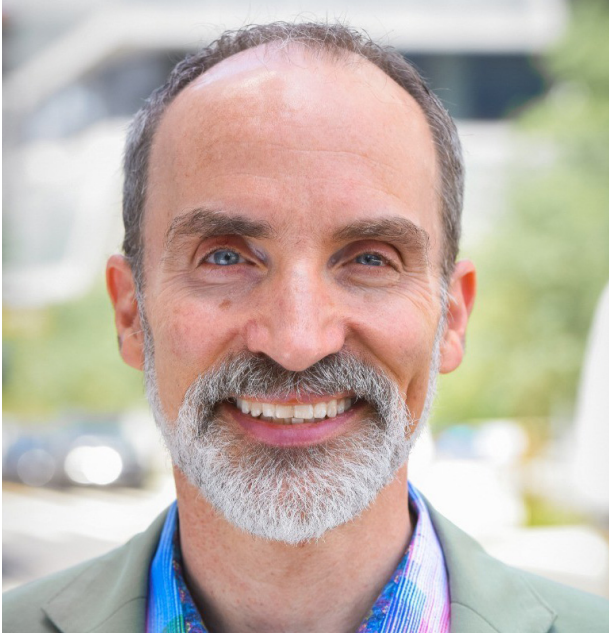
12:00 pm: *Lunch*

12:30 pm: Luncheon Lightning Talks

- The 10 Things You Wish You Knew About Forecasting Before You Started – **Dr. Enno Siemsen**
- Trustworthy Human-Technology Partnerships for the Future of Work – **Dr. Ranjana Mehta**
- The Era of Edge Computing – **Dr. Suman Banerjee**

1:00 pm: *Adjourn to Poster Gallery*

Keynote Speakers



David Rogers

Author, CxO Advisor, Keynote Speaker, Faculty, Columbia Business School

David is the world's leading expert on digital transformation, a member of the faculty at Columbia Business School, and the author of five books. His landmark bestseller, *The Digital Transformation Playbook*, was the first book on digital transformation and put the topic on the map. Rogers defined the discipline by arguing that digital transformation (DX) is not about technology; it is about strategy, leadership, and new ways of thinking. In his newest book, *The Digital Transformation Roadmap*, Rogers tackles the biggest barriers to DX success and offers a blueprint to rebuild any organization for continuous digital change.



Martina Luachengco

Author, Coach, Keynote Speaker, Lecturer, UC Berkeley's Graduate School of Engineering

Martina is the author of *LOVED: How to Rethink Marketing Tech Products*, a #1 Amazon Best Seller. She spent 30 years as a marketing and product leader. She started her career working on market-defining software, Microsoft Office and Netscape Navigator. She teaches what she's learned with Silicon Valley Product Group and is a lecturer at UC Berkeley's graduate school of engineering. As a partner at Costanoa Ventures, she sits on multiple boards and coaches startups. Martina holds a B.A. in Political Science and M.A. in Organizational Behavior from Stanford University.

Distinguished Executives Panel



Shree Dandekar

VP, Global Engineering, Generac

Mr. Dandekar is EVP of Global Engineering. Shree is an insightful business leader with deep technology knowledge to respond effectively to evolving business demands. Shree's expertise is identifying and understanding customer pains, driving the development of a solution ecosystem, and clearly communicating business, technical, and market value to stakeholders.



Martin Christopher

Chief Technology Officer, Lands' End

Mr. Christopher is responsible for leading all global technology functions for the company. Martin is an experienced technology executive with a successful record of building IT organizations that deliver winning digital growth strategies. He has a background in digital transformation and cloud migrations across various industries, including global manufacturing, logistics, CPG, and retail.



Ron Gilson

Chief Information Officer, CROPP | Organic Valley

Mr. Gilson is the Chief Information Officer at Organic Valley and the former CIO of Johnsonville Sausage. Ron is an active leader in ASUG (Americas SAP User Group) and has important experience with SAP Rise, Digital Transformation, Hybrid work model for SAP/IT talent in a Post-Pandemic world.



Anu Khare

SVP and Chief Information Officer, Oshkosh Corporation

Mr. Khare is responsible for all digital technology efforts to support Oshkosh's business growth and innovation efforts. In this role, he leads the company's intelligent enterprise agenda, which includes data science and artificial intelligence practice, digital manufacturing, cybersecurity, and technology shared services to drive technology-enabled business transformation.

Lightning Talk Speakers



Enno Siemsen

Wisconsin School of Business

Dr. Siemsen joined the WSB in 2015 after 11 years at University of Minnesota and University of Illinois. He received his PhD in Operations Management at the University of North Carolina at Chapel Hill. He serves as the Associate Dean for MBA and Masters Programs, and teaches courses in Sales & Operations Planning and Project Management. His expertise is in predictive analytics, demand forecasting, sales & operations planning, operations and supply chain strategy, and project management.



Ranjana Mehta

College of Engineering

Dr. Mehta's research examines the mind-motor-machine nexus using a novel neuroergonomics approach to understand, monitor, and predict human performance under fatigue and stress. Projects in her lab include user-centered and equitable design and evaluation of adaptive interfaces (AR/VR), wearable technologies, human-robotic interactions (HRI), and brain-computer interfaces (BCIs) to facilitate effective human-technology partnerships.



Suman Banerjee

Computer, Data & Information Sciences

Dr. Banerjee is the David J. Dewitt Professor in Computer Sciences at UW-Madison, where he is the founding director of the WiNGS laboratory, which broadly focuses on research in wireless and mobile networking systems. He is a co-founder of multiple startups in the US, leading them from initial seed funding to revenues. He served as the chair of ACM SIGMOBILE between 2013 and 2017.

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